WARWICK DISTRICT COUNCIL
RETAIL & LEISURE STUDY 2018

FINAL REPORT

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Contents

EXECUTIVE SUMMARY

1. Introduction

1. Carter Jonas was commissioned by Warwick District Council to produce a Retail and Leisure Study ('The Study') to help inform both plan-making and development management decisions across the District.
2. The study has been prepared in the context of current and emerging national and development plan policy guidance, as well as other key material considerations; principally the National Planning Policy Framework (NPPF) published in March 2012.
3. The key elements of the study were:
    - a review of national and local planning policy pertaining to retail planning and town centres;
    - a review of trends driving changes in the retail and leisure sectors;
    - market share analysis for convenience and comparison goods shopping and leisure uses across the District based on a specifically commissioned Household Telephone Interview Survey (HTIS);
    - a health check for the Council's main town centres of Royal Leamington Spa, Warwick and Kenilworth;
    - quantitative need (capacity) assessment for new retail (comparison and convenience goods) floorspace in the Council area up to 2029;
    - a 'gap' assessment of commercial leisure and other town centre uses;
    - a broad review on the extent of the existing Town Centre Boundary (TCB), Primary Frontages (PFs) and Secondary Frontages (SFs) in the District's main centres; and
    - strategic advice on how the Council can effectively plan for, manage and promote the vitality and viability of the main centres over the plan period to 2029.

Planning Policy & Retail Trends

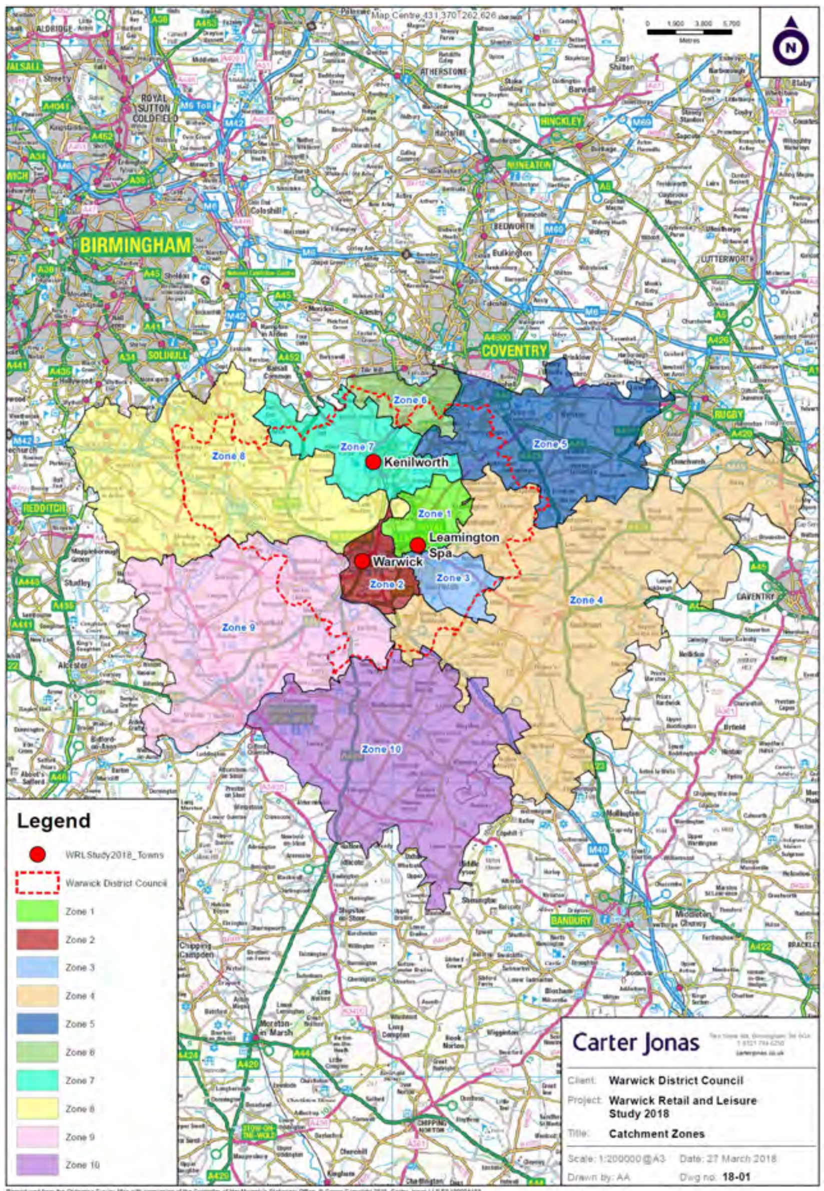
4. A review of the extant development plan highlights the relationship of the District in the context of West Midlands region. Within Warwick District the three main town centres of Royal Leamington Spa, Kenilworth and Warwick provide a focus for retail, leisure and employment uses. The unique and high quality environments of these town centres has meant that they have been relatively resilient to the recent recession and the competition from online retailing and other retail areas and town centres. Tourism is also a substantial revenue earner in the District with 3.1m trips a year, generating more than £220m and over 4,850 jobs[1].
5. However there is a structural shift in the way consumers spend their money. This is threatening longstanding retailers and forcing a rethink about how high streets and town centres will function and look in the future. What is clear is that profitable growth is becoming increasingly hard to achieve for retailers. This is undoubtedly a major contributing factor to the raft of store closures announced since the start of 2018.
6. In this way, existing floorspace in the District's town centre's face a myriad of challenges. These challenges will continue to grow over the short, medium and long term. Centres within the District will need to embrace the new dynamics and structural changes in the retail market and build in resilience to adapt seamlessly to future changes where necessary. There is still a role for existing floorspace and physical 'store based' retailing in town centres. Within Warwick District, there will be a need to build in resilience to the changes in shopping habits, which is likely to require it's town centres to move away from solely being retail led locations to those which offer a wider range of retail, leisure, cultural and other amenities. This will encourage increased visitor dwell times and create more purpose for frequenting centres.
7. The most pertinent issue for those involved in trying to create town centres that remain vibrant places to visit is how to ensure that unoccupied retail space can be brought back into use, or put to alternative uses compatible with the aspirations and environment of a specific location. This will require all parties including owners, investors and local authorities to consider ways of reconfiguring redundant space. The role and function of town centres may change and such a change may not necessarily led by the retail sector.

[1] Warwick District Council – Tourism Development Strategy

Market Share

8. The study addresses the requirement of the Council for an updated evidence base in respect of retailing, commercial leisure and town centre uses. To understand the local retail and commercial dynamics, a study (catchment) area was defined for the retail and town centre assessment. This is shown in **Figure 1**. It was identical to that used in the Council's 2014 retail study.

Figure 1: Study Area



9. The study area comprised ten zones based on postcode geography. A household telephone interview survey (HTIS) of some 1,005 respondents was carried out across this area. Zones 1, 2, 3 and 7 (Core Zones) broadly correspond with the immediate residential catchments of Royal Leamington Spa, Warwick and Kenilworth. The rest of the study area (Zones 4 to 6 and 8 to 10) represent the wider catchments of the District's main centres.

10. In terms of the market share of Special Forms of Trading[2] (SFT) and principally internet shopping, the share of all food (convenience goods) shopping across the study area (i.e. Zones 1-10) is 3.6%, whilst for the Core Zones (1, 2, 3 and 7) it is 4% which is lower than the national average of 10.8% which suggests that there is potential for internet food shopping to increase its market share over time.

11. The non-food (comparison goods) market share for SFT's across the total study area (i.e. Zones 1-10) is 21.6% and 22% for the Core Zones 1, 2, 3 & 7. This is high and in line with the national average of 19.7% reflecting the growing attraction and share of this channel of retailing. This is an indication of the shifting pattern of consumer behaviour and associated spending that needs to be monitored by way of regular surveys.

12. The convenience goods market share for the main centres and stores in the District, shows that they are achieving an overall market share ('retention level') of 37.9% from within the study area (Zones 1-10). This represents a low level of retention rate. However this increases to 79.6% for the Core Zones 1, 2, 3 & 7.

13. A comparison with the Council's 2014 study shows that the main centres and stores in the District were achieving a higher total convenience goods market share (excluding SFT) of 49.4% compared with 39.3% in 2018 (excluding SFT). This indicates a decreasing rate of retention primarily due to the outflow to stores outside District that has increased by 10.1%.

14. The market share for comparison goods shows an overall retention level of 32% within the total study area (Zones 1-10). This retention level increases to 60.1% within the Core Zones 1, 2, 3 & 7.

15. The Council's 2014 study showed that the main centres and stores in Royal Leamington Spa, Warwick and Kenilworth were collectively achieving an overall comparison goods market share of 34.3% (excluding SFT) which is higher than the current retention of 26.2% (excluding SFT).

16. A further comparison with the outputs of the 2014 Study shows a declining market share for Royal Leamington Spa and Warwick town centre(s) over the period 2009 to 2018. In contrast, Kenilworth town centre showed an increase. The fall in market shares for Royal Leamington Spa and Warwick can be explained by the increasing market share of out-of-centre provision in the District and the draw of competing shopping destinations outside the District. The increase in Kenilworth is attributable to the new investment in the centre specifically Talisman Square.

Table 1: Comparison Goods market shares Core District Zones (excluding SFT)

	Core East (Royal Leamington Spa) Zones 1 & 3 (%)			Core West (Warwick) Zone 2 (%)			Kenilworth Zone 7 (%)			Total Study Area Zones 1 to 10 (%)		
	2009	2013	2018	2009	2013	2018	2009	2013	2018	2009	2013	2018
Royal Leamington Spa Town Centre	74	61	49.8	47.1	40.3	31.4	33.9	26.7	19.4	33.3	27.9	20.2
Warwick Town Centre	2.1	1.9	1.2	22.2	15.9	10.9	2.7	2	1	4	3.3	2.1
Kenilworth Town Centre	0.4	0.7	1.4	0.6	0.7	1.3	26.6	28.9	37.8	3.3	3.1	3.8
Out-of-Centre	10	20.1	27.6	7.9	16.5	33	3.6	3.4	9.1	4.4	8.2	14.3
Other District	0.7	0.6	1	0	1.8	0	0	0.6	0.4	0	0.6	0.3
Outside District	12.9	15.6	19	22.2	24.7	23.5	33.3	38.4	32.4	54.7	57	59.2
Total	100	100	100	100	100	100	100	100	100	100	100	100

17. Whilst the above provides a broad indication of the market share performance of centres in the District, a key trend that the Council needs to proactively monitor by way of survey updates is the ongoing impact of the internet on food and non-food shopping. The key focus for the Council is to increase retention and clawback expenditure to its centres in the light of the decreasing rate of retention over time.

Royal Leamington Spa Town Centre

18. The healthcheck demonstrated that the centre has an attractive environment and a rich historic heritage.

19. The centre is performing well against key performance indicators and there is active demand from retailers seeking representation. The centre's vacancy rate of 8.9% is also lower than the national average (11.2%). The centre is currently ranked 79th, improving its position from 84th in 2014.

20. The lower vacancy rate is a positive facet. However in the light of the of the changing fortunes of retailing and the resultant impact on high streets and town centres this cannot be taken for granted The recent announcement of the closure of the House of Fraser stores including the store in Royal Leamington Spa is testament to this fact. Ongoing monitoring and engagement with relevant stakeholders such as the Leamington BiD will be a key essential.

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[2] Special Forms of Trading (SFT) comprises all non-store retail sales made via the internet, mail order, stalls and markets, door-to-door and telephone sales.

21. The healthcheck has highlighted the use of the creative economy in regenerating the Old Town just south of the central shopping and business areas. This initiative may assist in 'binding' the 'old' part with the 'new' part of Royal Leamington Spa as the Council seeks to create and refurbish building spaces and active public spaces. Over the long term this would provide additional vibrancy to this part of town and potentially create a more welcoming entry and thoroughfare to the town centre via the railway station.

Warwick Town Centre

22. The centre takes a traditional form with a historic street pattern and resulting smaller sized shop units. It has a good provision of shopping and leisure facilities typically found in a centre of its size and position within the retail hierarchy.
23. The historic pattern of the centre lends itself to a limited scale of development for expansion, but notwithstanding this it is nonetheless well thought of by local residents. Warwick also has a good level of accessibility but with no significant new investment in the recent past.
24. The centre has a vacancy level of 7.4%, which is below the GOAD national average of 11.2%. However over time its retail ranking status has declined from 898th in 2014 to 968th in 2017. The historic characteristics of Warwick and that the town centre is constrained by its historic road system limits expansion opportunities.
25. A strategy for the long term should be to proactively and continuously promote the centre as a family leisure destination and capitalise on its historic heritage. This is important to sustain and increase footfall and expenditure across the centre.

Kenilworth Town Centre

26. Kenilworth is a historic town with a retail provision along the linear thoroughfare of Warwick Road that serves the day to day needs of its local catchment population. It has a good range of shopping and leisure facilities typically found in a centre of its size and position within the retail hierarchy.
27. The level of vacancy at 6.4% is considerably below the GOAD national average of 11.2%. The centre has an improving retail rankings performance from ranked 616th in 2014 to 608th currently.
28. The centre has benefited from investment in the form of the redevelopment of Talisman Square and the development of a Waitrose Store that has also boosted the retail profile of the centre. This is set to expand further by way of a £12 million redevelopment to the north side of Talisman Square with retail units on the ground floor and student units on the upper floors.
29. The continued vitality and viability of the centre is dependent on building on its inherent provision and offer together with capitalising on the tourism spend associated with the District and specifically Kenilworth Castle

Quantitative Needs Assessment

30. The results of the HTIS informed the assessment of the overall quantitative capacity for new (convenience and comparison goods) retail floorspace over the period to 2029. The output of this assessment showed:
    - Convenience goods - District-wide forecast capacity over the plan period to 2029 between 1,964 sqm net and 3,507 sqm net.
    - Comparison goods - there is District-wide level capacity for up to 4,125 sqm net by 2023 rising to 13,396 sqm net by 2029.
31. The identified forecast capacity/need over the long term should be directed to the main town centres of Royal Leamington Spa, Warwick and Kenilworth first, in accordance with national and local plan policy objectives. The distribution of the forecast need for new retail floorspace should reflect the network and hierarchy of centres, and the relative role and function of these centres.
32. Capacity forecasts beyond five 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, constant market shares, etc. The Council should also take into account these margins for error when assessing the need for new retail floorspace.

Leisure Needs Assessment

33. The results of the HTIS indicate that there is currently an adequate level of leisure facilities (for example food and drink).

34. In terms of cinema provision, the assessment found a good retention level for cinemas from across the District of 73.5%. Any future market demand from cinema operators should be directed to the District's existing town centres in line with national and local plan objectives and cinema provision outside of these centres should be resisted.

35. The total available expenditure for food and drinking in the District is set to increase by 28.7% to £199.8m by 2029. The identified A3 – A5 capacity is for up to 1,525 sqm gross in the short term to 2023. Over the medium term to 2026 this is forecast to increase to 3,418 sqm gross and 5,358 by 2029. The prospect for new facilities is however ultimately determined by the level of market demand and interest and should be directed to town centres to enhance the complementarity, footfall and expenditure they bring to the town centres.

36. Given that the population of the Council study/catchment area is forecast to increase substantially and compounded further by the popularity of living healthier lifestyles, there may be potential scope for new health and fitness facilities subject to market interest and demand and other planning considerations. This quantum of population is able to support three commercial or budget type of operators (respectively) over the forecast period to 2029.

37. Respondents to the HTIS indicated that the need for more facilities for children. As such, in terms of future needs, the District could benefit from a wider range of family activities, such as a multi-use/family venue. The potential for new family activity venues will be subject to market demand and should be directed to a town centre location.

38. The District benefits from a diverse range of arts and historic attractions which contribute to the visitor economy of the area. These need to be proactively promoted to attract further visitors to the area and thereby contributing to the overall footfall and expenditure of the key centres in the District.

Frontages

39. A review of each centres Town Centre Boundary (TCB), Primary Frontage (PF) and Secondary Frontage (SF) showed that these are appropriately defined. Notwithstanding this, we recommend that the Council monitors existing provision in the light of the structural changes in the retail market and the resulting impact on physical space in the town centres. Additionally, we recommend that the Council defines Primary Shopping Areas (PSA's) across the three centres.

1. INTRODUCTION

1.1 Carter Jonas ('CJ') was commissioned by Warwick District Council (the 'Council') to produce a *Retail and Leisure Study (The Study*') to help inform both plan-making and development management decisions across the local authority area. The findings of the study will specifically provide robust evidence and update the findings identified in the 2014 Warwick District Council: Retail & Leisure Study Update ('2014 RLSU').

1.2 The outputs of the study will be used as the evidence to inform the future planning of the town centres of Royal Leamington Spa, Warwick and Kenilworth to 2029 and to provide an up to date evidence base for assessing all retail proposals thus meeting the requirements of the National Planning Policy Framework and National Planning Practice Guidance (PPG).

1.3 The Study has been prepared in the context of current and emerging national and development plan policy guidance, as well as other key material considerations; principally the National Planning Policy Framework (NPPF) published in March 2012. Where relevant, the Study also draws on advice set out in the National Planning Practice Guidance (PPG), published in March 2014, which places significant weight on the development of positive plan-led visions and strategies to help ensure the vitality of town centres. The sequential and impact 'tests' are also key to both plan-making and decision-taking at the local level.

1.4 The assessment of the need (or 'capacity') for new retail (convenience and comparison goods) floorspace has been carried out at the strategic level to help inform the likely scale, type, location and phasing of new retail development over the short (0-5 years), medium (6-10 years) and long term (11-15 years).

1.5 The study/catchment area defined for the purpose of this study principally covers the local authority area, but also extends to a wider area incorporating parts of neighbouring local planning authority areas (**Appendix 1**).

1.6 The defined study area and zones provide the framework for the new telephone interview survey of some 1,000 households conducted by NEMS Market Research (NEMS) in March 2018. The full (weighted) survey results are set out in **Appendix 4**. The survey provides the most up-to-date and robust evidence on shopping patterns, leisure preferences and expenditure flows within the study area. The survey findings have also informed the health check assessments for the main study centres, as well as the quantitative ('capacity') and qualitative need assessments for new retail (convenience and comparison goods) floorspace and leisure uses.

1.7 For ease of reference this report is structured as follows:

- **Section 2** reviews the national and local planning policy context material to retail planning and town centres.
- **Section 3** highlights some of the key trends that are driving the dynamic changes in the retail and leisure sectors at the national and local level, and how this has shaped (and is likely to shape) the UK's urban and retail landscape.
- **Section 4** sets out the results of the market share analysis for convenience and comparison goods shopping and leisure use across the study area based on the household telephone interview survey (HTIS). The market share tabulations for convenience and comparison goods are set out in **Appendix 5** and **Appendix 6** respectively.
- **Sections 5-8** set out the health check methodology and key findings for the Council's main town centres of Royal Leamington Spa, Warwick and Kenilworth. These assessments draw on the indicators identified by PPG, recent research and the latest town centre audits for the centres based on site visits. The health check assessment also takes account of the results of the household survey.
- **Section 9** sets out the key assumptions and outputs of CJ's in-house CREAT^{e} (excel-based) capacity model, including: (i) the forecast population and expenditure available in the study area (**Appendices 2**

and **3**); (ii) the forecast convenience (**Appendix 7**) and comparison (**Appendix 8**) turnovers of all existing centres/stores; and (iii) the forecast trading characteristics of all known committed retail floorspace at the time of preparing this assessment and the detailed District-wide and main centre capacity forecasts for both convenience (**Appendix 9**) and comparison goods (**Appendix 10**).

- **Section 10** sets out the findings of the commercial leisure and other town centre uses ‘gap’ assessment. This looks at the main leisure uses, including the need for new food and beverage uses, cinema and gyms.
- **Section 11** provides a review on the extent of the existing Primary Frontages (PFs) and Secondary Frontages (SFs) in the District’s main centres of Royal Leamington Spa, Warwick and Kenilworth.
- Finally, **Section 12 p**rovides high level advice on how Council can effectively plan for, manage and promote the vitality and viability of the main centres over the plan period to 2029.

1.8 When considering and assessing the findings of this retail assessment it is important to understand at the outset that capacity forecasts beyond a five year (short-term) time period should be interpreted with caution by the Council, applicants and any other person/organisation using the information, as they are subject to increasing margins of error. We therefore advise that although this updated study provides the robust evidence base required to help inform plan-making, site allocations and the determination of planning applications at the local level, the forecasts should be updated to take into account any significant new retail development and changes in the retail expenditure and population growth forecasts over time, as well as any potential impacts arising from other key trends in the retail and leisure sectors (such as, the growth in internet shopping) and commercial leisure sectors.

2. PLANNING POLICY OVERVIEW

2.1 This section provides a high level overview of the relevant national and local development plan planning policy pertaining to retail and town centre uses, along with other material considerations.

NATIONAL PLANNING POLICY FRAMEWORK (NPPF) (2012)

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. The NPPF must be taken into account in the preparation of Local Plans and Neighbourhood Plans. 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 level.

2.3 For plan-making the Framework states that Local Planning Authorities (LPAs) 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. The Framework (paragraph 15) 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".*

2.4 The NPPF (paragraph 17) sets out twelve core planning principles that underpin both plan-making and decision-taking. Amongst other objectives these principles confirm that planning should 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 sustainable; and deliver sufficient community and cultural facilities and services to meet local needs.

2.5 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 Development Plan Documents (DPDs) should only be used where clearly justified (paragraph 153).

2.6 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; and 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.

2.7 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.

2.8 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).

2.9 The Framework (paragraphs 18-149) sets out thirteen 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.

2.10 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;
- 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;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones;
- allocate a range of suitable sites to meet the scale and type of retail and leisure development needed in town centres;
- ensure that the needs for retail and leisure 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;
- 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.

2.11 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 NPPF states 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 sequentially more preferable 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 2,500 sqm)[3]. 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.

2.12 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".

2.13 This study also draws on advice set out in PPG, published in March 2014. The PPG has streamlined and replaced the advice previously set out in the PPS4 Practice Guidance on Need, Impact and the Sequential Approach. The revised PPG places significant weight on the development of positive plan-led visions and strategies for town centres, and has retained the key sequential and 'impact tests'. Of relevance to this study the PPG (para 003) states that the assessment of 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 and be regularly reviewed".***

DRAFT REVISED NATIONAL PLANNING POLICY FRAMEWORK (NPPF) (2018)

2.14 The new Draft NPPF was published on 5th March 2018 with consultation taking place until 10th Mary 2018. The NPPF (2012) still remains the adopted Framework, however, the Draft NPPF is now a material consideration in planning decisions. It will gain more weight as it moves through the process to adoption however the weight given to it is a matter for the decision maker.

2.15 With the publication of the revised draft Framework, there are some important proposed changes to policy aimed at '*ensuring the vitality of town centres*' that promotes a 'town centre first' policy approach. These changes are summarised below:

- In terms of plan-making, the revised draft Framework (paragraph 86d) now proposes a shorter ten year time horizon for allocating sites to meet the forecast needs for new retail, leisure, office and other main town centre uses. This contrasts with the current policy position, which requires local planning authorities to allocate sites to "*meet needs in full*" over the plan period; currently 15 years or more.
- In terms of decision-taking and specifically the sequential test, the revised draft Framework is also seeking to strengthen the 'town centre first' approach by bringing back the more flexible wording last seen in the PPS4; namely that suitable town centre or edge of centre sites do not have to be available immediately for development, but within a "*reasonable period of time*" (paragraph 87).
- The draft Framework also recognises that where centres are in decline then policies and measures should be promoted that support diversification and changes of use (paragraph 86g).

LOCAL PLANNING POLICY CONTEXT

Warwick District Local Plan (2017)

2.16 The Warwick District Local Plan (2017) is the overarching local policy document that will guide development up to 2029. It sets out a series of strategic polices, allocates sites for development, and includes polices to guide the form of development. Policies for retail and town centre uses include:

- **Policy TC1 (Protecting and Enhancing the Town Centres)** sets out that development proposals for main town centre uses will be permitted in town centres if they are of an appropriate scale with regard to

[3] Note: By way of reference the default threshold for Warwick District Council under Policy TC2 is 500sqm gross.

the role and function of the town centre. It ensures that proposals will also reflect the character and form of the town centre.

- **Policy TC2 (Directing Retail Development)** directs new retail development in the retail town centres first. Where suitable sites are not available in-centre, sites on the edge-of-centre will be considered and if no suitable sites are available in any of these preferred locations, out-of-centre sites will be considered. When considering edge-of-centre sites, preference will be given to accessible sites that are well connected to the retail area. An assessment of impact will be required when a development exceeds 500 sqm gross floorspace.
- **Policy TC3 (Safeguarding Existing and Potential Retail Floorspace**) protects town centre retail areas by restricting a change of use within Class A to other uses outside Class A , except for areas within defined Secondary Frontages. Change to hotels (Use Class C1) and assembly and leisure uses (Use Class D2) will be permitted subject to Policy TC7 (see below).
- **Policy TC4 (Chandos Street Town Centre Development Allocation, Royal Leamington Spa Town Centre)** designates Chandos Street car park as the focus of major town centre development proposal for retail and main town centre uses.
- **Policy TC5 (Providing for Shopping Growth in Royal Leamington Spa Town Centre)** states that proposals which satisfy the sequential test in Royal Leamington Spa will be permitted if: firstly, it can be demonstrated that the proposal meets retail needs appropriate to the character and form of the town centre; secondly, that the proposal creates pedestrian links between main shopping areas along primary frontages; and thirdly, that the impact of the proposal on traffic movement is fully considered to promote public transport and provide car parking.
- **Policy TC6 (Primary Retail Frontages)** sets out the requirements in Primary Frontages. It stipulates that changes of use from Use Class A1 to Use Class A2, A3, A4 or A5 will be permitted provided that: no more than 25% of the total length of the frontage would result in non-A1 use; and that the proposal would not contribute to creating a continuous non-A1 frontage of more than 16 metres.
- **Policy TC7 (Secondary Retail Areas)** sets out the requirements in Secondary Areas. It stipulates that changes of use from Use Class A1 to Use Class A2, A3, A4, A5, C1 or D2 will be permitted provided that: no more than 50% of the total length of the frontage would result in non-A1 use; and that the proposal would not contribute to creating a continuous non-A1 frontage of more than 16 metres. Proposals which do not meet the second criterion may be accepted where they would not have a prominence in the streetscape that would affect the character of the area.
- **Policy TC8 (Warwick Café Quarter)** states that changes of use from Use Class A1 and A2 to Use Class A3 or A4 will be permitted within Market Place. For A3 or A4 uses, permitted development rights for change of use to A2 from A3 or A4 will be removed.
- **Policy TC9 (Royal Leamington Spa Restaurant and Café Quarter)** states that changes of use from Use Class A1 to Use Class A3 will be permitted within Regent Court for A3 uses, permitted development rights for change of use to A2 will be removed.
- **Policy TC10 (Royal Leamington Spa Area Action Plan (AAP))** states that the Council will commit to prepare an Area Action Plan for Royal Leamington Spa Town Centre.
- **Policy TC11 (Warwick Town Centre Mixed Use Area)** states that within the mixed use area of Warwick town centre, development of residential, shops, financial and professional services, restaurants and cafes, drinking establishments, hot food takeaways, or hotels, leisure and assembly, and business uses will be permitted.
- **Policy TC12 (Protecting Town Centre Employment Land and Buildings)** states that the redevelopment or change of use of existing employment land and buildings to non-B Class Uses will not be permitted.

- **Policy TC13 (Protecting the Residential Role of Town Centres)** states that changes of use from residential to non-residential uses within the predominantly residential areas in the town centres will only be permitted if the proposed use maintains the residential character of the area
- **Policy TC14 (Protecting Residential Uses on Upper Floors)** restricts a change of use from residential to other uses on upper floors of buildings within Town Centres.
- **Policy TC15 (Access to Upper Floors in Town Centres)** states that development that denies access to the upper floors of buildings within the town centres will not be permitted.
- **Policy TC16 (Design of Shopfronts)** states that new or replacement shopfronts will be permitted where: they firstly, relate in scale, proportion, material and decorative treatment to the upper parts of the building and to adjoining shopfronts; and secondly, where they do not involve single shopfronts spreading over two or more frontages.
- **Policy TC17 (Local Shopping Facilities)** states that changes of use within local shopping centres from A1 to A2, A3, A4, or A5 will only be permitted if: the shop has been vacant for one year and marketed for at least nine months; where it is demonstrated that the proposed use will significantly increase pedestrian footfall and will not reduce frontage below 50%; and where it can be demonstrated to meet an important unmet local need controlled by a planning application.
- The policy also protects local shops outside town and local shopping centres by restricting a change of use from A1 to A2, A3, A4 or A5.
- In terms of rural shops and services, it states that the development or expansion of existing shops and local services will be permitted where these meet local retail or service needs. Proposals which result in the loss of such units will not be permitted unless: the unit is no longer financially viable; the unit has been marketed for 12 months; and that all reasonable options have been pursued.
- **Policy TC18 (Farm Shops)** states that the development and the extension of farm shops will be permitted where: the conversion of, or construction of a new building is of an appropriate scale and integrated into the landscape; and that that development does not have an impact on existing rural shops. Conditions will be applied to control the sale of goods which are not produced locally to a maximum of 25%.

2.17 Other relevant policies include:

- **Policy CT1 (Directing New Meeting Places, Tourism, Leisure, Cultural and Sports Development)** states that this type of development will be permitted in Town Centres in accordance with the Town Centre policies. Where suitable sites are not available in-centre, edge-of-centre will be considered and if no suitable sites are available in these preferred locations, out-of-centre sites will be considered.
- **Policy CT2 (Directing New or Extended Visitor Accommodation)** states that new or extended hotels will be permitted in Town Centres in accordance with the Town Centre policies. Visitor accommodation within rural areas will be permitted where it is located within the Growth Villages and will be appropriate in scale and character.
- **Policy CT3 (Protecting Existing Visitor Accommodation in Town Centres)** states that redevelopment of change of use from visitor accommodation at ground floor level within the Town Centres will only be permitted where it can be demonstrated that: the site is within a retail area; there is evidence of capacity to meet need; and the accommodation is no longer viable or no other parties are willing to acquire it for that use.

Warwick District Council Strategic Housing Market Assessment (2012)

2.18 GL Hearn (GLH) and Justin Gardner Consulting (JGC) were commissioned to prepare a Strategic Housing Market Assessment (SHMA) to provide a robust and up-to-date understanding of housing need and demand within the District and its seven Community Forum areas in order to inform and support planning policy and housing strategy. The 2012 report identified a future need of 1,131 dwellings per annum.

Coventry & Warwickshire Joint Strategic Housing Market Assessment (2013)

2.19 This report identifies an *Objectively Assessed Need* (OAN) for the local authorities in Coventry and Warwickshire. It was prepared to bring together the evidence base for housing requirements and policy.

2.20 Of relevance to this Study is the population for the District as a whole is projected to increase by 11% based on the level of housing provision in the Local Plan, with the potential to increase by 26% from 2011 – 2029.

Warwick District Retail and Leisure Study Update (2014)

2.21 Strategic Perspectives (now part of Carter Jonas) were commissioned by Warwick District Council to update the 2009 Retail and Leisure Study and 2013 Retail Study Refresh. This Study informed the performance of centres and the need for retail floorspace. The quantitative need assessment estimated the current performance of the retail provision and forecasted the capacity for additional convenience and comparison goods. It found no capacity for new convenience floorspace over the short to medium term, with limited forecast capacity by 2029. For comparison retail, it found a capacity for 16,180 sqm by 2029.

Sequential Assessment of sites in Royal Leamington Spa and Warwick town centres (2006)

2.22 This document sets out a sequential site assessment of potential opportunity sites in Royal Leamington Spa and Warwick Town Centres. It includes the planning and commercial appraisal of the suitability, viability and availability of 18 potential opportunity sites in accordance with the sequential approach. These are listed in **Table 2.1** below.

Table 2.1: Sequential Sites in Royal Leamington Spa and Warwick Town Centres (as at 2006)

Royal Leamington Spa	Warwick
Woodwards Department Store	Westgate House
Chandos Street Car Park	Shire Hall
Telephone Exchange, M&S Car Park and Moseley's	
Head Post Office	
Regent Square	
Bedford Street Car Park	
Court Street Car Park	
Kenilworth Street	
Waterside Development Area	
Euston Square	
Covent Garden Multi Storey Car Park	
Midland Autocar Garage and Surrounding Properties	
Tesco Metro Store	

Vision and Strategy for Leamington Town Centre (2017)

2.23 In 2016, Warwick District Council sought to develop a vision and strategy for Royal Leamington Spa Town Centre. A forum[4] was established to manage this vision and in September 2017, Forum produced a draft Vision and Strategy document. Although this document has no legal status, it is important as a framework for Royal Leamington Spa Town Centre that will inform future decisions and investment priorities. The vision document aims to build on of creativity and innovation; provide a welcoming environment for visitors and residents; and offer a great experience for shopping, leisure, culture, eating, working and living. This will be achieved by protecting town centre assets; ensuring new investment plays to the centre's strengths; meeting the needs of the diverse population; addressing any issues that are key to vision.

[4] The Forum comprises of the County and Town Councils, BID, Chamber of Trade, local civic society, Police, University of Warwick, local businesses and commercial agents.

SUMMARY

2.24 The review of the extant development plans in the Council area highlights the importance of the regeneration of town centre sites. The plans also highlight the importance of the District in the context of West Midlands region and the aspiration to nurture its natural and historic assets to help underpin social and economic progress.

2.25 The underlying objective of both the NPPF and Local Plan policy is to maintain and enhance the vitality and viability of town centres, and to promote new sustainable development and economic growth in town centre locations "first". This policy objective is crucial as town centres are facing increasing economic challenges associated with alternative forms of retailing; in particular online shopping (discussed further in **Section 3**).

2.26 Notwithstanding the town centre first policy, this does not rule out edge-of-centre development where identified needs cannot be met in existing Primary Shopping Areas (PSAs). Indeed the NPPF (paragraph 23) encourages LPAs to assess the potential to expand town centres to ensure a sufficient supply of suitable sites. If edge of centre sites cannot be identified to meet the identified needs "in full", then LPAs are required by the NPPF to set policies for meeting the identified needs in other accessible locations that are well connected to the town centre, subject to an assessment of the impact of any proposed retail and town centre uses on the vitality and viability of existing centres.

2.27 In the context of this study the Council's Local Plan policies provide a framework for maintaining and enhancing its town centres. For the future, this has to be considered with regard to the dynamics of the retail economy (**Section 3**) and prevailing national planning policy.

3. NATIONAL RETAIL AND TOWN CENTRE TRENDS

3.1 This section summarises some of the key trends that have fuelled the changes in the retail sector over the last three decades, and the impact of these trends on the UK's town centres. It provides a commentary on the impact of the downturn in the economy since the 2007 recession and the growth of internet ('multi-channel') retailing on consumer spending, retail development and retailers' business strategies. Drawing on the latest research it also describes how these trends may continue to shape changes in the future, and whether and how town centres can respond to help maintain and enhance their overall vitality and viability.

RETAIL TRENDS

3.2 Following an unprecedented period of growth in retail sales and expenditure since the mid-1990s, the onset of the longest and deepest economic recession in living memory in 2007/08 had a dramatic impact on consumer spending and market demand. Business and consumer confidence was 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 reduced disposable income and retailers' margins were squeezed further.

3.3 Official figures show that the UK recovery began in early 2013 and although GDP growth peaked at 2.9% in 2014, it slowed to around 2% in 2015 and 2016 against the backdrop of a weaker global economy and further uncertainty on financial markets. The Brexit vote and subsequent triggering of Article 50 is likely to further dampen business/consumer confidence and the prospects for new investment and growth in the near future. Indeed, over the last 12 months the UK has shifted from being one of the fastest growing G7 economies to among the slowest. Against this background of economic and political uncertainty, Experian Business Strategies project lower GDP growth of around +1.5% in 2017 and 2018.

3.4 This dampening in economic growth is also impacting on household income and spending, and ultimately retail sales. The combination of higher inflation, a decline in real wages, a rise in interest rates and a tightening of consumer credit will continue to place a drag on real incomes and consumer spending. Experian forecast that retail sales growth will average 1% in 2018 and 1.9% in 2019.

3.5 The table below shows the actual and forecast growth in retail (convenience and comparison goods) spending per head identified by Experian Business Strategies in their latest Retail Planner Briefing Note 15 ('Briefing Note') published in December 2017. This is based on their 'central forecast scenario' which assumes annual growth in GDP averaging 2% from 2016 to 2035.

Table 3.1 Forecast year-on-year growth in retail expenditure per capita

Volume Growth per head (%):	----------ACTUAL GROWTH---------									HISTORIC TRENDS	
	2008	2009	2010	2011	2012	2013	2014	2015	2016	1997-07	1997-16
Total Retail Spend	**2**	**-2.8**	**0.7**	**-1.1**	**1.3**	**1.9**	**2.1**	**2.8**	**3.5**	**5.4**	**3.5**
Convenience	-4.2	-4.2	-0.6	-3.3	-0.2	-0.3	-0.3	-1	1	0	-0.6
Comparison	4.4	-2.9	1.4	0.1	2.3	3.5	3.6	5.2	5	8.3	5.6

Source: Experian Retail Planner Briefing Note 15 (December 2017); Figures 1a and 1b.
Notes: The table also shows historic growth rates for the period 1997-2007 (the pre-recession period) and for 1997-2016.

3.6 As the table shows, there has been negative annual growth in convenience goods expenditure per capita levels between 2008 and 2015. Although there was positive growth of +1% in 2016, the forecasts show a return to no or negative growth over the period 2017 to 2019, with limited growth of +0.1% thereafter up to 2036. The forecast growth rates compare with previous historic trends of no growth between 1997 and 2007, and negative growth of -0.6% over the long term, between 1997 and 2016.

3.7 For comparison goods the Experian data indicates that annual growth rates are recovering from a low of -2.9% in 2009, to a peak of +5.2% in 2015 and +5% in 2016. However, for the reasons set out above, Experian forecast a dampening in growth in the immediate post-Brexit period; to +2.3% in 2017, +0.9% in 2018 and +2.1% in 2019. Thereafter, comparison spend growth is forecast to average circa +3.2% between 2020 and 2036. Despite the growth forecast by Experian, it is clear that comparison goods growth rates are well below historic trends of +8.3% per annum for the period 1997 to 2007.

3.8 Any further dampening of growth rates over the medium to long term could have implications for the viability of existing retail businesses and the take-up of new space, as well the need ('capacity') for new retail floorspace over the forecast period. This needs to be taken into account when assessing and reviewing the capacity forecasts for new convenience and comparison goods floorspace set out in this report.

SPECIAL FORMS OF TRADING AND INTERNET SHOPPING

3.9 One of the key trends that has impacted on the retail sector and shopping patterns over the last decade has been the growth in internet shopping, which forms part of Special Forms of Trading (SFT)[5]. Based on ONS data, Experian Business Strategies (EBS) estimate that:

- The value of internet sales in 2017 is estimated to be £55.1bn (at current prices). This represents a +31% increase from £42.1bn in 2015 and a +13% increase from £48.9bn recorded in 2016.
- The value of other (non-internet) SFT sales (e.g. mail order, vending machines, market stalls, etc.) is estimated to be £8.8bn in 2017. This represents a more modest growth from circa £8.5bn in 2016 and £7.9bn in 2015.
- Total non-store retail sales are therefore estimated to amount to some £63.9bn in 2017. This represents a 28% growth in sales from £50bn in 2015 a substantial increase from £17.1bn recorded in 2006.
- The overall market share of SFT, as a proportion of total retail sales, has increased nationally from 5.4% in 2006 to 16.5% in 2017. It is forecast by Experian to grow to 19.3% by 2021 and to 22.5% by 2036 (see table below).

3.10 Total SFT sales therefore amount to some £57.4bn in 2016. This represents a 14.8% increase from £50bn in 2015 and a substantial increase from £17.1bn recorded in 2006. The overall market share of SFT (as a proportion of total retail sales) has increased nationally from 5.5% in 2006 to 14.9% in 2016, and is forecast by Experian to increase to 19.7% by 2026 and 20.7% by 2033 (see table below)[6].

Table 3.2 SFT's market share of total retail sales

	2017	2021	2026	2033	2036
TOTAL:	**16.5%**	**19.3%**	**20.9%**	**22.1%**	**22.5%**
Comparison	19.7%	22.5%	23.4%	23.8%	24.0%
Convenience	10.8%	13.1%	15.5%	17.2%	17.8%

Source: Appendix 3 of Experian Retail Planner Briefing Note 15 (December 2017)

[5] Special Forms of Trading (SFT) comprises all non-store retail sales made via the internet, mail order, stalls and markets, door-to-door and telephone sales. On-line sales by supermarkets, department stores and catalogue companies are also included in the data collected by the Office for National Statistics (ONS).

[6] Such forecasts need to be treated with caution, as according to Experian approximately 25% of all SFT sales for comparison goods and some 70% for convenience goods are still sourced through traditional ('bricks-and-mortar') retail space, rather than from 'virtual' stores and/or distribution warehouses. On this basis Experian has produced revised forecasts to reflect the proportion of internet sales sourced from existing stores.

3.11 This significant growth is being sustained by new technology (such as browsing and purchasing through mobile phones) and the development of interactive TV shopping. Although Experian forecast that the pace of e-commerce growth will slow after 2020, other commentators suggest that the growth and market share could be higher.

3.12 However, such forecasts need to be treated with caution, as according to Experian approximately 25% of all SFT sales for comparison goods and some 70% for convenience goods are still sourced through traditional ('bricks-and-mortar') retail space, rather than from 'virtual' stores and/or distribution warehouses. On this basis, Experian has adjusted the SFT market shares downwards to reflect the proportion of internet sales sourced from existing stores.

Table 3.3 Revised forecast growth in SFT's market share of total retail sales

	2017	2021	2026	2033	2036
TOTAL:	**10.6%**	**12.4%**	**13.6%**	**14.5%**	**14.9%**
Comparison	14.8%	16.9%	17.5%	17.9%	18.0%
Convenience	3.2%	3.9%	4.6%	5.2%	5.3%

Source: Appendix 3 of Experian Retail Planner Briefing Note 15 (December 2017)

3.13 Notwithstanding this, there is no question that the digital revolution and growth of online ('virtual') retailing has significantly impacted on Britain's high streets and sales, as it provides local consumers with convenient and often cheaper alternatives to more traditional shops. Up to now, the impact of Internet shopping has been mainly concentrated on certain retail products and services (such as, for example, electrical goods, books, music and travel). In turn, this has resulted in a reduction in the number of retailers selling these types of products and services on the high street (examples being the rationalisation of HMV and GAME stores across the UK, and previously the loss of Blockbusters). However this does not mean that other comparison goods categories are immune to the impact of the internet, including clothing and footwear. This is illustrated by the survey-derived market shares for SFT and internet shopping across the defined study area and zones (see **Section 4**).

3.14 The impact of the digital revolution is also impacting on how and where people choose to spend their leisure time. For example, instead of visiting the cinema or theatre, consumers can digitally stream to their televisions a vast library of filmed entertainment on demand; and social media, Skype, email and instant messaging are displacing face-to-face interactions. The innovation and development of these alternative digital customer experiences is accelerating, and in the process exacerbating a 'digital divide' between, on the one hand, those well-resourced companies investing and competing in the digital arena, and on the other hand the small independent merchants that comprise most of today's high street communities. Yet the success of firms at both ends of the 'divide' is mutually dependent, and is essential to a successful high street.

3.15 Notwithstanding the clear and present impact of the digital revolution on how people shop and 'play', some town centres should be well positioned to benefit from the growth of new retail related services and multichannel retail, particularly through the provision of convenient 'click and collect' facilities to help drive footfall; whereby customers can browse and order a product on-line, and then collect it from a local store at their convenience. According to research by NEMS Market Research[7], 48% of online shoppers have at some point made 'click & collect' purchases (i.e. bought or ordered goods online, but then collected the goods themselves). This not only addresses the major weakness of online shopping, which is that customers may not be at home when their goods are delivered, but also offers an opportunity for the successful adaptation of traditional high street retailing. John Lewis has led the way in this field and Argos has reported that sales through its 'click & collect'

[7] Usage of Click & Collect by internet shoppers. NEMS Market Research (2016)

service account for circa one-third of the company's total turnover. Amazon also has an agreement with the Co-operative and Morrisons to locate self-service lockers in local stores. According to research by NEMS Market Research Ltd, a wide range of retailers are rated positively in terms of having a good 'click and collect' service, but a few stand out. For example Argos was rated positively by a third of the people who have used a 'click & collect', followed by Tesco (27% rated its service as good), ASDA (15%), John Lewis (13%) and Marks & Spencer (7%). The only 'pure' online retailer that was rated highly was Amazon (7%).

3.16 Further to this is the potential for 'showrooms' on the high street, where customers can view and test products in-store before purchasing online. This co-ordinated multi-channel strategy should therefore help to support the vitality and viability of some town centres over time, and help drive the demand for retail space from non-traditional retailers.

FLOORSPACE 'PRODUCTIVITY' GROWTH

3.17 Floorspace 'productivity' (or turnover 'efficiency') growth represents the ability of retailers to absorb higher than inflation increases in their costs over time (such as, for example, rents, rates, service charges and staff costs) to help maintain their profitability and viability. Practically, this is achieved by increasing the amount of sales (revenue) within a given retailer's available floorspace (measured in square feet or metres).

3.18 It is standard practice for retail planning assessments to make an allowance for the year-on-year growth in the average sales densities of existing and new (comparison and convenience) retail floorspace. However, there is limited evidence detailing actual changes in the turnover and profitability of retailers over time. Furthermore analysis of past data and trends is complicated by the fact that sales density increases have been affected by changes in the use of retail floorspace over the last 20 years; such as, for example, the growth in out-of-centre retailing; Sunday-trading; longer opening hours; and the very strong growth of retail expenditure relative to the growth in floorspace. Following the recession many retailers struggled to increase or even maintain sales density levels and, together with other financial problems, this resulted in some retailers going out of business.

3.19 The table below sets out the latest sales density growth forecasts for comparison and convenience goods floorspace published by Experian Business Strategies (EBS), based on predicted changes in retail floorspace over time and after making an allowance for 'non-store' (SFT) retailing.

Table 3.4 Forecast 'productivity' growth rates

	2014	2015	2016	2017	2021	2026	2020-24	2025-36
Comparison	-2.0%	-1.2%	0.7%	-0.1%	-0.1%	-0.2%	0.0%	0.1%
Convenience	5.4%	5.3%	4.3%	1.3%	0.9%	1.8%	2.3%	2.2%

Source: Figures 4a and 4b, Experian Retail Planner Briefing Note 15 (December 2017)

3.20 The forecasts show that the scope for sales density growth is limited for convenience goods retailing. This is mainly due to slow growth in sales volumes and limited additions to the floorspace stock following the shelving of major foodstore expansion programmes by the leading national grocers (i.e. Tesco, Waitrose, Sainsbury's, Morrisons and Asda). Notwithstanding this, the turnover densities of existing foodstores in strong trading locations will inevitably be driven upwards where they are serving catchments that are forecast to benefit from strong population and expenditure growth over the short, medium and long term, and particularly where there is limited or no addition to the floorspace stock.

3.21 For comparison goods retailing, the trends towards more modern, higher density stores and the demolition of older inefficient space is forecast to continue, resulting in average growth rates of over +2.3% per annum over the next 15-20 years. However, this is still well below the rate seen during the boom of the early years of this century.

3.22 The floorspace ‘productivity’ growth rates forecast by EBS have been used to inform the retail capacity assessment set out in **Section 10** of this study. It should be noted however that we consider that existing retailers and floorspace will have the potential to achieve higher annual revenue growth rates to absorb increasing costs in order to remain viable, and this is especially the case where opportunities for additional new floorspace is limited.

CHANGING RETAILER REQUIREMENTS

3.23 The economic downturn, the growth in internet shopping and the continued demand for out-of-centre shopping has resulted in national retailers reviewing and rapidly adapting their business strategies, requirements and store formats to keep pace with the dynamic changes in the sector and consumer demand.

3.24 This is probably best illustrated by the changes in the grocery sector over the last 2-3 years. Following a sustained period of growth over almost 20 years up to 2009/10, principally driven by new store openings, the focus for the main grocery operators (i.e. Tesco, Sainsbury’s, Asda, Waitrose and Morrisons) has now shifted to growing market share through opening new smaller convenience store formats (such as Tesco Express, Sainsbury’s Local and Little Waitrose) and online sales. Over this period applications for large store formats have slowed to a virtual standstill and in some cases permissions are not being built out[8]. At the other end of the grocery spectrum, the European-led ‘deep discount’ food operators (namely Aldi and Lidl) are increasing their market shares through new store openings across the UK. This will inevitably have implications for the scale and type of new floorspace required by food stores in the future.

3.25 In the non-food sector, those retailers that experienced significant growth up to 2007/08 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. 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 significantly reduced their store portfolio in centres across the UK (e.g. HMV, GAME etc.). There are still a number of traditional high street retailers that have recently been forced into administration, most notably Blacks Leisure in 2008 to BHS in 2016, Store Twenty One and Jaeger in 2017. In 2018 this has continued with high profile closures including: Toys 'R' Us UK, Maplin, Cloggs footwear and Claires (see detail on ‘Retail Sector Crisis’ below).

3.26 Research also shows that there is an increasing polarisation and concentration of retailer demand and investment interest in the larger regional and sub-regional centres (i.e. the ‘top 25-50’ UK centres as defined by Javelin VenueScore rankings). This is because these centres usually have large and established catchment areas, and therefore 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. At the same time, retailer and investment demand is also mainly focussed on the prime retail pitches, with the secondary and tertiary pitches contracting and deteriorating in some centres due to limited demand, smaller shop units and increasing vacancies. 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.

3.27 Furthermore, many of the major multiples and traditional high street retailers are changing their store formats and locational requirements. For example, key anchor retailers such as Boots, Next, Mothercare, TK Maxx,

[8] For example, in 2015 Tesco disposed of some 49 sites with relatively recent permissions for new foodstores, including sites in Ipswich, Basingstoke and Dartford.

John Lewis and Marks & Spencer are actively seeking larger format units to showcase their full product range and to provide an exciting shopper environment backed by the latest (digital) technology. As a result, it is the larger centres and out-of-centre retail parks that are often best placed to meet this demand; as larger units are difficult to accommodate within existing traditional high streets and town centres, particularly historic areas characterised by conservation areas and listed buildings. As a result, some traditional high street retailers are moving out of town centres to retail parks. For example, over recent years Marks & Spencer has closed a number of traditional variety stores on high streets (including in Harlow, Great Yarmouth and Rugby) and opened new M&S Simply Food stores in out-of-centre locations. M&S has also recently announced a further wave of closures for 2018/19. This further underlines the growing demand from multiple retailers for larger format shop units, and the need for town centres to provide a good mix of large modern units to help attract and retain high street retailers, or potentially risk their relocation to new competing shopping destinations as and when leases expire.

3.28 These changes in retailer requirements and market demand will continue to have a significant impact on the UK's town centres and high streets, particularly in those cases where retailers make the decision to relocate from town centres to out-of-centre locations, or even out of the area altogether.

THE RETAIL SECTOR CRISIS

3.29 2018 has seen an unprecedented onslaught of bad news for the retail sector. Cost pressures have mounted due to a combination of factors including: weakness in Sterling, cost inflation, business rates increases, the National Living Wage and other staff costs. Retailers and landlords are facing the most challenging environment since 2008/09 when failures of main stream multiple retailers such as Woolworths, Stead and Simpson and Zavvi, amongst others, occurred. Correspondingly consumers have continued to tighten expenditure diverting their spending towards non-discretionary categories and own label products. A weaker economic outlook, the business rates revaluation and the ongoing structural change in the sector are just a few of the headwinds facing the UK retail sector, which continues to see an ongoing reduction in physical space.

3.30 The most recent announcements on closures (January to June 2018) include:

- East - the fashion brand with 34 stores and 15 concessions, went into administration at the end of January.
- Toys 'R' Us UK - the UK's largest toy and children's games/leisure products supplier, went into administration in February 2018 after failing to find a third-party buyer for the business.
- Maplin - the electrical/electronic component and gadget business, went into administration on the same day as Toys 'R' Us, having failed to find a buyer. This affected more than 200 stores and 2,500 staff.
- Warren Evans - bed, mattress and furniture retailers closed 14 stores and a warehouse with 287 staff.
- Juice Corporation - owner of designer brands Elizabeth Emmanuel (wedding dresses etc), Joe Bloggs, Gabicci, Rawcroft and Loyalty & Faith, went into administration at the end of January.
- New Look announced in March 2018 that it was shutting 60 of its 600 UK stores and cutting almost 1,000 jobs as consolidated large debts.
- Conviviality Retailing - major drinks and off-licence supplier (owning Wine Rack and Bargain Booze) went into administration early in April 2018.
- Cloggs - specialist footwear retailer owned by J D Sports, is scheduled to be wound up in 2018.
- Ikea reported in May 2018 a sharp fall in UK profits and pulled out of opening a new store in Preston in what would have been its second-largest store in the country. The retailer blamed higher wages and the cost of investments in its stores and website for a near -40% slump in profits in the year to 31 August 2017. Pre-tax profits slid from £140m to £87m, according to accounts filed at Companies House.

- Mothercare announced in May 2018 is to close 50 stores with the potential loss of at least 800 jobs. The stores are expected to close within a year.
- Dixons Carphone in May announced that it would close 92 of its more than 700 Carphone Warehouse stores.
- Marks & Spencer (M&S) in May revealed plans to close a total of 100 shops by 2022.
- Department store House of Fraser reported in June 2018 that it would close 31 stores out of its 59 store portfolio (i.e. more than half of its UK chain) including its flagship Central London store, putting a further 6,000 retail jobs at risk and dealing another 'hammer blow' to British high street. The House of Fraser chairman, Frank Slevin, in announcing the closures stated: "*The retail industry is undergoing fundamental change and House of Fraser urgently needs to adapt to this fast-changing landscape in order to give it a future and allow it to thrive. Our legacy store estate has created an unsustainable cost base, which, without restructuring, presents an existential threat to the business*". This statement highlights the changing nature of retailing on the high street and the pressures that retailers face in maintaining physical stores.
- Poundworld in June filed for administration putting at risk more than 5,000 jobs and 335 shops.

3.31 The above illustrates that there is a structural shift in the way consumers spend their money. This is threatening longstanding retailers and forcing a rethink about how high streets and town centres will function and look in the future. The same debate equally applies to retail parks and shopping centres as they too will be affected by retailers shutting up shop. What is clear is that profitable growth is becoming increasingly hard to achieve for retailers. This is undoubtedly a major contributing factor to the raft of store closures announced since the start of 2018.

3.32 Many high streets and smaller shopping centres will struggle to find the investment needed to survive. Retailers, local authorities, developers and landlords will need to work together to ensure that there is a sustainable long term vision for town centres. This may require the repurposing of town centres to incorporate other uses such as food and beverage, conversion to residential, creation of additional public space, reusing retail space for offices or using the vacant space as distribution hubs for to fulfil online deliveries.

3.33 The most pertinent issue for those involved in trying to create town centres that remain vibrant places to visit is how unoccupied retail space can be brought back into use, or put to alternative uses compatible with the aspirations and environment of a specific location. There will need to be a by all parties including owners, investors, local authorities to consider ways of reconfiguring redundant space. The role and function of town centres will therefore change and not necessarily be led by the retail sector.

VACANCY LEVELS

3.34 The impact of retail closures in town centres detailed above has led to a dramatic increase in national vacancy rates.

3.35 Experian's figures show that the national average vacancy level (expressed as a proportion of total outlets) more than doubled between 2006 and 2013; from circa 7% to 16%. Although vacancy levels have more recently have fallen back to circa 11.2% in 2017, the national average figure 'masks' the reality for different centres and locations, for example:

- Research by the Local Data Company shows that there is a significant polarisation in vacancy levels between prime and secondary centres, and between centres in the north and south. The generally more 'healthy' centres, closer to London and the south-east have vacancy levels of less than 10%, whereas the more challenging conditions in centres such as Blackpool, Grimsby and Hull is resulting in vacancy levels of over 20%.

- Since 2012[9] a significant number of shopping centre and high street retail leases have expired as 25 year leases agreed in the late 1980's and early 1990's and more recently agreed sub-10 year leases all reach maturity. In some cases/locations this has helped retailers with their portfolio rationalisation as they adjust their store requirements for the new multi-channel environment.
- Third, in many centres, there can be as many as 25–30% of the occupied shops on temporary short-term lets, with little or no rent being paid[10].

3.36 Experience shows that long-term vacancies and concentrations of vacant properties in centres can lead to a 'spiral of decline', engender feelings of neglect and lack of confidence in town centres, and act as a magnet for crime and antisocial behaviour. Redeveloping and bringing vacant and under-used sites and properties back into use can help stimulate vitality and economic viability, and kick-start local growth[11]. In those cases where vacancies are long-term and units cannot be let, it will be necessary to consider alternative uses and options for redevelopment. This can include temporary uses that ensure town centres and frontages remain active, with the potential to accommodate business start-ups, art studios and galleries, community/youth centres, etc. Another option is 'meanwhile uses/leases', which can facilitate temporary occupation of empty buildings while a permanent solution is being found. Furthermore, local planning authorities can provide greater flexibility for changes of use in areas with high vacancy levels, particularly secondary frontages, through local plan policies, area action plans and other planning tools. As the role and function of town centres change, it is about how centres adapt and how local authorities position themselves in engaging with occupiers, landlords and investors and determine a longer yet future for their centres.

TRENDS IN RETAIL-LED INVESTMENT AND DEVELOPMENT

3.37 The weak UK retail economy, the low growth in retail sales volumes, high vacancy levels and the lack of traditional development funds are all combining with other factors to create a very difficult climate for new shopping centre development and investment. One of the key impacts at the height of the economic recession was to 'weed out' some of the more expensive and unviable development schemes that were in the pipeline before the downturn in 2007/08.

3.38 The Shopping Centre Development Pipeline Report (2012) published by the British Council of Shopping Centres (BCSC) showed that the UK experienced, on average, nine new centre openings in each of the first 10 years of the 21st century. However, following the development of circa 260,000 sqm in 2009, 232,000 sqm in 2010 and 280,000 sqm in 2011, 2012 was the first year since records began in 1983 that no significant new shopping centres opened. Notwithstanding this, there are more positive recent signs of new shopping centre investment and development activity, with UK-based and international funds seeking assets (principally in prime and secondary locations) that offer the potential for growth. In terms of new development, three significant schemes opened in 2013 with a total floorspace of circa 140,000 sqm (including Trinity Leeds); the Old Market scheme in Hereford opened in 2014; and in 2015 there were a number of significant openings, including Grand Central in Birmingham as part of the New Street station redevelopment and Friars Walk in Newport. Other shopping centre schemes have opened in centres across the UK since 2015, but none are of the scale witnessed during the 'golden age' of shopping centre development between 1997/98 and 2007/08.

3.39 Recent trends suggest that average scheme size is generally smaller than previous schemes (i.e. less than 27,870 sqm), apart from in the larger 'top ranking' cities with the strongest catchment populations and expenditure to support new floorspace. Furthermore, recent developments and schemes in the pipeline have a significantly higher proportion of leisure uses and space than earlier shopping centre developments. For example, Land Securities recently reported that leisure space had grown four-fold in their new development schemes over the last 10 years; as illustrated by their major Trinity Leeds scheme which includes a significant

[9] Jones Lang LaSalle, Property Predictions, 2012.
[10] Sourced from Beyond Retail (2013)
[11] London Assembly Economy Committee: Open for Business. Empty shops on London's high streets GLA, March 2013.

leisure and catering offer. In London, the High Street Quarter scheme in Hounslow Metropolitan Centre will also include a significant food and beverage offer, anchored by a multi-screen cinema, with a reduced retail offer.

3.40 Even smaller schemes, such as those in Hereford and Salisbury, are providing between 5-10 restaurant (Class A3) units. Such demand is especially true in those town centres which have wider employment, tourist or other attractions and offer the potential for longer stay shopping. It is apparent that the trend towards more eating out and more informal restaurants and catering outlets across town centres is now very much part of new investment and development. This is a trend that clearly has implications for the future planning and development of the Council's main centres and the delivery of a realistic retail vision.

3.41 Given that it takes on average over ten years for a town centre scheme to be planned and developed, 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. Town centre redevelopment is complex and complicated by fragmented ownership in many centres, which acts as a barrier to site assembly and the creation of new development and infill schemes that might provide the right type of larger format retail units to attract expanding retailers. Small units and fragmented ownership are not conducive to accommodating many of today's modern retailer requirements. As a result, LPAs will need to take a more proactive role in attracting and/or delivering new investment and development in town centres. This was a key recommendation of the BCSC research '*Enabling Retail Development'* (2015), which identified the following interventions by local authorities based on their case study research:

- **Investor**: Newport, Sheffield, Oldham, Walsall
- **Developer**: Sheffield, Oldham, Bradford, Walsall
- **Masterplanner/site assembly**: Ealing, Hounslow, Newport
- **Owner and management company**: Woking
- **Public Realm delivery**: Hemel Hempstead, Bradford
- **High Street improvements and grants**: Newport, Hounslow, Bradford

3.42 Furthermore, the more challenging retail environment means that those shopping locations outside the 'top 25-50' centres that missed the previous (pre-recession) development cycle may face a long wait for new town centre development, as investors look to reduce their exposure and risks. While existing shopping centres may provide the opportunity for asset management by their owners to improve their overall attraction, offer and turnover (such as, for example, through extensions and/or increasing the food, beverage and leisure offer), it can still be problematical and prohibitively expensive to reconfigure units in the more dated early generation shopping centres. In addition, a lack of finance in recent years has severely limited investment in these centres. So, even where there is single ownership and control, activity to create the right type of units for retailers has been restricted. However it is preferable to work with existing schemes, where possible, to avoid simply moving retailers from one scheme to another and creating yet more vacant units.

3.43 Even with internet growth, additional floorspace remains one of the primary mechanisms which retailers use to grow profit and if they cannot occupy or adapt existing space, they will often look elsewhere. This means that new retail development solutions are likely to need to become more imaginative in the way in which existing properties (including listed buildings, while mindful of avoiding harm to such heritage assets) are altered in order to help prevent further diversion of trade to out-of-centre locations. Notwithstanding this, the economic rationale for new floorspace in many town centres is much reduced and some commentators[12] argue that the focus will increasingly be on enhancing and updating the existing town centre fabric.

[12] English Heritage (2013), The Changing Face of the High Street: Decline and Revival

INDEPENDENTS AND MARKETS

3.44 Multiples continue to be a powerful force within the retail sector, both as marketable brands, and in their ability to secure prime locations in town centres. However this does not underestimate or undervalue the important role of small independent shops[13] and street markets, which help to improve consumer choice and convenience to the communities they serve, as well as generating significant benefits for town centre economies in terms of local employment and income generation. Furthermore, it is widely accepted that a good mix of independent shops and market stalls help to enhance the character, diversity and vibrancy of town centres, preventing the growth of so-called 'clone towns'[14] due to the increasing colonisation of centres by larger chain stores. The homogenisation of the high street is discussed below:

> *"Is the spread of clone towns and the creeping homogenisation of the high street anything more than an aesthetic blight? We think so. Yes, distinctiveness and a sense of place matter to people. Without character in our urban centres, living history and visible proof that we can in some way shape and influence our living environment we become alienated in the very places that we should feel at home." (New Economics Foundation, Reimagining the High Street, 2010)*

3.45 Notwithstanding this, research shows that the number of small shops in the UK has declined in the past decade. This decline has been caused by multiple factors including changes in shopping behaviour, competition from supermarkets, internet shopping and rising costs (including rents and rates).

3.46 In terms of street markets, the *Rhodes Survey (2005)*[15] demonstrated its collective and economic strength. From this report the industry has been successful in demonstrating its national economic value and successive governments have started to value the role of markets as a vibrant and active part of the future of our town centres and the high street. This is illustrated by the NPPF (paragraph 23), which places weight on the need to '*retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive'*.

3.47 The *Portas Review*[16] also identified markets as an important factor in the future of successful town centres. This review produced 28 recommendations for reforms and whilst the success (or otherwise) of the Portas Pilots and other interventions are still the subject of debate, recommendation No 17, a national market day, was grasped by the retail market industry. In May 2012 the first '*Love Your Local Market Fortnight'* (LYLM) was rolled out as an annual national celebration of all things positive about retail markets in the UK. The Department for Communities and Local Government (DCLG) have also been very proactive in supporting the positive role of markets in the UK and town centre economies.

3.48 Retail markets therefore continue to make a meaningful and important contribution to towns and cities across the UK. The successful markets we see today are those which have embraced change and adapted alongside the town in which they trade; as the demographics of a town change a successful market will reflect this change and continue to cater for and attract the town's residents creating a vibrant and successful market. This will in turn attract visitors from outside the area and increase the value of the market[17].

3.49 In summary, providing for the needs of modern retailers in larger format stores, principally through new retail-led developments, whilst maintaining the viability, representation and mix of independent businesses and market stalls is a difficult balancing act for local planning authorities. It will be a greater challenge going forward with the

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[13] There is no national definition however the Town Centres SPG defines 'small independent shops' as a shop with a gross floorspace of 80 sqm or less.
[14] New Economics Foundation (NEF) Clone Town Britain Report (2005 and 2010)
[15] A Policy & Research Review of UK Retail and Wholesale Markets in the 21st Century - The Retail Markets Alliance (2009)
[16] The Portas Review: An independent review into the future of our high streets (2011)
[17] Recent research documents supporting the benefits of markets can be found via the following link: http://www.nabma.com/publications/research-documents/.

threat of internet shopping and a fragile economy in the post-Brexit age, but it is vitally important that the diversity of a centre's offer is not undermined by the new retail brands.

IMPACT OF OUT-OF-CENTRE RETAILING

3.50 Alongside the dramatic growth in online shopping and sales over the last decade, it is apparent that the appetite from investors and operators for new retail and leisure floorspace in out-of-centre locations has not diminished.

3.51 Research[18] shows that there has been a significant shift of institutional retail investment away from town centres over the last 20 years. In 1993, the proportion of investment held out of town was less than a fifth of that in town centres; today the value of property owned out of town has overtaken that held in town centres.

3.52 Larger format units in out-of-centre shopping parks are increasingly attractive locations for more traditional high street retailers, with the benefits of good accessibility, lower costs and ample surface car parking compared with town centres. Out-of-centre retailing also accounts for a significant proportion of existing and new retail floorspace and sales in the UK. For example research has highlighted the fact that of the new retail developments approved since the NPPF was published in March 2012, 72% were in out of town locations, 16% were edge of centre and just 12% were in town centres.

3.53 Although planning policies and more restrictive conditions on what goods can and cannot be sold from some retail warehouses and parks has slowed down the growth of out-of-centre retailing to a degree, the sector continues to mature and move away from 'bulky' goods[19] retailing to the provision of larger stores selling fashion and homewares that compete directly with the high street. Examples include Next at Home (which now includes a significant proportion of fashion sales), John Lewis at Home and Outfit (which includes the Arcadia brands in one store, including Dorothy Perkins, Topshop, Burton, Wallis, etc.).

3.54 Continuation of this trend will further challenge the future vitality of many high streets as retailers choose edge and out of centre locations ahead of town centres. The impact of these changes will also affect centres differently depending on their function and the future growth in their catchment populations and expenditure. For many towns, the simple fact is that in the future they will require a smaller, more concentrated retail core repositioned for future consumer and retailer needs, and not focused on the past. This will further reinforce the polarisation trend already being witnessed. The impact is likely to be felt across all centres to a greater or lesser extent, manifested through high vacancy rates, falling rent levels, decreasing footfall, weakening multiple retail offer and, potentially, a worsening town centre environment.

WARWICK DISTRICT IN CONTEXT

3.55 The above national analysis of trends is also relevant in consideration of the planning, funding and delivery of new retail and leisure led development / regeneration in the District.

3.56 According to the Warwick Economic Review 2017, 28% of Warwickshire County's businesses were located in the District. This is the second highest in the county. In 2015, Gross Value Added (GVA) per head stood at £33,660, the second highest in the sub-region and exceeding the national average (£25,600). Relative to the West Midlands as a whole, the District has a strong local economy, with a skilled population and higher than average levels of productivity and earnings compared with regional and national averages[20].

3.57 The Warwickshire County area has invested in a number of key initiatives to drive economic growth in recent years. These include new railway stations at Nuneaton and Coventry Arena, the National Transport Design

[18] Property Data Report 2012, sourced from English Heritage Report (2013), The Changing Face of the High Street: Decline and Revival
[19] 'Bulky' goods retailing is generally defined as comprising DIY goods, furniture and floor coverings, major household appliances and audio-visual equipment.
[20] Warwick District Council Position Statement - June 2016.

Centre (Coventry University), Venture House Business Centre (Stratford-upon-Avon) and Trident Business Park (Royal Leamington Spa). Major investment also gone into road improvements at Tollbar Junction and the M40 junction 12 and business support programmes such as the Warwickshire Rural Growth Network. Figures show 4,617 new companies were formed in Warwickshire during 2017. Of those, the majority (1,398) were based in Warwick district, 1,049 in Stratford district, 901 in Nuneaton and Bedworth, 892 in Rugby, and 370 in North Warwickshire[21].

3.58 Over time Stratford-on-Avon and Warwick District(s) have attracted more knowledge-intensive services, which currently account for 23% of jobs compared to the national average of 19%[22]. These industries have seen higher rates of growth over the last decade. Royal Leamington Spa is located close to the large Jaguar Land Rover factory and is close by to the campuses for Warwick and Coventry universities and Warwickshire College. The town is increasingly known for hosting video game and software manufacturers, earning the area the nickname ‘Silicon Spa’. The associated cluster is a key driver of ‘smart specialisation’ for the West Midlands region, with a combination of creativity, technology and global reputation that raises its productivity and competitiveness to levels above those of UK and international peers[23].

3.59 The three main town centres of Royal Leamington Spa, Kenilworth and Warwick provide a focus for retail, leisure and employment. The unique and high quality environments of these town centres has meant that they have been relatively resilient to the recent recession and the competition from online retailing and other retail areas and town centres. Tourism is also a substantial revenue earner in the District with 3.1m trips a year, generating more than £220m and over 4,850 jobs[24].

3.60 The above sample of sets the scene in terms of the current economic profile of the District. It is therefore important that the Council is proactive in retaining and attracting expenditure from the District and beyond through a range of channels such as tourism. Over the longer term capitalising on multiplier effects of the technology industries and tourism will also aid in this objective.

SUMMARY

3.61 This section has illustrated that existing floorspace in town centres faces a myriad of challenges. These will continue to grow over the short, medium and long term. This notwithstanding, for the centres within the Council area to perform strongly they will need to embrace the new dynamics and build in resilience to adapt seamlessly to future changes where necessary. There is still a role for existing floorspace and physical ‘store based’ retailing in town centres.

3.62 Physical retailing faces competition from online shopping and therein lies the question about the effect this will have in the future as retailers consolidate their physical floorspace. It is clear that our town centres and high streets are under pressure to simply retain retail businesses, let alone attract new investment and development. In this way:

- First, although the economy in general, and retail sector in particular, is forecast to experience growth over the short to medium term at least, there are risks to these growth forecasts; not least the slowdown in global economies, an increase in interest rates and the potential fallout from Brexit and other global uncertainties arising from international politics.
- Second, the growth of online shopping is impacting on the vitality and viability of many of Britain’s centres and high streets.

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[21] ‘New figures show business is booming in Warwickshire’ - Stratford upon Avon Herald (20/02/2018).

[22] Driving growth: Supporting business innovation in Coventry & Warwickshire – Centre for Cities (May 2013).

[23] A blueprint for growth of the UK games sector-BOP Consulting

[24] Warwick District Council – Tourism Development Strategy

- Third, although the NPPF reinforces the longstanding policy objective of promoting development and investment in town centres first, the market appetite for new and extended shopping facilities in out-of-centre locations shows no signs of slowing. The lack of available, suitable and viable sites in town centres – and particularly historic centres - to meet the demands of modern retailers and commercial leisure operators for larger format units will inevitably result in an increase in new out-of-centre applications and/or applications to widen 'bulky goods' conditions on existing retail parks.

3.63 Within the Council's area, there will be a need to build in resilience to the changes in shopping habits, which are likely to move away from solely being retail led locations to those which offer a wider range of retail, leisure, cultural and other amenities. This is to encourage increased dwell times and to create more purpose in frequenting centres.

3.64 These trends, and others, are also placing pressures on rental growth and market demand in many centres, particularly the smaller secondary centres and market towns outside the 'top 25-50' shopping locations. This has been further compounded by rising vacancy levels and the loss of key retailers. As a result, the share of non-food retail sales conducted through town centre shops has declined; from 64% in 2002 to just over 40% by 2013. Indeed research predicts that by 2020, the impact of declining in-store sales will result in a 31% reduction in high street stores[25].

3.65 As a result a far more uncertain future awaits the next wave of new retail investment and development. The evidence suggests that:

- At one end of the spectrum the larger, more dominant 'top 25-50' **cities and towns** should strengthen their competitive position. Because of their scale and catchment populations they will continue to attract market interest from high profile domestic and international retailers seeking space, as well as from commercial leisure operators.
- At the other end of the spectrum the smaller **local and neighbourhood centres** will be less affected. They are principally meeting the everyday retail (food), service and community needs of their local ('walk-in') resident catchment populations. It will therefore be important for local planning authorities to protect the important offer, role and function of these smaller centres.
- It is the **medium-sized towns** that occupy the middle ground that are increasingly being squeezed by the dynamic shifts in retailer demand and investment. Historically, such towns have had a reasonably large comparison shopping function, but this is beginning to shrink back because the demand from multiples is slowing and the space offered is often of the wrong size and configuration, and in the wrong location to meet today's retailer requirements. The challenge for local planning authorities will therefore be how to revitalise and regenerate these centres, looking beyond retail as a key driver for growth.

3.66 Notwithstanding these threats, industry experts still predict that the demand from major retailers for new physical space in the right locations with strong catchments will continue, as it still remains one of the primary mechanisms for retailers to 'reach' their customers, to grow their businesses and to increase market share and profitability. 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). This is because there is limited new retail floorspace in the pipeline in town centres and, in any case, it can take a long time to deliver new development on complex town centres sites.

3.67 Therefore those shopping locations 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, with good accessibility, etc.) and having the right size, format and specification to meet the needs of modern retailers. Due care and attention will also need to be paid to ensuring that the new floorspace and tenants complement rather than

[25] Javelin Group (October 2011), 'How Many Stores Will We Really Need?'

compete with the centre's existing offer, and strengthen rather than weaken the existing pedestrian circuit so as to generate the maximum benefits for the centre's overall vitality and viability.

3.68 In this context, it is clear that the 'top 25-50' prime centres and shopping locations in Britain should continue to flourish once the economy recovers. The greatest challenge facing LPAs will be how to revitalise the fortunes of struggling small and medium sized centres and market towns that do not have the critical mass of retail, leisure and other uses to compete for more limited investment and development.

3.69 This provides the important background and context for assessing and understanding the potential for new retail investment and development in the local authority area over the short, medium and long term.

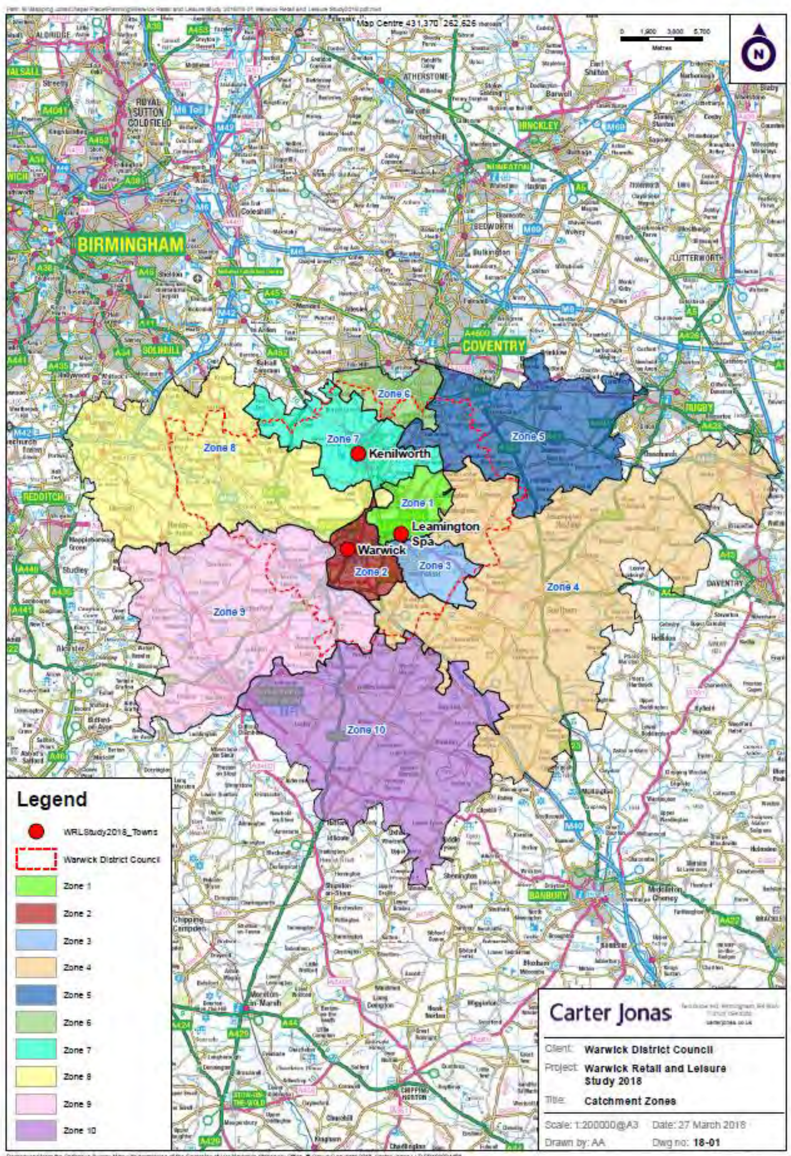
4. STUDY AREA & SHOPPING PATTERNS

4.1 This section first defines the catchment/study area that provides the basis for the quantitative needs assessment. It then describes the household telephone interview survey (HTIS) approach and summarises the key headline findings of the market share analysis for convenience and comparison goods retailing.

STUDY AREA AND ZONES

4.2 The definition of an appropriate study (catchment) area is an important starting point for any retail and town centre assessment. In this case the study area has been defined using postcode geography which covers the District area in full, as well as outlying areas (see **Figure 4.1** and also shown in **Appendix 1**).

Figure 4.1: Study Area



4.3 The study area is identical to that used in the Council's previous retail study (2014 RLSU). The comprising postcodes and number of interviews is detailed in **Table 4.1** below:

Table 4.1: Study Area and Zones

Zone	Postcode Sectors	Number of Interviews
1	CV32 4, CV32 5, CV32 6, CV32 7	100
2	CV34 4, CV34 5, CV34 6	100
3	CV31 1, CV31 2, CV31 3	100
4	CV23 8, CV33 9, CV47 0, CV47 1, CV47 2, CV47 8, CV47 9,	100
5	CV3 3, CV3 4, CV8 3, CV23 9	104
6	CV3 5, CV3 6, CV4 7, CV4 8	101
7	CV8 1, CV8 2 100	100
8	B93 0, B93 8, B94 5, B94 6, B95 5, CV35 7	100
9	B95 6, CV35 8, CV37 0, CV37 6, CV37 9	100
10	CV35 0, CV35 9, CV37 7	100
	Total	**1005**

4.4 These zones provide the sampling framework for the HTIS. This zone-by-zone approach also enables more detailed analysis of shopping patterns and expenditure flows both within and outside the study area for the purpose of the retail capacity assessment, in accordance with good practice. These combined zones are used to provide more detailed analysis of market shares achieved by stores in the District area and to take account of catchments for competing centres outside.

4.5 As with the 2014 RLSU, the ten zones can be grouped together to define geographic areas that broadly correspond to the 'core' catchments of the District's main centres as follows:

Table 4.2: Study Area Core Catchments

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

4.6 Zones 1, 2, 3 and 7 (Core Zones) broadly correspond with the immediate residential catchments of Royal Leamington Spa, Warwick and Kenilworth. The rest of the study area (Zones 4 to 6 and 8 to 10) represent the wider catchments of the District's main centres, but principally Royal Leamington Spa.

4.7 **Table 4.3** shows the study zone population projections[26]:

Table 4.3: Study Area: Experian Based Population Projections

ZONE:	2018	2023	2026	2029	%	2018-29
Zone 1	35,240	37,255	38,636	40,041	13.6%	4,802
Zone 2	33,507	35,469	36,818	38,190	14.0%	4,683
Zone 3	34,277	36,263	37,626	39,013	13.8%	4,736
Zone 4	29,474	30,374	30,926	31,489	6.8%	2,015
Zone 5	27,520	28,360	28,876	29,401	6.8%	1,881
Zone 6	46,909	50,380	53,206	55,840	19.0%	8,932
Zone 7	25,516	27,262	28,241	29,094	14.0%	3,577
Zone 8	29,410	30,308	30,859	31,421	6.8%	2,010
Zone 9	34,723	35,782	36,434	37,096	6.8%	2,374
Zone 10	23,363	24,076	24,514	24,960	6.8%	1,597
Study Area	**319,939**	**335,529**	**346,134**	**356,546**	**11.4%**	**36,607**
CORE EAST (ROYAL LEAMINGTON SPA) - Zones 1+3	69,517	73,518	76,261	79,055	13.7%	9,538
CORE WEST (WARWICK) - Zone 2	33,507	35,469	36,818	38,190	14.0%	4,683
KENILWORTH - Zone 7	25,516	27,262	28,241	29,094	14.0%	3,577
Sub-Total	**128,540**	**136,249**	**141,319**	**146,339**	**13.8%**	**17,799**

[26] The derivation of the population numbers and projections follows at Section 9. By way of summary this data incorporates a range of sources including Experian, the Council's SHMA and housing allocations in the District as provided by the Council.

Household Telephone Interview Survey

4.8 NEMS Market Research was commissioned to carry out a HTIS across the defined study area and zones in March 2018 (**Appendix 4**). The questionnaire was designed by CJ in collaboration with the Council. In total, some 1,005 interviews were conducted across ten zones (**Figure 4.1**). This involved structured interviews by telephone with the person responsible for the main household shop. A number of measures were put in place by NEMS 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 areas were not under or over represented in terms of the market share assessment. In addition, these results were further filtered to remove 'null' responses (and don't know) responses. This is a standard approach that helps to ensure the survey results provide a robust and realistic picture of shopping and leisure patterns.

4.9 The survey results help to identify broad patterns and preferences for different types of convenience and comparison goods shopping purchases, as well as leisure use across the study area. The key findings are used to inform the baseline market share analysis and turnover estimates that underpin the quantitative retail capacity assessment.

Convenience Goods – Market Share Analysis

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

4.11 The survey-derived market share (%) analysis for all convenience goods shopping is set out in Table 1 of **Appendix 5.** It should be noted that for this stage of the analysis the market shares for both convenience and comparison goods retailing include expenditure on SFT (which comprises internet sales, mail order shopping, etc.), but exclude 'null' responses (such as 'don't knows', etc.) in accordance with good retail planning practice.

4.12 The overall market shares in Table 1 have been derived from the analysis of the responses as to where people normally shop for their main ('bulk') and 'top up' grocery purchases. The market shares for these different types of food shopping are set out in detail in Tables 2 and 4 of **Appendix 5.**

4.13 In order to avoid the market share analysis of food shopping patterns being 'skewed' by larger superstores and foodstores in the study area, the survey also asked respondents where else they normally shop (if anywhere) for their 'main' and 'top up' purchases in addition to the first store identified. The market shares for this 'other' shopping are set out in Table 3 ('other' main food shopping) and Table 5 ('other' top up food purchases') of **Appendix 5.**

4.14 The responses for 'primary' and 'secondary' food shopping purchase have then been merged through the application of a weighting based on judgements as to the proportion of household expenditure normally accounted for by each type of convenience goods shopping. Assumptions are informed by Question 6 of the household survey which identifies the proportion of expenditure spent on main food shopping. In this case we have applied an assumed weighting of 60% for main 'bulk' shopping; 15% for secondary main 'bulk' shopping; 15% for primary 'top-up' shopping; and 10% for secondary 'top-up' shopping.

4.15 The key findings of the market share analysis are briefly described below.

4.16 In terms of the market share of SFT and principally internet shopping, Table 1 (**Appendix 5**) shows that the share of all food shopping across the study area (i.e. Zones 1-10) is 3.6%, whilst for the Core Zones (1, 2, 3 and 7) it is 4%. SFT's share varies across the study area from a low of 1.9% in Zone 4 to a high of 6.4% in Zone 10. Experian's latest Retail Planning Briefing Note 15 (RPBN15) (December 2017) shows that the 2017 unadjusted national average market share for non-store (SFT) convenience goods retail sales is 10.8%. This is higher than the market share of 3.6% for the wider study area. A number of factors may influence this lower than average market share; such as, for example, good access to foodstores at the local level and the extent/quality of the existing internet infrastructure (such as, for example, the logistics for delivery). This highlights the potential for SFT market penetration to increase in the future as online grocery shopping becomes more popular and convenient. If this was to occur, then it would potentially reduce the expenditure available to support the need ('capacity') for new ('physical') retail floorspace over the forecast period to 2029.

4.17 Turning to the market share analysis for the main centres and stores in the District, Table 1 (**Appendix 5**) shows that they are achieving an overall market share ('retention level') of 37.9% from within the study area (Zones 1-10). This represents a low level of retention rate.

4.18 However, focusing on individual zones in the Council area, the assessment shows that retention varies and shows a relatively strong level of retention as follows:

- Core Zones 1, 2, 3 & 7 – 79.6%
- Core East: Zone 1 & 3: 80.3%
- Core West: Zone 2: 82.2%
- Kenilworth: Zone 7: 74.7%

4.19 **Table 4.4** shows the distribution of market shares within the Core Council area Zones (1, 2, 3 & 7) against the wider study area (Zones 1-10):

Table 4.4: Convenience goods market shares for key centres in the Council Area against Study Area

Location	Core Area (Zones 1, 2, 3 & 7)	Study Area (Zones 1-10)
Royal Leamington Spa Town Centre	7.3%	3.2%
Warwick Town Centre	1.5%	1.2%
Kenilworth Town Centre	12.7%	5.5%
All Out-of-Centre	58.1%	28.0%
Total	**79.6%**	**37.9%**

Source: Table 1, **Appendix 5**

4.20 The above reflects the good availability and choice of major foodstores and convenience floorspace across the Council area. The analysis shows the highest level of retention is in Zone 2 at 82.2%.

4.21 The foodstores in the Council area are achieving lower market shares in the outer zones (e.g. 2.1% in Zone 5 and 6.4% in Zone 8), which reflects the attraction of other stores and centres that are more convenient to the population living in these zones; such as in Coventry and Solihull.

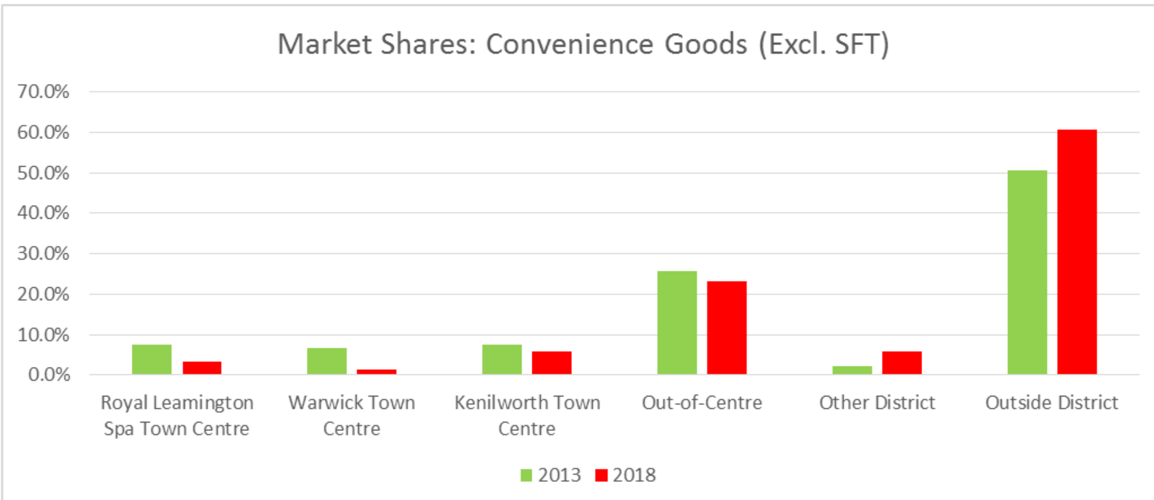
4.22 As the table shows, whilst Royal Leamington Spa town centre stores achieve a market share of 7.3% from the Core Zones (principally Tesco (3%) and Marks & Spencer (1.5%)), Warwick Town centre achieves a market share of only 1.5% (principally Sainsbury's Saltisford 1.1%). In contrast, Kenilworth achieves a higher market share of 12.7% (principally Sainsbury's (6.4%) and Waitrose (5.5%).

4.23 The District is also served by a large provision of out-of-centre floorspace that achieves a market share of 58.1% from the Core Zones 1, 2, 3 & 7. Of the named stores, Tesco (Emscote Road, Warwick) attracts the highest market share (12%) followed by Asda (Chesterton Drive, Royal Leamington Spa) at 10.5%, Sainsbury's (Tachbrook Drive) at 7.4% and Morrisons (Old Warwick Road) at 7.1%.

4.24 Finally, the 2018 survey results indicate that the 'leakage' to other competing stores stood at 16.4% (from Core Zones 1, 2, 3 & 7) but which increases to 58.5% when considering the study area as a whole (Zones 1 to 10). The main competing centres for food shopping from across the study area (Zones 1-10) are Coventry 17.9% and Stratford-upon-Avon (11.3%). Leakage is largely confined to peripheral zones where foodstore catchments overlap with the Council Area (e.g. Zone 5, 95.9% and Zone 6, 87.8%).

4.25 By way of comparison with the 2014 RLSU[27], this showed that the main centres and stores in the District were achieving a higher total market share (excluding SFT) of 49.4% compared with 39.3% in 2018. This indicates a decreasing rate of retention (**Figure 4.2**) primarily due to the outflow to stores outside District that has increased by 10.1%.

Figure 4.2: Convenience Goods Market Shares (excl. SFT) – 2014 and 2018 Studies Compared



Comparison Goods – Market Share Analysis

4.26 Comparison goods are generally defined as items not obtained on a frequent basis and include clothing, footwear, household and recreational goods. The household survey comprised questions on the main groupings of non-food expenditure, as defined by Experian in the latest RPBN15, including: 'clothing and footwear'; recording media; electrical goods; books; furniture and carpets; DIY and garden products; medical goods; etc.

4.27 Table 1 (**Appendix 6**) shows the market shares (%) for all comparison goods shopping purchases made both within and outside the study area. These total market shares have been informed by the shopping patterns for the different types of comparison goods expenditure set out in Tables 2-10. The market share analysis (%) takes account of the distribution and weight of spend (£) by households on the different comparison goods categories. This ensures that that the resultant shares are not 'skewed' by any particular comparison goods expenditure category. This is a standard approach for retail assessments.

4.28 As for the analysis of convenience goods, the market shares include expenditure on Special Forms of Trading (SFT) but exclude all 'null' responses. The key findings of the market share analysis are briefly described below.

4.29 Table 1 (**Appendix 6**) shows that SFT's share of all non-food shopping across the total study area (i.e. Zones 1-10) is 21.6% and 22% for the Core Zones 1, 2, 3 & 7. This is high and reflects the growing attraction and share of this channel of retailing. The SFT market shares vary from 17.5% in Zone 8 to 26.2% in Zone 7. In comparison, Experian's latest RPBN15 shows that the 2017 unadjusted national average market share for non-

[27] Note that the 2014 market shares exclude SFT (Appendix 4) and to undertake a like for like comparison the equivalent data (i.e. market share excluding SFT) from the 2018 assessment has been used.

store (SFT) comparison goods retail sales is 19.7% in 2017. The SFT for the study area overall is therefore higher than the Experian average. If the SFT market share for the study area increases at this rate over time, then it would potentially reduce the expenditure available to support the need ('capacity') for new ('physical') retail floorspace over the forecast period to 2029.

4.30 Turning to the market shares for the main centres and shopping facilities in the District, Table 1 (**Appendix 6**) shows that the Council's centres and comparison goods shops are achieving an overall 'retention level' of 32% within the total study area (Zones 1-10). This retention level increases to 60.1% within the Core Zones 1, 2, 3 & 7. The highest level of retention is in Zone 3 (66%).

4.31 Looking at expenditure retention for the main centres, the following key market shares have been identified:

- **Royal Leamington Spa Town Centre** accounts for 15.8% of study area expenditure (Zones 1-10) and 30.2% of the Core Zones 1, 2, 3 & 7 expenditure. Within Zone 1 retention increases to 44.6%.
- **Warwick Town Centre** accounts for 1.7% of study area (Zones 1-10) expenditure and 2.8% of Core Zones 1, 2, 3 & 7 expenditure. Within Zone 2 retention increases to 8.2%.
- **Kenilworth Town Centre** has a market share of 3% across the study area (Zones 1-10) and 7% in the broadly defined in the Core Zones 1, 2, 3 & 7. Within Zone 7 retention increases to 27.9%.
- All **Out-of-Centre** floorspace[28] accounts for 11.5% of study area (Zones 1-10) expenditure and 20% of Core Zones 1, 2, 3 & 7 expenditure. The highest market share is achieved by the collective provision at Tachbrook Park Drive (i.e. Leamington Shopping Park and Shires Gate Retail Park) from Zone 4 at 20.3%.

4.32 Based on an analysis of the entire study area (Zones 1-10), the main competing comparison goods centres are Coventry (19.4%), Stratford-upon-Avon (10.1%) and Solihull (7.4%).

4.33 By way of comparison with the 2014 RLSU[29], this showed that the main centres and stores in Royal Leamington Spa, Warwick and Kenilworth were collectively achieving an overall market share of 34.3% (excluding SFT) which is higher than the current retention of 26.2% (**Figure 4.3**). By way of further comparison, out-of-centre provision has increased its market share from 8.2% in to 14.3% as have centres outside the District with an increase from 57% to 59.2%.

Figure 4.3: Comparison Goods Market Shares (excl. SFT) – 2014 and 2018 Studies Compared

[28] Note: Also includes the market share for all other locations in the District.
[29] Note that the 2014 market shares exclude SFT (Appendix 5) and to undertake a like for like comparison the equivalent data (i.e. market share excluding SFT) from the 2018 assessment has been used.

4.34 A further analysis with the output of the 2014 RLSU shows a declining market share for Royal Leamington Spa and Warwick town centre(s) over the period 2009 to 2018. In contrast, Kenilworth town centre showed an increase. The fall in market shares for Royal Leamington Spa and Warwick can be explained by the increasing market share of out-of-centre provision in the District and the draw of competing shopping destinations outside the District. The increase in Kenilworth is attributable to the new investment in the centre specifically Talisman Square.

Table 4.5: Comparison Goods market shares Core District Zones (excluding SFT)

	Core East (Royal Leamington Spa) Zones 1 & 3 (%)			Core West (Warwick) Zone 2 (%)			Kenilworth Zone 7 (%)			Total Study Area Zones 1 to 10 (%)		
	2009	2013	2018	2009	2013	2018	2009	2013	2018	2009	2013	2018
Royal Leamington Spa Town Centre	74	61	49.8	47.1	40.3	31.4	33.9	26.7	19.4	33.3	27.9	20.2
Warwick Town Centre	2.1	1.9	1.2	22.2	15.9	10.9	2.7	2	1	4	3.3	2.1
Kenilworth Town Centre	0.4	0.7	1.4	0.6	0.7	1.3	26.6	28.9	37.8	3.3	3.1	3.8
Out-of-Centre	10	20.1	27.6	7.9	16.5	33	3.6	3.4	9.1	4.4	8.2	14.3
Other District	0.7	0.6	1	0	1.8	0	0	0.6	0.4	0	0.6	0.3
Outside District	12.9	15.6	19	22.2	24.7	23.5	33.3	38.4	32.4	54.7	57	59.2
Total	100	100	100	100	100	100	100	100	100	100	100	100

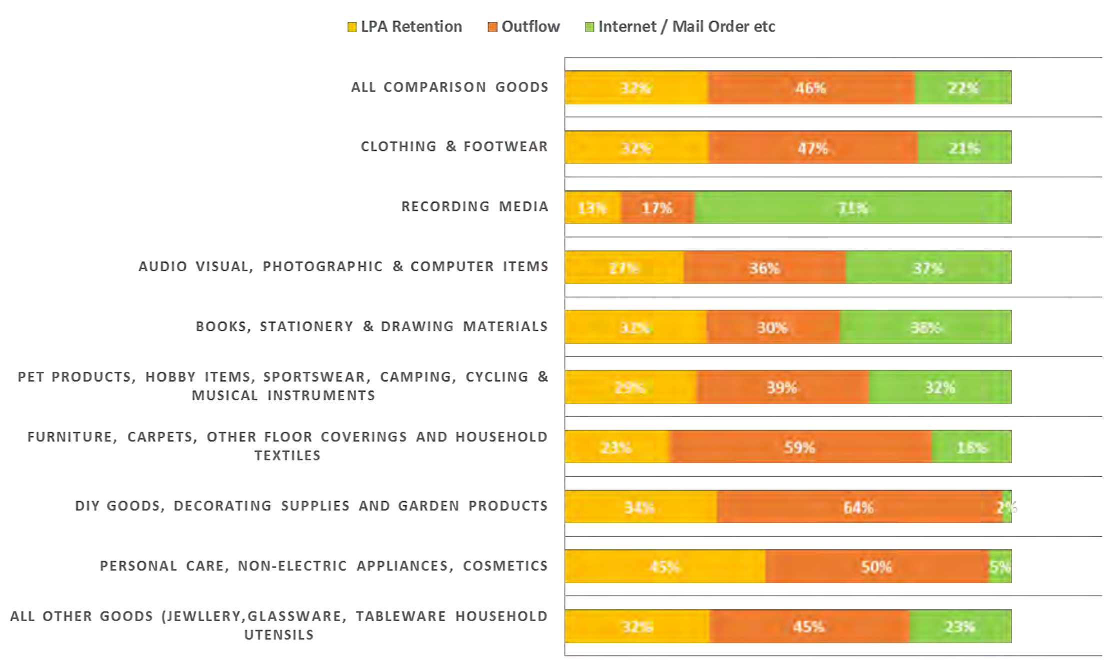
4.35 The pattern for the outer zones also shows the increase in market share for out-of-centre provision and competing centres and a decrease for the main centres in the District.

Table 4.6: Comparison Goods market shares Outer Zones (excluding SFT)

	Outer North Zones 5 & 6 (%)			Outer East Zones 4 & 10 (%)			Outer West Zones 8 & 9 (%)			Total Study Area Zones 1 to 10 (%)		
	2009	2013	2018	2009	2013	2018	2009	2013	2018	2009	2013	2018
Royal Leamington Spa Town Centre	7.8	8.7	7.5	34.5	28.6	18	12.6	8.1	4.4	33.3	27.9	20.2
Warwick Town Centre	0.4	0.4	0.3	1.3	1.1	1	3.6	3.3	2.4	4	3.3	2.1
Kenilworth Town Centre	0.7	1	1.6	0	0.5	0.4	0.8	0.4	0.2	3.3	3.1	3.8
Out-of-Centre	1	0.8	1.7	4.1	6	20.8	2	3.2	4.5	4.4	8.2	14.3
Other District	0	0.1	0	0	0.3	0	0.2	0.5	0.5	0	0.6	0.3
Outside District	90.1	89	88.8	60.2	63.5	59.7	80.9	84.5	88.2	54.7	57	59.2
Total	100	100	100	100	100	100	100	100	100	100	100	100

4.36 **Figure 4.4** illustrates the market shares for the Council's main centres and stores (aggregated), other centres and SFT/internet shopping for residents in the study area (Zones 1-10) for different categories of comparison goods expenditure (Table 1-10, **Appendix 6**).

Figure 4.4: Comparison Goods market shares for the study area (Zones 1-10)

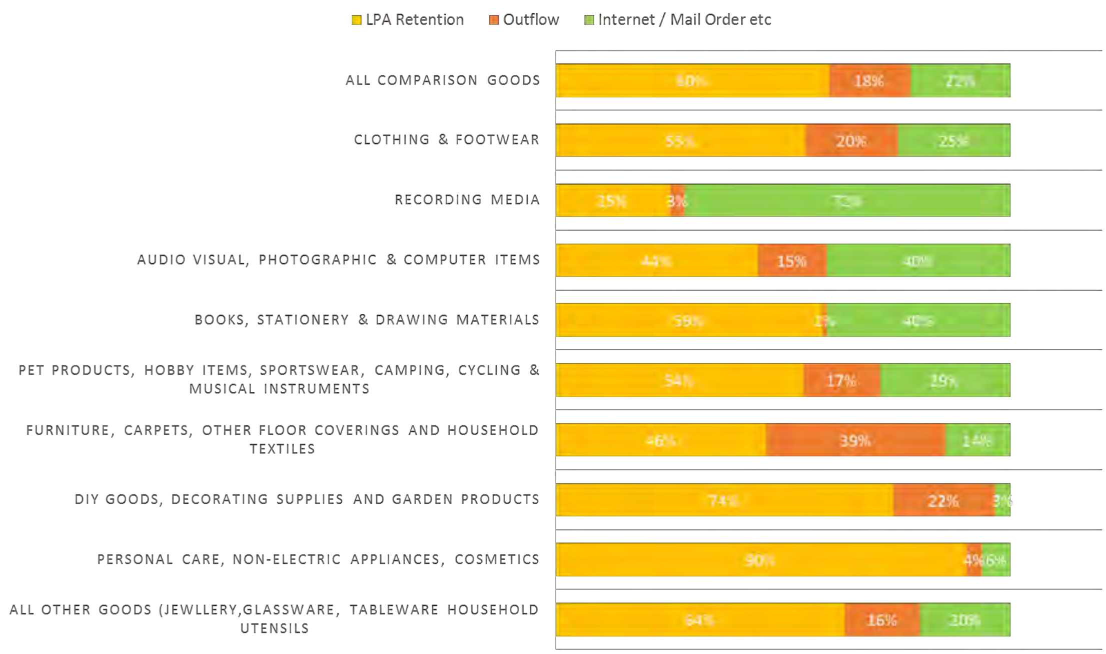


4.37 The figures show the relatively strong competition from other centres and shopping facilities located both within and outside the defined study area (Zones 1-10) for different types of comparison goods expenditure. For example, based on the study area, expenditure retention is highest in the personal care category (45%) and DIY goods category (34%). However these categories also show some of the largest outflow: DIY goods category (64%) and personal care category (50%). The other high outflow is in the furniture, carpets and flooring category (59%).

4.38 The highest outflow on SFT expenditure is in the recording media category at 71% from the study area (Zones 1-10). SFT's market share is more limited for DIY category (2%) and personal care products (5%). However, this does not necessarily mean that these specific sectors will be 'immune' from the growth in internet shopping over the medium to long term.

4.39 Focussing on the Core District (Zones 1, 2, 3 & 7), **Figure 4.5** shows the broad market share patterns. This shows a broad increase in retention levels across the various sub-categories of comparison goods. The key difference compared with the wider study area (Zones 1-10) is in the DIY and Personal Care goods categories where the Council area retention increases to 74% and 90% respectively. The highest outflow on SFT expenditure is again in the recording media category at 72%.

Figure 4.5: Comparison Goods market shares for the study area (Zones 1, 2, 3 & 7)



SUMMARY

4.40 The analysis has shown that convenience food stores serving the District are achieving a low overall market share of 37.9% (with SFT). Whilst for comparison goods the main centres and shopping facilities are also achieving a low retention rate of 32%. Focussing on the Core District area (Zones 1, 2, 3 & 7) the retention rate for both comparison and convenience goods increases to 79.6% and 60.1% respectively.

4.41 Across the study area SFT's market share for convenience goods is lower than the national average, which suggests that there is potential for internet food shopping to increase its market share over time. This may reduce the expenditure available to support the need for physical space over the longer term. The comparison goods market share for SFT stands at 21.6% which is higher than the national average. This is an indication of the shifting pattern of consumer behaviour and associated spending that needs to be monitored.

4.42 Comparing the market shares (excluding SFT) from the 2014 RSU[30] against the current assessment shows:

- Convenience goods overall: the main centres and stores in the District were achieving a higher total market share of 49.4% in 2014 compared with 39.3% in 2018. This indicates a decreasing rate of retention primarily due to the outflow to stores outside District that has increased by 10.1%;
- Royal Leamington Spa Town Centre convenience goods market share has decreased from 7.4% in 2014 to 3.3% to 2018.
- Warwick Town Centre convenience goods market share has decreased from 6.7% in 2014 to 1.3% in 2018.
- Kenilworth Town Centre convenience goods market share has decreased from 7.6% in 2014 to 5.7% in 2018.
- Convenience goods out-of-centre floorspace[31] has increased retention from 27.7% in 2014 to 29% in 2017
- Convenience goods floorspace in all other locations outside of the District has increased from 50.6% in 2014 to 60.7% in 2018.
- Comparison goods overall: the main centres and stores in Royal Leamington Spa, Warwick and Kenilworth were collectively achieving an overall market share of 34.3% which is higher than the 2018 retention of 26.2%.
- Royal Leamington Spa Town Centre comparison goods market share has decreased from 27.9% in 2014 to 20.2% to 2018.
- Warwick Town Centre comparison goods market share has decreased from 3.3% in 2014 to 2.1% in 2018.
- Kenilworth Town Centre comparison goods market share has increased from 3.1% in 2014 to 3.8% in 2018.
- Comparison goods out-of-centre floorspace[32] has increased retention from 8.8% in 2014 to 29% in 2017
- Comparison goods floorspace in all other locations outside of the District has increased from 57% in 2014 to 59.2% in 2018.

4.43 Whilst the above provides a broad indication of the market share performance of centres in the District, a key trend that the Council needs to proactively monitor by way of survey updates is the ongoing impact of the internet on food and non-food shopping.

4.44 The key focus for the Council is to increase retention and clawback expenditure to its centres in the light of the decreasing rate of retention over time.

[30] Note that the 2014 market shares exclude SFT and to undertake a like for like comparison the equivalent data (market share excluding SFT) from the current assessment has been used.

[31] Note: Also includes the market share for all other locations in the District.

[32] Note: Also includes the market share for all other locations in the District.

5. TOWN CENTRE HEALTH CHECKS: METHODOLOGY

5.1 **Sections 6-8** provide detailed health check assessment for the District's main centres of Royal Leamington Spa, Warwick, and Kenilworth.

5.2 Health checks are recognised as important planning 'tools' for appraising and monitoring the changes in the overall vitality and viability of town centres, and informing both plan-making and decision-taking at the local level.

5.3 In accordance with the PPG (paragraph 005 Reference ID: 2b-005-20140306), there are a number of indicators that are widely used (where the information exists) to help assess and monitor the overall health and performance of centres. Some of the indicators include:

- the diversity of uses (e.g. retail and services offer);
- proportion of vacant street level property;
- commercial yields on non-domestic property;
- customers' views and behaviour;
- retailer representation and intentions to change representation;
- commercial rents;
- pedestrian flows;
- accessibility;
- perception of safety and occurrence of crime; and
- town centre environmental quality.

5.4 In this case the most reliable KPIs have been gathered (where available) for the centres to help inform the assessment of their overall strengths and weaknesses in terms of their retail and leisure provision, the opportunities for new sustainable development and growth, and any potential current and future threats to their overall vitality and viability. We have referred to a number of datasets and research to help assess the relative vitality and viability of the Councils' main town centres, as referenced throughout the report. The general methodology is set out below.

Engagement of Key Stakeholders

5.5 As part of undertaking the town centre health checks we have contacted a number of key stakeholders to ascertain their views on the role, attraction and performance of the main centres. This involved either face-to-face meetings as part of our site visits and/or telephone calls. Carter Jonas sought to contact all organisations/ representatives on the list, in the time given. The key stakeholders we have engaged with at the time of preparing this study are as follows:

- Leamington Chamber of Commerce;
- Warwick Chamber of Commerce;
- Kenilworth Chamber of Commerce;
- Royal Priors Shopping Centre;
- Leamington Spa BID; and
- Wareing and Co: Commercial Property Consultants.

Retail Composition & Diversity of Uses

5.6 The town centre health check assessments have been informed by analysis of Experian Goad reports for each town centre.

5.7 In brief, the Goad reports set out the number and proportion of units in each use classification across the centres (i.e. convenience, comparison and service uses, and vacant units). They allow for benchmarks with the UK national average for all circa 2,000 centres and shopping locations covered by Experian Goad. It should be noted that 'services' as defined by Experian Goad are sub-divided into the following three sub-categories.

- **Retail services –** Class A1 and certain sui generis uses (including hairdressers, beauty salons, travel agents, launderettes, opticians, etc.);
- **Leisure services** - comprise cafés and restaurants (Class A3), betting shops (sui generis) and fast food/ takeaway outlets (Class A5); and
- **Financial and professional services** - cover all Class A2 uses (such as banks, estate agents, etc).

Goad Town Centre Definitions and Floorspace

5.8 The health checks provide an effective 'gap' analysis tool to help identify retail types and categories that are under or over represented in centres. This is based on benchmarking against Goad UK averages for all circa 2,000 centres and shopping locations covered by Experian.

5.9 It should be noted that in our description of each centre's town centre boundary we have referred to the boundaries defined by the respective Councils. However, where Experian Goad data is relied on it should be noted that the area surveyed is not necessarily identical to the Councils' identified town centre boundaries. As such, it is possible that the number of units set out in our analysis may not relate directly to the Councils' own boundaries and centre audits.

5.10 The floorspace figures shown in the report are also derived from the relevant Goad Plan which show only the 'footprint' floorspace and the site area without the building lines. They should therefore not 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.

Vacancies

5.11 The number and scale of vacancies in a centre, and the length of time properties have been vacant, represents a key performance indicator (KPI) to help assess a centre's overall vitality and viability. For example, high vacancy levels, or a concentration of vacancies in certain areas/streets, could point to underlying weaknesses in terms of retailer demand and/or the fact that vacant units are not meeting demand and are not 'fit-for-purpose'. Notwithstanding this, vacancies can arise in even the strongest centres due to the natural 'churn' in businesses opening and closing at any point in time. This KPI must therefore be used and interpreted with care. The Council's own monitoring data of the Town Centres has also been used to inform vacancies for each of the centres.

Multiple and Independent Retailers

5.12 The Experian Goad Category Reports also provide analysis on multiple retail representation. A multiple is defined by Experian Goad as being part of a network of nine or more outlets. It is widely accepted that a good presence and mix of multiples in a centre, alongside a strong independent offer, helps to increase the overall attraction and performance of shopping centres. Multiples are a strong draw for customers and they help to generate frequent shopping trips and footfall, and linked expenditure for other shops, businesses and services.

Street/Covered Markets

5.13 Whether or not a centre has a market, and the quality and offer of a market, can give an indication as to whether a centre is vital and viable. Information regarding the health of the markets discussed in this report has been obtained from our own research and observations of the centres, as well as stakeholder consultation. In line with Paragraph 23 of the NPPF, existing markets should be retained and enhanced and, where appropriate, new ones should be created, ensuring that markets remain attractive and competitive.

Retailer Demands & Requirements

5.14 Evidence of requirements ('market demand') from retail and leisure operators for representation in a town centre can provide a further indication of the overall health and attraction of centre, and investor confidence. In this case we have drawn on standard published sources to inform our assessment of current market demand; including CoStar and the Requirements List. However, it should be noted that this published information is not definitive, as many retailers and leisure operators prefer not to announce their requirements as it can undermine their negotiating position with potential landlords. Furthermore, market demand is often opportunity-driven; for example in response to the marketing of new development and regeneration initiatives.

Prime Zone A Rents

5.15 The level of rent that businesses are prepared to pay for retail space, and the commercial yields achieved provide a further indication of the relative strength of the centre and its prime retail pitch. However, it should be noted that Prime Zone A rents and yields are not available for all centres, particularly smaller centres where there are more limited transactions. Therefore, an assessment of Prime Zone A rents and yields is only provided where available.

Customer Views and Behaviour

5.16 Our assessment of customers' views and behaviours draws on the findings of the household survey. The household survey comprised in total 1,005 interviews across 10 zones and asked specific questions regarding what respondents 'like' and 'dislike' about the main centres.

Environmental Quality

5.17 Environmental quality represents a key performance indicator (KPI) to help assess a centre's overall vitality and viability. An assessment of environmental quality (including cleanliness and attractiveness, security, treatment of buildings and open spaces) has been undertaken using our own research and observations of the centres, as well as stakeholder consultation.

Accessibility

5.18 A centre's vitality and viability can also be impacted by the ease of accessibility by different modes of travel, and the level and quality of car parking. This assessment has been informed by the survey evidence, along with our own research and observations of how easy a centre is to access; mobility time and cost; public transportation; traffic management and signage; barriers; car parking; and access by other modes. Consultation with key stakeholders has supplemented our research.

Out-of-Centre Provision

5.19 Out of centre provision has been determined using a number of sources. For example, *Completely Retail*, a comprehensive retail database, has been referenced to identify the location, scale and operators trading outside of the main centres. We have also referred to the results of the household survey and consultation with key stakeholders.

New Investment & Potential Development

5.20 Carter Jonas has relied on the Council to identify new investments and potential development opportunities within the main centres.

5.21 Based on the above KPIs, the following sets out our health check assessments for the main centres

6. ROYAL LEAMINGTON SPA HEALTH CHECK

CONTEXT

6.1 Royal Leamington Spa is an affluent and historic spa town located in Warwickshire. The town was originally a small village known as Leamington Priors. After 1800, the natural spa springs were commercialised and the population grew considerably. The Town Centre is now the principal shopping and commercial centre within the District, serving the population's retailing needs and requirements, as well as serving its role as a tourist and leisure led destination.

6.2 Royal Leamington Spa is located 3.4km (2.1 miles) from Warwick; 13km (8.1 miles) from Coventry and 15.9km (9.9 miles) from Stratford-upon-Avon.

6.3 **Table 6.1** below shows Royal Leamington Spa's retail ranking against competing centres. It is ranked 79th, improving its position from 84th in 2014.

Table 6.1: Warwick District Centres Compared Against Competing Centres

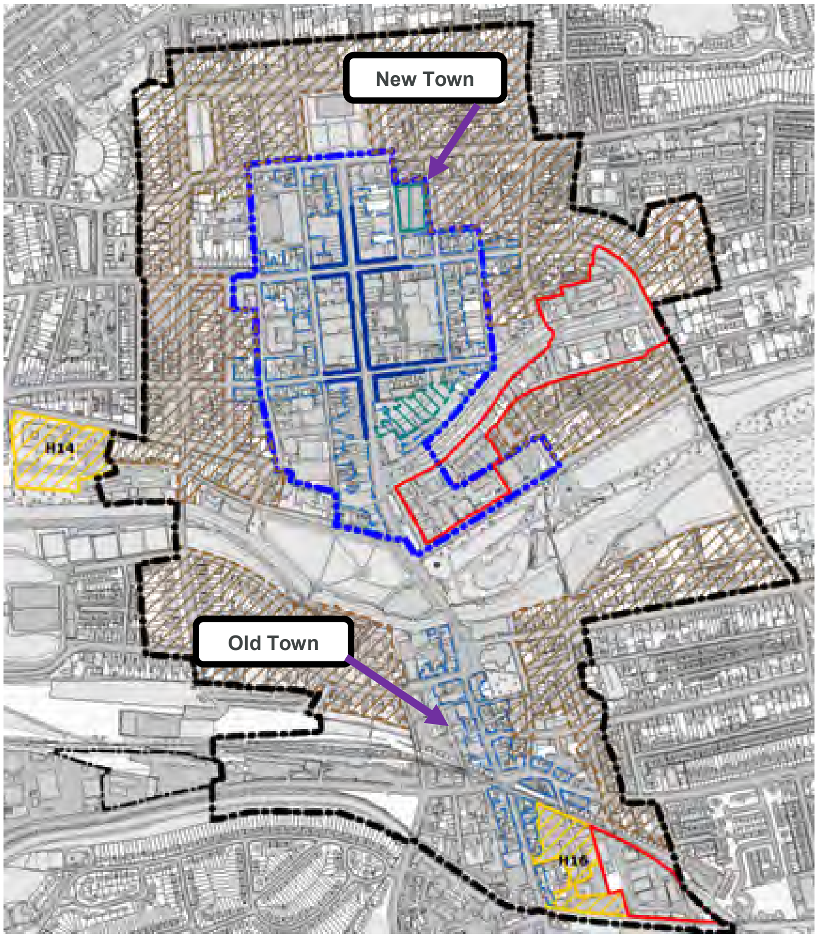
Centre	Rank (2017)	Rank (2014)
Birmingham	4th	4th
Solihul	42nd	43rd
Worcester	55th	61st
Northampton	63rd	59th
Coventry	66th	62nd
Royal Leamington Spa	**79th**	**84th**
Stratford Upon Avon	185th	174th
Kenilworth	608th	616th
Warwick	968th	898th

Source: Javelin Venuescore (2017) [33]

6.4 The Warwick District Local Plan (2017) designates Royal Leamington Spa as a Town Centre in the settlement hierarchy. The Town Centre Boundary (TCB) extends to Clemens Street to the south; the A452 to the west; Beauchamp Avenue to the north; and the junction between Leam Terrace and Willies Road to the east. The Town Centre is divided by the River Leam and there are two distinct retail areas, namely the 'New Town' and 'Old Town'. The primary frontages can be found within the 'New Town', whereas the 'Old Town' is exclusively secondary in nature. **Figure 6.1** below illustrates Royal Leamington Spa's TCB.

[33] Venuescore is Javelin Group's annual ranking of the UK's top 3,000+ retail venues based on provision of multiple retailers including anchor stores, fashion operators, and non-fashion multiples, where each operator is given a weighted score to reflect its overall impact on shopping patterns and the attraction of centres. The Market Position Index measures the degree to which the centre's offer has a high-end or discount focus (High=Bias towards High-end retailers; Low=Bias towards Discount-oriented retailers)

Figure 6.1: Royal Leamington Spa: Town Centre Showing New and Old Town



Source: Warwick District Local Plan (2017)

6.5 The ‘New Town’ is the predominant retail and commercial location. It is characterised by traditional and attractive architecture and hosts anchor retailers such as M&S. The key retail areas within the ‘New Town’ are detailed below:

- **The Parade** is the main street within the New Town which is characterised by Regency architecture and attractive shopping frontages. It hosts a number of key retailers and services such as Boots, McDonald’s, Marks & Spencer (M&S) and retail banks including Santander and Barclays.
- **The Royal Priors Shopping Centre** opened in 1987 and can be accessed via the Parade, Warwick Street and Regent Street. It is anchored by M&S. Other key fashion retailers including Pandora, New Look and Cath Kidston. Parking and personal shopping services are also available.
- **The Regent Court Shopping Centre** opened in 2005 and can be accessed via the Parade and Regent Street on Livery Street. This area is characterised by a cluster of casual dining outlets including Cote Brasserie, YO! Sushi and Turtle Bay.
- **Regent Street and Warwick Street** are the key secondary streets that host a mix of retail and service uses such as cafes, restaurants and fast food outlets.

6.6 The 'Old Town' complements the 'New Town' by providing lower value retailing as it primarily functions as an ancillary secondary shopping area. The location of the Old Town is particularly important as it is the gateway to the railway station. The main retail and commercial activity is along Bath Street and Victoria Terrace. Iceland Foods is a key multiple retailer in this location.

RETAIL COMPOSITION & DIVERSITY OF USES

6.7 **Tables 6.2 and 6.3** summarise the composition of the centre's retail mix and diversity of uses based on the latest available Experian Goad Category Report (April 2018). To be noted that the area surveyed by Goad is not identical to the Councils' identified Town Centre Boundary (TCB) (**Figure 6.1**), and as such, it is possible that the number of units set out using the GOAD analysis not directly correspond to the Councils' defined centre boundary.

6.8 The current provision in terms of outlets and floorspace is also compared against the outputs of the 2014 RLSU below:

Table 6.2: Current Retail and Service Offer – Units

Category	2014 Study		2018		% Change	UK Average 2018 %
	No. of Outlets	% of Total Outlets	No. of Outlets	% of Total Outlets		
Convenience	40	5.9%	49	7.3%	22.5%	8.9%
Comparison	255	37.2%	236	35.3%	-7.5%	30.8%
Retail Service	80	11.8%	90	13.5%	12.5%	14.5%
Leisure Service	139	20.5%	170	25.4%	22.3%	24.0%
Financial & Business Service	71	10.5%	64	9.6%	-9.9%	10.3%
Vacant	93	13.7%	60	9.0%	-35.5%	11.2%
TOTAL	**678**	**100.0%**	**669**	**100.0%**	**4.5%**	**100.0%**

Table 6.3: Current Retail and Service Offer – Floorspace

Category	2014 Study		2018		% Change	UK Average 2018 %
	Floorspace	% of Total Floorspace	Floorspace	% of Total Floorspace		
Convenience	7,915	6.5%	8,900	7.4%	12.4%	15.2%
Comparison	48,467	40.0%	44,983	37.6%	-7.2%	34.7%
Retail Service	11,027	9.1%	7,943	6.6%	-28.0%	6.8%
Leisure Service	28,967	23.9%	35,266	29.5%	21.7%	25.1%
Financial & Business Service	11,306	9.3%	8,946	7.5%	-20.9%	7.7%
Vacant	13,434	11.1%	13,480	11.3%	0.3%	9.8%
TOTAL	**121,116**	**100.0%**	**119,519**	**100.0%**	**-21.5%**	**100.0%**

Source: Experian Goad Category Reports (2012 and 2018)
Notes: The floorspace figures are derived from the relevant Goad Plan (see **Section 5**). The index is a comparison with the national average for all circa 2,000+ centres audited by Experian. A score of 100+ indicates an above average provision in that particularly category, whereas a score of under 100 shows a relative under-provision. Figures may not sum precisely due to rounding.

Convenience Provision

6.9 There are 49 convenience units in the survey area cording to the latest 2018 Experian Goad category Report. This represents 7.3% of total outlets, which is below the national average of 8.9%. The current floorspace provision (7.4%) is also below the UK national average (15.2%). There has been a 22.5% increase in units and a 12.4% increase in floorspace since the 2014 RLSU.

6.10 The convenience provision consists of 10 bakers, 4 butchers, 7 Confectionary, Tobacconist & Newsagents (CTN) stores, 6 convenience stores, 3 greengrocers, 4 grocers and delicatessens, 2 health foods, 4 off licences, a fishmonger and a frozen food store. The Farmers Market that operates within the centre further supports and enhances the convenience retailing in Royal Leamington Spa. The main food and convenience stores include the Tesco Metro and the two Co-op stores located in the New and Old Town.

Comparison Provision

6.11 According to the 2018 Goad Category Report, there are 236 comparison goods retailers located within Royal Leamington Spa trading from a total floorspace of 44,983 sqm. The number of outlets represents 35.3% of total units in the centre, which is significantly above the national average of 30.8%. The current floorspace provision represents 37.6% of total floorspace in the centre, which is also above the national average of 34.7%. This provision has seen a 7.5% reduction in units and a 7.2% reduction in floorspace since the 2014 RLSU.

6.12 In terms of its overall non-food provision the key headlines are:

- Across the different comparison sub-categories, the centre has a high representation of many categories including general clothing (22 units), ladies wear and accessorises (21 units), charity shops (17 units), DIY & home improvement (13 units), telephones and accessories (10 units), men's wear and accessories (9 units).
- There is an overprovision of fitted furniture stores with 8 units in the centre. This is equivalent to 1.2% of the total units, which is above the national average of 0.4%. There is an underrepresentation of chemist and drugstores, as these account for 0.7% of the total units which is below the national average of 1.1%. There is no representation of gardening and equipment stores, leather and travel goods, office supplies nor vehicle accessories.
- Key multiple brands include River Island, Sports Direct and Waterstones. The independent offer is characterised by small boutique stores including a sweet shop; a wine shop and a florist.
- The Regent Court Shopping Centre is located south west in the 'New Town' and includes high street fashion and beauty retailers such as Jaeger, the Bath Store, and independent operators including art galleries and electrical goods. The Royal Priors Shopping Mall is also located in the 'New Town' and is anchored by M&S, Gap and Topshop.
- The out-of-centre provision is strong at Leamington Shopping Park and The Shires Gate Retail Park is well represented with key retailers such as Mothercare; Debenhams; Next[34] and TK Maxx.

6.13 In summary, we consider Royal Leamington Spa's has a good comparison representation with a broad range of sub-categories across the provision. According to the GOAD survey, the comparison provision (in terms of both outlets and provision) is above the national average. As with convenience goods it is recommended that any new investment is directed to the town centre. This is particularly important as Royal Leamington Spa's comparison market share has shown a decline since 2009 (detailed in **Section 4**).

Service Provision

6.14 Service businesses are defined by Experian Goad as including retail, professional and financial services. As **Table 6.2 and 6.3** show, there are 324 service outlets in Royal Leamington Spa. This represents 48.4% of all units which is marginally below the national average of 48.8%. However, the associated floorspace provision of 43.6% is significantly higher than the national average (39.6%).

6.15 The following provides a brief summary of provision in the different service categories.

- There are 90 **retail services**, which account for 13.5% of total outlets. This is below the national average (14.5%). This category is mostly made up of health and beauty outlets (68 units); opticians (6 units); travel agents (4 units); dry cleaners (2 units); and post offices (2 units). Since the 2014 RLSU, there has been a 5% increase in units and but a 28.0% decrease in floorspace.

[34] Next was located in the 'New Town' but moved to Leamington Shopping Park. This unit is now taken up by Oliver Bonas.

- With reference to **financial services,** there are 64 outlets, which represent 9.7% of total units and is below the national average of 10.3%. Since the 2014 RLSU, there has been a reduction in both units (-9.9%) and floorspace (-20.9%). This category is currently composed of 28 property services, 10 retail banks, 6 legal services, 6 employment and careers outlets, 3 building societies, 2 building supplies and services, 1 printing and copying service and 1 other business service. Banks within the centre include HSBC, Lloyds and Natwest. These services are principally located along Parade and Bath Street.
- There are 170 **leisure services** outlets which represents 25.4% of total provision and is higher than national average 24.0%. There has been an increase in units (22.3%) and floorspace (21.7%) since the 2014 RLSU. Leisure provision consists of 51 restaurants, 35 cafes, 29 fast food takeaways, 16 bars, 12 public houses, 9 sports and leisure facilities, 4 hotels and guest houses and 3 outlets in the cinemas, theatres and concert halls category. Regent Court is the key location for casual dining operators where there is a clustering of operators such as Las Iguanas, Prezzo, Yo! Sushi, Nando's, Wagamama's. Additionally, and more widely within the 'new town centre', there is representation from operators such as Bill's, Cau, Bistrot Pierre, Carluccio's and Café Rouge.

6.16 In summary, we consider there is a strong service provision within the town centre with a particular strength in leisure provision and the branded casual dining sector in particular. This caters for both the local population and the tourist catchment. However it should be noted that this market is currently witnessing consolidation as a result of over expansion and this may change further if the macro economic climate stagnates or deteriorates further. Notwithstanding this trend, the provision currently positively contributes to the evening and night time economy.

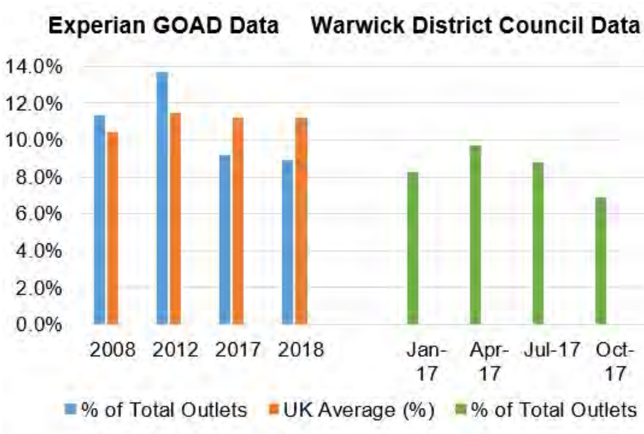
VACANCIES

6.17 Royal Leamington Spa currently has 60 vacant outlets, according to the 2018 GOAD Category Report. This represents a vacancy level of 8.9%, which is below the national average of 11.2%. **Table 6.4** and **Figure 6.2** illustrate the change in vacancies from 2008 to 2018, based on GOAD Category Reports, as well as the Council's own monitoring data (aligned to the town centre boundary). The trend indicates a declining vacancy rate across both data sets.

Table 6.4: Vacancy level change

Date	No. of Vacant Units	% of Total Outlets	GOAD UK Average (%)
Experian GOAD Data			
2008	75	11.3%	10.4%
2012	99	13.7%	11.5%
2017	62	9.2%	11.2%
2018	60	8.9%	11.2%
Warwick District Council Data			
Jan-17	39	8.3%	11.2%
Apr-17	49	9.7%	11.2%
Jul-17	44	8.8%	11.2%
Oct-17	34	6.9%	11.2%

Figure 6.2: Vacancy level change



6.18 According to the Council's monitoring data, vacancies have generally declined since the highest record of 99 units in 2012. In 2017, vacancies were higher in the middle of year in contrast to the beginning and end of the year. This is reflective of` seasonal spending patterns especially during the Christmas season.

6.19 Overall, we consider that the centre is performing well with a lower vacancy rate when compared to the national average. However, we advise that the Council continues to monitor vacancies across the centre in the light of the changing and challenging dynamics of the retail market.

MULTIPLE AND INDEPENDENT RETAIL REPRESENTATION

6.20 Based on the 2018 Goad Category Report, there are some 204 multiple retailers. This includes key fascias such as M&S, Argos, Boots, Topshop and Waterstones. Multiples account for 30.3% of the total units, with independent retail representing 69.7% of the total units. The independent offer is considered to be strong. The table below illustrates the provision of multiple retail and service outlets.

Table 6.5: Multiple Retailers: Royal Leamington Spa

Category	No. of Outlets	% of Total Outlets	UK Average 2016 %
Comparison	107	53.8%	42.7%
Convenience	13	6.5%	11.2%
Retail Service	17	8.5%	9.2%
Leisure Service	36	18.1%	21.5%
Financial & Business Service	26	13.1%	15.2%
TOTAL	**199**	**100.00%**	**100.00%**

6.21 In summary, we consider there is a good and complementary mix of multiple and independent retailers, serving the centre and its catchment population. Nonetheless, it will be important to maintain the current level of multiple retailers in order to retain the attraction and vitality of the centre.

MARKETS AND EVENTS

6.22 There is one regular market in Royal Leamington Spa and two special events which run alongside this market:

- **Leamington Spa Farmer's Market** – This is held in the Pump Room Gardens on the fourth Saturday of every month from 9:00am – 2:00pm. This market sales speciality produce and seasonal fruit and vegetables (including meat, olives, honey, fish etc.) which are produced 30 miles from the town. Consultation with key stakeholders revealed this market is very popular and profitable.

6.23 In terms of associated events these include:

- **Mini Harvest Event** – This is scheduled to take place in September 2018 to celebrate the harvest period. Attractions anticipated are: tractors, craft stalls and face painting activities.
- **Halloween Event** – This market is scheduled to take place in October 2018. It was traditionally held alongside the Warwick Market but has been relocated to alongside Leamington Spa Farmer's Market. Traders will be partaking in fancy dress and a number of activities will be put on such as face painting, children's tattoos and pumpkin carving.

RETAIL DEMAND & REQUIREMENTS

6.24 There are 36 operators with published requirements for Royal Leamington Spa which is equivalent to a total floorspace of between 8,933 sqm (96,155 sq ft) and 20,657 sqm (222,352 sq ft) gross. These include brands such as Sainsbury's Local; Matalan; Poundworld; KFC; All Bar One; and easyGym.

Table 6.6: Retailer Requirements

Operator	Use Class	Minimum sq.m	Maximum sq.m
Heron Foods	A1	186	465
The Fragrance Shop	A1	19	139
Machine Mart	A1	139	743
Jones Bootmaker	A1	111	232
Fone World	A1	23	74
The Shaker Kitchen Co	A1	70	186
BoConcept	A1	279	557
Repair My Phone	A1	74	111
Supercuts	A1	56	70
Cards Direct	A1	111	186
Sainsburys Local	A1	372	418
Matalan	A1	1,858	3,252
Loaf	A1	372	1,394
British Heart Foundation	A1	465	743
Cycle Republic	A1	232	557
Calendar Club	A1	74	186
Bonmarche	A1	167	465
Hawkins Bazaar	A1	149	279
Second Cup	A1	93	139
Steamer Trading Cookshop	A1	70	93
Crosseyes	A1	37	74
Poundworld	A1	465	1,858
Heron Foods	A1	232	465
A Write Card	A1	139	232
Craft Inn	A1, A4	46	93
KFC	A3	167	325
Miller & Carter	A3	279	557
Baresca	A3	279	465
Fullers	A4	279	557
All Bar One	A4	279	465
Marstons	A4	465	836
Shooting Stars Nurseries	D1	186	929
The Little Gym	D2	186	399
Digme Cycling	D2	232	325
easyGym	D2	372	1858
Snap Fitness	D2	372	929
TOTAL	**36**	**8,933**	**20,657**

Source: The Requirements List (2018)

PRIME ZONE A RENTS & YIELDS

6.25 Agent sources estimate that Prime Zone A rents in Royal Leamington Spa range from between £1,292/sqm (£120/sq ft) to £1,453/sqm (£135/sq ft) around the prime pitch of The Parade, Warwick Street and Regent Street. Zone A rents below the Parade range from £484/sqm (£45/sq ft) to £914/sqm (£85psf).

6.26 Prime retail yields in Royal Leamington Town Centre at the time of writing this report stood between 5% and 6.5%. By way of comparison, the UK average for prime high street locations is in the order of 4% - 4.25%[35]. This yield reflects a well let investment, where rental growth is seen as strong. Yields for Royal Leamington Spa Town Centre are marginally above this level.

HOUSEHOLD SURVEY

6.27 The household telephone interview survey (HTIS) asked specific questions on respondents' views and perceptions of Royal Leamington Spa Town Centre as a place to shop and visit for a wide range of uses and attractions.

6.28 The frequency of visits to Royal Leamington Spa Town Centre are shown in **Table 6.7.**

Table 6.7: Frequency of Visits to Royal Leamington Spa Town Centre

Frequency	Study Area (Zones 1 - 10)	WDC Area (Core Zones 1, 2, 3 and 7)
Daily	3.1%	6.8%
4-6 days a week	1.0%	2.5%
2-3 days a week	7.9%	15.4%
One day a week	15.3%	23.4%
Every two weeks	14.1%	23.4%
Monthly	14.8%	12.8%
Once every two months	5.9%	5.0%
Three-four times a year	9.1%	2.8%
Once a year	5.2%	1.3%
Less often	4.7%	2.8%
Never	17.4%	2.3%
Don't know	0.4%	0.2%
Varies	1.0%	1.3%
TOTAL	**100.0%**	**100.0%**

Source: HTIS 2018

6.29 As **Table 6.7** shows, 15.3% from the Study Area (Zones 1-10) visit Royal Leamington Spa Town Centre once a week which increased to 23.4% to those living within the WDC Area (Zones 1, 2, 3 and 7). Of those who do visit from the Study Area, 14.8% visited monthly and 17.4% never visited the centre. From the WDC Area, 23.4% visit every two weeks and 12.8% visit monthly.

6.30 In terms of what people 'like' about Royal Leamington Spa Town Centre, the most frequently raised themes are shown in **Table 6.8.**

[35] UK Retail High Street (Q3, 2017) – Cushman & Wakefield

Table 6.8: Reasons for Visiting Royal Leamington Spa Town Centre

Aspects	Study Area (Zones 1 - 10)	WDC Area (Core Zones 1, 2, 3 and 7)
Attractive environment / nice place	21.0%	24.6%
Close to home	17.9%	27.0%
Good range of 'high street' retailers/ multiples	14.0%	8.8%
Good range of independent shops	13.3%	8.3%
(Nothing / very little)	13.2%	13.9%
Good range of non-food shops	10.7%	10.6%
Easy to park	8.2%	7.6%
Good pubs, cafés or restaurants	6.4%	5.4%
Compact	5.2%	5.9%
Easy to get to by car	4.1%	4.4%

Source: HTIS 2018

6.31 As **Table 6.8** shows, the majority of respondents from both the Study Area (21.0%) and WDC Area (24.6%) consider the attractive environment a key reason for visiting the centre. Other positive aspects include proximity to home (17.9% from the Study Area and 27.0% from the WDC Area), the good range of high street retailers (14.0% from the Study Area and 8.8% from the WDC Area) and good range of independent shops (13.3% from the Study Area and 8.3% from the WDC Area).

6.32 Respondents were also asked what, if anything, they would improve in Royal Leamington Spa Town Centre that might encourage them to visit more. The most frequent suggestions are as follows:

Table 6.9: Key Improvements for Royal Leamington Spa Town Centre

Aspects	Study Area (Zones 1 - 10)	WDC Area (Core Zones 1, 2, 3 and 7)
Nothing	41.8%	32.6%
More / better parking	17.4%	18.9%
Free car parking	12.6%	14.2%
More national multiple shops / High Street shops	8.8%	10.0%
Don't know	6.8%	2.7%
More independent shops	5.1%	8.4%
Other	3.7%	7.1%
Address the homeless issue	2.8%	5.7%
More / better comparison retailers	2.1%	4.2%
Less vacant shops	1.7%	2.5%

Source: HTIS 2018

6.33 As **Table 6.9** shows, a high proportion of respondents from both the Study Area and WDC Area are broadly satisfied and suggested no improvements to Royal Leamington Spa Town Centre. Of the respondents with suggestions, the key suggested improvements included more or free car parking (30.0% from the Study Area and 33.1% from the WDC Area) and more national multiples and high street retailers (8.8% from the Study Area and 10.0% from the WDC Area).

ENVIRONMENTAL QUALITY

6.34 Royal Leamington Spa is a historic and traditional spa town that has strong character and identity. A large proportion of the town is designated as a Conservation Area. The centre benefits from significant heritage assets, unique and historic architecture, green planting and clean surroundings. Key areas throughout the Town Centre include: the Parade, as the wide pavements and attractive shopping frontages provide a pleasant shopping environment; the ‘green lungs’ of the centre such as the Jephson and Pump Room Gardens; and historic buildings including the Royal Pump Rooms, the Town Hall and the All Saints Church.

6.35 All the managed shopping areas such as The Royal Priors Shopping Centre / Regent Court are well kept with attractive frontages and clean surroundings.

6.36 In terms of short comings, consultation with key stakeholders has identified concerns over air quality, specifically on the Parade due to the volume of traffic that passes this street particularly at peak times. This is also prevalent in the ‘Old Town’ where peak time congestion and associated pollution was observed.

6.37 The ‘Old Town’ also exhibits a contrasting commercial proposition when compared with the ‘New Town’. The appearance of the shop frontages are dated and run down and there is observed evidence of buildings in need for refurbishment and maintenance. Additionally, the ‘Old Town’ is a key gateway to the railway station but signage is poor. Furthermore, stakeholder engagement has revealed that there are safety concerns in the routes leading from the railway station in to the Old Town and beyond that need to be addressed.

ACCESSIBILITY & PEDESTRIAN FOOTFALL

6.38 Royal Leamington Spa benefits from excellent national and regional road networks. For example, the M40 provides links 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. Birmingham Airport is located 31.4km (19.5miles) away.

6.39 The town is served by one train station which is located south-east of the town centre. The station provides Chiltern Railways, CrossCountry and West Midlands services to Manchester Piccadilly, London Marylebone, Birmingham Moor Street, Birmingham Snow Hill, Stratford-upon-Avon and Bournemouth. We recommend that signage from the railway station via the Old Town in to the New Town centre is improved to cater for a better visitor experience. Additionally there is a need to ensure the routes are perceived to be safe.

6.40 Royal Leamington Spa also benefits from a good provision of car parking both multi-storey and at grade across the centre. The table below sets out the town’s main car parks in the centre.

Table 6.10: Car Parking Provision in Royal Leamington Spa

Car Park	Spaces
New Town	
Royal Priors Shopping Mall	350
Covent Garden multi storey car park	473 spaces
Covent Garden surface car park	73 spaces
Chandos Street car park	146 spaces
Royal Priors car park	308 spaces
Rosefield Street car park	43 spaces
Bedford Street	47 spaces
St. Peter's multi storey car park	377 spaces
Adelaide Bridge Surface Car Park	43 spaces
Old Town	
Court Street	62 spaces
Bath Place	51 spaces
Packington Place	30 spaces

6.41 We consider there is a good range of car parking within the centre and it was observed that they get full rapidly at peak times and particularly at weekends. At the time of writing this report we have been made aware of the relocation to build a new Council headquarters on the site of the Covent Garden car park (Planning Ref: W/17/1700[36]). We note that this scheme also includes a new replacement 617 space multi-storey car park and 44 apartments for private sale. The construction phase of this scheme is likely to put additional pressure on existing parking infrastructure and it is recommended that the Council is mindful of this fact in terms of the provision of alternatives so as to maintain shopper draw to the centre.

6.42 Royal Leamington Spa also benefits from numerous bus routes. These link through the new and old town and provide connections to Warwick and Kenilworth and beyond. The key bus services and routes are listed below:

[36] This is in reference to W/17/1700 - Full planning application including means of access, appearance, landscaping, layout and scale, for the demolition of Covent Garden Multi-Storey car park and pedestrian footbridge, and the erection of mixed use buildings comprising new 2,685m2 (GIA) offices (use class B1) over four floors including plant room; a new multi-storey car park over four floors, comprising 617 car park spaces and 3 external spaces, 20 motor cycle spaces and 30 cycle spaces; and 44 residential units (use class C3) with 44 cycle spaces for the apartments. Permission granted 05/04/2018.

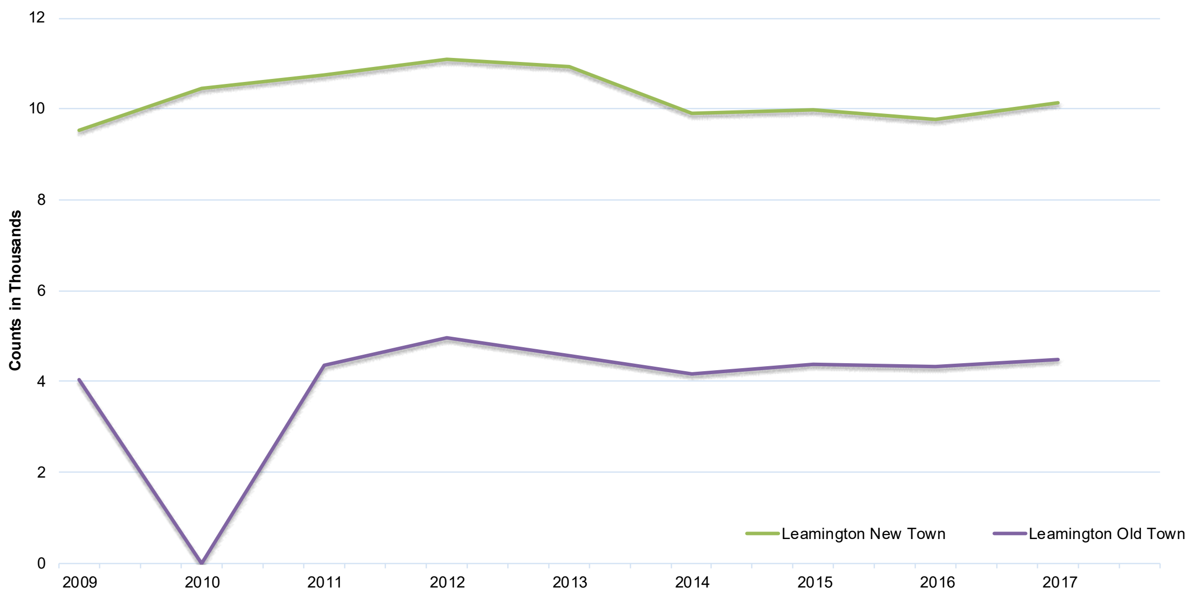
Table 6.11: Bus Services and Routes in Royal Leamington Spa

Bus Service	Key Stops
11	University of Warwick and Coventry
X17	Coventry
18	Warwick Hospital and Town Centre
X18	Stratford via Warwick Hospital, Wellesbourne and Coventry
63	Southam and Rugby
64	Southam and Long Itchington
67/67A/67B	Lillington
67	Sydenham
67A	Warwick Gates, Bishops Itchington and Kineton
67B	Bishops Tachbrook, Lightthorne Heath and Kenton
68	Cubbington, Warwick Gates and Hatton Park
X68	Cubbington, Kenilworth and Coventry
69	Weston under Wetherley, Lilington, Milverton and Leamington Shopping Park
77/77A	Lightthorne and Kineton
X77	British Motor Museum
665	Harbury, Southam and Napton
G1	Warwick and Whitnash
Unibus	University of Warwick, Brunswick Street and Warwick Gates
U17	University of Warwick, Coventry and Sydenham

6.43 The Council's pedestrian flow data for the town centre (**Figure 6.3**) shows no marked variations in since 2014 for both the New and Old Town based on an average of collection points (and in this way there will be variations in individual collection points). On these, the key highlights from relevant footfall collection points reveals:

- Increase in footfall Parade (south) since Coop moved into premises in 2013;
- Decline in footfall to Regent Court since peak in 2012;
- Decline in footfall Parade (north), outside Tesco Metro; and
- In the Old Town, Bath Street has increased from 2015 onwards.

Figure 6.3: Average Footfall Levels: Royal Leamington Spa Old and New Town



Source: Warwick District Council / PMRS

6.44 In summary, accessibility in Royal Leamington Spa Town Centre is considered to be good. In terms of investment and development, it will be important to maintain an appropriate level of car parking to ensure the centre remains accessible to shoppers and visitors.

OUT-OF-CENTRE PROVISION

6.45 In terms of out-of-centre provision, **Leamington Shopping Park** is located approximately 2.4km (1.5 miles) away from the Town Centre and can be accessed via the A452. The key anchors include Argos, Debenhams, New Look, Next, Sainsbury's, Outfit, Carpetright, Clarks, Mamas & Papas, TK Maxx and Halfords. It is worth noting that in December 2017, planning permission was refused on the site of Leamington Shopping Park for the erection of three additional A1 retail units of some 2,499 sqm (the proposed operator included an M&S Food Hall, Planning Ref: W/17/1470). Additional retail provision is present at **Shires Gate**, on the opposite side of Tachbrook Drive, comprising of two retail warehouses occupied by Mothercare and Curry's. There is also retail development at **Myton Road** which fronts the A425 to Warwick with prominent units including Dreams, Bensons for Beds and Pets at Home. Homebase trades from stores along both Myton Road near Leamington Spa and Emscote Road in Warwick.

6.46 The following stand-alone stores are also located out-of-centre:

- The **Asda Leamington Spa Superstore** is located approximately 3.9km (2.4 miles) away from the Town Centre on Chesterton Drive. Click and collect services and travel money are available at this store.
- The **Tesco Superstore** trades from a location on Emscote Road (the A445), close to the north-eastern outskirts of Warwick.
- The **Lidl** is located approximately 2.4km (1.5 miles) away from the Town Centre on Myton Road.
- The **Morrison's** store is located approximately 2.4km (1.5 miles) away from the Town Centre on Old Warwick Road.
- The **Aldi** store on Queensway is located approximately 2.3km (1.4 miles) away from the Town Centre.

6.47 Whilst town centre convenience provision is supported by out-of-centre provision, it is recommended that any new investment by way of additional convenience provision is directed to the town centre to restore an appropriate retail mix and contribute to the wider footfall of the town centre.

NEW INVESTMENT & POTENTIAL DEVELOPMENT

6.48 Warwick District Council is to relocate its offices from Riverside House to build a new Council headquarters on the site of the existing Covent Garden car park (Planning Ref: W/17/1700[37]) at the north end of Royal Leamington Spa's main town centre shopping area. The existing multi-storey car park, which requires replacement due to major deterioration of its concrete structure, would be demolished and a new multi-storey car park built on part of the site with the remainder being used for town centre apartments and the new office building. The new, state of the art car park, although only occupying part of the site will have circa 617 spaces, more than currently available across the whole site.

6.49 Additionally, planning permission was granted for the extension to the existing Newbold Comyn Leisure Centre, with associated hard and soft landscaping and reconfiguration of the existing car park. This is located outside the Town Centre Boundary but located approximately a 15 minute walk from the centre. This included the addition of a new leisure pool with changing facilities, a fitness block and studios, a sports hall, and a climbing zone (Planning Ref: W/16/0784, granted July 2016). This programme of improvements is anticipated to be completed and fully operational by the end of August 2018.

6.50 Separately, the Council also has had a long standing ambition to regenerate the Old Town area of Royal Leamington Spa, just to the south of the central shopping and business areas, using the creative economy[38] as a catalyst for change. The Creative Quarter is being delivered in partnership with Complex Development Projects (CDP) over ten years. We understand that the Council is seeking to create a bright, vital and distinct destination and attraction for the District based around refurbished and new building spaces and active public spaces, with public art throughout, creating an interesting, vibrant and 'intelligent' hub attraction.

6.51 The Creative Quarter is focussed in the Old Town area of Royal Leamington Spa, south of the river to the canal. It includes a number of Council owned assets that the Council wishes to regenerate. These include:

- Spencer Yard
- The United Reform Church
- North Hall
- West Wing
- The 'Old Dole Office'

6.52 The Creative Quarter also includes some assets north of the river including:

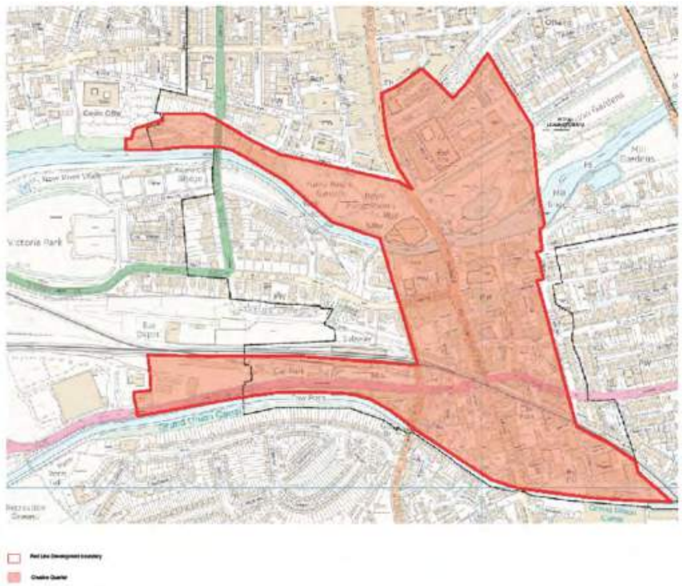
- The Royal Pump Rooms
- The Town Hall
- The 'club lands' adjacent to Adelaide Road car park.

[37] This is in reference to W/17/1700 - Full planning application including means of access, appearance, landscaping, layout and scale, for the demolition of Covent Garden Multi-Storey car park and pedestrian footbridge, and the erection of mixed use buildings comprising new 2,685m2 (GIA) offices (use class B1) over four floors including plant room; a new multi-storey car park over four floors, comprising 617 car park spaces and 3 external spaces, 20 motor cycle spaces and 30 cycle spaces; and 44 residential units (use class C3) with 44 cycle spaces for the apartments. Permission granted 05/04/2018.

[38] As mentioned in Section 3, Royal Leamington Spa town is home for hosting video game and software manufacturers.

6.53 The Council are currently reviewing this area as part of the masterplanning process and the current working red line area is shown in the map below:

Figure 6.4: Extent of Creative Quarter Boundary for Royal Leamington Spa



Source: Warwick District Council (2018)

SUMMARY

6.54 In summary, we provide a SWOT (Strengths, Weaknesses, Opportunities, Threats) assessment of Royal Leamington Spa Town Centre below:

Strengths

- Good environmental quality across a historic centre that benefits from attractive features such as listed buildings, green planting, traditional architecture and attractive frontages.
- Key visitor attraction as a spa town that caters to both immediate residents and tourists.
- Improvement in retail ranking position.
- There is a strong comparison offer that is anchored by key retailers.
- Diverse mix of multiple and independent operators.
- Strong provision of leisure service outlets and clustering of casual dining provision particularly at Regent Court Shopping contributing to the night-time economy and overall vitality and vibrancy of the centre.
- The market supplements the retail offer and is a key attraction to both local residents and visitors.
- Good parking provision.
- Lower than average vacancy rate.
- Continuing demand for retailer representation.

Weaknesses

- Car Parking is at a premium across the centre.
- Traffic congestion especially in the Old Town area.
- Perception of safety around railway station and from Old Town.

- The Old Town has a range of vacant and boarded frontages contributing to the area's poor perception.

Opportunities

- Promote the centre as a family and tourist leisure destination.
- Improve signage from the railway station to the town centre.
- Capitalise on multiplier / spill over effects stemming from Coventry's City of Culture 2021 status and the 2022 Birmingham Common Wealth Games.
- Consider additional convenience provision to the Town Centre to increase footfall and balance the wider mix in the retail offer.
- Improve the Old Town through the Creative Quarter initiative.
- Consider revitalisation of frontages / facades in the Old Town including those that are boarded up.

Threats

- The out-of-centre provision is a key threat to the Town Centre's convenience and comparison offer and the movement of town centre retailers moving out (e.g. Next from the Parade in the town centre to Leamington Shopping Park).
- Due to the recent high street store closures and consolidation by major national multiples across the UK, Royal Leamington Spa may be vulnerable to the closure of key retailers and more importantly from those seeking representation outside the centre.
- Declining market share[39].
- The convenience offer is strong across the sub-categories but there is a greater range and choice of food shopping located in out-of-centre locations such as at Leamington Spa Shopping Park and Myton Road.
- The temporary loss of Covent Garden car park may change shopper habits to the detriment of the centre if construction is prolonged.

6.55 In summary, Royal Leamington Spa is a vital and viable Town Centre that benefits from historic architecture, attractive setting and breadth in offer. The town centre has the potential to capitalise on this setting and with the regeneration opportunities for the Old Town providing an important catalyst for future enhancement in the offer available within the town centre as a whole. However it is important to recognise the changing dynamics of the retail market where store closures and consolidation prevail and in which the centre will not be immune from these structural changes. Coupled with a lower rate of market share retention when compared to the past, suggests a potential level of fragility for the centre. In this way, it is important that the Council regularly monitors both footfall and vacancy level across the centre. It is also important to ensure incentives that increase footfall and dwell times to the centre are proactively promoted.

[39] Refer to Section 4 on study area shopping patterns.

7. WARWICK HEALTH CHECK

CONTEXT

7.1 Warwick is a historic county town in Warwickshire that was founded on the banks of the River Avon in 914 AD. The town is characterised by the historic street pattern and benefits from associated period architecture.

7.2 The centre is located approximately 16.1km (10 miles) from Stratford-upon-Avon; 19.3km (12 miles) south of Coventry; and 25.7km (16 miles) from Solihull.

7.3 **Table 7.1** below shows Warwick's retail ranking against competing centres. It is ranked 968th, which has seen its position decline since 2014 when it was ranked 898th.

Table 7.1: Warwick District Centres Compared Against Competing Centres

Centre	Rank (2017)	Rank (2014)
Birmingham	4th	4th
Solihull	42nd	43rd
Worcester	55th	61st
Northampton	63rd	59th
Coventry	66th	62nd
Royal Leamington Spa	79th	84th
Stratford Upon Avon	185th	174th
Kenilworth	608th	616th
Warwick	**968th**	**898th**

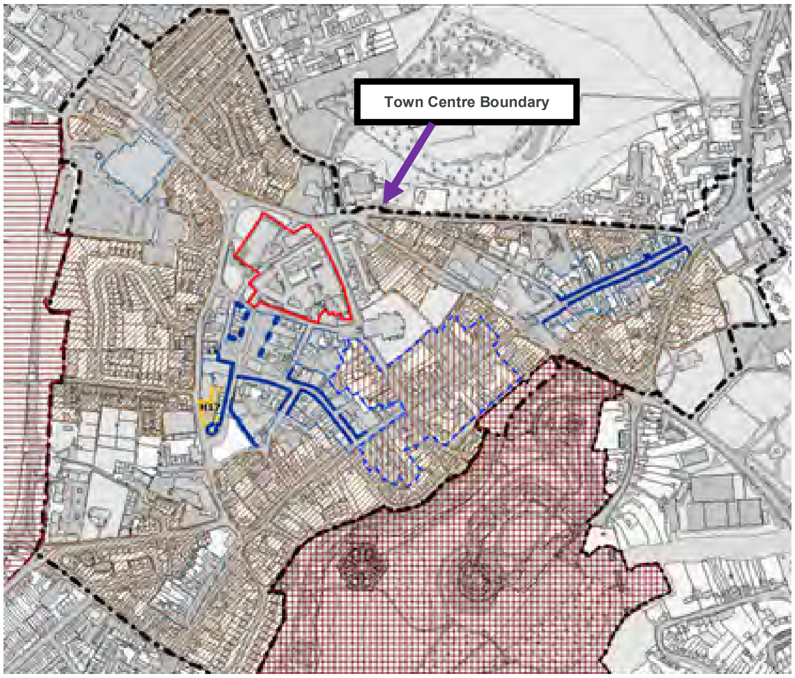
Source: Javelin Venuescore (2017)

7.4 Due to the historic nature of the centre and historic street pattern the shops and units are small. The centre also has not experienced any significant new investment in the recent past. As such, the centre does not have any major new purpose built modern retail floorspace.

7.5 The town centre is characterised by a narrow historic street pattern. The built environment consists of churches, heritage buildings as well as public buildings. The Collegiate Church of St. Mary – one of England's largest churches and the Warwickshire Museum within the Market Hall are key attractions for the centre. Additionally, the nearby Warwick Castle and Warwick Racecourse are also key tourist attractors that generate footfall and trips to the town centre.

7.6 The Warwick District Local Plan (2017) designates Warwick as a Town Centre in the settlement hierarchy. The extent of the TCB is illustrated in **Figure 7.1** below.

Figure 7.1: Warwick Town Centre



Source: Warwick District Local Plan (2017)

RETAIL COMPOSITION & DIVERSITY OF USES

7.7 **Tables 7.2 and 7.3** summarise the composition of the centre's retail mix and diversity of uses based on the latest available Experian Goad Category Report (2017). The area surveyed by Goad is not identical to the Councils' identified TCB (**Figure 7.1**), and as such, it is possible that the number of units set out in the GOAD analysis may not directly correspond to the Councils' defined centre boundary.

Table 7.2: Current Retail and Service Offer – Units

Category	2014 Study		2017		% Change	UK Average 2018 %
	No. of Outlets	% of Total Outlets	No. of Outlets	% of Total Outlets		
Convenience	15	5.3%	18	6.5%	20.0%	8.9%
Comparison	91	32.4%	89	32.2%	-2.2%	30.8%
Retail Service	38	13.5%	36	13.0%	-5.3%	14.5%
Leisure Service	71	25.3%	77	27.9%	8.5%	24.0%
Financial & Business Service	36	12.8%	40	14.5%	11.1%	10.3%
Vacant	30	10.7%	16	5.8%	-46.7%	11.2%
TOTAL	**281**	**100.0%**	**276**	**100.0%**	**-14.6%**	**100.0%**

Source: Experian Goad Category Reports (2012 and 2017)

Table 7.3: Current Retail and Service Offer – Floorspace

Category	2014 Study		2017		% Change	UK Average 2018 %
	Floorspace	% of Total Floorspace	Floorspace	% of Total Floorspace		
Convenience	6,494	16.6%	6,698	17.4%	3.1%	15.2%
Comparison	11,102	28.4%	10,516	27.4%	-5.3%	34.7%
Retail Service	2,815	7.2%	2,759	7.2%	-2.0%	6.8%
Leisure Service	10,860	27.8%	11,492	29.9%	5.8%	25.1%
Financial & Business Service	4,840	12.4%	4,496	11.7%	-7.1%	7.7%
Vacant	3,001	7.7%	2,480	6.5%	-17.4%	9.8%
TOTAL	**39,112**	**100.0%**	**38,441**	**100.0%**	**-22.8%**	**100.0%**

Source: Experian Goad Category Reports (2012 and 2017

Convenience Provision

7.8 There are 18 convenience units in the area according to the latest 2017 Experian Goad Category Report. This represents 6.5% of total outlets, which is below the national average of 8.9%. The current floorspace provision (17.4%) is above the national average (15.2%). There has been a 20.0% increase in units and a 3.1% increase in floorspace since the 2014 RLSU.

7.9 Warwick Town Centre is anchored by the Sainsbury's supermarket located on Parkes Street and the M&S Simply Food on Market Street. There are also 3 convenience stores, 3 bakers, 2 butchers, 2 grocers and delicatessens, 2 health food stores, 2 shoe repair stores, a greengrocers, an off licence and a CTN store.

7.10 Overall, it is considered that there is good provision of convenience goods within Warwick Town Centre.

Comparison Provision

7.11 According to the 2017 Goad Category Report, there are 89 comparison goods retailers located within Warwick trading from a total floorspace of 10,516 sqm. The number of outlets represents 32.2% of total units in the centre, which is above the national average of 30.8%. The current floorspace provision represents 27.4% of total floorspace in the centre, which is below the national average of 34.7%. There has been a reduction in units (-2.2%) and floorspace (-5.3%) since the 2014 RLSU.

7.12 In terms of its overall non-food provision the key headlines are:

- Across the different comparison sub-categories, the centre has a high representation of many categories including craft and gift shops (10 units), charity shops (7 units), ladies wear and accessorises (7 units), fitted furniture stores (5 units), antique stores (5 units), textiles and soft furnishings (5 units), general clothing (4 units) and jewellery, watches and silver (4 units).
- There is an overprovision of antique shops with 5 units in the centre. This is equivalent to 1.8% of the total units which is above the national average of 0.3%. There is an underrepresentation of ladies and men's wear and accessories as these account for 0.3% which is below the national average of 1.6%. There is no retailer representation of outlets trading in gardening and equipment stores nor hardware and household goods.
- Key multiple brands include Boots, M&S, WH Smith, and Superdrug. However, there is a stronger provision of fashion retailers at Leamington Shopping Park and The Shires Retail Park such as New Look; Debenhams; Next and TK Maxx.
- The independent offer is comprised of small stores including a bookshop, boutique clothing shops, a sweet shop, jewellers, gift shops and antique shops.

7.13 In summary, we consider Warwick's comparison offer is adequate. In qualitative terms there would appear to be potential scope to attract new high street brands, and opportunity to enhance the quality of the independent offer. However this is dependent on market demand from operators for representation in the Town Centre.

Service Provision

7.14 Service businesses are defined by Experian Goad as including retail, professional and financial services. As **Tables 7.2** and **7.3** show, there are 153 service outlets in Warwick. They account for 55.4% of all units, which is above the national average of 48.8%. Additionally, the current floorspace provision (48.8%) is substantially above the national average (39.6%). The following provides a brief summary of provision in the different service categories:

- There were 36 **retail services** in 2017 according to the Goad report. This represents 13.0% of total outlets in the town centre. This is marginally below the national average of 13.5%. This category is made up almost wholly of health and beauty retailers (24 units). Other services include 2 dry cleaners, 2 repair, alterations and restoration services, a post office, and other retail services. There has been a reduction in the number of units (-5.3%) and floorspace (-2.0%) since the 2014 RLSU.
- In terms of **financial services**, there were 40 outlets in 2017, which presents 14.5% of total units and is above the national average of 10.3%. Financial services are made up of 10 property services, 7 financial services, 5 retail banks, 5 legal services, 2 building supplies and services, a building society, a business goods service, an employment career service and other business services. There has been an 11.1% increase in units, but a 7.1% reduction in floorspace since the 2014 RLSU.
- There are 77 **leisure service** outlets in 2017. The equivalent to 27.9% of total provision and is significantly above the national average of 24.0%. There has been an increase in both units (8.5%) and floorspace (5.8%) since the 2014 RLSU. The current leisure offer consists of 24 restaurants, 17 cafes, 11 public houses, 11 fast food takeaways, 5 bars, 3 hotels, 2 betting offices, 2 clubs and 2 sports and leisure facilities. There is no cinema in the centre. It was noted during the site visit[40] that there is a qualitative gap of casual dining fascia's. The Market Hall Museum of Warwickshire is a 17th Century landmark that is situated within the heart of the Town Centre.

7.15 In summary, we consider Warwick has an adequate offer of services. Overall there has been a reduction in retail and financial activities and qualitative gap in terms of branded casual dining offer. As such, there would appear to be potential scope to attract new leisure investment in Warwick. However, this is dependent on market demand from operators.

VACANCIES

7.16 Warwick currently has 9 vacant outlets, according to the Council's own monitoring data in October 2017. This represents a vacancy level of 7.4%, which is below the GOAD national average of 11.2%. **Table 7.4** and **Figure 7.2** illustrate the change in vacancies from 2008 to 2017, based on GOAD Category Reports and the Council's own monitoring data (aligned to the town centre boundary).

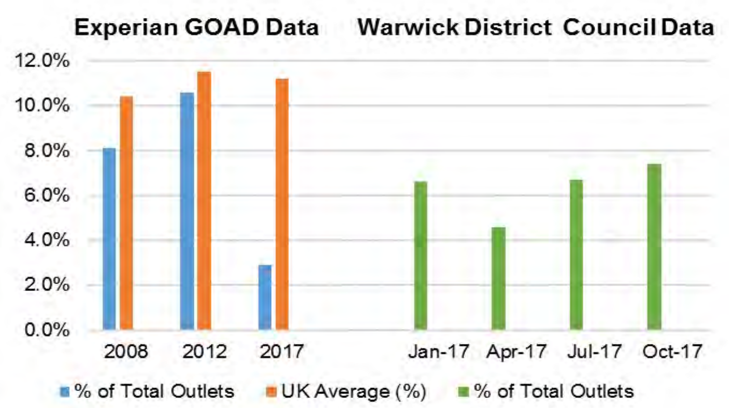
[40] Carter Jonas site visit April 2018.

Table 7.4: Vacancy levels

Date	No. of Vacant Units	% of Total Outlets	GOAD UK Average (%)
Experian GOAD Data			
2008	22	8.1%	10.4%
2012	30	10.6%	11.5%
2017	5	2.90%	11.20%
Warwick District Council Data			
Jan-17	8	6.6%	11.2%
Apr-17	6	4.6%	11.2%
Jul-17	8	6.7%	11.2%
Oct-17	9	7.4%	11.2%

Source: Council Data (2018), Experian Category Reports (2008, 2012 and 2017)

Figure 7.2: Vacancy level change



7.17 **Figure 7.2** shows that based on historic GOAD data, vacancy rates have decreased since 2008. The Council's more recent data for 2017 shows a rising vacancy rate with the highest level recorded in October 2017 (9 units). In contrast, Experian recorded 5 (in 2017) vacant units representing a vacancy rate of 2.9%.

7.18 Overall, we consider that the centre is performing well with a lower vacancy rate when compared to the national average. However, we advise that the Council continues to monitor vacancies across the centre in the light of the changing dynamics of the retail market.

MULTIPLE AND INDEPENDENT RETAIL REPRESENTATION

7.19 Based on the 2017 Goad Category Report, there are some 45 multiple retailers. This includes key names such as Boots, M&S, Sainsbury's, Superdrug and WH Smith. Multiples account for 26.6% of the total units, with independent retailers representing 73.4% of the total units indicating the predominance of the latter. The table below illustrates the provision of multiple retail and service outlets.

Table 7.5: Multiple Retailers: Warwick

Category	No. of Outlets	% of Total Outlets	UK Average 2018 %
Comparison	11	24.4%	42.7%
Convenience	8	17.7%	11.2%
Retail Service	3	6.6%	9.2%
Leisure Service	15	33.3%	21.5%
Financial & Business Service	8	17.7%	15.2%
TOTAL	**45**	**100.0%**	**100.0%**

MARKETS

7.20 There are two regular markets and four special events which run alongside this market. These are listed below:

- **Warwick Traditional Retail Market** – This operates at Market Place every Saturday from 9:00am – 4:00pm and sells a range of goods including fruit and vegetables, clothing, and hardware supplies.
- **Warwick Farmer's Market** – This operates at Market Place every second and fifth Saturday of the month when they occur from 9:00am – 4:00pm. This market sales speciality produce and seasonal fruit and vegetables (including meat, olives, honey, fish etc.) which are produced 48.2km (30 miles) from the town.

7.21 In terms of associated events these include:

- **French Market** – This operates alongside the Warwick Traditional Retail Market (in April 2018).
- **Beer, Cider and Wine Festival** – This operates alongside the Warwick Traditional Retail Market (in May 2018). It gives local traders the opportunity to showcase the local wineries, craft brewers and cider makers from across Warwick District along with a range of street food.
- **Carnival Party** – This operates alongside the Warwick Traditional Retail Market (in May 2018).
- **National Coffee Day** – This will operate alongside the Warwick Traditional Retail Market (in September 2018) and will give visitors a chance to obtain a free cup of coffee.

7.22 In summary, we consider there is a good range of markets and associated events in Warwick.

RETAIL DEMAND & REQUIREMENTS

7.23 There are 21 operators with published requirements for representation in Warwick equivalent to a total floorspace of between 13,215 sqm and 26,486 sqm gross. These include Lidl, Matalan, KFC, Clintons and Travelodge. Any additional town centre investment would clearly benefit the centre albeit that large modern format units are unlikely to be easily sourced due to the historic nature of the centre.

Table 7.6: Retailer Demand

Company Name	Planning Class	Size Sqm - Min	Size Sqm - Max
Lidl	A1	929	2,787
Kennelgate	A1	232	465
Sue Ryder	A1	186	743
Machine Mart	A1	139	743
Fone World	A1	23	74
Mind	A1	79	139
Matalan	A1	1,858	3,252
Holland & Barrett	A1	93	650
Second Cup	A1	93	139
Clintons	A1	186	279
Craft Inn	A1, A4	46	93
KFC	A3	167	325
Baresca	A3	279	465
Brunning & Price	A4	418	465
Marstons	A4	465	836
Starfish Fish & Chips	A5	70	139
Travelodge	C1	929	3,716
Village Hotels	C1	5,574	8,361
The Little Gym	D2	186	399
Kiss Gyms	D2	929	1,858
IN 'n' OUT	Sui Generis	334	557
TOTAL	**21**	**13,215**	**26,486**

Source: The Requirements List (2018)

PRIME ZONE A RENTS & YIELDS

7.24 Agent sources estimate that Prime Zone A rents in Warwick town centre are around £323/sqm (£30/sq ft) and that rental levels have been static over the last five years.

7.25 Prime yields in the centre are estimated at 7.5% reflecting the low level of transaction activity.

HOUSEHOLD SURVEY

7.26 The household telephone interview survey (HTIS) asked specific questions on respondents' views and perceptions of Warwick Town Centre as a place to shop and visit for a wide range of uses and attractions.

7.27 The frequency of visits to Warwick Town Centre are shown in **Table 7.7.**

Table 7.7: Frequency of Visits to Warwick Town Centre

Frequency	Study Area (Zones 1 - 10)	WDC Area (Core Zones 1, 2, 3 and 7)
Daily	1.4%	1.4%
4-6 days a w eek	0.3%	0.7%
2-3 days a w eek	3.7%	5.9%
One day a w eek	5.1%	9.2%
Every tw o w eeks	2.8%	4.1%
Monthly	6.4%	8.3%
Once every tw o months	3.7%	5.1%
Three-four times a year	7.7%	8.6%
Once a year	5.7%	2.6%
Less often	6.8%	7.9%
Never	55.4%	44.2%
Don't know	0.8%	1.5%
Varies	0.3%	0.5%
TOTAL	**100.0%**	**100.0%**

Source: HTIS 2018

7.28 As **Table 7.7** shows, a large proportion of respondents from the Study Area (Zones 1-10) (55.4%) and the WDC Area (Zones 1, 2, 3 and 7) (44.2%) never visit Warwick Town Centre. Overall, there is a higher proportion of respondents from the WDC Area who visit less frequently i.e. monthly or a few times a year (32.6%), compared to daily or weekly visits to the Town Centre (21.2%).

7.29 In terms of what people 'like' about Warwick Town Centre, the most frequently raised themes are shown in **Table 7.8.**

Table 7.8: Reasons for Visiting Warwick Town Centre

Aspects	Study Area (Zones 1 - 10)	WDC Area (Core Zones 1, 2, 3 and 7)
Attractive environment / nice place	28.0%	31.0%
Good range of independent shops	14.0%	17.3%
(Nothing / very little)	13.3%	10.7%
Traditional	11.3%	9.2%
Good pubs, cafés or restaurants	10.9%	10.8%
Close to home	10.0%	13.9%
Quiet	5.1%	7.8%
Compact	5.0%	4.3%
Other	3.6%	0.9%
The street markets	3.3%	1.7%

Source: HTIS 2018

7.30 As **Table 7.8** shows, the majority of respondents from both the Study Area (28.0%) and WDC Area (31.0%) consider the attractive environment as a key reason for visiting the centre. Other positive aspects include the good range of independent shops (14.0% from the Study Area and 17.3% from the WDC Area), the traditional nature of the centre (11.3% from the Study Area and 9.2% from the WDC Area) and the good pubs, cafés and restaurants (10.9% from the Study Area and 10.8% from the WDC Area).

7.31 Respondents were also asked what, if anything, they would improve in Warwick Town Centre that might encourage them to visit more. The most frequent suggestions were as follows:

Table 7.9: Key Improvements for Warwick Town Centre

Aspects	Study Area (Zones 1 - 10)	WDC Area (Core Zones 1, 2, 3 and 7)
Nothing	46.9%	46.9%
More / better parking	16.7%	16.3%
More national multiple shops / High Street shops	13.0%	14.2%
(Don't know)	10.4%	7.7%
Free car parking	7.4%	9.1%
More independent shops	6.1%	8.6%
Other	2.9%	2.6%
Less traffic	2.5%	4.1%
Better access by road	2.0%	1.9%
More / better comparison retailers	1.4%	1.9%

Source: HTIS 2018

7.32 As **Table 7.9** shows, a high proportion of respondents from both the Study Area and WDC Area are fairly satisfied and suggested no improvements to Warwick Town Centre (46.9% from both the Study Area and WDC Area). Other improvements included more and free parking (24.1% from the Study Area and 25.5% from WDC Area) and more multiple high street retailers (13.0% from the Study Area and 14.2% from WDC Area).

ENVIRONMENTAL QUALITY

7.33 Warwick is an attractive and historic town centre. The broad range of listed buildings of historic interest enhance the sense of place and add character. The town is generally tidy and clean throughout with no signs of graffiti or dereliction across the centre. As such, based on our health check and audit, we consider the environmental quality is good and it is important to maintain this for both day-to-day shoppers and visiting tourists.

ACCESSIBILITY & PEDESTRIAN FOOTFALL

7.34 Warwick benefits from excellent national and regional road networks. For example, the M40 provides links 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. Birmingham Airport is located 28.2km (17.5 miles) away.

7.35 The town is served by one train station which is located north-east of the town centre. The station provides Chiltern Railways and West Midlands services to Manchester Piccadilly, London Marylebone, Birmingham Moor Street, Birmingham Snow Hill, Stratford-upon-Avon and Oxford.

7.36 Warwick also benefits from a good provision of both multi-storey and at grade car parking facilities strategically located across the centre and enhancing the broader shopper flow across the centre. The table below sets out the town's main car parks

Table 7.10: Car Parking in Warwick

Car Park	Spaces
New Street car park	38 spaces
West Gate car park	32 spaces
Linen Street car park	152 spaces
Sainsbury's car park	360 spaces
West Rock car park	92 spaces
The Butts car park	16 spaces
Castle Lane car park	16 spaces
Priory Road car park	42 spaces
Barrack Street car park	260 spaces
St Nicholas Park car park	241 spaces
St Mary's Area 4 car park	66 spaces

7.37 Furthermore, Warwick also benefits from a good bus service provision. These link through the new and old town and provide connections to Royal Leamington Spa and Kenilworth and beyond. The key bus services and routes are listed below:

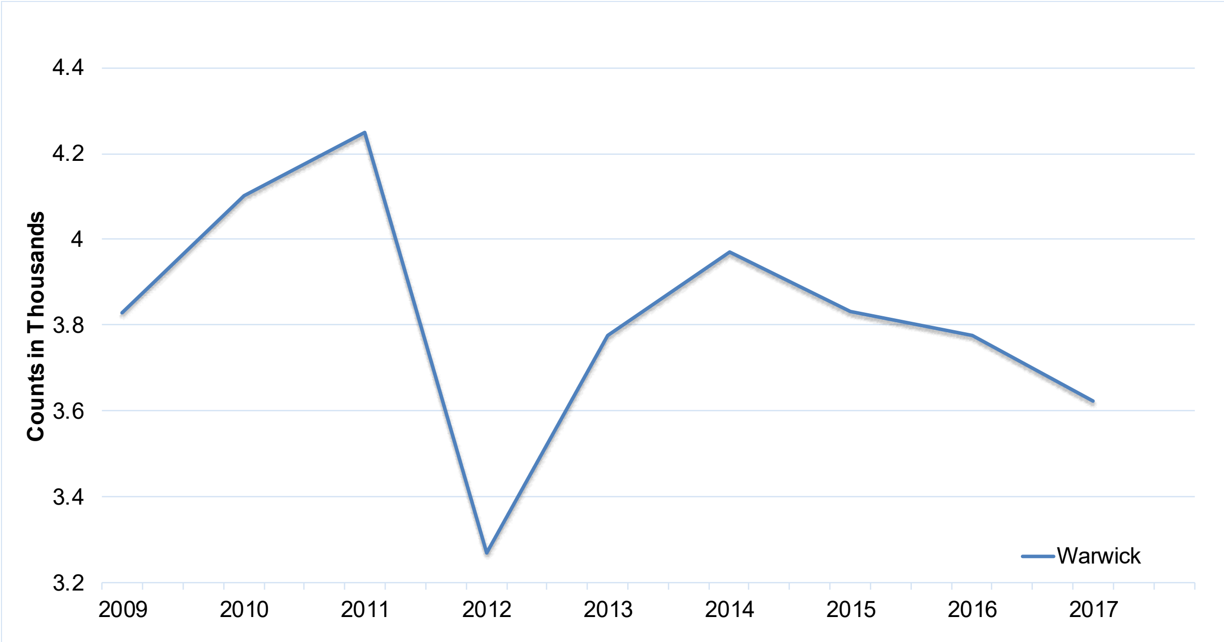
Table 7.11: Bus Services and Routes in Warwick

Bus Service	Key Stops
G1 (Goldline)	Leamington and Whitnash
X17	British Motor Museum and Jaguar Land Rover; Stratford via Wellesborune; Warwick Hospital, Leamington and Coventry
18	Evesham via Stratford; Coventry via Leamington and Warwick Hospital
X18	Evesham via Stratford; Coventry via Leamington
68	Warwick Gates, Leamington and Cubbington
X68	Warwick Gates, Leamington and Cubbington; Kenilworth and Coventry

7.38 The Council's average pedestrian flow data for the town centre (**Figure 7.3**) shows a decline since 2014. The key highlights from relevant footfall data collection points reveals:

- Swan Street has the highest footfall although falling from 2014;
- An increase in footfall around Marks and Spencer.

Figure 7.3: Average Footfall Levels: Warwick



Source: Warwick District Council / PMRS

7.39 In summary, accessibility in Warwick town centre is considered to be good. Notwithstanding this it is important that the Council monitors footfall levels. There is a need to encourage and promote linked trips between the town centre and visitor attractions to boost these levels.

NEW INVESTMENT & POTENTIAL DEVELOPMENT

7.40 In terms of new investment the Council has identified the following commitments with planned retail and leisure elements in Warwick. These are outlined below:

- Land between Myton Road and Europa Way (Ref: W/14/1076 granted December 2014), outline planning permission for residential development of 735 dwellings with associated retail element. The anticipated retail element will be for convenience goods. This development has not yet started.
- Land at Lower Heathcote Farm (Ref: W/14/0661 granted September 2014), outline planning permission for 784 dwellings with associated 1,400 sqm of retail floorspace. The anticipated retail element will be for convenience goods. The retail development has not yet started.
- St Nicholas Park Leisure Centre (Ref: W/16/0777 granted on July 2016), planning permission for the extension to existing leisure centre to provide new 80 station gym, 2 new group exercise studios and a climbing wall. This is complete and in operation.

OUT-OF-CENTRE PROVISION

7.41 In terms of out-of-centre provision, **Leamington Shopping Park** is located approximately 3.2km (2.0 miles) away from the Town Centre and can be accessed via Myton Road/A425. The key anchors include Next, Debenhams and New Look. The out-of-centre provision which is located approximately 1.7km (1.1 miles) away from the Town Centre at both Emscote Road, which includes a Tesco Superstore, and Wharf Street which includes household DIY goods such as a home furniture shop, double glazing and garden machinery. Additional retail provision is at **Shires Gate**, on the opposite side of Tachbrook Drive, comprising of two retail warehouses occupied by Mothercare and Curry's. There is also retail development at **Myton Road** which fronts the A425 to

Warwick with prominent units including Dreams, Bensons for Beds and Pets at Home. Homebase also trades from Emscote Road in Warwick.

SUMMARY

7.42 In summary, the SWOT assessment of Warwick Town Centre shows that:

Strengths

- Historic centre with significant heritage that contribute to its character and identity.
- Good range of shopping and leisure facilities typically found in a centre of its size and position within the retail hierarchy.
- There is a good range of convenience goods provision
- The comparison offer is adequate.
- Diverse mix of multiple and independent operators.
- It is a key tourist centre and attracts substantial visitor draw.
- Regular street market enhancing diversity of offer.
- There is a below average vacancy rate and the centre appears to be functioning well.
- There is demand for potential operators to locate in the centre.
- Good parking provision.
- Key visitor attraction.
- Well used street markets.
- Good environmental quality.

Weaknesses

- Historic nature of the centre and street pattern results in narrow streets and small shop units.
- Compact town centre constrained by historic road system and therefore limited expansion opportunities.
- Declining retail ranking position.
- No significant new investment in the recent past.
- Lack of large modern retail units in the town centre.
- Falling footfall levels.

Opportunities

- Enhance complementary offer between the town centre and other attractions (e.g. Warwick Castle) to enhance visitation, footfall and linkages.
- Branding the retail core to attract both locals and visitors.
- Further promotion as a family and tourist leisure destination.
- Promote markets as part of tourist offer
- Consumers' requirement for more national / high street shops, representing a latent demand.
- Capitalise on its historic heritage and attractions.
- There would appear to be potential scope to attract new high street brands, and opportunity to enhance the quality of the independent offer.

Threats

- Strong competition from centres with critical mass of retail and leisure (such as Royal Leamington Spa).
- Poor perception of current offer.
- Limited opportunities for further development.

7.43 In summary, Warwick town centre is performing well against many of the health check key performance criteria. However, given that the expansion of the centre is constrained by its historic street pattern, we consider that the main focus should be to market and promote the centre's offer and historic attractions to a wider 'audience' to help attract all-year trips that will maintain and enhance its overall vitality and viability as a shopping and leisure destination.

8. KENILWORTH HEALTH CHECK

CONTEXT

Kenilworth is a historic town in Warwickshire that is located approximately 14.5km (9 miles) from Coventry, 11.3km (7 miles) from Warwick and 37km (23 miles) from Birmingham. Kenilworth is a historic market and serves the day to day needs of its local catchment population. By comparison to both Royal Leamington Spa and Warwick it is a smaller centre. The centre also benefits from nearby attractions such as Kenilworth Castle and the surrounding Abbey Fields.

8.1 **Table 8.1** shows Kenilworth's retail ranking against competing centres. It is ranked 608th, which is an improvement since 2014 when it was ranked 616th.

Table 8.1: Warwick District Centres compared against competing centres

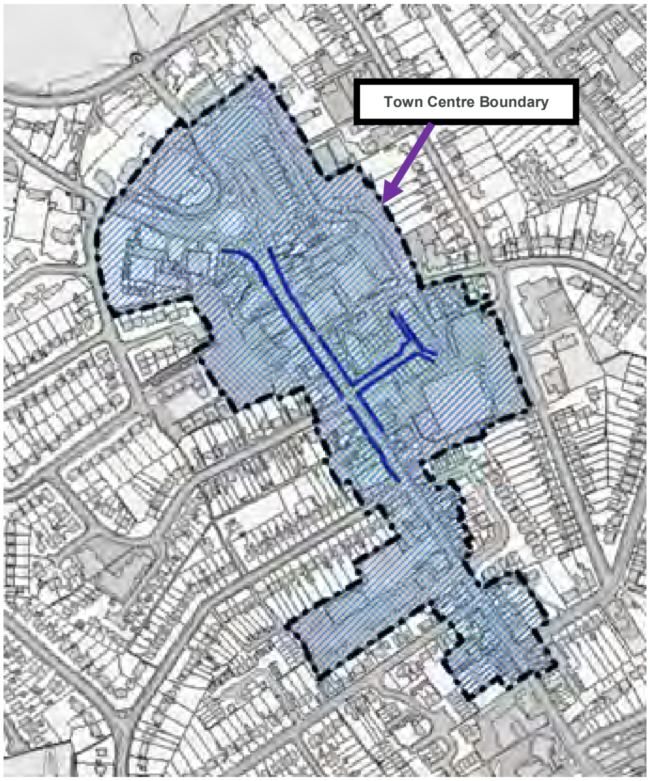
Centre	Rank (2017)	Rank (2014)
Birmingham	4th	4th
Solihull	42nd	43rd
Worcester	55th	61st
Northampton	63rd	59th
Coventry	66th	62nd
Royal Leamington Spa	79th	84th
Stratford Upon Avon	185th	174th
Kenilworth	**608th**	**616th**
Warwick	968th	898th

Source: Javelin Venuescore (2017)

8.2 The broad offer within the centre is located off Warwick Road. This runs north – south through the town and represents the core High Street. The town centre has benefited from investment in the form of redevelopment at Talisman Square which secured Waitrose as the anchor tenant with the residential element of the scheme let to Warwick University. Additionally there are further plans for redevelopment on the site for a mixed use development of 1,533 sqm gross of retail floorspace with residential uses above (Planning Ref: W/16/1139).

8.3 The Warwick District Local Plan (2017) designates Kenilworth as a Town Centre in the settlement hierarchy. The extent of the TCB is illustrated in **Figure 8.1** below.

Figure 8.1: Kenilworth Town Centre



Source: Warwick District Local Plan (2017)

RETAIL COMPOSITION & DIVERSITY OF USES

8.4 **Tables 8.2 and 8.3** summarise the composition of the centre's retail mix and diversity of uses. It should be noted that the composition is based on the latest available Experian Goad Category Report (2016). The area surveyed by Goad is not identical to the Councils' identified TCB (**Figure 8.1**), and as such, it is possible that the number of units set out in the GOAD analysis may not directly correspond to the Councils' defined centre boundary.

Table 8.2: Current Retail and Service Offer – Units

Category	2014 Study		2016		% Change	UK Average 2018 %
	No. of Outlets	% of Total Outlets	No. of Outlets	% of Total Outlets		
Convenience	12	7.2%	10	5.9%	-16.7%	8.9%
Comparison	65	38.9%	63	37.3%	-3.1%	30.8%
Retail Service	27	16.2%	31	18.3%	14.8%	14.5%
Leisure Service	34	20.4%	41	24.3%	20.6%	24.0%
Financial & Business Service	17	10.2%	19	11.2%	11.8%	10.3%
Vacant	12	7.2%	5	3.0%	-58.3%	11.2%
TOTAL	**167**	**100.0%**	**169**	**100.0%**	**-30.9%**	**100.0%**

Source: Experian Goad Category Reports (2012 and 2016)

Table 8.3: Current Retail and Service Offer – Floorspace

Category	2014 Study		2016		% Change	UK Average 2018 %
	Floorspace	% of Total Floorspace	Floorspace	% of Total Floorspace		
Convenience	7,042	23.3%	6,475	21.6%	-8.1%	15.2%
Comparison	10,303	34.0%	9,894	33.0%	-4.0%	34.7%
Retail Service	2,360	7.8%	2,545	8.5%	7.8%	6.8%
Leisure Service	6,708	22.2%	7,887	26.3%	17.6%	25.1%
Financial & Business Service	2,443	8.1%	2,768	9.2%	13.3%	7.7%
Vacant	1,421	4.7%	455	1.5%	-68.0%	9.8%
TOTAL	**30,277**	**100.0%**	**30,024**	**100.0%**	**-41.3%**	**100.0%**

Source: Experian Goad Category Reports (2012 and 2016)

Convenience Provision

8.5 There are 10 convenience units in the survey area according to the latest 2016 Experian Goad Category Report. This represents 5.9% of total outlets, which is below the national average of 8.9%. Despite this, the current floor space provision (21.6%) is above the national average of (15.2%). It is important to highlight there has been a decrease in the number of units (16.7%) and floorspace (8.1%) since the 2014 RLSU. The Experian Goad therefore figures suggest an under representation provision of food and convenience retailing in the area.

8.6 Convenience provision within the centre is anchored at either end of Warwick Road by Sainsbury's and Waitrose (Bertie Road, Talisman Square). Further provision comprises of 4 bakers, 1 convenience store, a frozen food store (Iceland); 1 greengrocer and a health food store. In particular, the high quality produce sold at the Joe Richards greengrocer (located on 1 Talisman Square) and the traditional market (at Abbey End) significantly enhances Kenilworth's convenience offer by providing a more diverse range of outlets.

8.7 Overall, it is considered that Kenilworth has a good convenience provision. However the Goad data indicates a reduction in units and floorspace since the 2014 RLSU which indicates a potential gap in provision.

Comparison Provision

8.8 According to the 2016 Goad Category Report, there are 63 comparison goods retailers located within Kenilworth trading from a total floorspace of 9,894 sqm. The number of outlets represents 37.3% of total units in the centre, which is significantly above the national average of 30.8%. The current floorspace provision represents 32.9% of total floorspace in the centre, which is below the national average of 34.7%. There has been a small decrease in the number of units (3.1%) and floorspace (4.0%) since the 2014 RLSU.

8.9 In terms of its overall non-food provision the key headlines are:

- Across the different comparison sub-categories, the centre has a high representation of many categories including charity shops (10 units); craft and gift shops (7 units); DIY and home improvement stores (4 units); and carpets and flooring (4 units).
- There is an overprovision of charity shops, which represent 5.9% of the total units, which is above the national average of 2.7%. There is an underrepresentation of ladies wear and accessorises (1.1%), compared to the national average of 2.0%. There is only 1 toiletry, cosmetic and beauty shop. There is no representation of children and infant wear shops nor garden and equipment stores.
- Major retailers in the centre[41] include Boots, WH Smith, Carphone Warehouse and Wilkinson. Additional multiple retailers include Peacocks, Poundland and Robert Dyas. The independent offer is also strong.

8.10 In summary, we consider Kenilworth has a good comparison offer for a centre of its size.

[41] As defined by Goad as 30 national retailers that are likely to improve the consumer appeal of a centre.

Service Provision

8.11 Service businesses are defined by Experian Goad as including retail, professional and financial services. As **Tables 8.2 and 8.3** show, there are 91 service outlets in Kenilworth. They account for 53.8% of all units, which is above national average 48.8%. The current floorspace provision (44.0%) is above the national average (39.4%). The following provides a brief summary of provision in the different service categories:

- There were 31 **retail services** in 2016, which represented 18.3% of total outlets. This is above the national average of 14.5%. There has been an increase in units (14.8%) and floorspace (7.8%). This category is mostly made up of the health and beauty outlets. There are 19 units in this category, which is equivalent to 11.2% of units, which is above the national average of 8.8%. Provision also includes 2 dry cleaners, 4 opticians, 2 travel agents, a post office and a repairs and alterations service.
- In terms of **financial services**, there were 19 outlets in 2016, which represented 11.2% of total units. This is above the national average of 10.3%. There has been an increase both in the number of units (11.8%) and floorspace (13.3%). The mix of services includes 6 property services, 5 retail banks, 3 building societies, 1 building supplies and services, 1 financial services, and other business services.
- There are 41 **leisure service** outlets in 2016; this is the largest service type provision in the centre. This presents 24.3% of total provision which is marginally above the national average of 24.0%. There has been a significant increase in leisure services since the 2014 RLSU in terms of units 20.6%) and floorspace (17.6%). Leisure mix includes 14 restaurants, 6 bars, 6 cafes, 5 fast food takeaways, 3 public houses, 3 hotels and guesthouses, 1 casino and betting offices, 1 sports and leisure facility, a club and a disco/nightclub.

8.12 In summary, we consider there is a strong service provision within the town centre with a particular strength in leisure provision in particular. The latter positively contributes to the evening and night time economy of the centre.

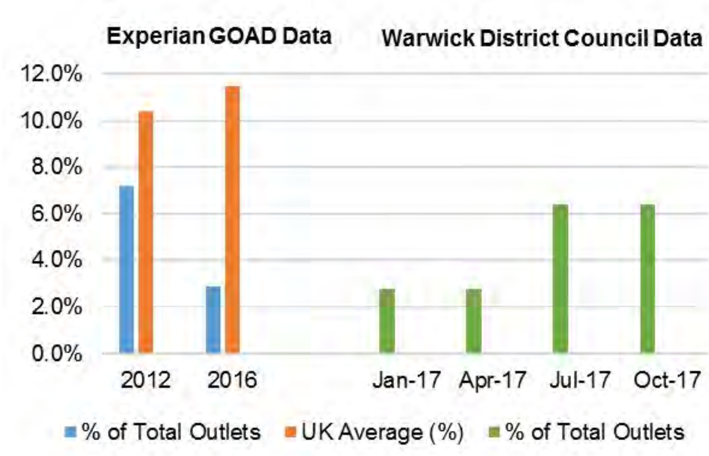
VACANCIES

8.13 Kenilworth currently has 9 vacant outlets, according to the Council's own monitoring data in October 2017. This represents a vacancy level of 6.4%, which is below the GOAD national average of 11.2%. **Table 8.4** and **Figure 8.2** illustrates the change in vacancies from 2008 to 2017, based on GOAD Category Reports and the Council's own monitoring data (aligned to the town centre boundary).

Table 8.4: Vacancy levels

Date	No. of Vacant Units	% of Total Outlets	GOAD UK Average (%)
Experian GOAD Data			
2012	13	7.2%	12.2%
2016	5	2.90%	11.20%
Warwick District Council Data			
Jan-17	4	2.8%	11.2%
Apr-17	4	2.8%	11.2%
Jul-17	9	6.4%	11.2%
Oct-17	9	6.4%	11.2%

Figure 8.2: Vacancy level change



8.14 The GOAD data indicates that that vacancies have decreased from 2012 to 2016. The Council's more recent data for 2017 shows an increase in 2017. According to the latter, the highest was recorded in October 2017 with 9 vacant units. Despite this marginal increase, we consider that the centre is performing well with a lower vacancy rate when compared to the national average.

MULTIPLE AND INDEPENDENT RETAIL REPRESENTATION

8.15 Based on the 2016 Goad Category Report, there are some 58 multiple retailers. This includes key names such as Boots, Wilko, WH Smith, Waitrose and Carphone Warehouse. Multiples account for 34.3% of the total units, with a strong independent retail sector representing 65.7% of the total units. The table below illustrates the provision of multiple retail and service outlets.

Table 8.5: Multiple Retailers: Kenilworth

Category	No. of Outlets	% of Total Outlets	UK Average 2016 %
Comparison	19	32.7%	42.7%
Convenience	6	10.3%	11.2%
Retail Service	9	15.5%	9.2%
Leisure Service	14	24.1%	21.5%
Financial & Business Service	10	17.2%	15.2%
TOTAL	**58**	**100.0%**	**100.0%**

8.16 Independent retailers are a key strength within the town and make an important contribution to the centres overall diversity, vitality and viability. In summary, there is a good and complementary mix of multiple and independent retailers, serving the centre and its catchment population. Such retailers positively add to the character of the centre, and its overall vitality.

MARKETS

8.17 There is one market in operation in Kenilworth Town Centre. This is the Kenilworth Traditional Retail Market which operates at Abbey End every Thursday from 9:00am – 4:00pm. This market sells a range of goods including fruit and vegetables, clothing, and hardware supplies

RETAIL DEMAND & REQUIREMENTS

8.18 There are seven operators with published requirements for representation in Kenilworth; equivalent to a total floorspace of between 2,369 sqm and 5,668 sqm.

Table 8.6: Retailer Demand

Company Name	Planning Class	Size Sqm - Min	Size Sqm - Max
Sainsburys Local	A1	372	422
Holland & Barrett	A1	93	656
Lidl	A1	929	2,811
Heron Foods	A1	232	468
Craft Inn	A1, A4	46	94
The White Brasserie	A4	232	375
Marstons	A4	465	843
TOTAL	**7**	**2,369**	**5,668**

Source: The Requirements List (2018)

8.19 As the table shows, operators include Holland and Barrett and Lidl. As detailed previously a Sainsbury's (superstore format) is already present in the town centre as is a new Holland & Barrett (that opened on Warwick Road in January 2018). The latter therefore may represent a satisfied requirement.

PRIME ZONE A RENTS

8.20 Agent sources estimate that Prime Zone A rents in Kenilworth town centre are estimated at around £323/sqm (£30/sq ft).

8.21 Agent sources state there is no information on retail yields due to the paucity of transaction data.

HOUSEHOLD SURVEY

8.22 The household telephone interview survey (HTIS) asked specific questions on respondents' views and perceptions of Kenilworth Town Centre as a place to shop and visit for a wide range of uses and attractions.

8.23 The frequency of visits to Kenilworth Town Centre Town Centre are shown in **Table 8.7.**

Table 8.7: Frequency of Visits to Kenilworth Town Centre

Frequency	Study Area (Zones 1 - 10)	WDC Area (Core Zones 1, 2, 3 and 7)
Daily	1.2%	2.7%
4-6 days a week	1.7%	4.1%
2-3 days a week	3.9%	8.1%
One day a week	5.1%	6.4%
Every two weeks	3.0%	4.4%
Monthly	6.0%	8.8%
Once every two months	3.6%	3.2%
Three-four times a year	5.7%	5.3%
Once a year	3.5%	3.7%
Less often	4.6%	2.9%
Never	59.4%	49.0%
Don't know	1.2%	0.2%
Varies	1.1%	1.1%
TOTAL	**100.0%**	**100.0%**

Source: HTIS 2018

8.24 As **Table 8.7** shows, a large proportion of respondents from the Study Area (Zones 1-10) (59.4%) and the WDC Area (Zones 1, 2, 3 and 7) (49.0%) never visit Kenilworth Town Centre. Collectively, a higher proportion of respondents from the WDC Area visit daily or weekly (25.8%), compared to respondents from the Study Area (14.9%).

8.25 In terms of what people ‘like’ about Kenilworth Town Centre, the most frequently raised themes are shown in **Table 8.8.**

Table 8.8: Reasons for Visiting Kenilworth Town Centre

Aspects	Study Area (Zones 1 - 10)	WDC Area (Core Zones 1, 2, 3 and 7)
Close to home	17.1%	29.2%
(Nothing / very little)	15.6%	17.0%
Attractive environment / nice place	13.9%	8.2%
Good range of independent shops	10.0%	13.3%
Good pubs, cafés or restaurants	9.3%	5.5%
Compact	8.5%	7.4%
Easy to park	6.7%	6.6%
(Dont know)	4.6%	4.0%
Good range of 'high street' retailers/ multiples	3.9%	3.5%
Has a Waitrose supermarket	3.7%	3.2%

Source: HTIS 2018

8.26 As **Table 8.8** shows, the majority of respondents from both the Study Area (17.1%) and WDC Area (29.2%) consider proximity to home as a key reason for visiting Kenilworth. Other positive aspects include the attractive environment (13.9% from the Study Area and 8.2% from WDC Area), the good range of independent shops (10.0% from the Study Area and 13.3% from WDC Area), and the good pubs, cafés and restaurants (9.3% from the Study Area and 5.5% from WDC Area).

8.27 Respondents were also asked what, if anything, they would improve in Kenilworth Town Centre that might encourage them to visit more. The most frequent suggestions are as follows:

Table 8.9: Key Improvements for Kenilworth Town Centre

Aspects	Study Area (Zones 1 - 10)	WDC Area (Core Zones 1, 2, 3 and 7)
Nothing	59.3%	50.1%
Don’t know	13.7%	14.4%
More national multiple shops / High Street shops	9.1%	13.0%
More independent shops	4.9%	5.6%
More / better parking	3.0%	5.1%
Other	2.6%	3.6%
Free car parking	2.1%	4.4%
If it was nearer	1.5%	2.5%
Better access by road	1.5%	0.9%
Fewer charity shops	1.2%	1.9%

Source: HTIS 2018

8.28 As **Table 8.9** shows, a high proportion of respondents from both the Study Area (59.3%) and WDC Area (50.1%) were satisfied and suggested no improvements to Kenilworth Town Centre. Other positive improvements included more multiple retailers (9.1% from the Study Area and 13.0% from WDC Area) as well as independent shops (4.9% from the Study Area and 5.6% from WDC Area) and more / better parking (3% from the Study Area and 5.1% from WDC Area).

ENVIRONMENTAL QUALITY

8.29 Based on our health check and audit of the town centre, Kenilworth has good environmental quality and is an attractive town centre. The centre is generally clean and tidy with a mixture of historic and modern buildings.

8.30 The centre has benefited from the investment and redevelopment of Talisman Square. This has provided a pedestrianised focal point to the town centre.

8.31 There is a good provision of street furniture within the town centre and this includes a good distribution of bins as well as pleasant and well maintained flower displays. There is a good provision of street lighting within the town centre, which helps to create a welcoming and safe environment for both residents and visitors.

8.32 The main thoroughfare (Warwick Road) through the centre can get congested and heavy traffic was observed during our site visit. Improvements to divert heavy traffic should be considered.

8.33 The HTIS results identified that 13.9% of respondents from within the Study Area visit Kenilworth because it is a nice place and has an attractive environment. As such, environmental quality in Kenilworth is considered to be good overall.

ACCESSIBILITY & PEDESTRIAN FOOTFALL

8.34 Kenilworth benefits from good accessibility by all modes of transport. Accessibility via the road network is through regional arteries (A46 and A452) that link to the main motorways (M6, M40 and M42).

8.35 The town is served with a number of car parks as detailed below:

Table 8.10: Car Parking in Kenilworth

Car Park	Spaces
Abbey End car park	213 spaces
Square West car park	145 spaces
Waitrose car park	150 spaces
Sainsbury's car park	155 spaces

8.36 The main bus terminus for the centre is located at Abbey End. The centre is served by 8 buses and the main service routes are listed below:

Table 8.11: Bus Services and Routes in Kenilworth

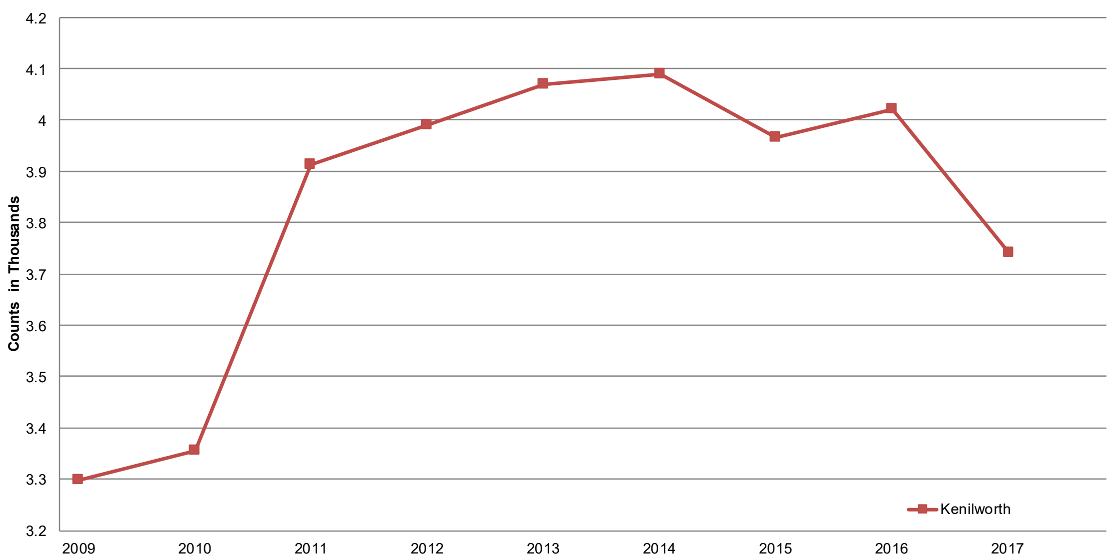
Bus Service Route	Bus Route
11	Leamington Spa, Kenilworth, University Of Warwick, Coventry
539	Kenilworth, Stoneleigh, Nac Stoneleigh, Bubbenhall, Baginton, Coventry
233	Solihull, Knowle, Balsall Common, Tile Hill, Burton Green, Kenilworth
SL	Kenilworth Railway Station, Kenilworth
U17	Sydenham, Leamington Spa, Kenilworth, University Of Warwick, Coventry
X17	Heritage Motor Centre, Jaguar Land Rover Gaydon, Lighthorne Heath, West Green Drive, Stratford Morrisons, Stratford, Tiddington, Alveston, Charlecote, Wellesbourne, Wasperton, Barford, Sherbourne, Chase Meadow, Forbes Estate, Warwick, Warwick Hospital, Warwick Railway Station, Leamington Rail Station, Leamington Spa, Kenilworth, Coventry
X68	Cubbington, Lillington, Leamington Spa, Leamington Rail Station, Shires Retail Park, Heathcote Hospital, Warwick Gates, Warwick Technology Park, Warwick, Warwick Hospital, Woodloes Park, Spinney Hill, Leek Wootton, Kenilworth, Coventry
X77	Kenilworth, Leamington Spa, Lighthorne Heath, Jaguar Land Rover Gaydon, Heritage Motor Centre, Kineton

8.37 Additionally, Kenilworth railway station reopened in April 2018 (after it was shut in the 1960s). Run by West Midlands Trains, residents and visitors are able to use an hourly service in each direction between Coventry and Royal Leamington Spa, except for Sundays.

8.38 The Council's average pedestrian flow data for the town centre (**Figure 8.3**) shows a peak in 2014 and a decline since 2016. The key highlights from relevant footfall data collection points reveals:

- the highest footfall level is outside Boots; and
- there has been an increase in footfall since Waitrose opened.

Figure 8.3: Average Footfall Levels: Kenilworth



Source: Warwick District Council / PMRS

8.39 In summary, whilst accessibility in centre is considered to be good it is important that the Council monitors footfall levels. It is anticipated that the redevelopment of the north side of Talisman shopping centre and the anticipated increase in housing development (see below) will boost footfall levels.

OUT OF CENTRE PROVISION

8.40 No out-of-centre provision is identified around Kenilworth Town Centre.

NEW INVESTMENT & POTENTIAL DEVELOPMENT

8.41 In terms of new investment, planning permission for the mixed use development for 1,533 sqm of retail floorspace with residential uses above at Talisman Square on Warwick Road (Planning Ref: W/16/1139 granted July 2017). This development is for a £12 million redevelopment to the north side of Talisman shopping centre. The units will be developed on the site which is currently used as a temporary car park with 105 student units on the upper floors.

8.42 In addition to the above, it should be noted that the Warwick District Local Plan has allocated a considerable number of housing sites in Kenilworth and south of Coventry that will inevitably increase the local catchment population and associated expenditure.

SUMMARY

8.43 In summary, the SWOT assessment of Kenilworth Town Centre shows that:

Strengths

- Good range of shopping and leisure facilities typically found in a centre of its size and position within the retail hierarchy.
- Low vacancy rate.
- Strong and varied convenience provision.
- Representation by major retailers including Boots, Iceland, Wilko, WH Smith, Waitrose and Holland & Barrett.
- Strong multiple offer supplemented by a high number of independent stores giving centre character and diversity.
- Improving its retail rankings position.
- Good level of accessibility.
- Good service and particularly leisure offer.
- Growing housing and associated population and expenditure.

Weaknesses

- Competing higher order centres for shopping (notably Royal Leamington Spa and Warwick).
- Heavy traffic on the main thoroughfare of Warwick Road.
- Falling footfall levels.

Opportunities

- Gain additional tourism trade.
- Capitalise on tourism spend associated with Kenilworth Castle.
- Support specialty markets and organise seasonal events to invigorate retail all year around.
- Capitalise on the student demographic and spend.

Threats

- Increased competition from larger order centres especially Royal Leamington Spa, Warwick and Coventry.
- Limited opportunities for further development.

8.44 In summary, Kenilworth town centre is a healthy and viable centre that serves its local resident catchment population, as well as visitors and tourists to the area. It is performing well against many of the key health check performance criteria. Over the long term, it is important to maintain the current provision and enhance this by capitalising on the growing student and residential population as well as nearby tourist draw.

9. QUANTITATIVE RETAIL NEED ASSESSMENT

9.1 This section provides an update on the key assumptions and forecasts underpinning the quantitative need (capacity) assessment for new retail (comparison and convenience goods) floorspace in the Council area over the plan period to 2029. The assessment updates and supersedes the retail capacity findings identified in the 2014 Warwick District Council: Retail & Leisure Study Update ('2014 RLSU').

9.2 The 'baseline' capacity tabulations for convenience goods and comparison goods are set out in **Appendix 9** and in **Appendix 10** respectively.

9.3 The following describes further the key steps and assumptions underpinning the retail capacity assessment.

BASELINE ASSUMPTIONS & FORECASTS

Population Projections

9.4 The population and associated projections were derived using a three stage process described below:

- The initial population for the study area (**Appendix 1**), based on postcode geography, was derived from Experian whose base data stems from 2016 (as derived from the Office of National Statistics' (ONS) 2016 mid-year estimates projected forwards). From this, a further analysis focussing on the population within the District area only was undertaken to ensure that the base year data derived for the District area aligned with the data from the Council's Strategic Housing Market Assessment (2012) (SHMA)[42].
- The second stage was the application of a projection rate to the derived data. The Council's SHMA indicated that over the period 2016 – 2031 the population in the District was set to increase by 0.6%pa. By way of comparison, the annualised growth projection for the study area based on Experian forecasts stood at a comparable 0.58%pa. On this basis, the Council's slightly higher SHMA population projection rate of 0.6%pa was utilised.
- The third stage incorporated the additional population anticipated as a result of the requirement to meet unmet housing need arising in Coventry. Some 5,976 dwellings have been allocated within Warwick District. This has been apportioned[43] upon advice from the Council and a similar growth rate of 0.6%pa has also been applied.

9.5 **Table 1, Appendix 2** (convenience goods) and **Table 1**, **Appendix 3** (comparison goods) sets out the resulting base year (2018) population and projections. It also shows the population projections over the plan period to 2029.

9.6 The population projections show a +11.4% growth for the study area as a whole between 2017 and 2029; from 319,939 to 356,546 (+36,697). In contrast, for the Core District Area (Zones 1, 2, 3 & 7), the growth is higher at +13.8%; from 128,540 to 146,339 (+17,799).

Expenditure per Capita & Special Forms of Trading (SFT)

9.7 The revised per capita expenditure and growth forecasts for each study zone are set out in **Appendix 2** for convenience and **Appendix 3** for comparison goods. The base year average expenditure figures have been derived from our in-house Experian MMG3 GIS based on 2016 prices.

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[42] The 2016 SHMA population for the District showed a District Wide population of 143,426 people whilst comparable data from Experian indicated a lower total of 142,628 people. The resulting difference of 798 people was equally distributed in the Council area Core Zones of 1, 3, 2, and 7.
[43] To note that Warwick District Council has allocated the 5,976 dwellings (and associated phasing) by zone as follows: 2,911 dwellings (apportioned equally between Zones 1, 2, 3); 2,325 dwellings to Zone 6 and 740 dwellings to Zone 7.

9.8 In identifying average expenditure levels, an allowance has been made for the market share of non-store retail sales (i.e. Special Forms of Trading) at the base year and over the forecast period. The most appropriate allowance for SFT has been informed by the results of the HTIS. The survey-derived market share analysis (**Table 1, Appendix 3**) shows that some 21.6% of all comparison goods expenditure in the defined study area was accounted for by internet and non-store sales (including mail order purchases) (22% in the Council area Core Zones 1, 2, 3 & 7). For convenience goods SFT accounted for 3.6% of total available expenditure in the study area (4% in the Core Zones 1, 2, 3 & 7) (**Table 1, Appendix 2**).

9.9 The expenditure per capita figures by zone have been grown year-on-year based on the latest Experian Retail Planner Briefing Note 15 (RPBN) published in December 2017. As described in **Section 3**, Experian forecast more limited year-on-year growth in convenience and comparison goods expenditure than previous forecasts.

9.10 Our allowance for SFT at the local level has been informed by the results of the household survey, benchmarked against Experian's SFT market share forecasts for convenience and comparison goods. The survey-derived shares have necessarily been adjusted downwards to reflect the fact that a proportion of online food and non-food sales are sourced from traditional stores rather than from dedicated ('dotcom') warehouses[44]. This is in compliance with the advice set out in Experian's latest RPBN. The adjusted SFT market share for comparison goods is 16.2% in 2018, which is higher the Experian (2018) national average figure of 15.4%. In contrast the locally adjusted SFT market share for convenience goods of 1.1% is below the 2018 national average of 3.4%.

Average Expenditure Growth Forecasts

9.11 The growth in average expenditure per capita levels over the plan period (up to 2029) has been informed by the forecasts set out in Experian's latest Retail Planner Briefing Note 15 (December 2017) (Figure 1a). Experian's forecasts show for:

- **convenience goods** – negative forecast annual growth in the short term (-0.6% in 2018 and -0.2% in 2019), before averaging at +0.1% for future years; and
- **comparison goods** - forecast annual growth of +0.9% in 2018, +2.1% in 2019 and averaging at +3.2% over the medium (up to 2023) to long term (2036). This forecast growth is lower than long-term historic (1997-2016) trends of +5.6%.

Total Available Expenditure

9.12 Total available retail expenditure in the study area is derived by multiplying the population and average expenditure per capita levels together. The forecasts for the plan period (2018 to 2029) show:

- **convenience goods**: +11.8% (+£36.5m) growth in total convenience goods expenditure by 2029 across the study area (**Table 3**, **Appendix 2**);
- **comparison goods**: +51.3% (+£501.5m) growth in total comparison goods expenditure to 2029 across the study area (**Table 5**, **Appendix 3**); and

9.13 The growth in comparison goods expenditure significantly outstrips convenience goods spend, which means that there should be greater capacity potential for new comparison goods floorspace over the forecast period than for convenience goods.

[44] Drawing on Experian's latest research we have assumed that some 30% of SFT convenience goods sales and 75% of comparison goods sales are sourced from traditional ('physical') retail space.

‘Inflow’ and Base Year Turnover Estimates

9.14 In order to provide a complete picture of the current trading (turnover) performance of the District’s main centres and stores we have necessarily made informed judgements with regard to the likely ‘inflow’ (trade draw) from outside the widely defined study area. In the absence of published turnover and trade draw information for centres and retailers our inflow assumptions have necessarily been informed by previous studies[45] and retail assessments, as well as the household survey. The ’inflow‘ assumptions also take account of:

- the scale, offer and location of all existing centres and stores in the District;
- the likely extent of their catchment areas;
- the competition from centres, stores and shopping facilities outside the District and study area; and
- the likely retail expenditure derived from people who live outside the study area (including visitors and commuters) in the District’s main centres and stores.

9.15 Although the assessment of ‘inflow’ is not a straightforward exercise, due to the complex nature of overlapping catchments and shopping patterns, it is reasonable to assume that for comparison goods retailing the District’s main centres and larger shopping facilities will draw a proportion of their shoppers and trade from outside the defined study area. On the other hand smaller stores and local centres will draw the majority of their shoppers and trade from within their more localised catchments, with limited or no ’inflow’ from outside the study area. These trade draw estimates are informed by retail spend from the previous study (2014 RLSU) as well as other factors including, inter alia, the location, scale and attractiveness of the retail offer in each centre/store; accessibility and parking provision; the distribution of competing centres/stores both within and outside the study area; and the retail expenditure derived from tourists, day-trippers and commuters living outside the study area. We have assumed the following rates:

- For **convenience goods** it is assumed that the main stores in the District 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 assumed an inflow rate of 10% for Royal Leamington Spa and 5% for both Warwick and Kenilworth. We have made this 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 allowance also takes account of retail spend by visitors/tourists to the area, as well from commuters who live outside the study area.

9.16 Based on the (survey-derived) market analysis and the ‘inflow’ assumptions, **Appendix 9** sets out the revised turnover estimates for convenience across the main centres with estimates for comparison goods turnover presented in **Appendix 10.**

Planned Commitments & New Development

9.17 In terms of retail commitments, **Table 2, Appendix 9** sets out planned retail floorspace identified for convenience goods and in **Table 2, Appendix 10** for comparison goods. Floorspace data has been provided by the Council and the evidence submitted in support of planning applications for each scheme.

9.18 The total convenience goods floorspace committed is 820 sqm net. This includes:

[45] 2014 RLSU

- **Planning Reference W/16/1139 - Talisman Square, Warwick Road, Kenilworth -** Mixed use development comprising 1,533 sqm gross of retail floor space at ground floor and 65 residential units (mix of cluster flats and studio rooms) above. Of this gross floorspace we assume that the net floorspace will be 1,073 sqm net (i.e. 70% of total) which will be split equally for convenience goods and comparison goods (i.e. 537 sqm respectively).
- **Planning Reference: W/14/1076 – Land between Myton Road, and Europa Way, Warwick –** Outline Planning Permission for the construction of up to 735 residential units (C3); A mixed-use neighbourhood centre to include up to 500 sqm gross floor area made available for retail development (A1-A4) and/or community/health uses (D1). As per the Planning Statement accompanying the application, the 500 sqm would be sub-divided into 3 units: one unit with a gross floorspace of 250 sqm, and two units each with a gross floorspace of 125 sqm. For the purposes of this assessment a gross to net ratio of 70% has been applied resulting in a net floorspace of 350 sqm. It is assumed that of the derived net floorspace, it will be equally apportioned in to A1-A4. It is further assumed that the resulting net A1 floorspace of 88 sqm is for convenience goods only.
- **Planning Reference W/14/0661 – Land at Lower Heathcote Farm, Harbury Lane, Warwick –** Residential development up to a maximum of 785 dwellings for a mixed use community hub/local centre to include retail development (Class A1 to A5 inclusive) and community buildings (Class D1). For the purposes of this assessment a gross to net ratio of 70% has been applied resulting in an overall net floorspace of 980 sqm that has been apportioned equally in to A1-A5 uses. This results in an A1 space of 196 sqm net which is assumed to be for convenience goods only.

9.19 As detailed in **Appendix 10** the total comparison goods committed floorspace totals 537 sqm net comprising:

- **Planning Reference W/16/1139 - Talisman Square, Warwick Road, Kenilworth**) **–** As detailed within the convenience goods commitments listing above, the derived comparison goods tested is 537 sqm net**.**

9.20 The turnover of the above commitments is set out in **Appendix 9** and **Appendix 10** which is discounted from residual expenditure in order to estimate net residual expenditure from which forecast new retail floorspace is identified.

CAPACITY OUTPUTS

9.21 The capacity forecasts will enable the Council to test the strategic options for the spatial distribution of new retail development over the plan period, and make informed policy choices about where any forecast need should be met in accordance with the advice set out in the NPPF (para 23). The allocation of sites to meet any identified need over the next five years and over the lifetime of the development plan will depend on a range of key considerations, including the suitability, viability and availability of sites in or on the edge of existing centres, and the potential to expand existing centres to accommodate the forecast needs.

9.22 The capacity assessment is underpinned by the survey-derived market shares for stores and centres across the District.

9.23 It has necessarily been assumed for the purpose of the District-wide capacity assessment that the retail market (convenience and comparison goods) is in ‘equilibrium’ at the base year. In other words we assume that the existing centres and stores are broadly trading in line with their assumed ‘benchmark’ turnover levels. Therefore, any residual expenditure available to support new retail floorspace within the study area over the development plan period is derived from the difference between the forecast growth in ‘current’ (survey-derived) turnover levels; and the growth in 'benchmark' turnovers based on applying year-on-year 'productivity' ('efficiency') growth rates to all existing and new retail floorspace[46].

9.24 For all existing and new convenience floorspace we have assumed an annual average 'productivity' growth rate ranging from a low of -0.1% (2018), -0.2% (2019), 0% to 2024 and +0.1% (2025 onwards). The corresponding annual productivity growth rates for comparison floorspace are higher; ranging from +0.9% (2018), +1.8% (2019), +2.3% to 2023 to an average of +2.2% (from 2024 onwards). These growth rates have been informed by Experian's latest RPBN15[47] and other research.

9.25 At the outset we advise that all capacity forecasts beyond a five year period should be treated with caution. This is because long term trends in the economy, consumer demand and retail property market could have a significant impact on the potential capacity and need for new retail floorspace. For example, as discussed previously, a higher growth in non-store retail sales (i.e. Internet sales) than forecast by Experian would reduce the capacity for new retail floorspace over time. It should also be noted that this District-wide strategic capacity assessment is based on a standard constant market share approach. It does not therefore take account of any potential uplift in market shares and capacity that could occur within catchment areas due to the 'claw back' of expenditure to planned new retail developments and investments in more convenient and sustainable town centre locations.

Convenience Retail Capacity Forecasts

9.26 **Appendix 9** sets out and explains the key steps underpinning the convenience goods capacity assessment. The 'baseline' residual expenditure and floorspace capacity forecasts are summarised in the table below:

Table 9.1 Warwick District: Convenience Goods Capacity Forecasts (sqm net)

	Foodstore Format (sqm net)			Local Supermarket/ Deep Discounter Format (sqm net)		
	2023	2026	2029	2023	2026	2029
Residual Expenditure (after Commitments)	**£7.3**	**£16.1**	**£24.6**	**£7.3**	**£16.1**	**£24.6**
Royal Leamington Spa Town Centre:	88	146	201	157	260	359
Warwick Town Centre:	36	59	81	64	105	145
Kenilworth Town Centre:	-169	-68	28	-301	-122	49
All Out-of-Centre Floorspace	630	1,153	1,654	1,124	2,059	2,953
Total District	**585**	**1,290**	**1,964**	**1,045**	**2,303**	**3,507**

Notes: Assumes: Equilibrium at 2018
Source: Table 3, Appendix 9

9.27 In order to convert the residual expenditure into a net sales figure we have assumed that new floorspace occupied by the 'top 6' mainstream foodstore operators (i.e. Tesco, Sainsbury's, Asda, Morrison's, Waitrose and Marks & Spencer) will achieve an average sales density of circa £12,500 per sqm in 2018. On this basis, and based on an equilibrium approach (described previously) and after taking into account all known commitments, there is District-wide convenience goods capacity of 585 sqm net by 2023 rising to 1,964 sqm net over the plan period to 2029. By way of comparison, the 2014 RLSU (using a benchmark turnover of foodstore operators approach) identified limited capacity of up to 170 sqm net by 2029.

9.28 If the residual expenditure capacity was to be taken up by a local supermarket (e.g. Co-Op, Budgens, etc.) and/or 'deep discount' retailer (e.g. Aldi, Lidl etc.) trading at lower average sales levels of circa £7,000 per sqm in 2018, the forecast capacity rises to 1,045 sqm net by 2023 and 3,507 sqm net over the plan period (up to 2029).

[46] The 'productivity' growth rates are based on Experian's latest Retail Planner Briefing Note 15 (published in December 2017). However, it should be noted that individual centres, stores and shopping facilities will be capable of achieving higher and/or lower annual 'productivity' growth depending on a range of trading factors (including the size, quality and type of retail floorspace).
[47] However, it should be noted that individual centres, stores and shopping facilities will be capable of achieving higher and/or lower annual 'productivity' growth depending on a range of trading factors (including the size, quality and type of retail floorspace).

9.29 To further help inform the Council's assessment of the potential scale and optimum location for new retail (convenience and comparison goods) floorspace in the Council area, we have also assessed localised capacity for the main centres as shown in **Table 9.1**. However, it should be noted at the outset that any forecast capacity identified for a specific centre/area does not necessarily mean that all the retail floorspace can and/or should be provided within that centre per se. For example, there may be a lack of suitable and viable sites available in some centres, or there may be other policy, heritage, transport and physical constraints to development. Alternatively it may be more appropriate to locate the floorspace capacity in one centre over another to encourage more sustainable travel patterns and/or help to achieve specific policy, regeneration and/or investment objectives. Furthermore, any potential capacity generated by foodstores in out-of-centre locations should be directed to town centres first in accordance with the NPPF and Local Plan policy. The assessment shows indicative economic capacity of the following quantum:

- **Royal Leamington Spa Town Centre** – between 201 sqm and 359 sqm net by 2029.
- **Warwick Town Centre** – between 81 sqm and 145 sqm net by 2029.
- **Kenilworth Town Centre** – between 28 sqm and 49 sqm net by 2029**.**
- **All Out-of-Centre Floorspace** – between 1,654 sqm and 2,953 sqm net by 2029**.**

9.30 Finally, should the Council consider the potential for new convenience floorspace within new developments then this should be located in town centres, which are the most sustainable and sequentially preferable locations. This is particularly relevant to centres where provision of new convenience provision or enhancement of existing provision could help to attract new shoppers to the centre and support footfall for the city/town centres as a whole through linked trips.

Comparison Goods Retail Capacity

9.31 **Appendix 10** sets out the detailed steps in the comparison goods capacity assessment. The residual expenditure and floorspace capacity forecasts are summarised in **Table 9.2** below. As for convenience goods this approach assumes 'equilibrium' at the base year and constant market shares over the forecast period.

9.32 The forecast residual 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 sqm at 2018. This is broadly equivalent to an average sales density for retail units in prime shopping locations. However, average sales levels inevitably vary between different locations, different retail formats, and different operators. Where this is the case it will have implications for assessing the capacity for, and impact of new retail floorspace. The local planning authority will therefore need to take this into account when plan making and in assessing and in determining applications for different operators and different types of retail floorspace in different locations (such as, for example, 'bulky goods' retail warehousing).

9.33 As the table below shows, at a District-wide level capacity is identified for up to 4,125 sqm net by 2023 rising to 13,396 sqm net by 2029. By way of comparison, the 2014 RLSU identified a higher level of capacity of up to 16,180 sqm net by 2029 rising further to 17,910 sqm net by 2031.

Table 9.2 Warwick District: Comparison Goods Capacity Forecasts (sqm net)

	2023	2026	2029
Royal Leamington Spa Town Centre:	2,255	4,609	6,983
Warwick Town Centre:	224	457	693
Kenilworth Town Centre:	98	508	921
All Out-of-Centre Floorspace	1,549	3,167	4,799
TOTAL DISTRICT WIDE COMPARISON GOODS CAPACITY	**4,125**	**8,742**	**13,396**

Source: Table 3, Appendix 10 (Steps 5 & 6)

9.34 The current assessment also disaggregates identified District-wide capacity for the main centres based on the relative trading performance and market shares of each centre at the base year. The results show:

- **Royal Leamington Spa Town Centre** – 6,983 sqm net by 2029. The 2014 (using a benchmark approach) RLSU identified capacity of up to 16,674 sqm net up to 2029[48].
- **Warwick Town Centre** – forecast capacity for 693 sqm net by 2029. The 2014 RLSU identified no capacity up to 2029.
- **Kenilworth Town Centre** – 921 sqm net by 2029. The 2014 RLSU identified no capacity up to 2029.
- **Out-of-Centre Floorspace** – identified capacity of 4,799 sqm net over the period to 2029.

9.35 To reiterate, and as with convenience goods, the potential for new comparison goods within new developments should be located in town centres, which are the most sustainable and sequentially preferable locations.

SUMMARY

9.36 This section has assessed the potential (economic) capacity for new retail (convenience and comparison) goods floorspace across the District's main centres and shopping locations between 2018 and 2029.

9.37 It is important to restate that capacity forecasts beyond five years should be interpreted with caution. This is because they are based on various layers of assumptions and forecasts with regard to changes in the national and local economy; the trading performance of existing centres and stores; the growth in population and retail spending; etc. For example, if the growth in Internet and multi-channel shopping is stronger than current forecasts suggest, then this could further 'dampen' the future demand and capacity for new (physical) floorspace over the long term. The Council should therefore take into account these margins for error when assessing the need for new retail floorspace over the medium term (5-10 years) and long term (10 years plus). It should be noted that the 2018 draft NPPF consultation document provides that LPAs should plan for need at least ten years ahead (para 86d).

9.38 Notwithstanding these caveats, the capacity forecasts do nevertheless provide a broad framework to help inform plan-making across the District area, including the potential need to identify and allocate sites for new retail floorspace in the identified centres.

9.39 The aggregated 'global' capacity forecasts show that for convenience goods capacity emerges by 2023 between 585 sqm net and 1,045 sqm net (representing a small convenience store or one Aldi / Lidl type store), rising to between 1,964 sqm net and 3,507 sqm net by 2029 (either circa a smaller format superstore or two to three discounter type stores).

9.40 The identified convenience goods capacity is likely to be accommodated primarily within existing town centres or emerging centres especially as part of commercial provision in residential led development schemes.

9.41 For comparison goods capacity emerges by 2023 of 4,125 sqm net and 13,396 sqm net by 2029.

9.42 In terms of the future allocation of the identified capacity, this should directed to the District's town centres and Royal Leamington Spa centre will remain at the apex of the hierarchy and the main focus point of investment.

9.43 In conclusion, the NPPF (paragraph 24) states that, in drawing up Local Plans, local planning authorities should 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. It is important that needs for retail, leisure and other main town centre uses "*are met in full and are not compromised by limited site availability*" and

[48] To note that the 2014 RLSU was also based differencing productivity and expenditure growth rates.

local planning authorities should therefore "*undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites*".

9.44 Where suitable and viable town centre sites are not available, the NPPF states that local planning authorities should "*allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre*". If sufficient edge of centre sites cannot be identified, then local planning authorities should set policies for meeting the identified needs in other accessible locations that are well connected to the town centre; and set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres.

9.45 We provide a high level review of the availability and suitability of the potential opportunity sites identified by the Council to accommodate the forecast need for new retail floorspace over the plan period in more detail in **Section 12**.

10. COMMERCIAL LEISURE NEED / 'GAP' ASSESSMENT

10.1 The NPPF (paragraph 23) states that in drawing up Local Plans to ensure the vitality of town centres, LPAs should promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres. Against this background 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 in centres, with significant benefits for both daytime and evening economies. However, forecasting the need for new commercial leisure uses is more complicated and problematic than for retailing, as the sector is highly complex and dynamic, and particularly sensitive to changes in economic, demographic, lifestyle and fashion trends. Consequently the methods and approaches developed to forecast the need for new commercial leisure floorspace and uses are more wide-ranging and less sophisticated than for retail capacity forecasts.

10.2 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 focuses on the following key elements:

- a review of the key trends driving market demand in the sector over the last 10-15 years;
- an audit of existing commercial leisure uses in the District to help identify any marked 'gaps' in provision;
- a review of the results of the household survey to understand current commercial leisure participation rates and preferences across the study area; and
- a broad economic assessment of the need for new additional leisure facilities across the main centres based on different datasets and accepted approaches.

10.3 For the purpose of our assessment we have necessarily focussed on the main commercial leisure uses that are widely accepted as making a significant contribution to the overall vitality and viability of town centres; namely food and beverage uses (Class A3-A5), cinemas, health clubs and gyms and to a lesser extent ten-pin bowling, casinos and bingo halls.

10.4 Detailed tables on forecast commercial leisure capacity, including projections on expenditure and need are set out below.

LEISURE EXPENDITURE GROWTH

10.5 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.

10.6 **Table 10.1** shows the UK average expenditure per head per annum on commercial leisure services and the average for the Study (Zones 1-10) and District Area (Zones 1, 2, 3 & 7) based on Experian data. It shows that UK household spending on leisure services is dominated by the restaurant and café category (including pubs). This pattern is broadly repeated across all the zones.

Table 10.1 Estimates of Spending on Leisure Services in 2018 (£ per head)

	Accommodation	Cultural services	Games of chance	Hairdressing salons & personal grooming	Recreational & sporting services	Restaurants, cafes, etc.	Total
Zone 1	£266	£327	£132	£102	£132.3	£1,269	£2,227
Zone 2	£240	£321	£141	£97	£114.2	£1,123	£2,037
Zone 3	£193	£288	£148	£73	£100.2	£1,199	£2,002
Zone 4	£306	£314	£148	£109	£127.3	£1,099	£2,103
Zone 5	£217	£263	£137	£80	£92.2	£924	£1,713
Zone 6	£283	£360	£174	£124	£139.3	£1,333	£2,413
Zone 7	£307	£350	£133	£131	£144.3	£1,247	£2,313
Zone 8	£375	£399	£138	£149	£170.3	£1,371	£2,602
Zone 9	£300	£340	£142	£122	£140.3	£1,217	£2,262
Zone 10	£334	£356	£137	£127	£145.3	£1,236	£2,336
STUDY AREA	£282	£331	£143	£112	£131	£1,202	£2,201
(% of Total)	12.8%	15.1%	6.5%	5.1%	5.9%	54.6%	100.0%
CORE ZONES, 1,2, 3 & 7	£252	£321	£139	£101	£123	£1,210	£2,145
(% of Total)	11.7%	15.0%	6.5%	4.7%	5.7%	56.4%	100.0%
UK Average (£)	£200	£277	£240	£88	£104	£1,002	£1,912
(% of Total)	10.5%	14.5%	12.6%	4.6%	5.5%	52.4%	100.0%

Source: Experian, 2016 prices.

10.7 The table below shows the most recent leisure spend projections by Experian Business Strategies (EBS) as set out in Retail Planner Briefing Note 15 (December 2017). EBS forecasts show a decreasing growth forecast in the short term (2016-2018) rising to +0.8% in 2019 before stabilising over the longer term (from 2019) to between +1.1% (to 2024) and 1.2% per annum (by 2036). This forecast growth is higher than annual average historic growth rates for the period 1997-2015, when there was no growth in leisure spend.

Table 10.2: UK Leisure Spend Growth: Actual & Forecasts (% per annum)

	2015	2016	2017	2018	2019	2020-2024	2025-2036
Leisure Spend Growth (%)	1.7	0.7	0.3	-0.1	0.8	1.1	1.2

Source: Experian Business Strategies, Retail Planner Briefing Note 15 (December 2017), Figure 1a and 1b

10.8 The base year expenditure per capita levels for leisure (**Table 10.1**) have been projected forward to 2029 using Experian's forecast annual growth rates (**Table 10.2**) and then applied to the projected population for each Study Zone to identify the total available expenditure on leisure and recreation goods and services (**Table 10.3**). As for the retail assessment, we have assessed total available leisure expenditure based on the Office of National Statistics' (ONS) and Experian's 2016 mid-year estimates projected forwards.

10.9 **Table 10.3** shows that available commercial leisure expenditure across the study area is forecast to increase by 26% (+£183.8m) up to 2029 in the Study Area and by 28.7% (+78.6m) in Core Zones (1, 2, 3 & 7). Growth in commercial leisure expenditure is greatest in Zone 6 with total expenditure forecast to increase by +34.5% over the study period to 2029 followed by Zone 7 (+28.9%).

Table 10.3 Total Available Commercial Leisure Expenditure: 2018 – 2029 (£m)

Zone	2018 (£m)	2023 (£m)	2026 (£m)	2029 (£m)	Change: 2018-2029 (£m)	Change: 2018-2029 (%)
Zone 1	£78.5	£87	£94	£101	£22.30	28.4%
Zone 2	£68	£76	£82	£88	£19.66	28.8%
Zone 3	£69	£76	£82	£88	£19.64	28.6%
Zone 4	£62	£67	£71	£75	£12.85	20.7%
Zone 5	£47	£51	£54	£57	£9.78	20.7%
Zone 6	£113	£128	£140	£152	£39.08	34.5%
Zone 7	£59	£66	£71	£76	£17.03	28.9%
Zone 8	£77	£83	£88	£92	£15.87	20.7%
Zone 9	£79	£85	£90	£95	£16.28	20.7%
Zone 10	£55	£59	£62	£66	£11.32	20.7%
STUDY AREA	£706.3	£780.3	£833.6	£890.1	£183.8	26.0%
CORE ZONES, 1,2, 3 & 7	£274.4	£306.3	£329.0	£353.0	£78.6	28.7%

Note: All monetary figures are expressed in 2016 prices.

10.10 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 enhance the scale and quality of Class A3 uses in the District's centres over the development plan period, subject to market demand.

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

CINEMA CAPACITY

10.12 Although cinema audiences grew significantly during the 1990s, the UK cinema market has traditionally been dominated by a handful of operators namely Cineworld (the UK's largest operator, with over a quarter of the cinema box office market), Odeon/UCI; Vue (who operate a venue in Royal Leamington Spa); 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.

10.13 According to research by Dodona (a specialist market research consultancy in the cinema industry) at the end of 2016, the UK had 4,015 screens, 140 more than 2014, in 766 cinemas in the UK. Approximately three-quarters (77%) of the screens are in multiplexes. It should be noted that the number of cinemas has fluctuated, with a low of 697 in 2006 and a high of 769 in 2012. This has been influenced by the increase in the number of multiplex screens and the loss of 'traditional' cinemas. 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 six screens) and screens in mixed-use venues (such as arts centres); including The Light, Curzon and Everyman cinemas. Everyman cinema reported in early 2017 that demand for its "home from home" experience is growing around the UK with new opening planned for 2018 venues in York, Liverpool and Newcastle, as well as London's Borough Market in 2020.

10.14 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 and the UK is the second largest consumer market for filmed entertainment in the world after the USA. The latest research shows that box office revenue in 2016 in the UK exceeded £1bn for the fifth year in succession, based on 168.3m admissions. Overall the cinema sector has remained relatively resilient in the prevailing economic and consumer environment.

10.15 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.

10.16 The most recent change to the industry – the transition to digital cinema technology – was one of the most fundamental shifts in the history of the sector, and has allowed the traditional cinema offer to expand to give audiences even greater choice in what they see. There has also 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 shopping auditoriums needed to accommodate traditional projectors. There are therefore opportunities for modern cinema offer to be provided in existing buildings. Examples include the HMV in Wimbledon which has a small Curzon cinemas above the store; Genesis, Whitechapel; The Grosvenor, Glasgow; Watershed, Bristol and the Lynton Cinema, Lynton.

10.17 At the other end of spectrum, smaller, boutique cinemas are also performing well. Focused on comfort, often by offering higher quality food, alcohol and larger reclining seats and holding special screening events. Additionally, a further category of film screening has started to emerge, namely event cinema. Mirroring trends in retail, people are prepared to pay significantly more for a unique, bespoke film experience – particularly one that lends itself to be shared on social media such as Secret Cinema.

10.18 Turning to the cinema provision in the District Council area, there are two commercial purpose-built cinemas:

- Royal Cinema, Newbold Terrace, Royal Leamington Spa (1 screen)
- Vue, Portland Place, Royal Leamington Spa (6 screens)

10.19 The HTIS shows that some 52.9% of respondents visited the cinema from across the study area (Zones 1-10), making it the second most popular leisure attraction (after restaurants and cafés). The majority of the respondents who visited a cinema visited once a month or more (40.7%) followed by once every two months (33.8%).

10.20 The survey results also show that cinemas within the District retain a market share of 39.9% from the study area (Zones 1 – 10) rising to 73.5% in the District area (Zones 1, 2, 3, & 7). The most popular cinema across both the study area (37.5%) and core District area (zones 1, 2, 3, & 7) (70.6%) is the Vue Cinema, Royal Leamington Spa. The other key competing cinemas outside of the Council area and across the study area are Showcase, Cross Point Business Park, Coventry (18.1%) and Cineworld, Touchwood, Solihull (10.3%).

Table 10.4 Cinema Facilities in the District Area: Market Share

Cinema	% Visits from Study Area (Zones 1 – 10)	% Visits from WDC Area (Zones 1, 2, 3, & 7)
Royal Cinema, Newbold Terrace, Royal Leamington Spa	2.5%	2.8%
Vue, Portland Place, Royal Leamington Spa	37.5%	70.6%
Total	39.9%	73.5%

Source: HTIS 2018

10.21 A standard accepted approach to assess the current level of cinema provision and future needs is based on national and regional 'screen density' averages (i.e. number of screens per unit of population).

10.22 According to Dodona, in 2016, the UK average was 6.3 screens per 100,000 people, up from 6.1 screens in 2014. The comparable screen density for the Midlands is 5.9 per 100,000 people. Based on the broad retention rate of 73.5% from the District area (Zones 1, 2, 3 & 7) **Table 10.5** shows the requirement for additional cinema screens.

Table 10.5 Potential Capacity for New Cinema Screens in the Warwick DC Area

	2018	2023	2026	2029
Potential Cinema Catchment Population	94,477	100,143	103,870	107,559
Cinema Screen Density (screens per 100,000 persons)	5.9	5.9	5.9	5.9
Cinema Screen Potential	6	6	6	6
Existing Screens	7	7	7	7
Proposed Screen Potential	0	0	0	0
Net Screen Potential	**No Potential**	**No Potential**	**No Potential**	**No Potential**

Source: Screen density for Midlands derived from British Film Institute Statistical Yearbook 2017
Notes: Screen density is used to measure screen provision in a given area. Existing cinema screens account for key cinema facilities only.
The net screen potential is derived by subtracting the existing and proposed provision less cinema screen potential

10.23 The results of our assessment indicate that based on population growth within the District area (Zones 1, 2, 3 & 7), there is no quantitative capacity to support new cinema screens over the study period to 2029, when applying an aspirational screen density of 5.9 screens per 100,000 people (Midlands average). Notwithstanding this, the additional housing and associated population growth within the District that may increase demand in the future.

10.24 In response to the question as to what improvements could be made to commercial leisure offer that would encourage people to participate more in leisure activities, respondents from across the study area (Zones 1-10) only 1.1% and 0.1% stated an art house cinema. Across the core zones (1, 2, 3 & 7) this increased to 1.8% and 0.3% respectively. This indicates there is no latent demand for this type of facility in the Council area.

EATING & DRINKING OUT

10.25 The food and beverage sector includes restaurants, cafes, bars and pubs (Class A3-A5), and provides an increasingly important part of a town centre's wider daytime and evening offer and economy. They also complement other town centre uses, particularly shops, offices and cinemas, helping to lengthen 'dwell times' (i.e. the time people spend in centres) and increase expenditure as part of the same trip.

10.26 As highlighted in **Section 3**, average household expenditure on leisure services in the UK is largely dominated by eating and drinking out. This sector has remained buoyant over time and the year-on-year forecasts for growth by Experian are strong. The UK F&B market has experienced sustained growth since 2008. The question is whether the past growth in the F&B sector is indicative of a long term structural change in UK consumer spending habits, or whether it is a cyclical trend.

10.27 The following provides a summary of some of the key trends driving changes in the food and beverage sector over recent years.

<table>
<tr><td>Pubs and Wine Bars</td><td>>> There are three main types of pubs:
Managed pubs, leased or tenanted pubs and free houses. Managed pubs are owned by companies such as Mitchells & Butlers, who employ a manager to run them and tend to display their own brand.
Tenanted pubs are leased from companies such as Enterprise Inns and Punch Taverns, who charge rents for the building but are ultimately managed by the landlords as their own business. The brands of beer and other beverages supplied however are also controlled by the company.
Free houses are run independent of any company or brewery supplying them and are therefore free to sell whichever beers or alcoholic beverages they choose.
>> In 2015 the Campaign for Real Ale (CAMRA) announced a rate of decline in pubs equal to 27 sites a week. According to the British Beer and Pub Association, the total number of pubs has fallen by 25% since 1982, to 50,800. However, while the number of pubs is decreasing, overall turnover growth is increasing, going from -0.5% between 2011-2014 to +1.3% between 2014-2017. This growth has come predominantly from managed, branded and franchised pubs which have seen an increase in turnover of 4.9%[49].

>> Pubs have seen escalating costs due to the impact of the minimum wage, VAT and business rates rises, and price competition on alcohol from supermarkets. A comprehensive food offering has become a 'must have' rather than 'nice to have' in increasing the value per customer. Changes in the consumer experience in pubs are also influenced by price and regulation, from duty on gaming machines to sports coverage licenses, all factors that put pressure on profit margins. Furthermore, industry players have been affected by the rising prices of beverages and food, higher rent costs and increased business rates.

>> Trends towards more flexible, less formal dining are playing to managed pubs' strengths, as is consumers' responsiveness to value adding activities (e.g. quality products, good service, an enhanced eating and drinking experience). Millennials are attracted by 'value added' factors such as atmosphere; environment; level of friendliness; type of music; places where they can relax and socialise with good food and drinks when choosing between pubs[50].</td></tr>
<tr><td>Restaurants</td><td>>> This sector has also experienced mixed fortunes during the economic downturn. Some of the key trends driving change in this sector include an increase in 'eating at home', which has increased sales for takeaways and deliveries. At the same time customers are increasingly 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. Recent successes include Bill's and Cote, with branded restaurants increasing their share in the market. 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). More detail on the casual dining sector follows below.</td></tr>
</table>

[49] https://www.egremontinternational.com/insight/article/the-evolution-of-the-pub-how-the-industry-is-meeting-modern-day-requirement
[50] https://www.geniusin.com/2017/10/04/pub-market-report-2017-simon-stenning/

Cafés & Coffee Shops	>> This sector has experienced strong growth over the last five years. According to Mintel research, the UK coffee shop market rose by 37%, up from £2.4 billion in 2011 to reach £3.4 billion in 2016. Additionally, between 2015 and 2016 sales increased by 10.4% – the biggest year-on-year growth witnessed in the last five years. The market over the next five years is forecast to grow a further 29%, to reach £4.3 billion. >> Estimated at 22,845 outlets, the total UK coffee shop market delivered a growth of 6% in outlets in 2016. Costa Coffee, Starbucks Coffee Company, and Caffè Nero remain the UK's leading chains with a 53% outlet share of the branded coffee shop market. Market leader Costa operates 2,121 UK outlets, adding 129 units in 2016, and Starbucks and Caffè Nero operate 898 and 650 UK outlets respectively. Leading chains continue to expand and enjoy positive like-for-like sales growth, albeit at a slowing pace. However small and medium sized boutique chains such as Coffee#1, Joe & the Juice, and Taylor St. Baristas are gaining momentum and driving the comparable sales growth across the sector, ahead of the leading chains. Increased merger and acquisition activity throughout 2016 signifies the strength of the vibrant coffee shop market in the UK. Activity such as Whitbread's 49% acquisition of Pure; Tchibo's acquisition of Matthew Algie; and Caffè Nero's purchase of Harris+Hoole signals further market convergence. >> 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). 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, Allegra reveals that after 18 years of considerable continued growth, the coffee shop market is one of the most successful in the UK economy and is set to outnumber pubs by 2030 as coffee shops become the new local.

10.28 Between 2014 and 2017, the expansion of F&B operators was dominated by multiple operators – from 37% of net addition of units, to 49% of units in 2016[51]. Moving forward this may change due to over-provision and saturation in certain sectors, and increasing costs. For example, over the last 12 months casual dining spending has taken a hit with some restaurants now struggling, and in the first quarter of 2018 alone the following chains announced closures / restructuring of operations and outlets:

- Strada – shutting down a third of their sites;
- Jamies Italian – filing for a company voluntary arrangement (CVA) closing 12 of its 37 sites;
- Jamie Oliver's Barbecoa has gone into administration;
- Square Pie has also gone into administration;
- Byron Burger – seeking reduced rents from landlords and closing 20 sites;
- Prezzo – Creditors have backed a restructuring plan that will see it close 94 outlets - about a third of the chain. The 94 closures include restaurants under the Prezzo, Mexico and Cleaver brands and all 33 Chimichanga sites; and
- Carluccios – appointed restructuring experts to advise on its 102 sites.

10.29 The current consolidation is attributable due to the presence and range of competing outlets and where margins have come under pressure. Once profitable sites for some operators have become unsustainable due to higher rents and business rates, labour costs and Brexit fuelled food inflation. Additionally, there is a recognition that dining restaurants and chains in particular have over expanded especially those backed by private equity who were under pressure to expand to sustain returns for the backers.

10.30 The type and quality of A3-A5 provision is described by centre below:

[51] Cushman & Wakefield – UK Food & Beverage Market Sustainable Growth – H1, 2017, Pg. 16

- **Royal Leamington Spa –** The ‘new’ town area has a good provision of food and beverage operators. There is an above average range of branded casual dining operators within the centre with representation from major fascias including Bistrot Pierre, Carluccio’s, Wagamama, Café Rouge, Bills, Las Iguanas, Gourmet Burger Kitchen, Zizzi’s, Yo! Sushi, Turtle Bay, Nando’s and Cotes Brasserie. This provision provides is further enhanced by a range of independent restaurants, cafes and take aways. The Experian Goad (2018) data shows that there are 51 restaurants, 35 cafes, 30 fast food takeaways, 16 bars and 12 public houses. The majority of the casual dining fascias and quality level of provision is within the ‘new town’ with lower quality of provision in the ‘old town’. The latter providing the opportunity for further enhancement as part of the wider regeneration strategy for the area.
- **Warwick –** Leisure uses are rather spread across the middle of the town centre reflecting its historic pattern. The provision of restaurants and pubs is generally dominated by independents with the Giggling Squid representing a key branded casual dining fascia. There are also a number of independent coffee shops and cafes with Costa Coffee representing the commercial chain offer. The Experian Goad (2017) data shows there are 24 restaurants, 17 cafes, 11 public houses, 11 fast food takeaways and 5 bars.
- **Kenilworth –** Within the town centre the majority of cafes and restaurants are located around the main artery of Warwick Road. The main offer is dominated by independents. Representation from chains is in the form of casual dining operator Zizzi’s and Costa Coffee. These complement to the retail offer and vibrancy of the town centre. The Experian Goad (2016) data shows there are 14 restaurants, 6 bars, 6 cafes, 5 fast food takeaways and 3 public houses.

10.31 The HTIS identified where people living in the study area currently choose to eat and drink, and whether there are potential ‘gaps’ in the current offer. The survey shows that some 78.6% of respondents visited a restaurant or café as a leisure attraction, making it the most popular leisure activity and some 50.8% visited a pub/bar/nightclub. The headline results show that from the study area (zones 1-10), 27% respondents eat out in restaurants once a month, 26.5% of respondents once a week and 21.8% once a fortnight. Considering the core zones (1, 2, 3 & 7), 29.3% respondents eat out in restaurants once a month, 24.9% of respondents once a week and 18.1% once a fortnight more than once a week.

10.32 The HTIS also shows where respondents choose to eat and drink. The popular choices of locations within the District, and from across the study area (zones 1-10), were: Royal Leamington Spa town centre (32%); Warwick town centre (11.4%) and Kenilworth town centre (9.9%). From within the core zones (1, 2, 3 & 7) the proportionate market share increases as follows: Royal Leamington Spa town centre (56.5%); Warwick town centre (17.5%) and Kenilworth town centre (19.3%). Other competing centres outside of the Council area (and from the study area zones 1-10) were Stratford–upon-Avon (14%) and Coventry City Centre (12.2%).

10.33 In terms of pub/bar/nightclub visits, the headline findings show that from the study area (zones 1-10), 35.9% of respondents frequent these once a week, 18.9% once a fortnight and 19.6% once a month. The popular choices for pubs, bars and nightclubs mirror those for restaurants from across the study area (zones 1-10) Royal Leamington Spa town centre (29.7%); Warwick town centre (12.9%) and Kenilworth town centre (9.1%). Other competing centres outside of the Council area were Stratford–upon-Avon (10.7%) and Coventry City Centre (13.2%).

10.34 Evidence from other centres in the UK shows that improving a town centre’s food and beverage offer can significantly increase the attraction of daytime and evening economies for different customer profiles, as well as generating higher footfall, dwell times and increased expenditure in centres. In summary the qualitative ‘gap’ analysis shows that in response to the question as to what improvements could be made to commercial leisure offer that would encourage people to participate more in the District; from across the study area only 0.2% stated that they would like more pavement cafes, 0.4% would like more quality restaurants and 0.2% would like more would like more/better public houses. This indicates that there is already a varied and diverse range in the current offer across the District.

10.35 Turning to the potential need for F&B uses (floorspace), the total available expenditure for food and drinking in the Council area (Zones 1, 2, 3 & 7) is £155.3m in 2018. This is set to increase by 28.7% to £199.8m by 2029 as shown in **Table 10.6**.

Table 10.6: Total Leisure Spend in the District Area (Zones 1, 2, 3 & 7) (£m)

	LPA Area (Core Zones 1,2, 3 & 7) : Total Leisure Spend (£m)				Change: 2018-2029 (£m)	Change: 2018-2029 (%)
	2018	2023	2026	2029		
Accommodation	31.9	35.6	38.2	41.0	£9.1	28.7%
Cultural services	41.0	45.8	49.2	52.8	£11.8	28.7%
Games of chance	17.9	20.0	21.4	23.0	£5.1	28.7%
Hairdressing salons & personal grooming	12.7	14.2	15.3	16.4	£3.6	28.7%
Recreational & sporting services	15.6	17.4	18.7	20.1	£4.5	28.7%
Restaurants, cafes, etc.	155.3	173.3	186.2	199.8	£44.5	28.7%
Total	**274.4**	**306.3**	**329.0**	**353.0**	**£78.6**	**28.7%**

10.36 The household survey has indicated a relatively strong retention in the District of expenditure (94.9%) for eating and drinking out. An appropriate strategy should seek to maintain this market share over the forecast period to 2029.

10.37 On this basis, the available expenditure has been projected forward to 2029 and any residual expenditure available to support new A3-A5 floorspace over the development plan period will be derived from the difference between the forecast growth in 'current' (survey-derived) turnover levels and the growth in 'benchmark' turnovers after applying robust year-on-year 'productivity' ('efficiency') growth rates to all existing floorspace at 1% per annum. The analysis also takes account of the following commitments (also detailed at **Section 9**):

- **Planning Reference: W/14/1076 – Land between Myton Road, and Europa Way, Warwick –** As detailed previously, the derived net floorspace for A3 & A4 uses is 175 sqm.
- **Planning Reference W/14/0661 – Land at Lower Heathcote Farm, Harbury Lane, Warwick –** As detailed previously, the derived net floorspace for A3, A4 & A5 uses is 588 sqm.

10.38 The resulting residual expenditure has been converted into floorspace projections using a 2018 average sales density of £5,000 per sqm net (inflated by 1% per annum over the plan period to 2029). **Table 10.7** summarises the high level capacity forecasts for new Class A3-A5 floorspace on this basis.

Table 10.7: Eating and Drinking Out – Projected Gross Floorspace (sqm)

	2023	2026	2029
Total Available Expenditure in Core Zones 1,2, 3 & 7 (£m)	173.3	186.2	199.8
Current retained turnover (£m)	164.5	176.7	189.6
Benchmark turnover (£m)	154.9	159.6	164.4
Net Residual Excluding Commitments (£m)	**9.6**	**17.1**	**25.2**
Turnover of Committed Floorspace (£m)	**4.0**	**4.1**	**4.3**
NET RESIDUAL EXPENDITURE AFTER COMMITMENTS: (£m)	**5.6**	**13.0**	**20.9**
Capacity (sq m gross) based on a sales density of: £5,000/sqm net	1,525	3,418	5,358

Notes: Gross to net ratio of 70% applied.
Commitment refers to those stated above.

10.39 Capacity is identified for up to 1,525 sqm gross in the short term to 2023. Over the medium term to 2026 this is forecast to increase to 3,418 sqm gross and 5,358 by 2029. This forecast should be directed to the town centres first to help increase competition and choice, and to help underpin their daytime/evening economies in accordance with national and local policies. New facilities in would help to increase dwell times and attract new town centre users.

10.40 However the need for new cafés, restaurants and bars is highly dependent on the level of market demand and confidence in town 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. As the analysis has shown there is already a strong demand and retention from within the District wide catchment and that the current offer is varied and diverse. The key opportunity to enhance footfall is within the 'old town' area of Royal Leamington Spa.

HEALTH & FITNESS NEED

10.41 The health and fitness market has generally performed well during the economic downturn. The latest statistics from the Leisure Database Company (LDC)[52] show that over the twelve month period to March 2017, the industry has grown its total market value by 6.3% to £4.7 billion, and its member base by 5.1% to 9.7million. According to the LDC there were an estimated 6,728 fitness facilities in the UK up from 6,435 facilities in 2016, which represented a 4.6% net increase from the previous year. 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;
- LA Fitness, Fitness First and Bannatyne's Health Clubs – operate smaller in-centre clubs at the more value end of the market; and

[52] Leisure Database Company : The 2017 State of the UK Fitness Industry Report

- Within London smaller ‘boutique’ gyms are popular, such as Soho Gyms, which have facilities across the City.

10.42 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 is growing steadily and lead by Pure Gym with 176 gyms in 2017. Other popular low cost brands include Anytime Fitness, EasyGym, Fitness 4 Less, Fitspace, TruGym and SimplyGym. The low cost business models is based on 24-hour opening, discounted monthly subscriptions (of between £10 and £20 on average) and ‘pay as you go’ membership. According to LDC, and in 2017, the low cost gym sector accounted for 15% of total private clubs and 35% of private sector membership.

10.43 Overall, the proportion of the population in 2017 with a gym membership in the UK was estimated at 14.9%, up from 14.3% in 2016 and 13.7% in 2015. According to 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 membership increases to 2,897, while budget chains are even higher at 3,452 members.

10.44 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 can help to create a wider range of attractions and activity in town centres, particularly in the evenings and at weekends.

10.45 The table below summarises the current representation of the main national, regional, independent, privately-owned as well as Council-owned leisure centres health and fitness operators across District.

Table 10.8: Leisure Centres, Gyms & Fitness Clubs Across WDC Area

Centre	Category	Operator	Private Sector	Public Sector
Leamington Spa	Gyms	Bizz Fitness	✓	
		Cleary's Boxing Gym	✓	
		Lear Fitness	✓	
		Pinx Gym	✓	
		Pure Healthclub/ Gym	✓	
		The Workout Mill	✓	
	Sports & Leisure Centres	Sydenham Sport Centre	✓	
		Sydenham Community Centre	✓	
		New bold Comyn Leisure Centre		✓
		Leamington Tennis Club	✓	
	Clubs & Hotels	Leamington Law n Tennis & Squash Club	✓	
		Leamington Athletics Academy	✓	
		Royal Leamington Spa Canoe Club	✓	
		Mallory Court Country House Hotel & Spa	✓	
Warw ick	Gyms	LA Fitness	✓	
		Nuffield Health	✓	
		Peak Fitness	✓	
		Urban Sports and Fitness	✓	
		Freedom Leisure	✓	
		Fitness Worx	✓	
	Sports & Leisure Centres	Ardencote Manor Leisure Club	✓	
		John Atkinson Sports Centre	✓	
		St Nicholas Park Leisure Centre / Gym		✓
	Clubs & Hotels	Living Well, Hilton Hotel	✓	
		The Warw ickshire Golf & Country Club	✓	
Kenilw orth	Gyms	Curves of Kenilw orth	✓	
		Fitness Worx	✓	
		Anytime Fitness	✓	
	Sports & Leisure Centres	Castle Farm Recreation Centre		✓
		Abbey Fields Sw imming Pool		✓
	Clubs & Hotels	Chesford Grange Health Club	✓	

10.46 The table shows a good representation by private operators across the District area. This is supplemented by public sector provision such as the Newbold Comyn Leisure Centre (which has planning permission for a extension Ref: W/16/0784), St Nicholas Park Leisure Centre[53], Castle Farm Recreation Centre and Abbey Fields Swimming Pool.

10.47 In terms of fitness/health activity participation rates, the household survey results show that 28.3% of respondents visited a gym, health club or sports facility from the study area (Zones 1-10) and 34.1% within the core Council area (Zones 1, 2, 3, and 7). Of these 73.3% visited more than once a week and 15.7% once a week and 7.7% once a fortnight. Nuffield Health in Warwick is the most popular venue attracting a market share of 9.5% from the study area. This is followed by The Xcel Leisure Centre in Coventry (8.6%), Newbold Leisure Centre in Royal Leamington Spa (7.7%), Stratford Leisure Centre in Stratford upon Avon (6.6%) and The Warwickshire Golf & Country Club (5.4%).

10.48 In terms of supporting new facilities, there is likely to be demand for new provision across the study area given that the population of the District is forecast to increase by 17,799 from 2018 to 2029 (Zones 1,2,3&7). Applying the participation rate (53.4%) for gym and health and health club activities identified for the District area, this results in some 9,504 potential new gym members over this period. Based on average membership levels of

[53] St Nicholas Park Leisure Centre was also granted planning permission for the extension to existing leisure centre and to provide a new 80 station gym, 2 new group exercise studios and a climbing wall (Ref: W/16/0777 granted on July 2016). This is complete and in operation.

2,897 members for commercial gym operators and 3,452 members for budget gyms, this quantum of population is able to support three commercial or budget type of operators (respectively) over the forecast period to 2029.

10.49 Finally, in response to the question as to what improvements could be made to commercial leisure offer that would encourage people to participate more in leisure activities, 3.7% suggested a swimming pool, 2.1% stated the addition of health clubs and 1.2% suggested better leisure facilities in general. This demonstrates low latent demand and a general satisfaction of the offer available in the Council area which is set to be enhanced with the extension to the Newbold Leisure Centre in Royal Leamington Spa.

BINGO & GAMBLING NEEDS

10.50 Gambling represents a significant 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 Council area, if any, based on the available evidence.

10.51 In terms of **Bingo** Halls, the latest research by The Gambling Commission (Industry Statistics November 2015) indicates that there are over 599 licensed premises in operation in the UK, which is a reduction from 653 recorded in 2014. Gala Leisure and Mecca Bingo are the leading operators accounting for over a third (36.9%) of all premises. 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. In response to falling admissions, bingo operators are increasingly taking advantage of the online market and embracing smart-phone 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 diversify 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. The above has resulted in the closure of many bingo halls across the UK.

10.52 For **Casinos** research shows that there were some 147 in the UK in September 2015. The number of premises has remained fairly static over the past five years. This sector is dominated by two companies: the Rank Group (incorporating Grosvenor Casinos and Gala Coral Casinos) and Genting UK. There has been consolidation of the sector in the past few years, with acquisitions such as Rank Group’s purchase of Gala Coral Casinos making it the largest operator in the UK. While casino attendance has grown from 18.24m in 2012 to 20.44m in 2015, attendance dropped by 2.6% from 2014 (20.99m). The increase in attendance since 2012 is largely explained by larger new casino venues granted licences under the 2005 Gambling Act. As far as we are aware there are no major casinos located within the Council area with the nearest major facilities being the Genting Casino (in Coventry and Birmingham) and the Grosvenor Casino (in Coventry).

10.53 **Betting shops** currently represent a growing market in the gambling sector. There are approximately 9,000 betting shops in the UK, of which around half are operated by Ladbrokes and William Hill. Regulatory changes in 2015 led to a fall in revenue and profit. In response, William Hill announced their intention to close 150 of their 2,300 outlets. As gambling activities continue their shift to online channels, demand for physical outlets could dampen in the future. The presence of betting shops in high streets is a contentious issue, particularly the perceived social issues that are linked to this particular activity (e.g. anti-social behaviour); potential for adverse impacts on health and wellbeing and their concentration in deprived areas. The Government has recognised that betting shops have specific impacts and in 2016 reclassified betting shops from A2 to Sui Generis use. This reclassification gave local authorities greater control on managing the number of outlets and therefore greater potential to limit impacts associated with betting shops.

10.54 According to the Experian Goad Category Reports, Kenilworth has one betting office, Warwick has two and Royal Leamington Spa has five. This provision across all centres is below the national average.

10.55 The HTIS results indicate that 3.5% of respondents living in the study area visit bingo clubs, casinos or bookmakers. Of those respondents who partake, 34.8% visit once every two months, 29.3% visit once every month, and 10.2% visit once a fortnight. The most popular named facilities include Gala Bingo on Brade Drive in Coventry (19.4%) and the Gala Bingo on Fairfax Street also in Coventry (10.6%).

10.56 In our judgement, there is no demonstrable need to enhance existing provision to improve competition and choice at the local level. Given that current trends for bingos and casinos show activity moving online instead of physical venues, future demand for new venues is expected to be very limited.

10.57 Finally, in response to the question as to what improvements could be made to commercial leisure offer that would encourage people to participate more in leisure activities, only 0.2% of respondents to the household survey stated that they would like a bingo hall with a no response for a casino. These findings further demonstrate the lack of demand for bingo and gambling facilities in the Council area.

OTHER COMMERCIAL LEISURE NEEDS

10.58 Other commercial leisure facilities can be grouped together under ‘family entertainment’ venues which include paid activities that appeal to adults and children; such as, for example, tenpin bowling, roller skating, ice skating, and similar uses.

10.59 Tenpin bowling is possibly the most popular of this category and has been established as a commercial leisure activity in the UK for over 40 years. It remains a strong family and group activity. Research shows that there are currently over 321 bowling centres in the UK. This sector benefited 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.

10.60 There is only one ten-pin bowling facility located in the Council area notably the Tenpin at the Shires Retail Park. The HTIS indicates that this is the most popular venue for this activity (36.5%), followed by the Tenpin Bowling in Coventry (6.1%).

10.61 The survey further indicates that 19.2% of respondents from the study area partake in family entertainment activities. Compared to other commercial leisure activities, family activities are carried out less frequently with the majority of respondents engaging in family entertainment once every six months (32.4%); 24.2% once a year or less, and 17.4 every two months.

10.62 In response to the question as to what improvements could be made to commercial leisure offer that would encourage people to participate more in leisure activities, 5.7% of respondents to the household survey stated that they would like more facilities for children and 0.8% stated ten-pin bowling. As such, in terms of future needs, the District could benefit from a wider range of family activities, such as a multi-use venue. The potential for new family activity venues will be subject to market demand and should be directed to a town centre location.

CULTURAL ACTIVITIES

10.63 Cultural activities include a broad range of activities that are focused on the arts and historic attractions. For the purpose of this assessment, consideration is given to the provision of theatres, music venues, and historic/ cultural attractions across the Council area. A list of some popular cultural venues (including theatres, music venues, museums and art galleries) are set out in the table below:

Table 10.9: Cultural Venues in the Council Area

Type	Centre	Operator
Theatres, concerts and music venues	Leamington Spa	Loft Theatre
		The Assembly
		Royal Spa Centre
	Warwick	The Bridge House Theatre
		The Dream Factory
	Kenilworth	Talisman Theatre
		The Priory Theatre
Museum, gallery and places of historical interest	Leamington Spa	Leamington Art Gallery and Museum
	Warwick	St Johns House Museum
		The Queens Own Hussars Museum
		Market Hall Museum
		Warwickshire Yeomanry Museum
		Warwick Castle
	Kenilworth	Kenilworth Castle

10.64 Cultural venues in the Council area are relatively extensive. The results of the HTIS indicate that 29.5% of respondents from the study area visit museums, galleries and places of historical interest. The HTIS confirms that this form of activity is carried out infrequently, with the majority of respondents visiting places of cultural interest (i.e. museums, galleries, etc.) once every six months (28.5%) or once a year or less (16.8%). The most popular location for those visiting cultural venues is the Herbert Art Gallery in Coventry (17.3%) and the Warwickshire County Museum (11.3%). Other notable responses include 'Central London/West End' (27.7%), Coventry Transport Museum (7.2%) and Leamington Art Gallery (5.7%).

10.65 With regard to theatres and music venues, the HTIS shows that 41.0% visit these facilities. In terms of frequency of visits, 40.3% of respondents visit a theatre or music venue once every six months, with 28.2% visiting once every two months. The most popular location for those visiting music venues is the Royal Shakespeare Theatre in Stratford upon Avon (18.3%), Belgrade Theatre in Coventry (15.1%), and Warwick Arts Centre (10.3%).

10.66 In response to the question as to what improvements could be made to cultural venues, only 0.2% stated the addition of cultural facilities, 0.2% suggested art houses and classes, and 0.2% suggested improvements to live music and concerts. This illustrates the lack of demand for this type of facilities in the Council area

HOTEL PROVISION

10.67 Hotel provision across the Council area is predominates around Royal Leamington Spa and Warwick. It is supported by both national and independent operators with the latter having a strong presence. The provision of hotels is outlined in the table below.

Table 10.10: Hotels in the WDC Area

Centre	Hotel	Price per night
Leamington Spa	Falstaff Hotel	£38
	Marvel Aprtments	£59
	Episode Hotel	£73
	Angel Hotel	£105
	Travelodge The Regent	£40
	Premier Inn	£69
	Victoria Park Lodge	£88
	Serviced Apartments Leamington Spa	£117
	Hedley Villa Guest House	£68
	Thomas James	£45
	Holiday Inn	£55
Warwick	Hilton Hotel	£71
	Jersey Villa Guest House	£60
	Austin Guest House	£40
	Westham Guest House	£60
	Cambridge Villa Hotel	£75
	Park House Guest House	£60
	Castle Limes Hotel	£80
	The Black Horse Inn	£70
	The Old Coffee Tavern	£92
	The Globe	£61
	The Tilted Wig	£60
	The Warwick Arms Hotel	£80
	The Old Fourpenny Shop Hotel	£77
	Warwick Castle Knight's Village	£134
	The Tudor House	£80
	Premier Inn	£69
Kenilworth	Loch Fyne Resturant and Hotel	£67
	Holiday Inn	£71
	Ferndale House	£63
	Woodside	£90
	The Kenilworth	£95
	The Peacock Hotel	£52
	Arden Guest House	£63

10.68 As the table above shows, provision across all centres is dominated by independently owned hotels, apartments, bed & breakfasts and guesthouses and across a broad price base. There are three national operators within these centres, namely Holiday Inn (Royal Leamington Spa & Kenilworth), Premier Inn (Royal Leamington Spa & Warwick), Travelodge (Royal Leamington Spa) and Hilton (Warwick).

10.69 In summary, based on our high level assessment, whilst the current hotel provision in the District is considered adequate, future investment in the area is likely to create opportunities for significant improvements in the sector. In addition, as has been highlighted in the SWOT analysis for the key centres, a broader strategy for the District is to market and promote the offer and attractions to a wider 'audience' to help attract all-year trips. In this way there may be potential opportunities for growth in this sector. The Council should undertake a periodic assessment of current supply of hotel rooms, occupancy rate and revenue generated (RevPAR)[54] to get an understanding of performance and any potential for growth.

[54] Revenue Per Available Room (RevPAR) - Total room revenue divided by the total number of available rooms.

SUMMARY

10.70 The commercial leisure industry faces considerable challenges and pressures. 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, gaming, and audio technology. The challenge for town centres and leisure operators in the future will therefore be to attract customers away from their homes.

10.71 Our review of the Council's commercial leisure sector and offer, and the results of the household survey, indicate that there is an adequate level of leisure facilities (for example food and drink).

10.72 In terms of cinema provision, the assessment found that whilst the retention level for cinemas from across the 73.5% in the District area (Zones 1, 2, 3, & 7). Future market demand from cinema operators should be directed to town centres in line with national and local plan objectives.

10.73 The total available expenditure for food and drinking in the Council area (Zones 1, 2, 3 & 7) is £155.3m in 2018. This is set to increase by 28.7% to £199.8m by 2029. The identified A3 – A5 capacity is for up to 1,525 sqm gross in the short term to 2023. Over the medium term to 2026 this is forecast to increase to 3,418 sqm gross and 5,358 by 2029. The prospect for new facilities is however ultimately determined by the level of market demand and interest and should be directed to town centres to enhance the complementarity they bring to the town centres.

10.74 Given that the population of the Council study/catchment area is forecast to increase compounded further by the popularity of the need for a healthier lifestyle, there may be potential scope for new health and fitness facilities subject to market interest and demand and other planning considerations. Applying the participation rate (53.4%) for gym and health and health club activities identified for the District area, this results in some 9,504 potential new gym members over this period. Based on average membership levels of 2,897 members for commercial gym operators and 3,452 members for budget gyms, this quantum of population is able to support three commercial or budget type of operators (respectively) over the forecast period to 2029.

10.75 Additionally, in terms of addressing future needs, the Council could benefit from a wider range of family activities, such as a multi-use venue. The potential for new family activity venues will be subject to market demand and should be directed to a town centre location.

10.76 The Council area benefits from a diverse range of arts and historic attractions which contribute to the visitor economy of the area. These need to be maintained and promoted to maintain their current status and attract other further visitors to the area. Whilst the current hotel provision in the District is considered adequate, future investment in the area is likely to create opportunities for significant improvements in the sector.

11. REVIEW OF PRIMARY AND SECONDARY FRONTAGES AND TOWN CENTRE BOUNDARIES

11.1 This section provides a review on the extent of the existing Primary Frontages (PFs) and Secondary Frontages (SFs) in the District's main centres of Royal Leamington Spa, Warwick and Kenilworth. This assessment has been carried out in accordance with the advice and guidance set out in the NPPF.

POLICY CONTEXT

11.2 In setting out policies for the management and growth of centres over the plan period, and promoting competitive town centre environments, local planning authorities are required by the NPPF (paragraph 23) to 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.

11.3 The NPPF (Annex 2) defines primary and secondary frontages as follows:

- **Primary Frontages (PFs)** - likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods.
- **Secondary Frontages (SFs)** - provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.

11.4 The difference between the definition of the Primary Shopping Area (PSA) and Town Centre Boundary (TCB) is defined by NPPF (Annex 2) as follows:

- **Primary Shopping Area (PSA)** – the area where retail development is concentrated and generally comprises the PFs and those SFs which are 'adjoining and closely related to the PF's.
- **Town Centre Boundary (TCB)**[55] – defined as the area on the local authority's proposal map, including the PSA and areas predominantly occupied by main town centre uses within or adjacent to the PSA. 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 centres uses, do not constitute town centres.

11.5 The definition of a centre's PSA and TCB is important in retail planning terms in respect of the following:

- First, for the purposes of plan making and development management, sites and applications for new retail, leisure and other main town centre uses that are not in an existing centre and not in accordance with an up-to date Local Plan will be subject to the sequential and impact 'tests' in accordance with the NPPF (paragraphs 24-27).
- Second, in terms of applying the sequential approach for both plan making and decision-taking, an 'edge-of-centre' site is defined for retail purposes by the NPPF (Annex 2) as a location that is '*well connected and up to 300 metres of the primary shopping area*'. For all other main town centre uses it is a location '*within 300 metres of a town centre boundary*'; and for office development, it includes '*locations outside the town centre but within 500 metres of a public transport interchange*'. The NPPF states in determining whether a site falls within the definition of edge-of-centre, '*account should be taken of local circumstances*' and preference should be given to '*accessible sites that are well connected to the town centre*' (NPPF, paragraph 24).

[55] 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.

- Third, defining the extent of the PF and PSA for town centres will also enable local planning authorities to manage Permitted Development Rights (PDR), principally from retail to residential use.

11.6 It is against this policy background and guidance that we have necessarily reviewed and identified the extent of each centre's PF, SF, PSA and Town Centre Boundary (all where relevant). Our assessment has been based on the evidence from our healthcheck assessments of each centre. In reviewing each centre consideration has been given to the current mix of uses and vacancies within the centre and its constituent parts as well as the current levels of use and any development proposals which may alter the attractiveness of the centre or use of parts of it.

11.7 In terms of policies in the Local Plan the following are of relevance:

- Town Centre Boundary: **Policy TC1 -** (Protecting and Enhancing the Town Centres) sets out that development proposals for main town centre uses will be permitted in town centres if they are of an appropriate scale with regard to the role and function of the town centre. It ensures that proposals will also reflect the character and form of the town centre.
- Primary Retail Frontages: **Policy TC6 -** sets out the requirements in Primary Frontages. It stipulates that changes of use from Use Class A1 to Use Class A2, A3, A4 or A5 will be permitted provided that: no more than 25% of the total length of the frontage would result in non-A1 use; and that the proposal would not contribute to creating a continuous non-A1 frontage of more than 16 metres.
- Secondary Retail Areas: **Policy TC7 -** sets out the requirements in Secondary Frontages. It stipulates that changes of use from Use Class A1 to Use Class A2, A3, A4, A5, C1 or D2 will be permitted provided that: no more than 50% of the total length of the frontage would result in non-A1 use; and that the proposal would not contribute to creating a continuous non-A1 frontage of more than 16 metres. Proposals which do not meet the second criterion may be accepted where they would not have a prominence in the streetscape that would affect the character of the area.

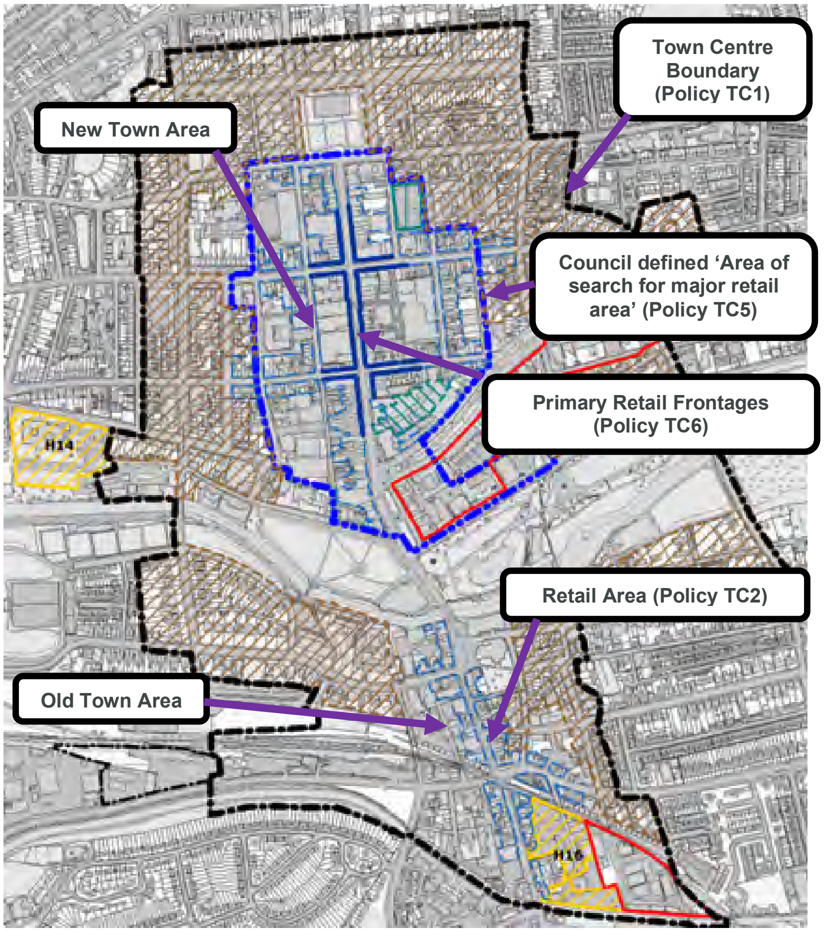
DEFINITIONS OF FRONTAGES AND TOWN CENTRE BOUNDARIES

11.8 Our review for each of the centres is detailed below. The assessment should be reviewed alongside the current boundary and frontage plans for each centre as defined in the Warwick District Local Plan (2017) especially under Policy TC6 (Primary Retail Frontages) and Policy TC7 (Secondary Retail Areas).

Royal Leamington Spa Town Centre

11.9 The extent of the TCB is shown at **Figure 11.1**.

Figure 11.1: Royal Leamington Town Centre: TCB & Frontages



Source: Warwick District Local Plan (2017) / CJ Annotations

11.10 The extent of the TCB can be very broadly described as follows: It extends to Clemens Street to the south; the A452 to the west; Beauchamp Avenue to the north; and the junction between Leam Terrace and Willies Road to the east. The TCB is considered to be appropriate given that it includes all major retail and town centre uses.

11.11 There is no defined Primary Shopping Area (PSA), but the local plan does set out an area of 'Search for Major Retail (Policy TC5)'. A review of this area shows that it covers a high proportion of retail uses closely related to the PF. We recommend that the Council should consider a further audit of units within this area to define an appropriate PSA for the centre.

11.12 The extent of the current PF for Royal Leamington Spa Town Centre is also shown in **Figure 11.1** and tabulated below. These are all located within the 'New Town' area. A review of these suggests that it is correct and incorporates a high concentration of A1 uses. We nevertheless recommend a regular monitoring of the retail provision/units in this area especially in the light of the rapid structural changes taking place within the retail sector.

Table 11.1: Royal Leamington Town Centre: Distribution / Location of Primary Frontages

Street Name:	Property Number:
Parade	22-124, 15-87
Warwick Street	47-71, 52-84
Regent Street	63-123, 64a-90

Source: Warwick District Local Plan (2017)

11.13 It is noted that there is no defined Secondary Frontage on the Proposals Map accompanying the Local Plan. Notwithstanding this, under Policy TC7 of the Local Plan, secondary retail areas are defined as "…*those retail areas identified on the Policies Map that are not otherwise defined as primary retail frontage…*". A review of these areas indicates that they are correct and contain a higher diversity and mix of uses. The broad extent of these are detailed below. The majority of the 'Old' town in particular falls within this category.

Table 11.2: Royal Leamington Town Centre: Distribution / Location of Secondary Frontages

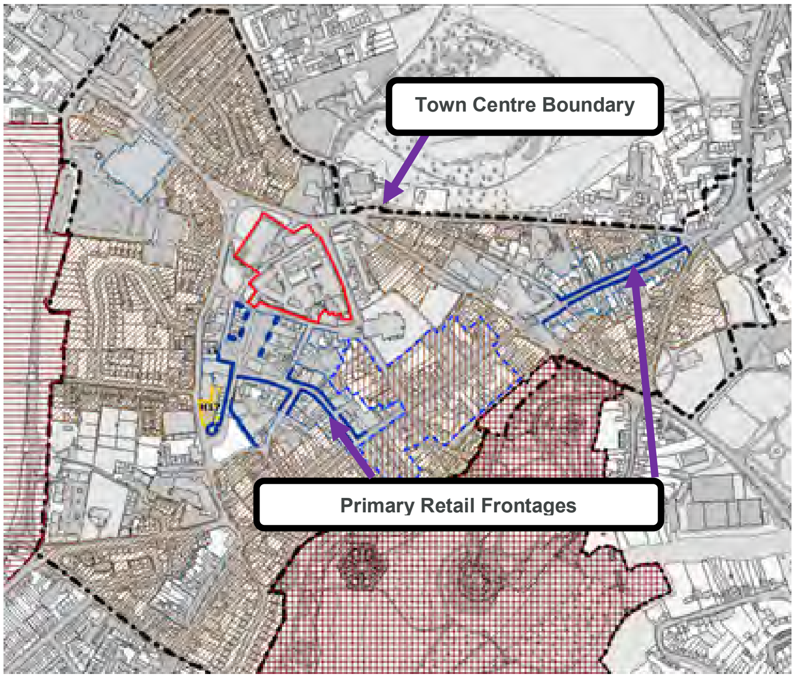
Street Name:	Property Number:
(North of River Leam)	
Clarendon Avenue	4-8
Parade	2-20, 9-13, 126-170
Warwick Street	31-45a, 38-50, 73-119, 86-130
Regent Street	22-62, 25-61, 98-124, 125-141,
Portland Street	21-29
Park Street	1-51, 2-44
Bedford Street	2-42
Regent Grove	1-49
(South of River Leam)	
Victoria Terrace	2-24
Spencer Street	1-15, 6-14
Church Walk	1-4
Gloucester Street	2-14
Bath Street	11-49, 26-66
Regent Place	1-11, 4-6a
High Street	12-52, 21-47
Clemens Street	2-36, 1-43

Source: Warwick District Local Plan (2017)

Warwick Town Centre

11.14 The extent of the TCB is shown at **Figure 11.2**.

Figure 11.2: Warwick Town Centre: TCB & Frontages



Source: Warwick District Local Plan (2017) / CJ Annotations

11.15 The TCB is considered to be appropriate given the Centre's historic street pattern and as it covers all major retail and town centre uses including historic and tourism related uses.

11.16 There is no defined PSA but two designated locations of PFs. The extent of these are shown in **Figure 11.2** and comprise the areas defined below. Upon review these are considered to be correct. These areas could potentially represent the PSA's and recommend that the Council undertake a detailed audit of provision at the appropriate time.

Table 11.3: Warwick Town Centre: Distribution / Location of Primary Frontages

Street Name:	Property Number:
Smith Street	7-61, 2-76
High Street	22
Swan Street	2-30, Former National Westminster Bank and Radio House, 1-13
Brook Street	38-50, 49-53
Market Place	30-34, 50-72,
Market Street	1-40
The Holloway Westgate House	1-6

Source: Warwick District Local Plan (2017)

11.17 In relation to the secondary retail areas, and as detailed previously, these are the retail areas that are not otherwise defined as primary retail frontage. These are detailed below and considered to be correct.

Table 11.4: Warwick Town Centre: Distribution / Location of Secondary Frontages

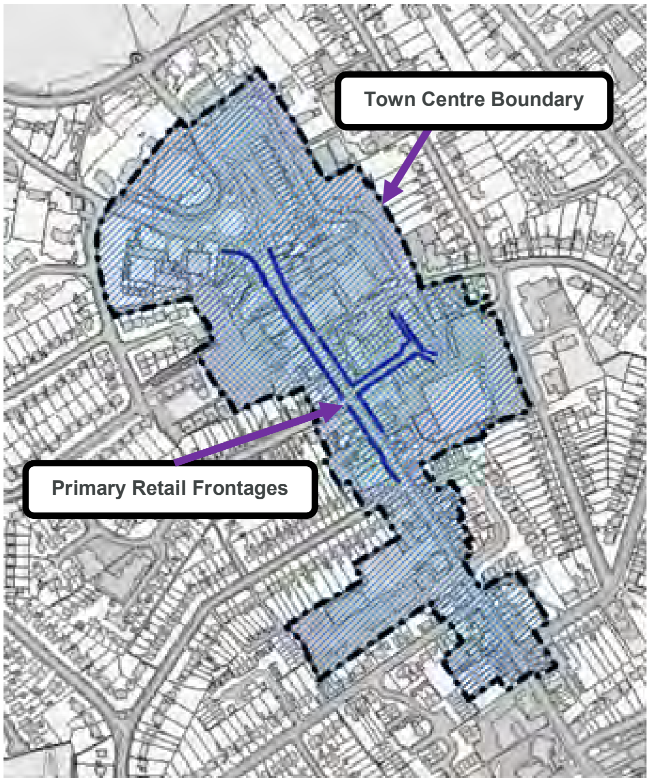
Street Name:	Property Number:
West Street	8-44
High Street	2-20
Old Square	5-21
New Street	1-11, 2-6a
Market Place	13-21a
The Holloway	2-10
St Johns	1-33

Source: Warwick District Local Plan (2017)

Kenilworth Town Centre

11.18 The extent of the TCB is shown at **Figure 11.3**.

Figure 11.3: Kenilworth Town Centre: TCB & Frontages



Source: Warwick District Local Plan (2017) / CJ Annotations

11.19 The TCB is considered to be appropriate given the broadly linear nature of the centre as it covers all major retail and town centre uses.

11.20 There is no defined PSA but there is a designated PF. The extent of these are shown in **Figure 11.3** and comprise the areas defined below. Upon review these are considered to be correct. This area could potentially represent the PSA for the centre upon detailed audit of provision by the Council.

Table 11.5: Kenilworth Town Centre: Distribution / Location of Primary Frontages

Street Name:	Property Number:
Smalley Place	1-7
The Square	1-29, 2-50
Warwick Road	1-27, 2-42
Talisman Square	1-27

Source: Warwick District Local Plan (2017)

11.21 In relation to the secondary retail areas, and as detailed previously, these are the retail areas that are not otherwise defined as primary retail frontage. These are detailed below and considered to be correct.

Table 11.6: Kenilworth Town Centre: Distribution / Location of Secondary Frontages

Street Name:	Property Number:
Abbey End	1-59, 85-89
Warwick Road	29-69, 44-100, 93-103,
Waverley Road	60

Source: Warwick District Local Plan (2017)

SUMMARY

11.22 In summary, the assessment of the each centres TCB, PF and SF shows that these are appropriately defined. Notwithstanding this we recommend that the Council monitors existing provision in the light of the structural changes in the retail market and the resulting effect on physical space in the town centres. Additionally, we recommend that the Council defines PSA's across the three centres based on a detailed audit of provision across the centres.

12. KEY FINDINGS

12.1 This final section summarises the key findings of the Retail and Leisure Study. It sets out high level advice on how the Council can effectively plan for, manage and promote the vitality and viability of the main centres over the plan period to 2029.

12.2 Our advice is informed by the updated assessment of the quantitative and qualitative need for new retail (comparison and convenience goods) floorspace and commercial leisure uses up to 2029. The need assessment draws on a robust and up-to-date evidence base and new primary research, including: (i) a health check of Royal Leamington Spa, Warwick and Kenilworth; and (ii) a telephone interview survey of some 1,005 households across the local authority area and a wider defined Study Area to help establish current shopping patterns, leisure preferences and market shares.

12.3 The study has been prepared in the context of national and development plan policy guidance, as well as other key material considerations. This includes the *National Planning Policy Framework* (NPPF) and the *Planning Practice Guidance* (PPG), which place weight on the development of positive plan-led visions and strategies for town centres, and promote new investment and development in town centres first ahead of edge and out-of-centre locations.

12.4 Based on the District-wide and centre capacity forecasts, the following provides a brief summary of:

- each of the main centres' relative health, role and function;
- the forecast quantitative and qualitative need for new convenience goods and comparison goods retail floorspace;
- a reasonable and robust impact 'threshold' in accordance with the NPPF and PPG that will allow the Council to assess and understand any likely impacts from new edge and out of centre applications on the vitality and viability of each main centre; and
- a review of PFs, SFs and TCB for the main centres.

CENTRE OVERVIEW

Royal Leamington Spa

12.5 The healthcheck has demonstrated that the centre has an attractive environment and a rich historic heritage. The centre is highly accessible and is divided into the 'old' and 'new' parts, with the former dominating key multiple retail and casual dining provision and the latter providing lower value retailing and functions as an ancillary secondary shopping area.

12.6 The centre is performing well against key performance indicators and there is active demand from retailers seeking representation. The centre's vacancy rate of 8.9% is also lower than the national average (11.2%). The centre is currently ranked 79th, improving its position from 84th in 2014.

12.7 The lower vacancy rate is a positive facet. However in the light of the of the changing fortunes of retailing and the resultant impact on high streets and town centres this cannot be taken for granted The recent announcement of the closure of the House of Fraser stores including the store in Royal Leamington Spa is testament to this fact. Ongoing monitoring and engagement with relevant stakeholders such as the Leamington BiD will be a key essential.

12.8 Over the long term and to ensure that the centre is vital and viable a key part of the Council's strategy should encompass diversity of uses with retail forming a contributing, but not necessarily the key driver, of its future. The household survey has shown that the centre's market share for both convenience and comparison goods has decreased and therefore gives an indication of the fragility of the centre. A contributing factor has been the competition from out-of-centre provision. In this way any investment should be directed to the town centre to ensure the continued vitality and viability of the centre and contribution to the wider footfall of the town centre.

12.9 Hence, and in relation to the relocation of the Council's headquarters on the site of the Covent Garden car park, it is important to ensure that as far as practicable alternative provision is maintained during its construction phase so as to maintain shopper draw and footfall to the centre.

12.10 The healthcheck has highlighted the use of the creative economy in regenerating the Old Town just south of the central shopping and business areas. This essentially may assist in 'binding' the 'old' part with the 'new' part as the Council seeks to create and refurbish building spaces and active public spaces. Over the long term this would provide vibrancy to this part and potentially create a more welcoming entry and thoroughfare in to the town centre via the railway station.

12.11 As the District's main centre and it is essential to capitalise upon a sustainable long term future, the emerging points for the Council to address in relation to Royal Leamington Town Centre are:

- **Monitoring Vacancies**: A regular monitoring exercise together with proactive engagement with landlords, investors and developers where vacancies occur.
- **Destination Marketing**: There is a need for co-ordinating branding, marketing and promotion of the town centre as a destination. This is essential in capturing the multiplier / spill over effects stemming from Coventry's City of Culture 2021 status and the 2022 Birmingham Commonwealth Games.
- **Creative Quarter:** The Council should proactively promote and maintain the momentum of this initiative. It represents a key element of diversity that can be brought in to the town centre and for the 'old' part to truly blend and integrate with the rest of the town centre.
- **Repurposing of Empty Space:** Over the longer term and moving forward, the Council may need to consider the repurposing and potential change of use of vacant retail units within the town centre. The repurposing of space may in the long term lead to more diversity and contribute to the vibrancy of the centre. Town centres are multi-purpose venues where people shop, live, share time or make use of public services (to name a few). For any centre to work optimally there needs to be a mix of uses that are complementary to its functioning. Empty space represents opportunities for other types of development such as residential, offices, bars and restaurants as well as other types of uses.

Warwick Town Centre

12.12 Warwick in comparison to Royal Leamington Spa is a more compact centre. It takes a traditional form with a historic street pattern and resulting smaller sized shop units. It has a good provision of shopping and leisure facilities typically found in a centre of its size and position within the retail hierarchy.

12.13 The historic pattern of the centre lends itself to a limited scale of development for expansion, but notwithstanding this it is nonetheless well thought of by local residents. Warwick also has a good level of accessibility but with no significant new investment in the recent past.

12.14 The centre has a vacancy level of 7.4%, which is below the GOAD national average of 11.2%. This is a positive indicator with interest from retailers seeking representation though it is acknowledged that retailers seeking modern retail footprints will be stymied by the historic nature and scale of available space across the centre.

12.15 However over time its retail ranking status has declined from 898th in 2014 to 968th in 2017. The historic nature entails that the town centre is constrained by its historic road system and therefore there are limited expansion opportunities. Notwithstanding this there would appear to be the scope to attract new entrants and enhance the quality of the independent offer. In this way it is also important for the centre to capitalise on its tourist status.

12.16 A strategy for the long term should be to proactively and continuously promote the centre as a family leisure destination and capitalise on its historic heritage. This is important to sustain and increase footfall and expenditure across the centre.

Kenilworth Town Centre

12.17 Kenilworth a historic town with a retail provision along the linear thoroughfare of Warwick Road that serves the day to day needs of its local catchment population. It has a good range of shopping and leisure facilities typically found in a centre of its size and position within the retail hierarchy. The centre is accessible via the road network through regional arteries (A46 and A452) that link to the main motorways (M6, M40 and M42). Additionally, Kenilworth railway station reopened in April 2018 with residents and visitors being able to use an hourly service between Coventry and Royal Leamington Spa, except for Sundays.

12.18 The retail profile of the centre is dominated by independent traders who contribute to the overall diversity, vitality and viability of the centre visit. In terms of representation by multiples this includes Boots, Wilko, WH Smith, Waitrose and Carphone Warehouse. The level of vacancy at 6.4% is considerably below the GOAD national average of 11.2%. The centre has an improving retail rankings performance from ranked 616th in 2014 to 608th currently.

12.19 The centre has benefited from recent investment in the form of the redevelopment of Talisman Square that has also boosted the retail profile of the centre. This is set to expand further by way of a £12 million redevelopment to the north side with retail units on the ground floor and student units on the upper floors. Furthermore, the centre will benefit from the additional expenditure generated from the new homes proposed as part of the allocation of housing sites in Kenilworth and south of Coventry.

12.20 The continued vitality and viability of the centre is dependent on building on its inherent provision and offer together with capitalising on the tourism spend associated with the District and specifically Kenilworth Castle.

PRIMARY AND SECONDARY FRONTAGES

12.21 We have also reviewed and identified the extent of each centre's primary and secondary frontages. In setting out policies for the management and growth of centres over the plan period, and promoting competitive town centre environments, local planning authorities are required by the NPPF (paragraph 23) to 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.

12.22 Our broad conclusions by centre indicate that the defined PF and SF areas are appropriately defined. We recommend that the Council monitors existing provision in the light of the structural changes in the retail market and the resulting effect on physical space in the town centres. Additionally, we further recommend that the Council defines a PSA across the three centres based on an audit of provision of the centres at the appropriate time.

RETAIL NEEDS ASSESSMENT

12.23 **Section 9** assessed the overall need for new (convenience and comparison goods) retail floorspace in the District over the plan period to 2029. The retail capacity assessment is informed by CJ's CREAT^{e} Capacity Model. The retail capacity assessment is underpinned by robust evidence and forecasts; it assumes that the retail market is in 'equilibrium' at the base year (2018) and that market shares remain constant over the study period. The assessment shows indicative economic capacity for convenience goods of the following quantum by 2029:

- **District-wide** – between 1,964 sqm net and 3,507 sqm net;

- **Royal Leamington Spa Town Centre** – between 201 sqm and 359 sqm net;
- **Warwick Town Centre** – between 81 sqm and 145 sqm net;
- **Kenilworth Town Centre** – between 28 sqm and 49 sqm net; and
- **All Out-of-Centre Floorspace** – between 1,654 sqm and 2,953 sqm net.

12.24 In relation to comparison goods, and as shown below, the District-wide level capacity is identified for up to 4,125 sqm net by 2023 rising to 13,396 sqm net by 2029.

Table 12.1 District-wide Comparison Goods Capacity Forecasts (sqm net)

	2023	2026	2029
Royal Leamington Spa Town Centre:	2,255	4,609	6,983
Warwick Town Centre:	224	457	693
Kenilworth Town Centre:	98	508	921
All Out-of-Centre Floorspace	1,549	3,167	4,799
TOTAL DISTRICT WIDE COMPARISON GOODS CAPACITY	**4,125**	**8,742**	**13,396**

Source: Table 3, Appendix 10 (Steps 5 & 6)

12.25 The comparison goods forecasts by centre are shown below:

- **Royal Leamington Spa Town Centre** – 6,983 sqm net by 2029;
- **Warwick Town Centre** – forecast capacity for 693 sqm net by 2029;
- **Kenilworth Town Centre** – 921 sqm net by 2029; and
- **Out-of-Centre Floorspace** – identified capacity of 4,799 sqm net over the period to 2029.

12.26 It is important to restate that capacity forecasts beyond five years should be interpreted with caution. This is because they are based on various layers of assumptions and forecasts with regard to changes in the national and local economy; the trading performance of existing centres and stores; the growth in population and retail spending; etc. For example, if the growth in Internet and multi-channel shopping is stronger than current forecasts suggest, then this could further 'dampen' the future demand and capacity for new (physical) floorspace over the long term. The Council should therefore take into account these margins for error when assessing the need for new retail floorspace over period to 2029.

12.27 In terms of the future allocation of the identified capacity, this should directed to the District's town centres and Royal Leamington Spa centre will remain at the apex of the hierarchy and the main focus of investment.

LEISURE NEEDS / GAP ASSESSMENT

12.28 **Section 10** of the study assesses the need for new commercial leisure uses and the 'gaps' in provision. The results of the HTIS indicate that there is currently an adequate level of leisure facilities (for example food and drink). Consumers are becoming increasingly selective in terms of where and how they spend their discretionary leisure spending and it is therefore important that there is the right mix of provision to retain this expenditure across the District.

12.29 In terms of cinema provision, the assessment found a good retention level for cinemas from across the District of 73.5%. Any future market demand from cinema operators should be directed to the District's existing town centres in line with national and local plan objectives and cinema provision outside of these centres should be resisted.

12.30 The total available expenditure for food and drinking in the District is set to increase by 28.7% to £199.8m by 2029. The identified A3 – A5 capacity is for up to 1,525 sqm gross in the short term to 2023. Over the medium term to 2026 this is forecast to increase to 3,418 sqm gross and 5,358 by 2029. The prospect for new facilities is however ultimately determined by the level of market demand and interest and should be directed to town centres to enhance the complementarity they bring to the town centres.

12.31 Given that the population of the Council study/catchment area is forecast to increase compounded further by the popularity of the need for a healthier lifestyle, there may be potential scope for new health and fitness facilities subject to market interest and demand and other planning considerations. Applying the participation rate (53.4%) for gym and health and health club activities identified for the District area, this results in some 9,504 potential new gym members over this period. Based on average membership levels of 2,897 members for commercial gym operators and 3,452 members for budget gyms, this quantum of population is able to support three commercial or budget type of operators (respectively) over the forecast period to 2029.

12.32 Additionally, in terms of addressing future needs, the Council could benefit from a wider range of family activities, such as a multi-use venue. The potential for new family activity venues will be subject to market demand and should be directed to a town centre location.

12.33 The Council area benefits from a diverse range of arts and historic attractions which contribute to the visitor economy of the area. The District and its centres also benefit from significant heritage assets. These need to be maintained and promoted to maintain their current status and attract other further visitors to the area to the benefit of its key centres in particular. Whilst the current hotel provision in the District is considered adequate, future investment in the area is likely to create opportunities for significant improvements in the sector.

MEETING NEEDS IN THE MAIN CENTRES

12.34 The capacity forecasts show that there is between 1,964 sqm net and 3,507 sqm net of identified convenience goods in the District over the period to 2029. In contrast, and for comparison goods, this is higher at some 13,396 sqm net by 2029.

12.35 The Council is therefore faced with the challenge of identifying suitable sites in and/or on the edge of Royal Leamington Spa, Warwick and Kenilworth Town Centre(s) to accommodate the identified floorspace capacity in full over the development plan period, in accordance with the NPPF (paragraph 23). The identified capacity should be directed to these town centres first in accordance with the sequential approach.

12.36 It is noted that at the time of writing this report the Council has not identified any new or emerging sites. Notwithstanding this, the Chandos Street site has been provided with an allocation status in line with the Council’s longstanding vision and policy (Policy TC4 of the extant Local Plan).

12.37 In this way, and as part of this study, the Council has referenced back to the Sequential Assessment of sites in Royal Leamington Spa and Warwick town centres (2006) (detailed previously). No Sites were identified in this document for Kenilworth.

12.38 By way of an update, **Table 12.2** below details the current status of each of these sites to gauge availability:

Table 12.2: 2016 Sequential Sites in Royal Leamington Spa and Warwick Town Centres: Status Update

Centre	Site Number	Site Name	Size	Status Update
Leamington Spa	1	Regents Court	N/A	Unavailable - Redeveloped
	2	Woodwards Department Store	N/A	Unavailable - Redeveloped
	3	Chandos Street Car Park	1 acre	Available
	4	Telephone Exchange, M&S Car Park and Moseley's	0.5 hectares	Unavailable - In Use
	5	Head Post Office	0.18 hectares	Unavailable - In Use
	6	Regent Square House	0.2 hectares	Unavailable - Redeveloped
	7	Bedford Street Car Park	0.15 hectares	Available
	8	Court Street Car Park	0.25 hectares	Unavailable - To be Redeveloped
	9	Kenilworth Street	0.72 hectares	Available
	10	Waterside Development Area	6 hectares	Unavailable - In Use
	11	Euston Square	N/A	Unavailable - Redeveloped
	12	Covent Garden Car Park	0.63 hectares	Unavailable - To be Redeveloped
	13	Midland Autocar Garage and Surrounding Properties	0.64 hectares	Unavailable - Redeveloped
	14	Tesco Metro Store	N/A	Unavailable - In Use
	15	Regent Grove	N/A	Unavailable - Redeveloped
	16	Leamington Spa Railway Station: adjacent areas	N/A	Unavailable - Redeveloped
Warwick	17	Westgate House	0.7 hectares	Unavailable - In Use
	18	Shire Hall	0.53 hectares	Unavailable - In Use
	19	New Street Car Park	N/A	Available
	20	Land off St. Nicholas, Church St	N/A	Unavailable - Redeveloped

12.39 The resulting analysis indicates that within the District there are potentially the following sites that are available that could accommodate a quantum of the forecast need:

Table 12.3: Sequential Sites in Royal Leamington Spa and Warwick Town Centres: Status Update

Centre	Site Number	Site Name	Size	Status Update
Leamington Spa	3	Chandos Street Car Park	1 acre	Available
	7	Bedford Street Car Park	0.15 hectares	Available
	9	Kenilworth Street	0.72 hectares	Available
Warwick	19	New Street Car Park	N/A	Available

12.40 It should be noted that the Chandos Street and Bedford Street Car Park(s) are Council owned. It is our understanding that these will remain open until the Covent Garden multi-storey car park is developed and fully operational (anticipated by 2022)

12.41 At the outset it is apparent that each of the development opportunity sites could accommodate a quantum of the forecast need for new retail, leisure and town centre uses over the plan period subject to a detailed feasibility evaluation. In our judgement the key issues/questions that need to be addressed in this case are:

- Which site or sites in the District represent the optimum and most viable location for new retail-led development in planning and commercial terms over the short, medium and long term?
- Which site or sites in the District will bring the most benefits to a town centre as a whole in social, economic and environmental terms?
- Which site or sites in the District will best help to maintain and enhance a town centre's overall vitality and viability, by increasing its competitive position and strengthening its role and function network and hierarchy of centres?

12.42 The merits of each site are reviewed below:

- **Site 3: Chandos Street** – This one acre site represents a main longstanding development opportunity for new retail and mixed use development in the town centre. This is in line with the Council's longstanding vision and policy (Policy TC4 of the Local Plan) to strengthen the centre's overall retail and leisure offer. The site is likely to be available within a reasonable period of time (i.e. in the next 3-5 years) especially after the completion of the multi-storey car park at Covent Garden (anticipated by 2022). The site has the potential to integrate with the Parade and Warwick Street and wider PF. It therefore represents a viable site over the medium term and requires a detailed feasibility evaluation of its commercial prospects.

- **Site 7: Bedford Street Car Park** – This 0.15ha site situated behind the southern part of the PF on the Parade. It is a small site and the potential for further expansion, say through a CPO of adjacent units, is limited. Notwithstanding this the Council would need to undertake a detailed feasibility study to evaluate the viability of the site. The likely potential for the site is for mixed use.
- **Site 9: Kenilworth Street** - This 0.7ha site is located on the eastern edge and again is much smaller site. It represents a secondary location and is not readily connected to the Primary Frontage area. It is unclear whether there is potential to enlarge the site, but considering the depth of the site there will be a potential requirement for further land assembly. Based on the location the redevelopment of the site is likely to be for mixed use development.
- **Site 19: New Street Car Park, Warwick** - This site is located just off the western Primary Frontage area of the town centre. The site is constrained by virtue of its location in a conservation area. It also serves as a key car park for the centre. The Council would need to undertake a detailed feasibility study to evaluate the commercial viability of the site.

12.43 The above represent potential sites where a quantum of the identified floorspace can be accommodated. Given the scale of need forecast up to 2029, the Council is advised to identify more likely sites in and/or on the edge of its main centres to meet the forecast need in full over the plan period in compliance with the NPPF (paragraph 23). With the structural changes taking place in the retail sector, there may be fortuitous opportunities that may present themselves and which the Council will need to capitalise upon. The key aim would be for the Council to ensure that it responds proactively to ensure that town centre sites are identified and to prevent investment moving to out-of-centre locations.

LOCAL IMPACT THRESHOLDS RECOMMENDATIONS

12.44 The default threshold for an impact assessment for a development (identified by the NPPF, paragraph 26), if there is no locally set floorspace threshold is 2,500 sqm. It is acknowledged from the outset that the Warwick District Local Plan (2017) under **Policy TC2 (Directing Retail Development)** requires an assessment when a development exceeds 500 sqm gross floorspace in edge / out-of-centre locations. The quantitative and qualitative research evidence indicates that whilst the centres in the District are performing, vital and viable, they are all nevertheless vulnerable to increased competition from out-of-centre retailing and the growth of online shopping.

12.45 As a result, it has been further assessed whether there is a requirement for the Council to retain or consider amending the local (floorspace-based) impact threshold of 500sqm gross. In summary, the Planning Practice Guidance (PPG) published in March 2014 provides 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.

12.46 Notwithstanding this, the assessment of retail trends in **Section 3** has highlighted the dynamic growth in smaller convenience stores operated by the major grocers (i.e. Sainsbury's Local, Tesco Express, Little Waitrose, etc.).

Although sizes vary from location-to-location, the main grocers are generally seeking new convenience stores (e.g. Tesco Express, Sainsbury's Local, Little Waitrose) with a minimum gross floorspace of circa 372 sqm gross (4,000 sq ft gross). In circumstances where these smaller stores are proposed on the edge or outside of smaller local and village centres, often as part of petrol filling stations, they could result in a significant adverse impact on their trading performance, and overall vitality and viability. This will particularly be the case where smaller centres and villages are dependent on smaller supermarkets and convenience ('top-up') stores to anchor their retail offer and generate footfall and linked trips/expenditure to the benefit of other shops, services and facilities.

12.47 In addition, modern retailers selling a range of comparison goods (including fashion, homestore and 'bulky' goods retailers) generally have requirements for larger format shop units with a minimum floorspace of approximately 465 sqm gross (5,000 sq ft gross). This scale of floorspace provides operators with the necessary minimum 'critical mass' of sales needed to display their full range of goods in-store and attract customers from a wider catchment area, particularly where they are co-located alongside similar stores in town centre and out-of-centre locations. In general terms larger format non-food stores of over 465 sqm gross (5,000 sq ft gross) are also unlikely to trade as a purely local facility. In circumstances where these types of stores are proposed on the edge or outside of defined town centres, they could result in a significant adverse impact on the trading performance, and overall vitality and viability of existing centres. In this way, investment of this type should be oriented towards town centres to generate footfall and linked trips/expenditure to the benefit of existing shops, services and facilities.

12.48 In this way it is recommended that it is reasonable for applicants proposing developments for new A1 retail (comparison and convenience goods) floorspace and A3-A5 uses of <u>350 sqm gross</u> and above to demonstrate that they will not, either on their own or cumulatively with other commitments, result in a "significant adverse impact" on any defined centres within the local authority area; carried out in accordance with the NPPF and PPG.

12.49 This is judged to be a reasonable impact threshold as it will provide the Council with sufficient flexibility to assess the merits and implications of edge and out-of-centre foodstore applications that could potentially have significant implications for the viability and delivery of new or extended floorspace in these existing centres. This is also relevant in the context of the threat posed by increased competition from out-of-centre retailing and the growth of internet shopping. It is advised that this threshold should be applied, where relevant, to change of use applications and applications seeking variations of conditions.

12.50 By way of additional reference, a 350 sqm gross impact threshold is also reasonable in this case based on experience of advising other local planning authorities, and also drawing on the minimum impact thresholds identified in recently adopted local plans (including, for example, Richmondshire District Council, Rother District Council, Rotherham Metropolitan Council, Stafford Borough Council, Warrington Borough Council and Norwich City Council).

12.51 Notwithstanding the adoption of a lower locally set impact threshold, it is important that the scope of any Retail Impact Assessment (RIA) in support of planning applications is discussed and agreed between the applicants and the Council at an early stage in the pre-application process. The level of detail included within a RIA should be proportionate to the scale and type of retail floorspace proposed, and should be agreed between the Council and applicant on a case-by-case basis. In all cases the local planning authority should adopt a pragmatic and reasonable approach with regard to the scope and detail of evidence required in support of planning applications.

SUMMARY

12.52 In conclusion, this Study has identified District-wide capacity for convenience goods by 2029 for between 1,964 sqm net and 3,507 sqm net and comparison goods of 13,396 sqm net. This forecast capacity/need over the long term should be directed to the main town centres of Royal Leamington Spa, Warwick and Kenilworth first, in accordance with national and local plan policy objectives. The distribution of the forecast need for new retail floorspace should reflect the network and hierarchy of centres, and the relative role and function of these centres.

12.53 The intensification of retail and leisure uses in out-of-centre locations is not advised as this could have a significant adverse impact on the vitality and viability of the District's main centres due to the further loss of businesses, customers, footfall and turnover/trade. Applications for new retail, leisure and town centre uses outside of the District's existing centres should be assessed on their merits, and considered against the key sequential and impact tests set out in the NPPF (paragraphs 24-27), and other material considerations.

12.54 Finally, it is important to restate that capacity forecasts beyond five years should be treated with caution, as they are based on various layers of assumptions and forecasts. The Council should take into account these margins for error and the structural changes in the retail property sector when assessing the need for new retail floorspace. For this reason it is advised that the capacity forecasts should be subject to regular review and a refresh (normally within a 2-year period) to take account of any key changes in the economic forecasts and retail/leisure trends.

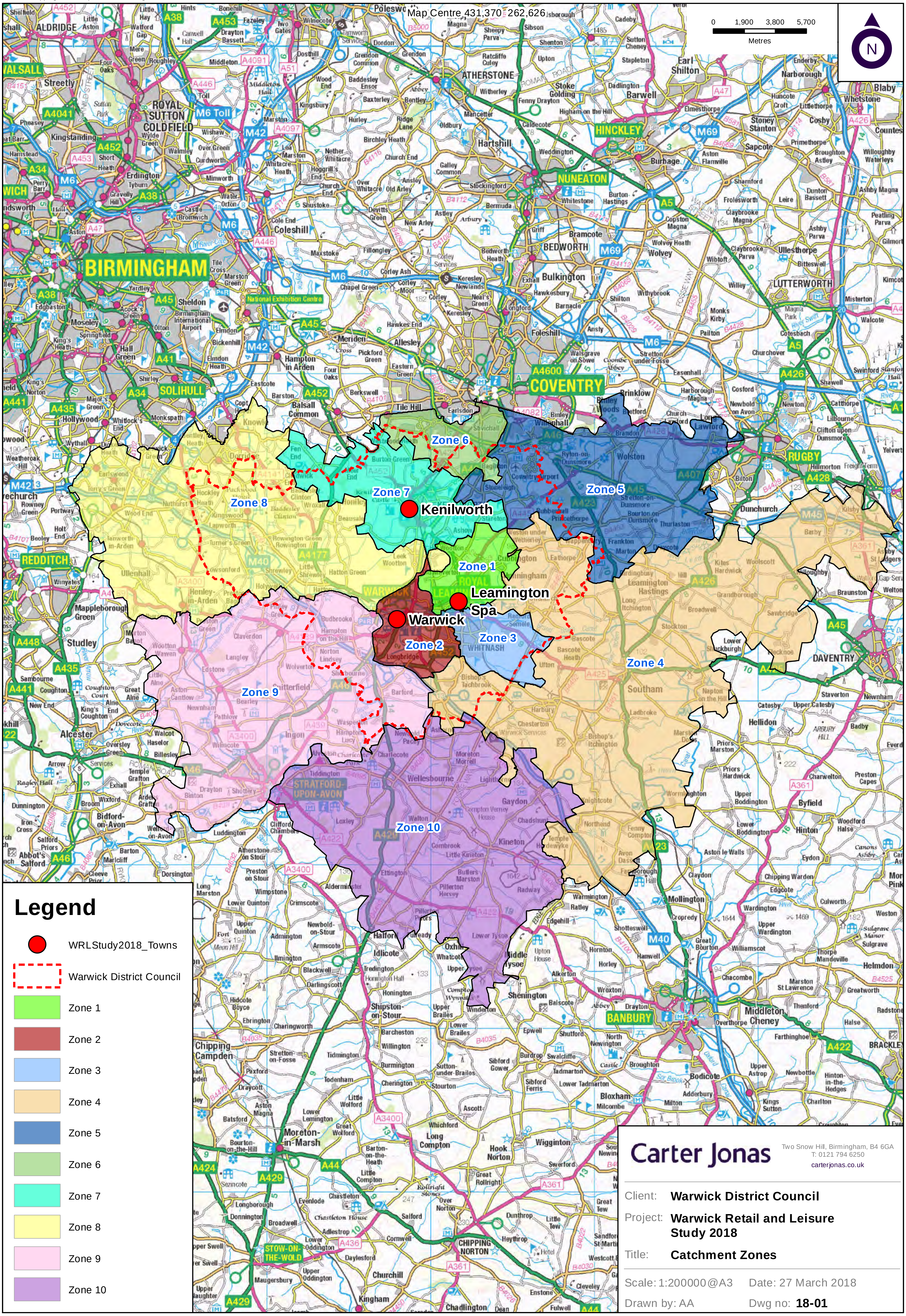
GLOSSARY

TOWN CENTRES:	Town are the principal centre or centres in a local authority's area 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.
MAJOR CENTRES	Major centres are typically found in Inner London and often have a borough wide catchment. They generally contain over 50,000sqm of retail, leisure and service floorspace with a higher proportion of comparison over convenience goods; and potentially significant employment, service and civic functions.
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. These centres generally contain between 10,000-50,000sqm of retail, leisure and service floorspace; and provide a higher proportion of convenience over comparison goods.
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, a pharmacy or a launderette.
TOWN CENTRE USES:	As defined in the NPPF, 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 in Local Plans and on the policies 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).
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	As defined in the NPPF, 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.
OUT-OF-CENTRE	A location which is not in or on the edge of a town centre. Out-of-centre locations are at the bottom of the retail hierarchy and any application for retail development in an out-of-centre location must fully assess impacts and rule out potential for locating in a more sequentially preferable location.
CONVENIENCE SHOPPING	Convenience retailing is the provision of everyday essential items, including food, drinks, newspapers/magazines and confectionery.
COMPARISON SHOPPING	Comparison retailing is the provision of items not obtained on a frequent basis. These include clothing, footwear, household and recreational goods.
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.
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.
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.
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, 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.

APPENDIX 1: STUDY AREA

Path: M:\Mapping Jobs\Chapel Place\Planning\Warwick Retail and Leisure Study 2018\18-01 Warwick Retail and Leisure Study2018.pdf.mxd



APPENDIX 2: POPULATION AND EXPENDITURE: CONVENIENCE GOODS

Carter Jonas

TABLE 1: EXPERIAN BUSINESS STRATEGIES - BASE YEAR (2018) POPULATION & PROJECTIONS (to 2029) GROWTH 2018 to 2029:

ZONE:	2018	2023	2026	2029	%	2018-29
Zone 1	35,240	37,255	38,636	40,041	13.6%	4,802
Zone 2	33,507	35,469	36,818	38,190	14.0%	4,683
Zone 3	34,277	36,263	37,626	39,013	13.8%	4,736
Zone 4	29,474	30,374	30,926	31,489	6.8%	2,015
Zone 5	27,520	28,360	28,876	29,401	6.8%	1,881
Zone 6	46,909	50,380	53,206	55,840	19.0%	8,932
Zone 7	25,516	27,262	28,241	29,094	14.0%	3,577
Zone 8	29,410	30,308	30,859	31,421	6.8%	2,010
Zone 9	34,723	35,782	36,434	37,096	6.8%	2,374
Zone 10	23,363	24,076	24,514	24,960	6.8%	1,597
Study Area	**319,939**	**335,529**	**346,134**	**356,546**	**11.4%**	**36,607**
CORE EAST (ROYAL LEAMINGTON SPA) - Zones 1+3	69,517	73,518	76,261	79,055	13.7%	9,538
CORE WEST (WARWICK) - Zone 2	33,507	35,469	36,818	38,190	14.0%	4,683
KENILWORTH - Zone 7	25,516	27,262	28,241	29,094	14.0%	3,577
Sub-Total	**128,540**	**136,249**	**141,319**	**146,339**	**13.8%**	**17,799**

Source: EXPERIAN BUSINESS STRATEGIES

Notes: The base year (2017) population figures have been sourced directly from Experian's 'Retail Area Planner' Reports for each study zone using CJ's (Experian-based) MMG3 Geographic Information System (GIS). The base year figures are based on ONS (mid-year) population figures. The projections for zones are derived from Experian's revised 'demographic component model; these projections take into account mid-year age and gender estimates and project the population forward year-on-year based on Government population projections for local authority areas in England. The yearly components of population change that are taken into account are the birth rate (0-4 age band), ageing, net migration, death rates, etc.

TABLE 2: REVISED CONVENIENCE EXPENDITURE PER CAPITA FORECASTS (excluding SFT)

	2018 (incl SFT)	2018	2023	2026	2029
		EXCLUDING SPECIAL FORMS OF TRADING			
EXPERIAN - SPECIAL FORMS OF TRADING (%):		**3.4%**	**4.2%**	**4.6%**	**4.9%**
REVISED SPECIAL FORMS OF TRADING (%):		**1.1%**	**1.3%**	**1.5%**	**1.6%**
Zone 1	£2,033	£2,011	£2,010	£2,013	£2,017
Zone 2	£2,051	£2,028	£2,027	£2,031	£2,035
Zone 3	£2,010	£1,988	£1,987	£1,990	£1,994
Zone 4	£2,334	£2,309	£2,307	£2,311	£2,316
Zone 5	£2,007	£1,985	£1,984	£1,987	£1,992
Zone 6	£2,243	£2,219	£2,218	£2,222	£2,226
Zone 7	£2,172	£2,148	£2,147	£2,151	£2,155
Zone 8	£2,471	£2,444	£2,443	£2,447	£2,452
Zone 9	£2,270	£2,246	£2,244	£2,248	£2,253
Zone 10	£2,366	£2,340	£2,339	£2,343	£2,348
STUDY AREA AVERAGE:	**£2,196**	**£2,172**	**£2,171**	**£2,174**	**£2,179**

Source: Average spend per capita estimates (2015 prices) are derived from Experian 'Retail Area Planner' Reports using the MMG3 GIS and the year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 15 published by Experian Business Strategies (December 2017).

Notes: 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 informed by the household survey-derived market shares for SFT. Forecast growth in SFT is based on the year-on-year forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 15 (December 2017).

TABLE 3: TOTAL AVAILABLE COMPARISON GOODS EXPENDITURE, BASE YEAR (2018) TO 2029 (£m) GROWTH 2017 to 2037:

	2017 (incl SFT)	2018	2023	2026	2029	%	2018-29
Zone 1	£71.6	£70.9	£74.9	£77.8	£80.8	14.0%	£9.9
Zone 2	£68.7	£68.0	£71.9	£74.8	£77.7	14.3%	£9.7
Zone 3	£68.9	£68.1	£72.1	£74.9	£77.8	14.2%	£9.7
Zone 4	£68.8	£68.0	£70.1	£71.5	£72.9	7.2%	£4.9
Zone 5	£55.2	£54.6	£56.3	£57.4	£58.6	7.2%	£3.9
Zone 6	£105.2	£104.1	£111.7	£118.2	£124.3	19.4%	£20.2
Zone 7	£55.4	£54.8	£58.5	£60.7	£62.7	14.4%	£7.9
Zone 8	£72.7	£71.9	£74.0	£75.5	£77.0	7.2%	£5.2
Zone 9	£78.8	£78.0	£80.3	£81.9	£83.6	7.2%	£5.6
Zone 10	£55.3	£54.7	£56.3	£57.4	£58.6	7.2%	£3.9
STUDY AREA:	**£700.7**	£693.1	£726.1	£750.1	£774.0	11.7%	£80.9

APPENDIX 3: POPULATION AND EXPENDITURE: COMPARISON GOODS

TABLE 1: EXPERIAN BUSINESS STRATEGIES - BASE YEAR (2018) POPULATION & PROJECTIONS (to 2029) **GROWTH 2018 to 2029:**

ZONE:	2018	2023	2026	2029	%	2018-29
Zone 1	35,240	37,255	38,636	40,041	13.6%	4,802
Zone 2	33,507	35,469	36,818	38,190	14.0%	4,683
Zone 3	34,277	36,263	37,626	39,013	13.8%	4,736
Zone 4	29,474	30,374	30,926	31,489	6.8%	2,015
Zone 5	27,520	28,360	28,876	29,401	6.8%	1,881
Zone 6	46,909	50,380	53,206	55,840	19.0%	8,932
Zone 7	25,516	27,262	28,241	29,094	14.0%	3,577
Zone 8	29,410	30,308	30,859	31,421	6.8%	2,010
Zone 9	34,723	35,782	36,434	37,096	6.8%	2,374
Zone 10	23,363	24,076	24,514	24,960	6.8%	1,597
Study Area	**319,939**	**335,529**	**346,134**	**356,546**	**11.4%**	**36,607**
CORE EAST (ROYAL LEAMINGTON SPA) - Zones 1+3	69,517	73,518	76,261	79,055	13.7%	9,538
CORE WEST (WARWICK) - Zone 2	33,507	35,469	36,818	38,190	14.0%	4,683
KENILWORTH - Zone 7	25,516	27,262	28,241	29,094	14.0%	3,577
Sub-Total	**128,540**	**136,249**	**141,319**	**146,339**	**13.8%**	**17,799**

Source: EXPERIAN BUSINESS STRATEGIES

Notes: The base year (2017) population figures have been sourced directly from Experian's 'Retail Area Planner' Reports for each study zone using CJ's (Experian-based) MMG3 Geographic Information System (GIS). The base year figures are based on ONS (mid-year) population figures. The projections for zones are derived from Experian's revised 'demographic component model; these projections take into account mid-year age and gender estimates and project the population forward year-on-year based on Government population projections for local authority areas in England. The yearly components of population change that are taken into account are the birth rate (0-4 age band), ageing, net migration, death rates, etc.

TABLE 2: REVISED COMPARISON EXPENDITURE PER CAPITA FORECASTS (excluding SFT)

	2018	2018	2023	2026	2029
	(incl SFT)	EXCLUDING SPECIAL FORMS OF TRADING			
EXPERIAN - SPECIAL FORMS OF TRADING (%):		**15.4%**	**17.4%**	**17.5%**	**17.7%**
REVISED SPECIAL FORMS OF TRADING (%):		**16.2%**	**18.3%**	**18.4%**	**18.6%**
Zone 1	£3,362	£2,817	£3,180	£3,491	£3,827
Zone 2	£3,403	£2,852	£3,219	£3,534	£3,874
Zone 3	£3,119	£2,614	£2,951	£3,239	£3,551
Zone 4	£3,733	£3,128	£3,532	£3,877	£4,250
Zone 5	£2,961	£2,481	£2,802	£3,075	£3,371
Zone 6	£3,906	£3,273	£3,695	£4,056	£4,446
Zone 7	£3,797	£3,182	£3,592	£3,943	£4,323
Zone 8	£4,431	£3,713	£4,192	£4,602	£5,045
Zone 9	£3,762	£3,153	£3,559	£3,907	£4,283
Zone 10	£4,028	£3,375	£3,810	£4,182	£4,585
STUDY AREA AVERAGE:	**£3,650**	**£3,059**	**£3,453**	**£3,791**	**£4,156**

Source: Average spend per capita estimates (2016 prices) are derived from Experian 'Retail Area Planner' Reports using the MMG3 GIS and the year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 15 published by Experian Business Strategies (December 2017).

Notes: 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 informed by the household survey-derived market shares for SFT. Forecast growth in SFT is based on the year-on-year forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 15 (December 2017).

TABLE 3: TOTAL AVAILABLE COMPARISON GOODS EXPENDITURE, BASE YEAR (2018) TO 2029 (£m) **GROWTH 2018 to 2029:**

	2018	2018	2023	2026	2029	%	2017-37
	(incl SFT)						
Zone 1	£118.5	£99.3	£118.5	£134.9	£153.2	54.4%	£54.0
Zone 2	£114.0	£95.5	£114.2	£130.1	£148.0	54.8%	£52.4
Zone 3	£106.9	£89.6	£107.0	£121.9	£138.5	54.6%	£48.9
Zone 4	£110.0	£92.2	£107.3	£119.9	£133.8	45.1%	£41.6
Zone 5	£81.5	£68.3	£79.5	£88.8	£99.1	45.1%	£30.8
Zone 6	£183.2	£153.5	£186.2	£215.8	£248.3	61.7%	£94.8
Zone 7	£96.9	£81.2	£97.9	£111.4	£125.8	54.9%	£44.6
Zone 8	£130.3	£109.2	£127.1	£142.0	£158.5	45.1%	£49.3
Zone 9	£130.6	£109.5	£127.4	£142.3	£158.9	45.1%	£49.4
Zone 10	£94.1	£78.8	£91.7	£102.5	£114.4	45.1%	£35.6
STUDY AREA AVERAGE:	**£1,166.1**	£977.1	£1,156.7	£1,309.6	£1,478.6	51.3%	£501.5

APPENDIX 4: NEMS HOUSEHOLD SURVEY RESULTS

NEMS market research
22 Manor Way
Belasis Hall Technology Park
Billingham
TS23 4HN
Tel 01642 37 33 55
www.nemsmr.co.uk

Warwick District Council:
Retail & Leisure Study
for
Carter Jonas

March 2018

Job Ref: 050318

Table of Contents

Introduction

1.1 Research Background & Objectives

To conduct a survey amongst residents in the Warwick area to assess shopping habits for main food and grocery, top-up food, non-food shopping and leisure activities.

1.2 Research Methodology

A total of 1,005 telephone interviews were conducted between Tuesday 6th March 2018 and Tuesday 20th March 2018. Interviews were conducted using NEMS in-house CATI (Computer Assisted Telephone Interviewing) Unit. Respondents were contacted during the day and in the evening. All respondents were the main shopper in the household, determined using a preliminary filter question.

1.3 Sampling

1.3.1 Survey Area

The survey area was segmented into 10 zones, defined using postcode sectors. The zone details were:

Zone	Postcode Sectors	Number of Interviews
1	CV32 4, CV32 5, CV32 6, CV32 7	100
2	CV34 4, CV34 5, CV34 6	100
3	CV31 1, CV31 2, CV31 3	100
4	CV23 8, CV33 9, CV47 0, CV47 1, CV47 2, CV47 8, CV47 9,	100
5	CV3 3, CV3 4, CV8 3, CV23 9	104
6	CV3 5, CV3 6, CV4 7, CV4 8	101
7	CV8 1, CV8 2	100
8	B93 0, B93 8, B94 5, B94 6, B95 5, CV35 7	100
9	B95 6, CV35 8, CV37 0, CV37 6, CV37 9	100
10	CV35 0, CV35 9, CV37 7	100
Total		**1,005**

1.3.2 Telephone Numbers

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

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

1.3.3 Sample Profile

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

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

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

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

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

1.3.4 Time of Interviewing

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

1.3.5 Monitoring of Calls

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

1.4 Weightings

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

Age	Main Shopper Profile (%)	Interviews Achieved	Age Weightings
18-34	21.1%	37	5.4915
35-44	17.5%	75	2.2563
45-54	17.9%	259	0.6652
55-64	17.9%	214	0.8056
65+	25.7%	380	0.6522
(Refused)	n/a	40	1.0000
Total		**1,005**	

Further weightings were then applied to adjust zone samples to be representative by population. Details of those weightings are given in the table below:

Zone	Population *	Interviews Achieved	Interviews Achieved (Weighted by Age)	Zone Weightings
1	32,696	100	93	1.1792
2	31,345	100	118	0.8925
3	31,530	100	128	0.8273
4	27,932	100	88	1.0658
5	25,505	104	115	0.7480
6	42,856	101	86	1.6661
7	24,260	100	103	0.7919
8	27,848	100	84	1.1106
9	32,802	100	92	1.2034
10	22,281	100	98	0.7657
Total	**299,055**	**1,005**		

* Source: Census 2011

1.5 Statistical Accuracy

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

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

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

For example, if 50% of a sample of 1,005 answers "Yes" to a question, we can be 95% sure that between 46.9% and 53.1% of the population holds the same opinion (i.e. +/- 3.1%). The following is a guide showing confidence intervals attached to various sample sizes from the study:

%ge Response	95% confidence interval
10%	±1.9%
20%	±2.5%
30%	±2.8%
40%	±3.0%
50%	±3.1%

1.6 Data Tables

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

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

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

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

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

Appendix 1:

Data Tabulations

By Zone - Filtered

(Weighted)

Q01 Where do you NORMALLY shop for all your household's main food and grocery shopping needs (i.e. primarily bulk trolley purchases)?
Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Aldi, Ruscote Avenue, Banbury	0.3%	3	0.0%	0	0.0%	0	0.0%	0	2.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Aldi, Unit 8 Airport Retail Park, Coventry	1.4%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.8%	12	0.8%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Aldi, Radford Road, Coventry	0.3%	3	0.7%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Shultern Lane, Cannon Park, Coventry	1.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	4.9%	7	6.0%	5	0.0%	0	0.0%	0	0.0%	0
Aldi, Queensway, Leamington Spa	5.0%	49	0.9%	1	18.7%	20	3.3%	4	22.4%	21	0.0%	0	0.0%	0	3.5%	3	0.8%	1	0.0%	0	1.3%	1
Aldi, Stratford Road, Solihull	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.4%	6	0.0%	0	0.0%	0
Aldi, Canners Way, Stratford-upon-Avon	2.2%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	13.2%	15	9.0%	7
Asda, North London Road, Cheylesmore (Abbey Park), Coventry	2.5%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.8%	14	7.9%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Daventry Road, Coventry	2.4%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.7%	11	9.2%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Chesterton Drive, Leamington Spa	6.5%	65	10.8%	12	1.1%	1	42.0%	45	6.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1
Asda, Chapel Street, Rugby	0.6%	6	0.0%	0	0.0%	0	0.0%	0	5.0%	5	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Maybird Retail Park, Stratford-upon-Avon	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Wordsworth Avenue, Stratford-upon-Avon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.7%	0
Co-op, Chapel Street, Southam	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Binley Road, Coventry	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Queen Victoria Street, Coventry	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Warwick Road, Kenilworth	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Bath Street, Leamington Spa	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Binley Road, Coventry	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Myton Road, Leamington Spa	0.7%	7	1.4%	2	2.5%	3	0.5%	1	0.0%	0	0.0%	0	0.0%	0	2.8%	2	0.0%	0	0.0%	0	0.7%	0
Marks & Spencer, Upper Precinct, Coventry	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Parade, Leamington Spa	0.3%	3	2.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Elliots	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Field Retail Park, Rugby																						
Marks & Spencer, Bridge Street, Stratford-upon-Avon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Marks & Spencer, Maybird Centre, Stratford-upon-Avon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Marks & Spencer Simply Food,Westgate House, Market Street, Warwick	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Morrisons, Swan Close Road, Banbury	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Alvis Retail Park, Coventry	1.7%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	5	9.0%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Parkgate Road, Coventry	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Old Warwick Road, Leamington Spa	4.8%	48	13.9%	15	8.4%	9	15.6%	16	2.3%	2	0.0%	0	0.8%	1	0.0%	0	0.8%	1	2.5%	3	0.7%	1
Morrisons, Westway, Rugby	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Stratford Road, Solihull	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Morrisons, Alcester Road, Stratford-upon-Avon	3.2%	32	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	22.8%	25	8.8%	7
Sainsbury's, Oxford Road, Banbury	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.6%	4
Sainsbury's, Trinity Street, Coventry	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.6%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Far Gosford Street, Coventry	0.1%	1	0.7%	1	0.0%	0	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, Hillmorton Road, Rugby	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Dunchurch Road, Rugby	0.9%	9	0.7%	1	0.0%	0	0.0%	0	5.5%	5	3.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Warwick Road, Kenilworth	3.3%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	40.7%	33	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Local, Rugby Road, Cubbington, Leamington Spa	0.6%	6	3.0%	3	0.0%	0	1.8%	2	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Local, Radford Road, Leamington Spa	2.9%	29	0.7%	1	15.7%	17	9.0%	10	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.8%	1	0.9%	1	0.0%	0
Sainsbury's, Poplar Way, Solihull	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	3	0.0%	0	0.0%	0
Sainsbury's, Stratford Road, Shirley	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	3	0.0%	0	0.0%	0
Sainsbury's, Bridge Street, Stratford-upon-Avon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Sainsbury's, The Shires	4.5%	45	10.7%	12	8.8%	9	13.3%	14	5.0%	5	0.6%	0	0.0%	0	0.6%	1	0.8%	1	2.3%	3	0.8%	1

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Retail Park, Tachbrook Park Drive, Warwick																						
Sainsbury's Local, Coten End, Warwick	1.3%	13	0.0%	0	5.0%	5	0.0%	0	0.0%	0	0.6%	0	2.2%	3	0.0%	0	0.8%	1	3.0%	3	0.7%	1
Spar, Warwick Road, Kenilworth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Tesco, Lockheed Close, Banbury	0.4%	4	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	2
Tesco, Arena Park, Pheonix Way, Coventry	0.5%	5	0.7%	1	0.0%	0	0.0%	0	0.7%	1	3.1%	3	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Tesco, Cannon Park Centre, Lynchgate Road, Coventry	3.6%	36	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	24.4%	34	1.9%	2	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Shelton Square, Coventry	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Walsgrove Road, Coventry	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, New Street, Daventry	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Leyes lane, Kenilworth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Metro, Parade, Leamington Spa	1.6%	16	10.7%	12	0.7%	1	1.8%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Leicester Road, Rugby	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Stratford Road, Solihull	1.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	12.9%	12	0.0%	0	0.7%	1
Tesco, Warwick Road, Solihull	0.3%	3	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Tesco Superstore, Birmingham Road, Stratford-upon-Avon	4.7%	47	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	29.3%	32	16.8%	13
Tesco Superstore, Kineton Road Industrial Estate, Northfield Road, Southam	3.0%	30	0.0%	0	0.0%	0	0.0%	0	29.5%	27	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.7%	1	0.7%	0
Tesco Superstore, Emscote Road, Warwick	7.7%	77	33.5%	37	28.7%	30	1.8%	2	4.3%	4	0.6%	0	0.0%	0	1.9%	2	1.5%	1	0.9%	1	0.0%	0
Waitrose, Highfield Lane, Coventry	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, Bowen Square, Daventry	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, Talisman Square, Bertie Road, Kenilworth	3.5%	35	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	9	32.1%	26	0.0%	0	0.0%	0	0.7%	1
Waitrose, Homer Road, Solihull	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0
Waitrose, The Rosebird Centre, Shipstone Road, Stratford-upon-Avon	1.8%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.8%	10	10.6%	8

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Local Stores, Leamington Spa Town Centre	0.1%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Stores, Kenilworth Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Internet - delivered	5.4%	54	7.0%	8	3.6%	4	7.7%	8	2.3%	2	2.3%	2	3.7%	5	5.4%	4	6.8%	6	6.5%	7	9.1%	7
Internet - collected (click and collect)	0.2%	2	0.7%	1	0.0%	0	0.0%	0	0.8%	1	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Aldi, Birmingham Road, Studley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Aldi, Paddox Close, Rugby	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Sheaf Street, Daventry	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Trescott Road, Redditch	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Asda, Ventura Road, Tamworth	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Clarkes Greengrocers, Warwick Street, Leamington Spa	0.1%	1	0.0%	0	0.0%	0	0.5%	1	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, Henley-In-Arden	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Co-op, Loxley Close, Wellesbourne	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	2
Lidl, Bilton Road, Rugby	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Stores, Coventry City Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Stores, Stratford-upon-Avon Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Morrisons, Skipworth Road, Binley, Coventry	1.7%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.7%	16	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Warwick Highway, Redditch	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
One Stop, Heathcote Road, Whitnash	0.1%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Abbey Trading Centre, Alvechurch Highway, Redditch	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Sainsbury's, Austin Drive, Court House Green, Coventry	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Fletchamstead Highway, Canley, Coventry	1.6%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.7%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Loxley Road, Wellesbourne	1.8%	18	0.0%	0	0.0%	0	0.5%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.7%	1	19.7%	15
Sainsbury's, Saltisford, Warwick	1.1%	11	0.0%	0	4.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	3.9%	4	0.7%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Sainsbury's, Station Road, Dorridge, Solihull	3.8%	38	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	40.2%	38	0.0%	0	0.0%	0
Spar, Banbury Road, Ettington, Stratford-upon-Avon	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Tesco Express, Banbury Road, Stratford-upon-Avon	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2
Tesco Extra, Coldfield Drive, Oakenshaw, Redditch	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Tesco Extra, Cross Point Business Park, Olivier Way, Coventry	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Metro, St Johns Way, Knowle, Solihull	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.0%	9	0.0%	0	0.0%	0
Tesco Superstore, Clifford Bridge Road, Walsgrave, Coventry	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	3	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		999		110		105		106		93		86		139		82		94		110		75
Sample:		1002		100		100		100		99		104		99		100		100		100		100

Q01AWhich retailer do you purchase your main food internet / home delivery shopping from?

Those who do their main food shopping via the Internet at Q01:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Amazon	0.0%	0	0.0%	0	0.0%	0	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	8.7%	5	0.0%	0	53.1%	2	18.2%	1	0.0%	0	20.2%	0	0.0%	0	0.0%	0	14.1%	1	0.0%	0	0.0%	0
Co-op	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gousto	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
HelloFresh	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.9%	1
Iceland	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons	3.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	26.1%	1	0.0%	0	0.0%	0	0.0%	0	6.9%	1
Ocado	15.3%	9	0.0%	0	15.7%	1	0.0%	0	0.0%	0	0.0%	0	73.9%	4	35.7%	2	14.1%	1	24.6%	2	0.0%	0
Riverford	0.0%	0	0.0%	0	0.0%	0	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	9.6%	5	27.6%	2	15.7%	1	0.0%	0	0.0%	0	20.2%	0	0.0%	0	12.0%	1	23.2%	1	0.0%	0	0.0%	0
Tesco	58.6%	33	72.4%	6	15.7%	1	81.8%	7	75.0%	2	59.7%	1	0.0%	0	52.3%	2	37.1%	2	75.4%	5	79.2%	6
Waitrose	2.6%	1	0.0%	0	0.0%	0	0.0%	0	25.0%	1	0.0%	0	0.0%	0	0.0%	0	11.6%	1	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milk & More	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.9%	1
Weighted base:		56		8		4		8		3		2		5		4		6		7		7
Sample:		54		6		4		6		4		5		4		6		8		4		7

Q02 What do you like about (LOCATION MENTIONED AT Q01)? [MR]
Excluding those who do their main food shopping via the Internet at Q01:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Clean store	2.5%	23	8.9%	9	1.1%	1	1.4%	1	1.5%	1	0.6%	0	1.6%	2	7.2%	6	0.0%	0	0.8%	1	2.2%	1
Close to family / friends	0.4%	3	0.0%	0	0.6%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.9%	1
Convenient to home	39.8%	377	28.3%	29	45.0%	46	49.4%	48	40.5%	37	37.1%	31	28.4%	39	54.2%	42	56.3%	49	35.0%	36	30.3%	20
Convenient to work	2.5%	23	2.3%	2	0.6%	1	1.5%	1	0.8%	1	1.8%	1	3.6%	5	0.7%	1	2.5%	2	7.4%	8	2.3%	2
Delivery service	0.6%	6	0.0%	0	0.0%	0	1.9%	2	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	4	0.0%	0
Easy to get to by car	2.7%	25	6.4%	6	9.4%	10	2.3%	2	0.8%	1	2.4%	2	0.0%	0	0.0%	0	3.3%	3	0.0%	0	2.2%	2
Easy to get to by foot	0.7%	6	1.5%	2	0.0%	0	1.1%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	3
Easy to get to by public transport	0.1%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ethical policy	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Friendly / helpful staff	3.7%	35	5.5%	6	0.0%	0	0.0%	0	0.8%	1	2.0%	2	2.5%	4	5.3%	4	2.9%	3	16.1%	17	0.7%	0
Good layout / easy to get around	3.6%	34	4.7%	5	3.9%	4	3.9%	4	0.0%	0	3.4%	3	5.1%	7	1.5%	1	4.5%	4	3.6%	4	4.1%	3
Good offers	2.0%	19	3.4%	3	0.6%	1	0.0%	0	9.5%	9	1.2%	1	0.8%	1	0.7%	1	1.7%	1	1.5%	2	0.8%	1
Habit / always used it / familiarity	5.5%	52	6.5%	7	4.9%	5	3.4%	3	5.1%	5	5.7%	5	5.3%	7	3.7%	3	9.5%	8	4.6%	5	6.6%	4
Has a cafe	1.3%	12	0.8%	1	1.1%	1	0.6%	1	0.0%	0	0.7%	1	6.6%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Has a petrol station	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Large store	2.1%	20	0.8%	1	2.6%	3	3.1%	3	2.3%	2	4.9%	4	0.8%	1	2.2%	2	4.2%	4	0.0%	0	0.9%	1
Long opening hours	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Low prices / value for money	19.8%	188	5.7%	6	27.6%	28	20.6%	20	19.8%	18	34.2%	28	16.0%	22	21.9%	17	11.5%	10	24.2%	25	20.0%	14
Loyalty scheme / reward points	2.0%	19	14.5%	15	0.6%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2	0.7%	0
Online shopping is convenient	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Only one in the area	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.8%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Parking is free	0.6%	6	0.0%	0	0.9%	1	0.0%	0	1.5%	1	0.0%	0	1.0%	1	0.8%	1	0.0%	0	0.9%	1	0.7%	0
Parking prices are low	1.4%	13	0.8%	1	0.6%	1	5.2%	5	1.5%	1	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0	4.8%	3
Parking provision is good	4.5%	43	3.1%	3	3.9%	4	9.8%	10	0.9%	1	2.0%	2	4.3%	6	4.0%	3	11.1%	10	2.5%	3	3.5%	2
Pleasant shopping environment	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.8%	1	0.9%	1	0.7%	0
Preference for retailer	1.3%	12	4.0%	4	1.7%	2	1.2%	1	0.0%	0	1.9%	2	1.0%	1	2.8%	2	0.0%	0	0.0%	0	0.0%	0
Quality of food goods available	10.3%	97	8.7%	9	6.5%	7	9.1%	9	12.0%	11	17.3%	14	12.5%	17	10.2%	8	10.8%	9	5.3%	6	11.2%	8
Self-service checkouts	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Quality of non-food goods available	1.1%	10	0.8%	1	1.5%	1	1.9%	2	0.8%	1	0.6%	0	1.6%	2	0.0%	0	0.0%	0	1.2%	1	2.4%	2
Range of food goods available	10.3%	97	11.9%	12	13.6%	14	13.8%	14	9.0%	8	5.0%	4	7.6%	11	15.1%	12	12.9%	11	5.3%	6	9.8%	7
Range of non-food goods available	1.7%	16	1.5%	2	2.4%	2	4.4%	4	0.9%	1	1.2%	1	0.0%	0	0.7%	1	0.0%	0	2.3%	2	4.2%	3
Safe shopping environment	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Small / quiet store	1.8%	17	0.0%	0	0.7%	1	0.0%	0	2.5%	2	0.0%	0	0.0%	0	6.3%	5	4.5%	4	4.3%	4	0.8%	1
Staff discount / work there	1.9%	18	3.2%	3	0.0%	0	1.1%	1	4.4%	4	1.2%	1	3.7%	5	0.0%	0	0.0%	0	0.0%	0	5.1%	3

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Supporting local business	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	1.5%	14	0.8%	1	0.6%	1	5.2%	5	0.0%	0	1.2%	1	1.0%	1	1.5%	1	0.8%	1	1.7%	2	2.6%	2
Has everything I need	0.8%	8	0.8%	1	0.6%	1	5.3%	5	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Other shops / services nearby	0.8%	7	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	0	1.9%	3	0.0%	0	1.3%	1	1.5%	2	0.7%	0
Quick checkouts	0.3%	3	0.0%	0	0.6%	1	0.6%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Reliable	0.4%	4	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	2.6%	2
(Don’t know / nothing)	3.3%	31	2.6%	3	0.6%	1	1.4%	1	2.5%	2	7.0%	6	4.1%	6	2.0%	2	1.0%	1	5.1%	5	7.7%	5
Weighted base:		949		101		102		98		91		83		139		77		87		103		68
Sample:		951		94		96		94		96		99		97		94		92		96		93

Q03 How do you normally travel to (LOCATION MENTIONED AT Q01)?
Excluding those who do their main food shopping via the Internet at Q01:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Car / van (as driver)	82.3%	781	79.0%	80	83.8%	85	78.8%	77	93.5%	85	77.1%	64	76.6%	106	73.2%	56	88.6%	77	89.7%	92	84.0%	57
Car / van (as passenger)	7.3%	69	11.5%	12	10.7%	11	11.1%	11	3.3%	3	6.1%	5	9.8%	14	5.6%	4	2.7%	2	3.8%	4	5.2%	4
Bus, minibus or coach	2.6%	24	4.5%	5	2.4%	2	0.0%	0	0.0%	0	7.4%	6	7.4%	10	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Using park & ride facility	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Motorcycle, scooter or moped	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Walk	6.5%	62	1.5%	2	3.0%	3	8.3%	8	3.3%	3	8.7%	7	5.4%	8	19.9%	15	7.0%	6	3.1%	3	10.0%	7
Taxi	0.3%	3	0.8%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.8%	1	0.0%	0	0.0%	0
Train	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bicycle	0.3%	3	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mobility scooter / wheelchair	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know)	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	3	0.0%	0
(Varies)	0.3%	3	0.8%	1	0.0%	0	1.1%	1	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Weighted base:		949		101		102		98		91		83		139		77		87		103		68
Sample:		951		94		96		94		96		99		97		94		92		96		93

Q04 When you visit (LOCATION MENTIONED AT Q01) 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.)? [MR]
Excluding those who do their main food shopping via the Internet at Q01:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Yes - non-food shopping	10.6%	101	12.7%	13	17.0%	17	8.0%	8	13.8%	13	13.7%	11	7.7%	11	20.5%	16	5.2%	5	3.8%	4	5.7%	4
Yes - other food shopping	10.3%	98	12.8%	13	13.9%	14	7.3%	7	4.2%	4	16.9%	14	10.9%	15	14.1%	11	9.0%	8	2.9%	3	13.1%	9
Yes - bars / pubs	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.8%	1	0.0%	0
Yes - bingo	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - cafés	5.2%	49	3.8%	4	2.9%	3	12.3%	12	3.4%	3	1.8%	1	12.4%	17	4.7%	4	2.9%	3	1.5%	2	0.8%	1
Yes - cinemas	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - get petrol	2.6%	25	2.5%	2	6.5%	7	4.4%	4	4.4%	4	0.0%	0	3.5%	5	0.0%	0	2.1%	2	0.8%	1	0.0%	0
Yes - go to park	0.7%	7	0.0%	0	0.0%	0	4.6%	5	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	2
Yes - gyms / health and fitness	2.2%	21	0.0%	0	0.6%	1	1.1%	1	2.5%	2	2.0%	2	3.2%	4	8.0%	6	1.3%	1	3.6%	4	0.0%	0
Yes - library	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Yes - markets	0.2%	2	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Yes - meeting family	0.7%	6	0.0%	0	0.7%	1	0.0%	0	0.8%	1	0.6%	0	0.8%	1	0.7%	1	0.0%	0	2.3%	2	0.8%	1
Yes - meeting friends	0.4%	3	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	1.7%	1	0.8%	1	0.0%	0
Yes - museums / art gallery	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - other service (e.g. travel agent, estate agent etc.)	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	3.5%	3	0.0%	0	0.0%	0
Yes - personal service (e.g. hairdressers, beauty salon etc.)	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.7%	1	0.8%	1	0.0%	0	0.0%	0
Yes - restaurants	0.7%	7	3.4%	3	0.6%	1	0.0%	0	0.0%	0	0.7%	1	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - swimming	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	2.6%	3	0.0%	0
Yes - theatre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - visiting services such as banks and other financial institutions	2.5%	24	0.8%	1	0.0%	0	0.6%	1	4.2%	4	0.6%	0	2.7%	4	4.6%	4	5.0%	4	5.1%	5	1.5%	1
Yes - work	2.2%	21	2.5%	3	0.0%	0	6.6%	6	8.9%	8	0.6%	0	0.0%	0	0.0%	0	1.7%	1	0.8%	1	1.5%	1
Yes - Other	0.9%	8	1.7%	2	0.0%	0	0.6%	1	0.8%	1	0.6%	0	1.7%	2	0.0%	0	0.0%	0	0.8%	1	2.4%	2
Yes - picking up / dropping off passenger	0.4%	4	0.0%	0	0.0%	0	0.0%	0	1.5%	1	2.0%	2	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Yes - school run	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.8%	1	0.0%	0	0.8%	1	0.8%	1	3.3%	2
(No)	63.8%	606	72.7%	74	64.5%	66	58.9%	58	55.7%	51	70.1%	58	60.1%	83	44.4%	34	67.7%	59	74.3%	77	68.8%	46
(Don't know)	1.8%	17	0.8%	1	0.6%	1	3.0%	3	0.0%	0	0.0%	0	3.0%	4	7.7%	6	1.3%	1	0.0%	0	2.8%	2
Weighted base:		949		101		102		98		91		83		139		77		87		103		68
Sample:		951		94		96		94		96		99		97		94		92		96		93

Q05 When you combine your trip with other activities, where do you normally go?
Those who combine their main food shopping trip with other activities at Q04: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Asda Superstore, Chesterton Drive, Leamington Spa	1.2%	4	3.3%	1	0.0%	0	8.5%	3	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, Leamington Spa	0.5%	1	3.3%	1	1.6%	1	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 Superstore, Emscote Road, Warwick	3.5%	10	6.6%	2	12.3%	4	13.1%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Homebase, Myton Road, Leamington Spa	0.2%	1	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lower Precinct, Coventry	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bowen Square, High Street, Daventry	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Talisman Square, Kenilworth	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Royal Priors Shopping Centre, Parade, Leamington Spa	0.5%	1	4.1%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abbey Retail Park, South Way Daventry (Argos, Homebase, Pets at Home)	1.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.3%	4	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Airport Retail Park, London Road, Coventry (Aldi, Carpetright, Currys PC World)	1.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alvis Retail Park, Holyhead Road, Coventry (B&Q, Morrisons, Staples)	3.4%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cannon Park Retail Park, Lynchgate Road, Coventry (Greggs, Holland & Barrett, Iceland)	4.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	24.4%	12	2.9%	1	0.0%	0	0.0%	0	0.0%	0
Elliotts Field Retail Park, Leicester Road, Rugby (Carpetright, DFS, River Island)	0.5%	2	0.0%	0	0.0%	0	0.0%	0	4.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leamington Shopping Park, Tachbrook Park Drive, Leamington Spa (Argos, Carpetright, Mamas & Papas)	1.0%	3	6.7%	2	0.0%	0	1.9%	1	2.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Maybird Shopping Park, Birmingham Road, Stratford-upon-Avon (B&Q, Matalan, New Look)	2.5%	8	0.0%	0	5.7%	2	3.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.1%	2	15.7%	3
Shires Gate Retail Park,	10.7%	32	6.6%	2	49.2%	17	24.0%	8	2.2%	1	2.2%	0	0.0%	0	7.9%	3	0.0%	0	3.5%	1	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Tachbrook Park Drive, Leamington Spa (Currys, Mothercare World)																						
Sears Retail Park, Oakenshaw Road, Solihull (Carpetright, Currys, Halfords).	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.1%	2	0.0%	0	0.0%	0
Warwickshire Shopping Park, Kynner Way, Coventry (Asda Living, DW Sports, M&S)	0.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Banbury Town Centre	1.4%	4	0.0%	0	0.0%	0	0.0%	0	9.2%	3	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coventry City Centre	5.4%	16	3.4%	1	0.0%	0	0.0%	0	0.0%	0	11.4%	3	25.2%	12	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Daventry Town Centre	0.5%	2	0.0%	0	0.0%	0	0.0%	0	4.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kenilworth Town Centre	10.9%	32	0.0%	0	1.6%	1	0.0%	0	2.2%	1	0.0%	0	10.5%	5	71.3%	26	0.0%	0	0.0%	0	2.9%	1
Leamington Spa Town Centre	16.4%	49	62.7%	15	16.5%	6	30.9%	11	29.1%	9	0.0%	0	5.5%	3	2.9%	1	5.3%	1	3.5%	1	15.0%	3
Rugby Town Centre	2.6%	8	0.0%	0	0.0%	0	0.0%	0	16.3%	5	11.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Solihull Town Centre	2.4%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	26.2%	7	0.0%	0	0.0%	0
Stratford-upon-Avon Town Centre	10.0%	30	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.9%	3	77.9%	17	51.8%	9
Southam Town Centre	1.8%	5	0.0%	0	0.0%	0	0.0%	0	16.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Warwick Town Centre	5.0%	15	3.4%	1	13.0%	5	0.0%	0	0.0%	0	7.5%	2	0.0%	0	12.1%	4	5.3%	1	4.4%	1	5.8%	1
Binley Local Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birmingham City Centre	1.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.3%	4	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Canley Local Centre	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Clifford Chambers Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1
Dorridge Village Centre	3.2%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	35.5%	10	0.0%	0	0.0%	0
Dunchurch Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gaydon Village Centre	1.5%	5	0.0%	0	0.0%	0	13.1%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Henley-in-Arden Town Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	1	0.0%	0	0.0%	0
Kineton Road Industrial Estate, Northfield Road, Southam	1.0%	3	0.0%	0	0.0%	0	0.0%	0	9.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shirley District Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	1	0.0%	0	0.0%	0
Studley Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	1	0.0%	0	0.0%	0
Tesco Superstore, Birmingham Road, Stratford-upon-Avon	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	1	0.0%	0
Wellesbourne Village Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	1
Weighted base:		299		23		35		35		32		22		49		36		27		22		17
Sample:		285		20		27		29		34		21		35		43		32		22		22

Q06 In addition to (LOCATION MENTIONED AT Q01), is there anywhere else you regularly use for your main-food shopping?
Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Aldi, Ruscote Avenue, Banbury	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Aldi, Unit 8 Airport Retail Park, Coventry	2.8%	28	1.6%	2	0.0%	0	0.0%	0	2.6%	2	20.4%	17	4.0%	6	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Aldi, Radford Road, Coventry	1.1%	11	0.0%	0	0.0%	0	0.0%	0	0.9%	1	1.2%	1	6.5%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Shultern Lane, Cannon Park, Coventry	2.9%	29	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.8%	22	0.8%	1	6.5%	6	0.0%	0	0.0%	0
Aldi, Queensway, Leamington Spa	3.2%	32	3.6%	4	10.1%	11	8.9%	9	5.6%	5	0.7%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	2.2%	2
Aldi, Stratford Road, Solihull	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0
Aldi, Canners Way, Stratford-upon-Avon	1.0%	10	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.8%	1	3.1%	3	5.4%	4
Asda, North London Road, Cheylesmore (Abbey Park), Coventry	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.9%	7	2.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Daventry Road, Coventry	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	3.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Chesterton Drive, Leamington Spa	2.7%	27	5.2%	6	0.6%	1	2.6%	3	13.7%	13	0.0%	0	0.0%	0	5.3%	4	0.0%	0	0.0%	0	1.3%	1
Asda (Garage), Rugby Road,Leamington Spa	0.2%	2	0.9%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Chapel Street, Rugby	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Stratford Road, Solihull	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Asda, Maybird Retail Park, Stratford-upon-Avon	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2
Co-op, Allesley Old Road, Allesley, Coventry	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Co-op, Clemens Street, Leamington Spa	0.1%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Parade, Leamington Spa	0.1%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Longford Road, Rugby	0.6%	6	0.0%	0	0.0%	0	0.0%	0	6.2%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Chapel Street, Southam	0.2%	2	0.0%	0	0.0%	0	0.0%	0	2.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Reardon Court, Warwick	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Calthorpe Street, Banbury	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Cannon Park, Coventry	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Iceland, Warwick Road, Kenilworth	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	2	0.0%	0	0.0%	0	0.0%	0
Iceland, Bath Street, Leamington Spa	0.3%	3	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Iceland, Clocktower Centre, Northway, Rugby	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Binley Road, Coventry	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	4	0.8%	1	2.2%	2	0.0%	0	0.0%	0	0.0%	0
Lidl, Myton Road, Leamington Spa	1.2%	12	2.2%	2	5.5%	6	2.8%	3	0.7%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Upper Precinct, Coventry	0.3%	3	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Parade, Leamington Spa	1.4%	14	5.1%	5	3.1%	3	2.9%	3	1.5%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Elliots Field Retail Park, Rugby	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Mill Lane, Solihull	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.7%	1	0.0%	0
Marks & Spencer, Bridge Street, Stratford-upon-Avon	0.5%	5	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	4	0.7%	1
Marks & Spencer, Maybird Centre, Stratford-upon-Avon	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	4	2.2%	2
Marks & Spencer Simply Food,Westgate House, Market Street, Warwick	0.5%	5	0.0%	0	2.0%	2	0.0%	0	0.9%	1	0.6%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0
Marks & Spencer Simply Food (BP), Coventry Road, Warwick	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.9%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Morrisons, Alvis Retail Park, Coventry	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	3	1.5%	2	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Morrisons, Parkgate Road, Coventry	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.9%	1	1.3%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Old Warwick Road, Leamington Spa	2.7%	27	4.4%	5	4.2%	4	10.7%	11	1.7%	2	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.7%	1	4.5%	3
Morrisons, George Road, Solihull	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Morrisons, Alcester Road, Stratford-upon-Avon	2.4%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	18.1%	20	4.0%	3
One Stop, Kenpas Highway, Coventry	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
One Stop, Oaks Precinct, Kenilworth	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Oxford Road, Banbury	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Sainsbury's, Trinity Street, Coventry	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Sainsbury's, Far Gosford Street, Coventry	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Hillmorton Road, Rugby	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.9%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Dunchurch Road, Rugby	0.3%	3	0.0%	0	0.0%	0	0.0%	0	2.4%	2	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Warwick Road, Kenilworth	1.5%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.2%	14	0.0%	0	0.0%	0	0.7%	1
Sainsbury's Local, Rugby Road, Cubbington, Leamington Spa	1.6%	16	9.3%	10	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	3	3.0%	2
Sainsbury's Local, Radford Road, Leamington Spa	1.4%	13	3.5%	4	2.4%	2	1.9%	2	0.8%	1	0.6%	0	0.0%	0	0.8%	1	0.8%	1	2.5%	3	0.0%	0
Sainsbury's, Poplar Way, Solihull	0.2%	2	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Sainsbury's, Stratford Road, Shirley	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	3	0.0%	0	0.0%	0
Sainsbury's, The Shires Retail Park, Tachbrook Park Drive, Warwick	4.3%	43	5.9%	6	12.9%	14	15.4%	16	3.0%	3	0.0%	0	0.0%	0	1.4%	1	0.0%	0	1.4%	2	1.4%	1
Sainsbury's Local, Coten End, Warwick	0.5%	5	0.7%	1	0.7%	1	0.0%	0	2.6%	2	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.7%	1	0.0%	0
Tesco Express, Middleton Road, Banbury	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Tesco, Cannon Park Centre, Lynchgate Road, Coventry	1.3%	13	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.6%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Leyes lane, Kenilworth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Metro, Parade, Leamington Spa	0.7%	7	2.9%	3	0.6%	1	1.4%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Tesco Superstore, Leicester Road, Rugby	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.8%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Stratford Road, Solihull	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	6	0.0%	0	0.0%	0
Tesco Superstore, Birmingham Road, Stratford-upon-Avon	1.8%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.1%	13	6.0%	5
Tesco Superstore, Kineton Road Industrial Estate, Northfield Road, Southam	0.7%	7	0.0%	0	0.0%	0	0.0%	0	6.2%	6	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Emscote Road, Warwick	3.2%	32	6.9%	7	9.1%	10	6.0%	6	0.7%	1	0.6%	0	0.0%	0	2.7%	2	1.0%	1	3.4%	4	0.7%	1
Waitrose, Southam Road, Banbury	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, Highfield Lane, Coventry	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, Bowen Square,	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Daventry																						
Waitrose, Talisman Square, Bertie Road, Kenilworth	2.2%	22	2.2%	2	1.9%	2	0.6%	1	0.0%	0	0.0%	0	3.3%	5	14.1%	11	0.0%	0	0.0%	0	0.7%	0
Waitrose, Homer Road, Solihull	1.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.3%	12	0.0%	0	0.0%	0
Waitrose, The Rosebird Centre, Shipstone Road, Stratford-upon-Avon	1.5%	15	0.0%	0	0.6%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.8%	8	6.9%	5
Local Stores, Leamington Spa Town Centre	1.0%	10	8.4%	9	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Stores, Kenilworth Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Internet - delivered	0.9%	9	0.7%	1	0.6%	1	0.6%	1	0.8%	1	1.8%	1	0.8%	1	0.0%	0	0.8%	1	0.0%	0	3.7%	3
Internet - collected (click and collect)	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	4	0.0%	0	0.0%	0	0.0%	0
Acorn Stores, Coventry Street, Southam	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Birmingham Road, Studley	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Aldi, Paddox Close, Rugby	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Brade Drive, Coventry	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Cape Road, Warwick	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Church Road, Long Itchington	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Coventry Street, Southam	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Loxley Close, Wellesbourne	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Co-op, School Street, Wolston, Coventry	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, The Green, Old Bilton, Rugby	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Umberslade Road, Earlswood, Solihull	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Costco, Torrington Avenue, Coventry	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Costcutter, Queen Street, Cubbington, Leamington Spa	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Farmfoods, Riley Square, Bell Green, Coventry	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Heron Foods, Walsgrave Road, Coventry	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Bilton Road, Rugby	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Brandon Road, Coventry	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Stores, Coventry City	0.2%	2	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Centre																						
Local Stores, Earlswood Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Local Stores, Knowle Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Local Stores, Stratford-upon-Avon Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.8%	1
Marks & Spencer Simply Food, Warwickshire Shopping Park, Binley, Coventry	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Skipworth Road, Binley, Coventry	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Warwick Highway, Redditch	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	3	0.0%	0	0.0%	0
Sainsbury's, Abbey Trading Centre, Alvechurch Highway, Redditch	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Sainsbury's, Austin Drive, Court House Green, Coventry	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Fletchamstead Highway, Canley, Coventry	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Loxley Road, Wellesbourne	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	2.5%	3	8.2%	6
Sainsbury's, Saltisford, Warwick	0.3%	3	0.7%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Sainsbury's, Station Road, Dorridge, Solihull	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.2%	8	0.0%	0	0.0%	0
Southam Tuesday Market, Market Hill, Southam	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Banbury Road, Ettington, Stratford-upon-Avon	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Tesco Express, Banbury Road, Stratford-upon-Avon	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	2
Tesco Metro, St Johns Way, Knowle, Solihull	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Tesco Superstore, Clifford Bridge Road, Walsgrave, Coventry	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Nowhere else)	36.7%	365	32.0%	34	42.5%	45	42.3%	44	33.5%	31	34.2%	29	33.5%	47	37.2%	30	40.7%	38	33.9%	37	38.3%	29
Weighted base:		996		107		105		105		94		85		142		82		94		109		75
Sample:		993		96		100		98		100		102		99		100		100		98		100

Q06AWhich internet / home delivery retailer do you also use for your main food shopping?
Those who do their main food shopping via the Internet at Q06:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Amazon	0.0%	0	0.0%	0	0.0%	0	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	3.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.5%	1
Co-op	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gousto	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
HelloFresh	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ocado	44.1%	6	0.0%	0	0.0%	0	0.0%	0	100.0%	1	0.0%	0	0.0%	0	100.0%	4	100.0%	1	0.0%	0	0.0%	0
Riverford	0.0%	0	0.0%	0	0.0%	0	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	0.0%	0	0.0%	0	0.0%	0	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	43.8%	6	100.0%	1	100.1%	1	100.1%	1	0.0%	0	100.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	81.5%	2
Waitrose	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milk & More	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	8.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		13		1		1		1		1		1		1		4		1		0		3
Sample:		13		1		1		1		1		3		1		1		1		0		3

Q07 In addition to your main food shopping, where do you normally 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)?
Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Aldi, Ruscote Avenue, Banbury	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Unit 8 Airport Retail Park, Coventry	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	3	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Shultern Lane, Cannon Park, Coventry	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Queensway, Leamington Spa	1.9%	12	8.1%	6	2.0%	1	3.5%	3	3.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Canners Way, Stratford-upon-Avon	1.2%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.2%	7	1.1%	1
Asda, North London Road, Cheylesmore (Abbey Park), Coventry	2.5%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	3	14.0%	12	1.9%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Daventry Road, Coventry	2.5%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.4%	4	14.1%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Chesterton Drive, Leamington Spa	4.7%	30	3.3%	3	4.4%	3	27.5%	23	1.4%	1	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Garage), Rugby Road,Leamington Spa	0.6%	4	3.9%	3	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Chapel Street, Rugby	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Queensway Shopping Centre, Banbury	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Allesley Old Road, Allesley, Coventry	0.6%	4	0.0%	0	1.2%	1	0.0%	0	0.0%	0	5.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Clemens Street, Leamington Spa	0.4%	2	0.0%	0	0.0%	0	0.6%	1	3.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Parade, Leamington Spa	0.5%	3	0.0%	0	0.0%	0	3.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Longford Road, Rugby	0.6%	4	0.0%	0	0.0%	0	0.0%	0	1.7%	1	5.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Wordsworth Avenue, Stratford-upon-Avon	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	7.0%	3
Co-op, Chapel Street, Southam	2.4%	15	0.0%	0	0.0%	0	0.0%	0	29.7%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Cressida Drive, Warwick	2.0%	12	0.0%	0	12.4%	7	5.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Reardon Court, Warwick	0.8%	5	0.0%	0	8.0%	5	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Warwick Road, Kenilworth	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	2	0.0%	0	1.4%	1	0.0%	0
Iceland, Bath Street, Leamington Spa	0.3%	2	0.0%	0	0.0%	0	2.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Myton Road,	0.5%	3	1.0%	1	1.0%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Leamington Spa																						
Marks & Spencer, Upper Precinct, Coventry	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Parade, Leamington Spa	1.6%	10	4.8%	4	4.4%	3	1.4%	1	0.0%	0	1.8%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Mill Lane, Solihull	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Marks & Spencer, Bridge Street, Stratford-upon-Avon	1.2%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.5%	7	0.0%	0
Marks & Spencer, Maybird Centre, Stratford-upon-Avon	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	3	2.1%	1
Marks & Spencer Simply Food,Westgate House, Market Street, Warwick	0.7%	4	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	4.1%	2	0.0%	0
Marks & Spencer Simply Food (BP), Coventry Road, Warwick	1.8%	12	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0	12.3%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Alvis Retail Park, Coventry	0.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.4%	4	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Old Warwick Road, Leamington Spa	0.7%	5	1.0%	1	1.0%	1	3.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Alcester Road, Stratford-upon-Avon	0.9%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.9%	6	0.0%	0
One Stop, Albion Street, Kenilworth	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0
One Stop, Chase Meadow Square, Narrow Hall Meadow, Warwick	1.0%	6	0.0%	0	9.7%	6	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Trinity Street, Coventry	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Far Gosford Street, Coventry	0.3%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Dunchurch Road, Rugby	0.3%	2	0.0%	0	0.0%	0	0.0%	0	4.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Warwick Road, Kenilworth	1.8%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.5%	11	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Local, Rugby Road, Cubbington, Leamington Spa	2.1%	13	13.9%	11	1.0%	1	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Local, Radford Road, Leamington Spa	1.6%	10	1.5%	1	0.0%	0	8.9%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	1.1%	1
Sainsbury's, Stratford Road, Shirley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Sainsbury's, Bridge Street, Stratford-upon-Avon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Sainsbury's, The Shires Retail Park, Tachbrook Park Drive, Warwick	2.7%	17	4.3%	3	5.6%	3	7.8%	7	4.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	1.3%	1
Sainsbury's Local, Coten End, Warwick	1.5%	9	0.0%	0	14.2%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Spar, Warwick Road, Kenilworth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Spar, Crown Way, Lillington, Leamington Spa	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar (petrol station), Rugby Road, Leamington Spa	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Rugby Road, Leamington Spa	0.4%	2	2.0%	2	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Lockheed Close, Banbury	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Arena Park, Pheonix Way, Coventry	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Cannon Park Centre, Lynchgate Road, Coventry	3.0%	19	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	0	11.0%	9	14.3%	9	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Shelton Square, Coventry	0.3%	2	0.0%	0	1.2%	1	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Leyes lane, Kenilworth	2.6%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	26.9%	16	0.0%	0	0.0%	0	0.0%	0
Tesco Metro, Parade, Leamington Spa	2.8%	17	14.4%	12	2.0%	1	1.4%	1	0.0%	0	0.0%	0	3.2%	3	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Tesco, Stratford Road, Solihull	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Tesco Superstore, Birmingham Road, Stratford-upon-Avon	1.4%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.4%	6	5.7%	3
Tesco Superstore, Kineton Road Industrial Estate, Northfield Road, Southam	1.5%	10	0.0%	0	0.0%	0	0.0%	0	14.5%	7	0.9%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Tesco Superstore, Emscote Road, Warwick	2.1%	13	7.9%	6	5.9%	4	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	3	0.0%	0
Waitrose, Talisman Square, Bertie Road, Kenilworth	2.0%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	19.8%	12	0.0%	0	0.0%	0	1.1%	1
Waitrose, Homer Road, Solihull	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.6%	4	0.0%	0	0.0%	0
Waitrose, The Rosebird Centre, Shipstone Road, Stratford-upon-Avon	1.8%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.8%	8	6.6%	3
Local Stores, Leamington Spa Town Centre	4.2%	26	21.0%	17	1.2%	1	10.3%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Stores, Kenilworth Town Centre	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.3%	4	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Local Stores, Warwick Town Centre	0.2%	1	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet - delivered	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Acorn Stores, Coventry Street, Southam	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Birmingham Road, Studley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0
B&M, Airport Retail Park, Pilot Close, Coventry	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Barby Village Stores, Rugby Road, Barby, Rugby	0.4%	3	0.0%	0	0.0%	0	0.0%	0	5.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Cape Road, Warwick	0.9%	5	0.0%	0	9.2%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Church Road, Long Itchington	0.7%	5	0.0%	0	0.0%	0	0.0%	0	8.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Coventry Street, Southam	0.5%	3	0.0%	0	0.0%	0	0.0%	0	6.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Earlsdon Street, Coventry	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Greenock Road, Bishopton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, High Street, Fenny Compton, Southam	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, High Street, Harbury, Leamington Spa	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, High Street, Henley-In-Arden	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	3	0.0%	0	0.0%	0
Co-op, High Street, Ryton-on-Dunsmore, Coventry	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Kenilworth Road, Balsall Common, Coventry	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Loxley Close, Wellesbourne	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	3.6%	2
Co-op, Main Street, Newbold-on-Avon, Rugby	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, School Street, Wolston, Coventry	0.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.2%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, The Green, Old Bilton, Rugby	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Umberslade Road, Earlswood, Solihull	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	2	0.0%	0	0.0%	0
Costcutter, Warwick Street, Leamington Spa	0.2%	1	1.0%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Farmfoods, Riley Square, Bell Green, Coventry	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Heron Foods, Stafford Street,	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.3%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Willenhall																						
Iceland Food Warehouse, Junction 1 Retail Park, Rugby	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Bilton Road, Rugby	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Stores, Baginton Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Stores, Barford Village Centre	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.4%	4	0.0%	0
Local Stores, Bentley Heath Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Local Stores, Birmingham City Centre	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Stores, Budbrooke Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Local Stores, Cheylesmore Local Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Stores, Claverdon Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0
Local Stores, Coventry City Centre	3.9%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.0%	12	15.3%	13	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Local Stores, Earlswood Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0
Local Stores, Henley-in-Arden Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0
Local Stores, Hockley Heath Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Local Stores, Kensworth Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Stores, Kineton Village Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	2
Local Stores, Lapworth Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0
Local Stores, Middle Tysoe Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Local Stores, Radford Semele Village Centre	0.1%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Stores, Snitterfield Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Local Stores, St John's Local Centre	0.1%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Stores, Stratford-upon-Avon Town Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	2	2.1%	1
Local Stores, Tysoe Village Centre	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.8%	4

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Local Stores, Wellesbourne Village Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	2
Local Stores, Whitnash Town Centre	1.3%	8	0.0%	0	0.0%	0	9.7%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Stores, Willenhall Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Stores, Wootton Wawen Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Marks & Spencer Simply Food, Warwickshire Shopping Park, Binley, Coventry	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milkman delivery	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Hilmore Way, Tamworth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Morrisons, Warwick Highway, Redditch	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0
Nisa Local, Baginton Road, Coventry	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
One Stop, Bridge Street, Wellesbourne	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
One Stop, Drayton Avenue, Stratford-upon-Avon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
One Stop, Heathcote Road, Whitnash	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
One Stop, Newbold Road, Wellesbourne	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1
One Stop, Stratford Road, Hockley Heath, Solihull	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	2	0.0%	0	0.0%	0
Sainsbury's, Fletchamstead Highway, Canley, Coventry	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Loxley Road, Wellesbourne	2.3%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	30.2%	14
Sainsbury's, Saltisford, Warwick	1.0%	6	0.0%	0	7.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	1.7%	1	0.0%	0
Sainsbury's, Station Road, Dorridge, Solihull	4.0%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	50.0%	25	0.0%	0	0.0%	0
Spar, Banbury Road, Ettington, Stratford-upon-Avon	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1
Spar, Main Street, Tiddington, Stratford-upon-Avon	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1
Tachbrook Stores, Wychwood Close, Bishop's Tachbrook	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Tesco Express, Banbury Road, Stratford-upon-Avon	0.9%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	10.4%	5
Tesco Express, Coltness Road, Wishaw	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Tesco Express, Cubbington Road, Lillington	0.6%	4	5.1%	4	0.0%	0	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 Express, Lillington Road, Cubbington	1.0%	6	2.1%	2	0.0%	0	5.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Cross Point Business Park, Olivier Way, Coventry	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Metro, St Johns Way, Knowle, Solihull	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	2	0.0%	0	0.0%	0
Tesco Superstore, Clifford Bridge Road, Walsgrave, Coventry	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		631		80		60		85		51		55		84		61		51		58		48
Sample:		631		66		67		79		59		57		60		74		53		53		63

Q07AWhich retailer do you purchase your top-up food internet / home delivery shopping from?
Those who do their top-up food shopping via the Internet at Q07:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Amazon	0.0%	0	0.0%	0	0.0%	0	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	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gousto	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
HelloFresh	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ocado	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Riverford	0.0%	0	0.0%	0	0.0%	0	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	0.0%	0	0.0%	0	0.0%	0	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	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milk & More	100.0%	1	100.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		1		1		0		0		0		0		0		0		0		0		0
Sample:		1		1		0		0		0		0		0		0		0		0		0

Q08 In addition to (LOCATION MENTIONED AT Q07), is there anywhere else you regularly use for your household's small scale top-up food shopping?
Those who do top-up shopping at Q07: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Aldi, Unit 8 Airport Retail Park, Coventry	1.2%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.2%	4	3.3%	3	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Aldi, Shultern Lane, Cannon Park, Coventry	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Aldi, Queensway, Leamington Spa	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Aldi, Stratford Road, Solihull	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0
Aldi, Canners Way, Stratford-upon-Avon	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	3	0.0%	0
Asda, North London Road, Cheylesmore (Abbey Park), Coventry	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	1.3%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Chesterton Drive, Leamington Spa	0.8%	5	1.0%	1	0.0%	0	2.9%	2	3.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Asda (Garage), Rugby Road,Leamington Spa	0.6%	4	4.7%	4	0.0%	0	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, Chapel Street, Rugby	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Parade, Leamington Spa	0.1%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Wordsworth Avenue, Stratford-upon-Avon	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.8%	3
Co-op, Chapel Street, Southam	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Cressida Drive, Warwick	0.9%	6	0.0%	0	1.0%	1	5.5%	5	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Warwick Road, Kenilworth	0.4%	3	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	2	0.0%	0	0.0%	0	0.0%	0
Iceland, Bath Street, Leamington Spa	0.5%	3	0.0%	0	3.2%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Binley Road, Coventry	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	1.3%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Lidl, Myton Road, Leamington Spa	0.9%	5	0.0%	0	4.2%	3	0.7%	1	2.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Marks & Spencer, Upper Precinct, Coventry	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Parade, Leamington Spa	1.1%	7	0.0%	0	0.0%	0	6.0%	5	0.0%	0	0.0%	0	1.6%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Mill Lane, Solihull	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Marks & Spencer, Bridge Street, Stratford-upon-Avon	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	1.1%	0
Marks & Spencer, Maybird Centre,	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	3	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Stratford-upon-Avon																						
Marks & Spencer Simply Food,Westgate House, Market Street, Warwick	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	3	0.0%	0
Marks & Spencer Simply Food (BP), Coventry Road, Warwick	0.8%	5	0.9%	1	3.2%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	1	1.0%	1	1.5%	1	0.0%	0	0.0%	0
Morrisons, Alvis Retail Park, Coventry	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Old Warwick Road, Leamington Spa	0.7%	5	3.2%	3	0.9%	1	0.8%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Stratford Road, Solihull	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Morrisons, Alcester Road, Stratford-upon-Avon	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0
One Stop, Oaks Precinct, Kenilworth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
One Stop, Albion Street, Kenilworth	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0
One Stop, Chase Meadow Square, Narrow Hall Meadow, Warwick	0.1%	1	0.0%	0	1.0%	1	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, Oxford Road, Banbury	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Trinity Street, Coventry	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Hillmorton Road, Rugby	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Sainsbury's, Warwick Road, Kenilworth	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.3%	4	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Local, Rugby Road, Cubbington, Leamington Spa	0.6%	4	2.9%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Sainsbury's, Bridge Street, Stratford-upon-Avon	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	2	0.0%	0
Sainsbury's, The Shires Retail Park, Tachbrook Park Drive, Warwick	0.7%	5	0.0%	0	1.0%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	3	0.0%	0
Sainsbury's Local, Coten End, Warwick	0.1%	1	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Crown Way, Lillington, Leamington Spa	0.1%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar (petrol station), Rugby Road, Leamington Spa	0.1%	1	1.0%	1	0.0%	0	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, Lockheed Close, Banbury	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Tesco, Cannon Park Centre, Lynchgate Road, Coventry	1.9%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.0%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Leyes lane, Kenilworth	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.8%	5	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Leicester Road, Rugby	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Stratford Road, Solihull	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1	0.0%	0	0.0%	0
Tesco Superstore, Birmingham Road, Stratford-upon-Avon	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	3.7%	2
Tesco Superstore, Kineton Road Industrial Estate, Northfield Road, Southam	0.9%	6	0.0%	0	0.0%	0	0.0%	0	10.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Emscote Road, Warwick	0.2%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0
Waitrose, Highfield Lane, Coventry	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, Talisman Square, Bertie Road, Kenilworth	1.1%	7	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1	9.2%	5	0.0%	0	0.0%	0	0.0%	0
Waitrose, Homer Road, Solihull	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Waitrose, The Rosebird Centre, Shipstone Road, Stratford-upon-Avon	1.4%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1	5.6%	4	8.2%	4
Local Stores, Leamington Spa Town Centre	1.4%	9	3.8%	3	0.0%	0	5.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Local Stores, Kenilworth Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	2	0.0%	0	0.0%	0	0.0%	0
Local Stores, Warwick Town Centre	0.3%	2	0.0%	0	3.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet - delivered	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Acorn Stores, Coventry Street, Southam	0.7%	5	0.0%	0	0.0%	0	0.0%	0	8.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Birmingham Road, Studley	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	2	0.0%	0	0.0%	0
Clarkes Greengrocers, Warwick Street, Leamington Spa	0.2%	2	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Church Road, Long Itchington	0.2%	2	0.0%	0	0.0%	0	0.0%	0	3.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Coventry Street, Southam	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, High Street, Henley-In-Arden	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0
Co-op, High Street, Ryton-on-Dunsmore,	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Coventry																						
Co-op, High Street, Shipston-on-Stour	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Co-op, Loxley Close, Wellesbourne	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	2
Co-op, Newhall Street, Birmingham	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Widney Road, Bentley Heath, Solihull	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0
Costcutter, Queen Street, Cubbington, Leamington Spa	0.4%	2	2.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Heron Foods, Remembrance Road, Coventry	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hilltop Farm, Fosse Way, Hunningham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Stores, Coventry City Centre	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	5.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Stores, Hockley Heath Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Local Stores, Kineton Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Stores, Rugby Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Stores, Stratford-upon-Avon Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0
Local Stores, Stretton-on-Dunsmore Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Stores, Wellesbourne Village Centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	2
Marks & Spencer Simply Food (BP), Stonebridge Highway, Coventry	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Skipworth Road, Binley, Coventry	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Warwick Highway, Redditch	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
One Stop, Bridge Street, Wellesbourne	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
One Stop, Rugby Road, Binley Woods, Coventry	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
One Stop, Stratford Road, Hockley Heath, Solihull	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	2	0.0%	0	0.0%	0
Sainsbury's Local, Clifton Road, Rugby	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Sainsbury's, Fletchamstead Highway, Canley, Coventry	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Loxley Road, Wellesbourne	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Sainsbury's, Saltisford, Warwick	0.1%	1	0.0%	0	0.9%	1	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, Station Road, Dorridge, Solihull	1.1%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	4	4.4%	3	0.0%	0
Spar, Banbury Road, Ettington, Stratford-upon-Avon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Spar, Main Street, Tiddington, Stratford-upon-Avon	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1
Tesco Express, Banbury Road, Stratford-upon-Avon	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	3
Tesco Express, Cubbington Road, Lillington	0.1%	1	0.9%	1	0.0%	0	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 Express, Lillington Road, Cubbington	0.9%	6	1.0%	1	0.0%	0	6.1%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Station Road, Solihull	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0
Tesco Metro, St Johns Way, Knowle, Solihull	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	1	0.0%	0	0.0%	0
Tesco Superstore, Clifford Bridge Road, Walsgrave, Coventry	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Nowhere else)	64.0%	402	74.1%	61	78.5%	49	67.8%	56	59.4%	31	66.4%	33	58.0%	49	58.1%	32	56.1%	28	58.9%	37	56.1%	26
Weighted base:		628		82		62		83		52		50		85		55		49		62		47
Sample:		629		68		69		76		61		54		61		71		51		56		62

Q08AWhich internet / home delivery retailer do you also use for your top-up food shopping?
Those who also do top-up shopping via the Internet at Q08:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Amazon	0.0%	0	0.0%	0	0.0%	0	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	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gousto	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
HelloFresh	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ocado	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Riverford	0.0%	0	0.0%	0	0.0%	0	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	0.0%	0	0.0%	0	0.0%	0	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	100.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.1%	1	0.0%	0
Waitrose	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milk & More	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		1		0		0		0		0		0		0		0		0		1		0
Sample:		1		0		0		0		0		0		0		0		0		1		0

MeanScore: %

Q09 Of all the money you spend on your main and top-up food shopping, what share goes to your main food shopping?
Those who do top-up shopping at Q07:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
1 - 5%	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
6 - 10%	0.2%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
11 - 15%	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
16 - 20%	0.7%	4	3.2%	3	1.2%	1	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
21 - 25%	0.5%	4	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	2.5%	2	0.8%	1	0.0%	0	0.0%	0	0.0%	0
26 - 30%	0.5%	4	1.1%	1	0.9%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	1.4%	1	1.2%	1	0.0%	0
31 - 35%	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
36 - 40%	0.6%	4	0.0%	0	1.0%	1	0.0%	0	1.6%	1	0.9%	0	1.1%	1	0.0%	0	2.2%	1	0.0%	0	0.0%	0
41 - 45%	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
46 - 50%	8.0%	54	1.9%	2	3.1%	2	12.7%	11	9.7%	5	13.1%	7	6.1%	6	8.5%	5	11.2%	6	12.5%	8	2.3%	1
51 - 55%	0.5%	3	0.0%	0	1.0%	1	0.0%	0	1.3%	1	0.0%	0	1.4%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
56 - 60%	5.0%	34	3.7%	3	8.9%	6	3.6%	3	7.1%	4	0.9%	0	3.1%	3	6.3%	4	4.9%	3	5.5%	4	8.9%	4
61 - 65%	0.5%	3	0.0%	0	1.0%	1	0.0%	0	1.3%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0
66 - 70%	8.4%	57	7.2%	6	18.2%	11	12.7%	11	0.0%	0	2.0%	1	5.5%	5	11.0%	7	8.2%	4	9.4%	6	8.9%	4
71 - 75%	11.1%	74	17.0%	14	2.1%	1	5.3%	5	10.9%	6	24.7%	14	10.0%	10	12.1%	8	16.0%	8	2.4%	2	14.9%	7
76 - 80%	23.3%	156	18.8%	16	22.3%	14	10.5%	9	23.9%	13	22.0%	12	27.2%	27	17.1%	11	20.3%	10	38.9%	26	37.5%	18
81 - 85%	1.8%	12	4.1%	3	0.0%	0	0.6%	1	1.3%	1	0.0%	0	2.5%	2	3.6%	2	1.4%	1	1.4%	1	1.3%	1
86 - 90%	19.5%	131	10.8%	9	30.0%	19	33.9%	29	21.0%	11	24.6%	14	19.5%	19	12.1%	8	14.5%	7	12.2%	8	13.0%	6
91 - 95%	4.4%	30	12.3%	10	3.8%	2	0.8%	1	9.7%	5	1.8%	1	4.7%	5	2.5%	2	4.2%	2	1.2%	1	2.1%	1
96 - 100%	1.1%	7	1.1%	1	1.0%	1	0.0%	0	0.0%	0	2.7%	1	0.0%	0	5.4%	3	1.4%	1	0.0%	0	0.0%	0
(Dont know)	13.0%	88	17.8%	15	4.9%	3	18.5%	16	11.0%	6	4.4%	2	15.2%	15	14.7%	9	13.0%	7	13.1%	9	11.2%	5
(Refused)	0.5%	4	0.9%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	3.5%	2	0.0%	0	0.0%	0	0.0%	0
Mean:		*75.85*		*77.35*		*76.72*		*75.83*		*77.26*		*75.65*		*76.36*		*74.59*		*73.43*		*73.55*		*77.25*
Weighted base:		671		84		62		86		54		55		98		64		52		67		49
Sample:		664		70		69		82		63		57		65		79		54		60		65

Q10 Where do you normally do most of your household's shopping for men's, women's, children's and baby clothing and footwear? NOTE we mean fashion items - NOT sports clothing and footwear
Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Asda Superstore, Chesterton Drive, Leamington Spa	1.1%	11	2.3%	2	0.6%	1	4.1%	4	2.7%	2	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Marks & Spencer, Parade, Leamington Spa	0.6%	6	3.2%	3	0.6%	1	1.0%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Old Warwick Road, Leamington Spa	0.1%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsburys Superstore, Leamington Shopping Park, Leamington Spa	1.0%	9	2.0%	2	0.0%	0	1.2%	1	4.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0
Sainsbury's, Saltisford, Warwick	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Emscote Road, Warwick	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
House of Fraser, Parade, Leamington Spa	0.3%	3	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Parade, Leamington Spa	0.3%	3	1.5%	2	0.0%	0	0.6%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Royal Priors Shopping Centre, Parade, Leamington Spa	0.6%	5	0.8%	1	0.0%	0	4.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Touchwood Shopping Centre, Poplar Arcade, Solihull	1.7%	16	0.8%	1	2.5%	3	1.3%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	8.5%	8	2.2%	2	0.7%	1
Abbey Retail Park, South Way Daventry (Argos, Homebase, Pets at Home)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Arena Shopping Park, Classic Drive, Rowleys Green, Coventry (Just for Pets, Marks & Spencer, Tesco Extra)	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	4.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Banbury Gate Shopping Park, Acorn Way, Banbury (M&S, Primark, River Island)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2
Cannon Park Retail Park, Lynchgate Road, Coventry (Greggs, Holland & Barrett, Iceland)	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central Six Retail Park, Warwick Road, Coventry (Poundland, Sports Direct, TK Maxx)	1.4%	13	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0	8.0%	10	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Elliotts Field Retail Park,	1.3%	12	0.0%	0	0.0%	0	0.0%	0	7.4%	7	7.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Leicester Road, Rugby (Carpetright, DFS, River Island)																						
Gallagher Retail Park, Stoney Stanton Road, Coventry (Aldi, Argos, Matalan)	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Junction 1 Retail Park, Leicester Road, Rugby (Carpetright, Homebase, Pets at Home)	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.8%	1	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leamington Shopping Park, Tachbrook Park Drive, Leamington Spa (Argos, Carpetright, Mamas & Papas)	2.6%	25	0.9%	1	3.9%	4	5.2%	5	5.0%	5	0.6%	0	1.9%	2	5.7%	4	0.0%	0	2.6%	3	0.0%	0
Maybird Shopping Park, Birmingham Road, Stratford-upon-Avon (B&Q, Matalan, New Look)	6.2%	58	0.0%	0	4.5%	5	1.2%	1	0.8%	1	0.0%	0	0.0%	0	0.8%	1	1.7%	1	36.8%	39	15.7%	11
Orchard Retail Park, London Road, Coventry (Currys, Dunelm, Halfords,)	0.1%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shires Gate Retail Park, Tachbrook Park Drive, Leamington Spa (Currys, Mothercare World)	5.3%	50	5.6%	6	8.4%	9	12.0%	13	16.3%	15	0.0%	0	0.9%	1	1.4%	1	0.0%	0	3.9%	4	3.2%	2
Sears Retail Park, Oakenshaw Road, Solihull (Carpetright, Currys, Halfords).	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Warwickshire Shopping Park, Kynner Way, Coventry (Asda Living, DW Sports, M&S)	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.2%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Banbury Town Centre	1.7%	16	2.6%	3	0.7%	1	0.5%	1	8.6%	8	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	5.4%	4
Coventry City Centre	10.1%	96	3.1%	3	2.4%	2	5.4%	6	1.0%	1	24.4%	19	34.2%	45	23.0%	18	0.0%	0	2.3%	2	0.0%	0
Kenilworth Town Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	3	0.0%	0	0.0%	0	0.0%	0
Leamington Spa Town Centre	20.7%	196	47.9%	48	33.0%	34	33.7%	35	24.5%	22	6.9%	5	10.6%	14	26.6%	21	2.5%	2	6.8%	7	11.0%	8
Rugby Town Centre	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.8%	1	4.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Solihull Town Centre	8.0%	76	0.8%	1	1.1%	1	6.1%	6	1.0%	1	0.6%	0	2.5%	3	2.2%	2	60.0%	53	5.0%	5	4.1%	3
Stratford-upon-Avon Town Centre	5.8%	55	0.0%	0	5.7%	6	0.8%	1	0.0%	0	0.0%	0	0.0%	0	2.7%	2	2.9%	3	24.5%	26	26.2%	18
Southam Town Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	3.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Warwick Town Centre	0.2%	2	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Abroad	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / catalogue / TV shopping	21.2%	201	23.9%	24	29.1%	30	17.6%	18	19.9%	18	30.4%	24	22.2%	29	29.6%	23	11.3%	10	7.0%	7	25.9%	18
Bicester Village, Pingle Drive, Bicester	0.1%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birmingham City Centre	2.2%	21	0.8%	1	4.7%	5	1.3%	1	0.0%	0	0.0%	0	4.8%	6	0.0%	0	5.7%	5	2.6%	3	0.0%	0
Blooms Garden Centre, Straight Mile, Rugby	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardiff City Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Central London	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	1.5%	2	0.7%	1
Chester City Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Cheylesmore Local Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Clifford Chambers Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Coventry Business Park, Canley Road, Coventry	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Darlaston Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Derby City Centre	0.1%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dunchurch Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fosse Shopping Park, Fosse Park Avenue, Leicester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Guildford Town Centre	0.1%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Knowle Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Liverpool City Centre	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Longbridge Local Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Redditch Town Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	3	0.0%	0
Sainsbury's, Fletchamstead Highway, Canley, Coventry	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Loxley Road, Wellesbourne	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2
Shirley District Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0	0.0%	0
Solihull Gate Retail Park, Marshall Lake Road, Shirley, Solihull	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Stapleton Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Swindon Designer Outlet, Kemble Drive, Swindon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Walsgrave-on-Sowe Village Centre	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wyevale Garden Centre, Chester Road, Birmingham	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	1.3%	1	0.0%	0	0.0%	0
Weighted base:		947		101		103		105		90		78		130		77		89		105		70
Sample:		939		91		97		98		95		95		91		92		94		94		92

Q11 How do you normally travel to (LOCATION MENTIONED AT Q10)?
Those who buy clothing and footwear (excluding via the Internet) at Q10:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Car / van (as driver)	72.1%	563	57.7%	48	75.4%	56	66.3%	58	89.6%	67	76.6%	46	62.4%	68	77.2%	45	79.3%	64	75.6%	77	66.3%	35
Car / van (as passenger)	6.0%	47	11.8%	10	7.3%	5	10.3%	9	2.1%	2	4.5%	3	6.9%	8	2.0%	1	2.7%	2	5.0%	5	4.8%	3
Bus, minibus or coach	8.5%	66	9.5%	8	5.7%	4	5.0%	4	4.9%	4	17.3%	10	16.5%	18	14.3%	8	6.1%	5	1.6%	2	5.7%	3
Using park & ride facility	0.2%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Motorcycle, scooter or moped	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walk	6.7%	52	17.9%	15	3.2%	2	12.9%	11	0.0%	0	0.8%	0	2.2%	2	0.9%	1	0.9%	1	12.1%	12	14.2%	7
Taxi	0.4%	3	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	1.4%	1	0.0%	0	1.0%	0
Train	3.6%	28	0.9%	1	6.6%	5	1.5%	1	0.0%	0	0.0%	0	6.7%	7	0.0%	0	7.9%	6	4.2%	4	5.2%	3
Bicycle	0.5%	4	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.9%	1	0.8%	1	1.0%	1
Mobility scooter / wheelchair	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aeroplane	0.4%	3	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know)	0.6%	5	0.0%	0	0.0%	0	0.6%	1	0.9%	1	0.8%	0	1.2%	1	2.7%	2	0.0%	0	0.0%	0	0.0%	0
(Varies)	1.1%	9	1.2%	1	1.0%	1	2.5%	2	1.4%	1	0.0%	0	0.0%	0	2.0%	1	0.9%	1	0.8%	1	1.9%	1
Weighted base:		780		83		74		87		75		60		110		58		81		101		53
Sample:		815		76		84		84		78		76		80		84		87		89		77

Q12 Where do you normally do most of your household's shopping for recording media for pictures and sound (e.g. records, pre-recorded and unrecorded CDs & DVDs, unexposed films for photographic use, etc.) (Excluding video games)?
Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Asda Superstore, Chesterton Drive, Leamington Spa	1.8%	9	4.3%	3	1.3%	1	7.2%	4	3.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Old Warwick Road, Leamington Spa	0.3%	1	1.2%	1	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsburys Superstore, Warwick Road, Kenilworth	1.2%	6	1.2%	1	4.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.3%	3	0.0%	0	0.0%	0	0.0%	0
Sainsburys Superstore, Leamington Shopping Park, Leamington Spa	1.0%	5	7.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Saltisford, Warwick	0.4%	2	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0
Tesco Superstore, Emscote Road, Warwick	0.4%	2	1.3%	1	2.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Regent Court Shopping Centre, Livery Street, Leamington Spa	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Airport Retail Park, London Road, Coventry (Aldi, Carpetright, Currys PC World)	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cannon Park Retail Park, Lynchgate Road, Coventry (Greggs, Holland & Barrett, Iceland)	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Central Six Retail Park, Warwick Road, Coventry (Poundland, Sports Direct, TK Maxx)	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leamington Shopping Park, Tachbrook Park Drive, Leamington Spa (Argos, Carpetright, Mamas & Papas)	0.5%	2	1.5%	1	0.0%	0	1.3%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Maybird Shopping Park, Birmingham Road, Stratford-upon-Avon (B&Q, Matalan, New Look)	0.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	2	4.3%	2
Shires Gate Retail Park, Tachbrook Park Drive, Leamington Spa (Currys, Mothercare World)	0.5%	2	1.2%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0

Warwick District Council: Retail & Leisure Study
For Carter Jonas

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Sears Retail Park, Oakenshaw Road, Solihull (Carpetright, Currys, Halfords).	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0
Warwickshire Shopping Park, Kynner Way, Coventry (Asda Living, DW Sports, M&S)	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Banbury Town Centre	0.8%	4	1.2%	1	0.0%	0	0.0%	0	3.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	2
Coventry City Centre	5.7%	27	1.2%	1	0.0%	0	2.4%	1	0.0%	0	27.4%	12	19.6%	12	3.0%	1	0.0%	0	0.0%	0	0.0%	0
Kenilworth Town Centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	2.7%	1	0.0%	0	0.0%	0	0.0%	0
Leamington Spa Town Centre	6.4%	31	7.5%	5	17.7%	8	13.4%	7	10.1%	5	0.0%	0	0.0%	0	9.1%	4	3.3%	1	0.0%	0	4.0%	2
Rugby Town Centre	0.7%	3	0.0%	0	0.0%	0	0.0%	0	5.2%	2	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Solihull Town Centre	2.8%	13	0.0%	0	1.3%	1	0.0%	0	0.0%	0	1.2%	0	1.8%	1	1.6%	1	22.3%	10	0.0%	0	1.6%	1
Stratford-upon-Avon Town Centre	1.4%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.8%	6	2.7%	1
Southam Town Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	3.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Warwick Town Centre	0.6%	3	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	1.6%	1	2.0%	1
Abroad	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0
Internet / catalogue / TV shopping	70.9%	340	72.1%	45	67.9%	31	73.4%	38	70.0%	32	62.1%	27	67.2%	42	73.5%	28	69.5%	31	75.5%	37	79.4%	30
Birmingham City Centre	0.6%	3	0.0%	0	0.0%	0	1.3%	1	1.5%	1	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Darlaston Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kineton Road Industrial Estate, Northfield Road, Southam	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Redditch Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0
Sainsbury's, Loxley Road, Wellesbourne	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1
Shirley District Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0
Weighted base:		479		62		45		52		46		43		62		39		44		49		38
Sample:		454		46		44		42		50		49		40		48		46		46		43

Q13 Where do you normally do most of your household's shopping for audio visual, photographic, computer items (such as TVs, cameras, ipads, telephones etc) and all other domestic electrical goods (such as irons, kettles, fridges, freezers, dishwashers etc)?
Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Aldi, Queensway, Leamington Spa	0.1%	1	0.0%	0	0.6%	1	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 Superstore, Chesterton Drive, Leamington Spa	0.5%	4	0.0%	0	0.0%	0	2.7%	3	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Old Warwick Road, Leamington Spa	0.1%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0
Sainsburys Superstore, Warwick Road, Kenilworth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsburys Superstore, Leamington Shopping Park, Leamington Spa	0.7%	6	1.6%	2	0.6%	1	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	2.8%	2
Sainsbury's, Saltisford, Warwick	0.1%	1	0.0%	0	0.6%	1	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 Superstore, Emscote Road, Warwick	0.2%	2	0.8%	1	1.2%	1	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, Guy Street, Leamington Spa	1.0%	9	6.3%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	3	0.0%	0
Homebase, Emscote Road, Warwick	0.1%	1	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
House of Fraser, Parade, Leamington Spa	0.1%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Owens Electrical, Emscote Roasd, Warwick	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0
Royal Priors Shopping Centre, Parade, Leamington Spa	0.2%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Touchwood Shopping Centre, Poplar Arcade, Solihull	1.6%	14	1.8%	2	2.7%	3	0.6%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.9%	1	6.0%	5	2.5%	2
Abbey Retail Park, South Way Daventry (Argos, Homebase, Pets at Home)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Airport Retail Park, London Road, Coventry (Aldi, Carpetright, Currys PC World)	11.1%	95	9.3%	9	0.6%	1	0.6%	1	3.6%	3	42.2%	32	33.3%	43	11.9%	7	0.0%	0	0.0%	0	0.8%	1
Alvis Retail Park, Holyhead Road, Coventry (B&Q, Morrisons, Staples)	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	4.4%	6	2.0%	1	0.0%	0	0.0%	0	0.0%	0
Banbury Cross Retail Park, Ruscote Avenue, Banbury (Brantano, Currys, DFS)	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.6%	6

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Banbury Gate Shopping Park, Acorn Way, Banbury (M&S, Primark, River Island)	0.6%	5	0.0%	0	0.0%	0	4.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Cannon Park Retail Park, Lynchgate Road, Coventry (Greggs, Holland & Barrett, Iceland)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elliotts Field Retail Park, Leicester Road, Rugby (Carpetright, DFS, River Island)	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gallagher Retail Park, Stoney Stanton Road, Coventry (Aldi, Argos, Matalan)	0.8%	7	0.0%	0	0.6%	1	0.7%	1	0.0%	0	6.1%	5	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Junction 1 Retail Park, Leicester Road, Rugby (Carpetright, Homebase, Pets at Home)	0.8%	7	0.0%	0	0.0%	0	0.0%	0	3.8%	3	5.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leamington Shopping Park, Tachbrook Park Drive, Leamington Spa (Argos, Carpetright, Mamas & Papas)	3.9%	34	2.7%	3	11.0%	11	5.1%	5	6.3%	5	0.0%	0	0.0%	0	8.0%	5	0.0%	0	4.0%	4	3.3%	2
Maybird Shopping Park, Birmingham Road, Stratford-upon-Avon (B&Q, Matalan, New Look)	1.1%	9	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	5	6.1%	4
Orchard Retail Park, London Road, Coventry (Currys, Dunelm, Halfords,)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	1.8%	1	0.0%	0	0.0%	0	0.0%	0
Shires Gate Retail Park, Tachbrook Park Drive, Leamington Spa (Currys, Mothercare World)	13.0%	112	20.1%	19	17.5%	17	27.8%	27	27.1%	22	0.8%	1	0.0%	0	7.0%	4	5.1%	4	10.5%	9	15.0%	9
Sears Retail Park, Oakenshaw Road, Solihull (Carpetright, Currys, Halfords).	4.2%	36	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	43.0%	34	0.0%	0	0.0%	0
Warwickshire Shopping Park, Kynner Way, Coventry (Asda Living, DW Sports, M&S)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Banbury Town Centre	0.6%	5	0.0%	0	0.0%	0	0.0%	0	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	3
Coventry City Centre	3.8%	32	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.6%	4	17.9%	23	2.0%	1	0.0%	0	4.0%	4	0.8%	1

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Kenilworth Town Centre	0.7%	6	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.8%	1	6.6%	4	0.0%	0	0.0%	0	0.0%	0
Leamington Spa Town Centre	6.2%	53	12.7%	12	15.9%	15	8.3%	8	5.1%	4	0.0%	0	1.9%	2	8.8%	5	0.0%	0	4.8%	4	3.3%	2
Rugby Town Centre	0.6%	5	0.0%	0	0.0%	0	0.0%	0	3.6%	3	2.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Solihull Town Centre	5.7%	50	0.0%	0	2.0%	2	9.5%	9	0.0%	0	0.0%	0	8.8%	11	7.5%	4	19.8%	16	6.0%	5	3.1%	2
Stratford-upon-Avon Town Centre	0.9%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	3.8%	3	4.5%	3
Warwick Town Centre	0.6%	6	0.0%	0	2.4%	2	0.0%	0	2.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.8%	0
Abroad	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / catalogue / TV shopping	37.1%	319	40.6%	38	42.8%	42	35.6%	34	41.6%	34	31.0%	23	26.4%	34	42.8%	25	27.5%	22	48.4%	43	39.2%	24
Birmingham City Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central London	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Costco, Torrington Avenue, Coventry	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Darlaston Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dorridge Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Dunchurch Village Centre	0.1%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Evesham Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Redditch Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Sainsbury's, Fletchamstead Highway, Canley, Coventry	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shirley District Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
The MK Centre, Marlborough Gate, Milton Keynes	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		861		94		97		96		83		76		129		59		79		89		61
Sample:		846		81		96		83		87		91		88		80		81		79		80

Q14 Where do you normally do most of your household's shopping for books (incl. dictionaries, encyclopaedias, text books, guidebooks and musical scores) and stationary (incl. writing pads, envelopes pens, diaries, etc.) and drawing materials?
Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Asda Superstore, Chesterton Drive, Leamington Spa	1.4%	11	0.9%	1	0.0%	0	9.3%	9	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Morrisons, Old Warwick Road, Leamington Spa	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Sainsburys Superstore, Leamington Shopping Park, Leamington Spa	1.1%	9	0.0%	0	6.9%	6	1.1%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1
Sainsbury's, Saltisford, Warwick	0.3%	3	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	1.2%	1	0.0%	0
Tesco Metro, Parade, Leamington Spa	0.4%	3	2.0%	2	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Tesco Superstore, Emscote Road, Warwick	0.6%	5	0.0%	0	5.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Wilko, Station Road, Kenilworth	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	2	0.0%	0	0.0%	0	0.0%	0
Talisman Square, Kenilworth	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0
Royal Priors Shopping Centre, Parade, Leamington Spa	0.6%	5	0.9%	1	0.0%	0	4.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mell Square Shopping Centre, Drury Lane, Solihull	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Abbey Retail Park, South Way Daventry (Argos, Homebase, Pets at Home)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Airport Retail Park, London Road, Coventry (Aldi, Carpetright, Currys PC World)	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alvis Retail Park, Holyhead Road, Coventry (B&Q, Morrisons, Staples)	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cannon Park Retail Park, Lynchgate Road, Coventry (Greggs, Holland & Barrett, Iceland)	1.6%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.2%	12	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Central Six Retail Park, Warwick Road, Coventry (Poundland, Sports Direct, TK Maxx)	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elliotts Field Retail Park, Leicester Road, Rugby (Carpetright, DFS, River	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Island)																						
Leamington Shopping Park, Tachbrook Park Drive, Leamington Spa (Argos, Carpetright, Mamas & Papas)	0.8%	6	0.9%	1	2.5%	2	1.5%	1	1.1%	1	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0
Maybird Shopping Park, Birmingham Road, Stratford-upon-Avon (B&Q, Matalan, New Look)	1.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	4	7.2%	5
Shires Gate Retail Park, Tachbrook Park Drive, Leamington Spa (Currys, Mothercare World)	0.2%	1	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sears Retail Park, Oakenshaw Road, Solihull (Carpetright, Currys, Halfords).	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0
Warwickshire Shopping Park, Kynner Way, Coventry (Asda Living, DW Sports, M&S)	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Banbury Town Centre	0.9%	7	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.9%	5
Coventry City Centre	8.2%	65	0.0%	0	0.0%	0	0.0%	0	0.0%	0	42.5%	23	33.7%	40	2.5%	2	0.0%	0	0.0%	0	0.0%	0
Daventry Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kenilworth Town Centre	5.1%	40	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	54.2%	36	0.0%	0	0.0%	0	0.8%	1
Leamington Spa Town Centre	19.5%	155	42.9%	37	23.2%	19	48.2%	45	39.6%	25	3.0%	2	8.3%	10	7.2%	5	4.8%	4	6.2%	5	4.6%	3
Rugby Town Centre	1.0%	8	0.0%	0	0.0%	0	0.0%	0	7.1%	4	6.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Solihull Town Centre	4.3%	34	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	40.0%	32	1.9%	2	0.0%	0
Stratford-upon-Avon Town Centre	7.4%	59	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	43.0%	35	32.8%	22
Warwick Town Centre	1.9%	15	1.8%	2	9.4%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	2	4.2%	4	0.0%	0
Internet / catalogue / TV shopping	38.6%	307	48.8%	42	51.2%	42	33.1%	31	45.1%	29	40.4%	22	36.9%	44	27.4%	18	37.0%	29	32.1%	26	34.7%	23
Barford Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Birmingham City Centre	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	3.3%	3	0.0%	0
Dorridge Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0
Dunchurch Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Earlswood Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Kineton Road Industrial Estate, Northfield Road, Southam	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Knowle Village Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Sainsbury's, Fletchamstead Highway, Canley,	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Coventry																						
Sainsbury's, Loxley Road, Wellesbourne	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	3
Shirley District Centre	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	3.9%	3	0.0%	0	0.0%	0
Tesco Superstore, Birmingham Road, Stratford-upon-Avon	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	2	1.9%	1
Walsgrave-on-Sowe Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wellesbourne Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Weighted base:		794		86		81		94		64		54		120		67		79		82		68
Sample:		784		76		74		85		69		65		80		88		82		79		86

Q15 Where do you normally do most of your household's shopping for games & toys; pets and pet products; hobby items; sport clothing / footwear and equipment; camping goods; bicycles; and musical instruments?
Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Aldi, Queensway, Leamington Spa	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda Superstore, Chesterton Drive, Leamington Spa	2.0%	13	1.2%	1	0.8%	1	12.6%	10	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0
Sainsburys Superstore, Warwick Road, Kenilworth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0
Sainsburys Superstore, Leamington Shopping Park, Leamington Spa	0.7%	4	0.0%	0	3.8%	3	2.3%	2	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	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Tesco Metro, Parade, Leamington Spa	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Emscote Road, Warwick	0.5%	3	0.0%	0	2.4%	2	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Argos, Guy Street, Leamington Spa	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	3	0.0%	0
Pets at Home, Myton Road, Leamington Spa	1.4%	9	2.5%	2	4.4%	3	4.0%	3	0.0%	0	0.0%	0	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.0%	0
Royal Priors Shopping Centre, Parade, Leamington Spa	1.0%	6	6.6%	4	0.0%	0	2.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Touchwood Shopping Centre, Poplar Arcade, Solihull	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Abbey Retail Park, South Way Daventry (Argos, Homebase, Pets at Home)	0.4%	3	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.8%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Airport Retail Park, London Road, Coventry (Aldi, Carpetright, Currys PC World)	5.6%	37	6.6%	4	3.6%	3	5.9%	5	0.0%	0	19.4%	12	12.2%	10	6.7%	3	0.0%	0	0.0%	0	0.0%	0
Arena Shopping Park, Classic Drive, Rowleys Green, Coventry (Just for Pets, Marks & Spencer, Tesco Extra)	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alvis Retail Park, Holyhead Road, Coventry (B&Q, Morrisons, Staples)	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Banbury Cross Retail Park, Ruscote Avenue, Banbury	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
(Brantano, Currys, DFS)																						
Cannon Park Retail Park, Lynchgate Road, Coventry (Greggs, Holland & Barrett, Iceland)	1.7%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	13.3%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central Six Retail Park, Warwick Road, Coventry (Poundland, Sports Direct, TK Maxx)	1.0%	7	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.9%	1	4.3%	4	3.4%	2	0.0%	0	0.0%	0	0.0%	0
Elliotts Field Retail Park, Leicester Road, Rugby (Carpetright, DFS, River Island)	0.7%	5	0.0%	0	0.0%	0	0.0%	0	2.3%	1	5.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gallagher Retail Park, Stoney Stanton Road, Coventry (Aldi, Argos, Matalan)	0.3%	2	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Junction 1 Retail Park, Leicester Road, Rugby (Carpetright, Homebase, Pets at Home)	1.0%	6	4.2%	3	0.0%	0	0.0%	0	5.0%	3	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leamington Shopping Park, Tachbrook Park Drive, Leamington Spa (Argos, Carpetright, Mamas & Papas)	2.7%	17	0.0%	0	8.6%	6	1.1%	1	15.0%	9	0.8%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Maybird Shopping Park, Birmingham Road, Stratford-upon-Avon (B&Q, Matalan, New Look)	6.1%	40	0.0%	0	0.8%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	34.9%	26	22.3%	12
Shires Gate Retail Park, Tachbrook Park Drive, Leamington Spa (Currys, Mothercare World)	2.6%	17	4.2%	3	7.6%	5	7.4%	6	2.2%	1	0.0%	0	0.0%	0	2.1%	1	0.0%	0	1.3%	1	0.0%	0
Sears Retail Park, Oakenshaw Road, Solihull (Carpetright, Currys, Halfords).	1.5%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.8%	9	1.0%	1	0.0%	0
Warwickshire Shopping Park, Kynner Way, Coventry (Asda Living, DW Sports, M&S)	0.6%	4	0.0%	0	0.0%	0	0.0%	0	1.4%	1	1.7%	1	0.0%	0	3.6%	2	0.0%	0	0.0%	0	0.0%	0
Banbury Town Centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1
Coventry City Centre	5.9%	39	0.0%	0	1.8%	1	6.7%	5	0.0%	0	25.0%	16	16.0%	13	4.7%	2	0.0%	0	1.0%	1	0.0%	0
Daventry Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kenilworth Town Centre	2.5%	17	10.1%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	2	14.1%	7	0.0%	0	1.0%	1	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Leamington Spa Town Centre	15.0%	98	33.6%	22	19.5%	14	25.9%	20	19.0%	12	2.7%	2	7.6%	6	23.4%	12	5.5%	3	4.7%	4	7.8%	4
Rugby Town Centre	0.8%	5	0.0%	0	0.0%	0	0.0%	0	2.5%	2	5.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Solihull Town Centre	1.7%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	18.7%	10	1.1%	1	0.0%	0
Stratford-upon-Avon Town Centre	3.6%	24	0.0%	0	1.6%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	2.3%	1	2.1%	1	19.4%	15	8.7%	5
Southam Town Centre	0.6%	4	1.2%	1	0.0%	0	0.0%	0	5.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Warwick Town Centre	1.4%	9	1.5%	1	5.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	2	1.7%	1	2.3%	2	0.9%	0
Internet / catalogue / TV shopping	31.6%	207	18.3%	12	40.1%	29	26.5%	21	32.7%	20	28.0%	18	29.0%	24	29.4%	15	39.5%	21	26.5%	20	51.5%	28
Allesley Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Birmingham City Centre	1.0%	6	10.1%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central London	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Charlecote Garden Store, Charlecote Gardens, Charlecote, Warwick	0.3%	2	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1
Cheylesmore Local Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coventry Business Park, Canley Road, Coventry	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dorridge Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Kineton Road Industrial Estate, Northfield Road, Southam	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Knowle Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Middle Tysoe Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Sainsbury's, Loxley Road, Wellesbourne	0.2%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0
Sixfields Retail Park, Gambrel Road, Northampton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Bull Ring Shopping Centre, Birmingham	0.9%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.5%	6	0.0%	0	0.0%	0
Walsgrave-on-Sowe Village Centre	1.2%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.2%	5	4.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wyevale Garden Centre, Warwick Road, Stratford-upon-Avon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Weighted base:		654		64		73		77		63		64		81		50		53		75		54
Sample:		612		49		64		64		62		65		58		66		55		65		64

Q16 Where do you normally do most of your household's shopping for furniture, carpets, other floor coverings and household textiles (includes beds, sofas, tables, etc)?
Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Benson for Beds, Myton Road, Leamington Spa	0.1%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Castle Quay Shopping Centre, Banbury	0.8%	5	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.8%	4
Touchwood Shopping Centre, Poplar Arcade, Solihull	2.1%	14	4.1%	3	2.7%	2	1.5%	1	0.0%	0	0.0%	0	3.2%	3	0.0%	0	0.0%	0	6.4%	5	0.9%	1
Abbey Retail Park, South Way Daventry (Argos, Homebase, Pets at Home)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	2.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Airport Retail Park, London Road, Coventry (Aldi, Carpetright, Currys PC World)	2.0%	13	2.7%	2	1.6%	1	0.7%	1	1.1%	1	7.1%	4	5.9%	5	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Arena Shopping Park, Classic Drive, Rowleys Green, Coventry (Just for Pets, Marks & Spencer, Tesco Extra)	0.3%	2	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.9%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alvis Retail Park, Holyhead Road, Coventry (B&Q, Morrisons, Staples)	2.8%	19	0.0%	0	0.0%	0	5.8%	5	0.0%	0	1.2%	1	15.4%	13	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Banbury Cross Retail Park, Ruscote Avenue, Banbury (Brantano, Currys, DFS)	1.5%	10	0.0%	0	1.0%	1	0.0%	0	9.4%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	3
Cannon Park Retail Park, Lynchgate Road, Coventry (Greggs, Holland & Barrett, Iceland)	0.7%	5	0.0%	0	0.0%	0	5.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central Six Retail Park, Warwick Road, Coventry (Poundland, Sports Direct, TK Maxx)	0.6%	4	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1	4.8%	2	0.0%	0	0.0%	0	0.0%	0
Elliotts Field Retail Park, Leicester Road, Rugby (Carpetright, DFS, River Island)	0.6%	4	0.0%	0	0.0%	0	0.0%	0	2.1%	1	5.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gallagher Retail Park, Stoney Stanton Road, Coventry (Aldi, Argos, Matalan)	1.3%	9	1.2%	1	2.3%	2	0.7%	1	0.0%	0	5.2%	3	0.0%	0	4.9%	2	0.0%	0	1.0%	1	0.0%	0
Junction 1 Retail Park, Leicester Road, Rugby (Carpetright, Homebase,	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Pets at Home)																						
Leamington Shopping Park, Tachbrook Park Drive, Leamington Spa (Argos, Carpetright, Mamas & Papas)	3.4%	23	5.3%	3	10.7%	8	6.4%	5	6.6%	4	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.9%	0
Maybird Shopping Park, Birmingham Road, Stratford-upon-Avon (B&Q, Matalan, New Look)	3.2%	21	0.0%	0	0.0%	0	6.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.2%	11	8.7%	5
Shires Gate Retail Park, Tachbrook Park Drive, Leamington Spa (Currys, Mothercare World)	4.7%	32	15.0%	10	17.5%	13	4.9%	4	2.1%	1	0.0%	0	0.0%	0	0.0%	0	2.3%	1	1.0%	1	2.1%	1
Sears Retail Park, Oakenshaw Road, Solihull (Carpetright, Currys, Halfords).	3.4%	23	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	33.8%	21	1.2%	1	0.0%	0
Warwickshire Shopping Park, Kynner Way, Coventry (Asda Living, DW Sports, M&S)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Banbury Town Centre	1.8%	12	0.0%	0	1.0%	1	0.0%	0	8.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.0%	5
Coventry City Centre	13.7%	91	15.5%	10	20.3%	15	11.2%	9	9.6%	6	31.7%	16	26.8%	22	10.1%	5	0.0%	0	1.0%	1	11.3%	6
Kenilworth Town Centre	3.8%	25	2.4%	2	4.9%	4	2.4%	2	1.0%	1	0.0%	0	3.9%	3	27.3%	13	0.0%	0	0.0%	0	1.9%	1
Leamington Spa Town Centre	9.6%	64	31.1%	20	5.0%	4	23.1%	18	7.6%	5	4.4%	2	5.9%	5	7.6%	4	1.2%	1	1.0%	1	7.4%	4
Rugby Town Centre	0.7%	5	0.0%	0	0.0%	0	0.0%	0	5.7%	4	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Solihull Town Centre	6.4%	43	1.2%	1	5.6%	4	0.0%	0	1.3%	1	0.0%	0	1.6%	1	9.7%	5	36.3%	23	5.7%	5	6.2%	3
Stratford-upon-Avon Town Centre	5.6%	37	0.0%	0	2.7%	2	2.4%	2	0.0%	0	0.0%	0	0.0%	0	1.1%	1	1.4%	1	25.6%	21	20.7%	11
Southam Town Centre	0.9%	6	0.0%	0	0.0%	0	0.0%	0	8.1%	5	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Warwick Town Centre	1.9%	12	1.2%	1	5.2%	4	0.8%	1	2.6%	2	0.0%	0	1.6%	1	0.0%	0	1.2%	1	3.4%	3	0.9%	0
Internet / catalogue / TV shopping	17.7%	118	8.9%	6	5.2%	4	21.0%	17	13.0%	9	27.7%	14	28.6%	24	25.6%	12	12.5%	8	23.8%	19	10.7%	6
Alcester Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Avon Retail Park, Wharf Road, Stratford-upon-Avon	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	3	1.9%	1
B&Q, Brandon Road, Binley Woods, Coventry	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Bentley Heath Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Binley Local Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birmingham City Centre	1.9%	13	1.2%	1	7.3%	5	0.0%	0	0.0%	0	0.0%	0	1.3%	1	2.2%	1	6.1%	4	0.0%	0	0.9%	0
Cardiff City Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Central London	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chapelfields Local Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cubbington Village Centre	0.1%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Derby City Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Erdington Local Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0
Evesham Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Fosse Shopping Park, Fosse Park Avenue, Leicester	0.1%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Henley-in-Arden Town Centre	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.9%	4	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Ikea, Croft Road, Coventry	2.7%	18	2.7%	2	0.0%	0	1.5%	1	14.5%	10	0.0%	0	1.6%	1	0.0%	0	0.0%	0	4.6%	4	0.9%	1
Ikea, Park Lane, Wednesbury, Birmingham	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	1.0%	1	0.0%	0
Karpet Kingdom, Longfield Road, Leamington Spa	0.5%	3	1.2%	1	0.0%	0	3.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kenilworth Carpets, Farmer Ward Road, Kenilworth	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0
Lillington Local Centre	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lincoln City Centre	0.7%	5	0.0%	0	6.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Long Marston Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Longbridge Local Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0
Milverton Local Centre	0.1%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The MK Centre, Marlborough Gate, Milton Keynes	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Willenhall Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		666		65		76		79		67		52		83		48		63		80		54
Sample:		643		57		70		67		64		61		54		71		61		69		69

Q17 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)?
Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Asda Superstore, Chesterton Drive, Leamington Spa	0.2%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Homebase, Emscote Road, Warwick	3.4%	30	8.5%	8	20.0%	18	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.8%	1	0.9%	1	0.8%	1	0.7%	0
Homebase, Myton Road, Leamington Spa	17.1%	151	28.4%	27	38.8%	36	54.6%	52	16.3%	14	0.6%	0	0.0%	0	19.5%	14	0.0%	0	5.4%	5	5.5%	4
House of Fraser, Parade, Leamington Spa	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Screwfix, Tachbrook Park Drive, Leamington Spa	2.3%	21	4.7%	4	0.6%	1	11.5%	11	0.0%	0	0.0%	0	0.0%	0	7.0%	5	0.0%	0	0.0%	0	0.0%	0
Wilko, Station Road, Kenilworth	0.2%	2	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Royal Priors Shopping Centre, Parade, Leamington Spa	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abbey Retail Park, South Way Daventry (Argos, Homebase, Pets at Home)	0.6%	5	0.0%	0	0.0%	0	0.0%	0	3.8%	3	1.3%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Airport Retail Park, London Road, Coventry (Aldi, Carpetright, Currys PC World)	2.2%	20	6.9%	6	0.0%	0	0.6%	1	0.0%	0	7.5%	6	3.6%	5	3.5%	2	0.0%	0	0.0%	0	0.0%	0
Alvis Retail Park, Holyhead Road, Coventry (B&Q, Morrisons, Staples)	7.1%	62	1.8%	2	0.6%	1	7.5%	7	5.6%	5	17.8%	13	24.1%	31	5.5%	4	0.0%	0	0.0%	0	0.0%	0
Banbury Cross Retail Park, Ruscote Avenue, Banbury (Brantano, Currys, DFS)	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Banbury Gate Shopping Park, Acorn Way, Banbury (M&S, Primark, River Island)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cannon Park Retail Park, Lynchgate Road, Coventry (Greggs, Holland & Barrett, Iceland)	1.0%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	5.9%	8	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Elliotts Field Retail Park, Leicester Road, Rugby (Carpetright, DFS, River Island)	0.4%	4	0.0%	0	0.0%	0	0.0%	0	2.7%	2	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gallagher Retail Park, Stoney Stanton Road, Coventry (Aldi, Argos,	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Matalan)																						
Junction 1 Retail Park, Leicester Road, Rugby (Carpetright, Homebase, Pets at Home)	0.9%	8	0.0%	0	0.0%	0	0.0%	0	7.1%	6	2.3%	2	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Leamington Shopping Park, Tachbrook Park Drive, Leamington Spa (Argos, Carpetright, Mamas & Papas)	3.3%	29	3.8%	4	8.3%	8	2.5%	2	11.9%	10	0.0%	0	0.0%	0	1.5%	1	0.0%	0	3.8%	4	0.9%	1
Maybird Shopping Park, Birmingham Road, Stratford-upon-Avon (B&Q, Matalan, New Look)	10.4%	92	0.0%	0	0.6%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	1.9%	1	64.9%	63	34.7%	24
Shires Gate Retail Park, Tachbrook Park Drive, Leamington Spa (Currys, Mothercare World)	2.3%	20	5.3%	5	2.1%	2	7.9%	7	3.8%	3	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.8%	1	0.7%	0
Sears Retail Park, Oakenshaw Road, Solihull (Carpetright, Currys, Halfords).	7.3%	65	4.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	78.4%	61	0.0%	0	0.0%	0
Warwickshire Shopping Park, Kynner Way, Coventry (Asda Living, DW Sports, M&S)	1.2%	10	0.0%	0	0.0%	0	0.0%	0	1.3%	1	10.3%	8	0.8%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Banbury Town Centre	1.9%	17	0.0%	0	0.0%	0	0.0%	0	10.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.8%	8
Coventry City Centre	8.0%	70	13.0%	12	0.6%	1	1.1%	1	1.9%	2	13.9%	10	24.0%	31	18.8%	13	0.0%	0	0.0%	0	0.7%	1
Daventry Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kenilworth Town Centre	1.5%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	18.0%	12	0.0%	0	0.0%	0	0.0%	0
Leamington Spa Town Centre	5.3%	47	9.3%	9	10.8%	10	7.8%	7	9.4%	8	0.6%	0	0.0%	0	6.4%	4	1.0%	1	2.8%	3	6.2%	4
Rugby Town Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	1.0%	1	3.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Solihull Town Centre	0.5%	4	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	4	0.0%	0	0.0%	0
Stratford-upon-Avon Town Centre	3.9%	34	0.0%	0	0.0%	0	0.6%	1	3.9%	3	0.0%	0	0.0%	0	0.7%	1	2.8%	2	12.2%	12	22.9%	16
Southam Town Centre	0.5%	5	0.0%	0	0.0%	0	0.0%	0	5.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Warwick Town Centre	2.4%	21	7.7%	7	8.7%	8	1.4%	1	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	2	1.1%	1
Internet / catalogue / TV shopping	2.3%	20	3.8%	4	6.3%	6	0.7%	1	1.9%	2	0.7%	0	1.7%	2	2.6%	2	2.9%	2	1.0%	1	0.9%	1
Avenue Farm Industrial Estate, Stratford-upon-Avon	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
B&Q, Brandon Road, Binley Woods, Coventry	7.5%	67	2.7%	3	1.3%	1	0.0%	0	1.7%	1	37.2%	28	22.7%	29	0.9%	1	0.0%	0	3.6%	4	0.0%	0
B&Q, Jinnah Road,	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Smallwood, Redditch																						
B&Q, Marley Way Industrial Estate, Southam Road, Banbury	0.7%	6	0.0%	0	0.0%	0	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.9%	5
Blooms Garden Centre, Straight Mile, Rugby	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Cardiff City Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Charlecote Garden Store, Charlecote Gardens, Charlecote, Warwick	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Dobbies Garden Centre, Cross Lane Farm, Nuneaton Road, Atherstone	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Earlswood Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0
Hampton-in-Arden Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Homebase, Sir Henry Parkes Road, Canley, Coventry	2.3%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	11.4%	15	8.0%	6	0.0%	0	0.0%	0	0.0%	0
Low March Industrial Estate, Daventry	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Redditch Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Russells Garden Centre, Mill Hill, Baginton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Fletchamstead Highway, Canley, Coventry	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shirley District Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0
Technology Retail Park, Rugby	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wellesbourne Village Centre	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	3.6%	3
Wyevale Garden Centre, Warwick Road, Stratford-upon-Avon	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	1.2%	1	2.2%	2
Weighted base:		883		95		92		95		83		76		129		69		78		97		70
Sample:		857		83		86		84		85		93		90		78		81		86		91

Q18 Where do you normally do most of your household's shopping on all goods for personal care (including, electric razors, hair dryers, bathroom scales, cosmetics, perfume, toothpaste, etc), other medical and pharmaceutical products (e.g. vitamins, plasters) and therapeutic appliances (e.g. spectacles, hearing aids, wheelchairs, contact lenses etc)?
Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Aldi, Queensway, Leamington Spa	0.7%	7	0.7%	1	5.2%	5	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda Superstore, Chesterton Drive, Leamington Spa	3.8%	37	6.1%	7	0.6%	1	23.2%	24	3.7%	3	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	2
Lidl, Myton Road, Leamington Spa	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Parade, Leamington Spa	0.2%	2	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Old Warwick Road, Leamington Spa	0.9%	8	2.2%	2	1.1%	1	0.5%	1	0.8%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	2.4%	2
Sainsburys Superstore, Warwick Road, Kenilworth	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	2.6%	2	0.0%	0	0.0%	0	0.0%	0
Sainsburys Superstore, Leamington Shopping Park, Leamington Spa	3.0%	29	6.1%	7	7.5%	8	8.5%	9	2.7%	2	0.0%	0	0.0%	0	1.3%	1	0.8%	1	0.9%	1	0.9%	1
Sainsbury's, Saltisford, Warwick	0.3%	3	0.7%	1	1.1%	1	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Metro, Parade, Leamington Spa	0.8%	8	5.9%	6	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Emscote Road, Warwick	2.6%	26	4.0%	4	14.6%	15	0.6%	1	0.8%	1	2.4%	2	0.0%	0	0.7%	1	0.8%	1	0.7%	1	0.7%	1
Boots, Talisman Square, Kenilworth	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	7.2%	6	0.0%	0	0.0%	0	0.7%	1
Boots, Market Street, Warwick	1.4%	13	2.5%	3	7.7%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	3	0.0%	0
Boots, Parade, Leamington Spa	3.5%	34	15.9%	17	3.7%	4	9.9%	10	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
House of Fraser, Parade, Leamington Spa	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wilko, Station Road, Kenilworth	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lower Precinct, Coventry	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Talisman Square, Kenilworth	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	2	0.0%	0	0.0%	0	0.0%	0
Touchwood Shopping Centre, Poplar Arcade, Solihull	0.2%	2	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abbey Retail Park, South Way Daventry (Argos, Homebase, Pets at Home)	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	4	2.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Airport Retail Park, London Road, Coventry (Aldi, Carpetright, Currys PC	1.8%	18	0.0%	0	0.0%	0	0.0%	0	1.6%	1	16.8%	14	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
World)																						
Arena Shopping Park, Classic Drive, Rowleys Green, Coventry (Just for Pets, Marks & Spencer, Tesco Extra)	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alvis Retail Park, Holyhead Road, Coventry (B&Q, Morrisons, Staples)	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cannon Park Retail Park, Lynchgate Road, Coventry (Greggs, Holland & Barrett, Iceland)	1.6%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.9%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central Six Retail Park, Warwick Road, Coventry (Poundland, Sports Direct, TK Maxx)	3.3%	32	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.1%	8	17.6%	23	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Elliotts Field Retail Park, Leicester Road, Rugby (Carpetright, DFS, River Island)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.6%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Junction 1 Retail Park, Leicester Road, Rugby (Carpetright, Homebase, Pets at Home)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leamington Shopping Park, Tachbrook Park Drive, Leamington Spa (Argos, Carpetright, Mamas & Papas)	1.8%	18	0.7%	1	0.0%	0	4.3%	4	9.1%	8	0.6%	0	1.0%	1	0.0%	0	0.0%	0	2.5%	3	0.0%	0
Maybird Shopping Park, Birmingham Road, Stratford-upon-Avon (B&Q, Matalan, New Look)	3.1%	30	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	19.3%	21	12.0%	9
Shires Gate Retail Park, Tachbrook Park Drive, Leamington Spa (Currys, Mothercare World)	4.6%	44	6.0%	6	10.2%	11	7.2%	7	13.6%	12	0.0%	0	0.8%	1	0.0%	0	1.7%	1	1.6%	2	4.7%	3
Sears Retail Park, Oakenshaw Road, Solihull (Carpetright, Currys, Halfords).	0.8%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.4%	7	0.0%	0	0.0%	0
Warwickshire Shopping Park, Kynner Way, Coventry (Asda Living, DW Sports, M&S)	1.1%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.5%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Banbury Town Centre	1.5%	14	0.0%	0	0.0%	0	0.0%	0	6.4%	6	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.4%	8
Coventry City Centre	8.8%	85	6.7%	7	0.0%	0	0.0%	0	1.6%	1	24.4%	20	42.5%	56	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Daventry Town Centre	0.4%	4	0.0%	0	0.0%	0	0.0%	0	2.9%	3	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kenilworth Town Centre	5.9%	56	0.7%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	68.2%	54	0.0%	0	0.0%	0	0.0%	0
Leamington Spa Town Centre	12.5%	120	33.3%	36	18.9%	20	37.3%	38	17.1%	15	1.9%	2	3.0%	4	0.7%	1	0.8%	1	0.9%	1	4.8%	3
Rugby Town Centre	1.3%	13	0.0%	0	0.0%	0	0.0%	0	8.6%	8	6.2%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Solihull Town Centre	3.8%	37	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	39.0%	34	0.8%	1	0.0%	0
Stratford-upon-Avon Town Centre	8.3%	80	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	47.7%	51	38.9%	28
Southam Town Centre	1.2%	11	0.0%	0	0.0%	0	0.0%	0	12.9%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Warwick Town Centre	3.1%	30	0.7%	1	17.8%	19	0.6%	1	1.0%	1	0.0%	0	0.0%	0	0.7%	1	3.3%	3	4.6%	5	0.7%	1
Abroad	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	4	0.0%	0
Internet / catalogue / TV shopping	5.1%	49	5.5%	6	6.9%	7	1.8%	2	4.9%	4	6.4%	5	4.6%	6	10.7%	8	5.8%	5	1.7%	2	4.5%	3
Bentley Heath Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Birmingham City Centre	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Budbrooke Village Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2	0.0%	0
Central London	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Chadwick End Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Cheylesmore Local Centre	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	2.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Darlaston Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dorridge Village Centre	1.6%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.1%	15	0.0%	0	0.0%	0
Dunchurch Village Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	2.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Earlsdon Local Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Gaydon Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Heathcote Local Centre	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Henley-in-Arden Town Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.7%	1	0.0%	0
Hockley Heath Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Kineton Road Industrial Estate, Northfield Road, Southam	0.3%	3	0.0%	0	0.0%	0	0.0%	0	3.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kineton Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Knowle Village Centre	1.1%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.7%	10	0.0%	0	0.0%	0
Lapworth Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Lillington Local Centre	0.1%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Redditch Town Centre	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.1%	8	0.0%	0
Sainsbury's, Fletchamstead Highway, Canley, Coventry	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Loxley Road, Wellesbourne	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	3
Shirley District Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Tanworth-in-Arden Village Centre	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Tesco Superstore, Birmingham Road, Stratford-upon-Avon	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	4.5%	3
The Bull Ring Shopping Centre, Birmingham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Waitrose, Bertie Road, Kenilworth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Wellesbourne Village Centre	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	4
Whitnash Town Centre	0.4%	4	0.0%	0	0.0%	0	4.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Willenhall Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wolston Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		964		108		105		103		89		82		132		79		88		107		72
Sample:		959		97		100		95		93		98		93		96		95		98		94

Q19 Where do you normally do most of your household's shopping on all other goods including jewellery & watches; glassware, china, tableware and household utensils; and other personal effects (e.g. travel goods, suitcases, prams, sunglasses)?
Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Aldi, Queensway, Leamington Spa	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda Superstore, Chesterton Drive, Leamington Spa	0.5%	3	2.3%	2	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsburys Superstore, Warwick Road, Kenilworth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Sainsburys Superstore, Leamington Shopping Park, Leamington Spa	0.6%	4	1.2%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	2
Tesco Metro, Parade, Leamington Spa	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Emscote Road, Warwick	0.1%	1	0.0%	0	1.2%	1	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, Guy Street, Leamington Spa	0.6%	4	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	3	0.0%	0
Boots, Parade, Leamington Spa	0.5%	3	4.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
House of Fraser, Parade, Leamington Spa	0.6%	4	2.6%	2	0.0%	0	3.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wilko, Station Road, Kenilworth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Castle Quay Shopping Centre, Banbury	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.4%	4
Talisman Square, Kenilworth	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	2	0.0%	0	0.0%	0	0.0%	0
Royal Priors Shopping Centre, Parade, Leamington Spa	0.2%	1	0.0%	0	1.2%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Clock Towers Shopping Centre, Market Mall, Rugby	0.4%	2	0.0%	0	0.0%	0	0.0%	0	4.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Touchwood Shopping Centre, Poplar Arcade, Solihull	1.5%	8	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	9.5%	6	1.7%	1	0.0%	0
Airport Retail Park, London Road, Coventry (Aldi, Carpetright, Currys PC World)	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	2	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Banbury Cross Retail Park, Ruscote Avenue, Banbury (Brantano, Currys, DFS)	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0
Banbury Gate Shopping Park, Acorn Way,	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Banbury (M&S, Primark, River Island)																						
Cannon Park Retail Park, Lynchgate Road, Coventry (Greggs, Holland & Barrett, Iceland)	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Central Six Retail Park, Warwick Road, Coventry (Poundland, Sports Direct, TK Maxx)	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gallagher Retail Park, Stoney Stanton Road, Coventry (Aldi, Argos, Matalan)	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Junction 1 Retail Park, Leicester Road, Rugby (Carpetright, Homebase, Pets at Home)	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leamington Shopping Park, Tachbrook Park Drive, Leamington Spa (Argos, Carpetright, Mamas & Papas)	1.9%	11	1.1%	1	0.0%	0	9.8%	6	5.5%	3	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Maybird Shopping Park, Birmingham Road, Stratford-upon-Avon (B&Q, Matalan, New Look)	2.4%	14	0.0%	0	0.0%	0	7.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.4%	4	11.6%	5
Shires Gate Retail Park, Tachbrook Park Drive, Leamington Spa (Currys, Mothercare World)	2.7%	15	1.1%	1	2.6%	1	6.1%	4	12.5%	7	0.0%	0	1.4%	1	0.0%	0	0.0%	0	1.7%	1	0.0%	0
Sears Retail Park, Oakenshaw Road, Solihull (Carpetright, Currys, Halfords).	0.1%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Warwickshire Shopping Park, Kynner Way, Coventry (Asda Living, DW Sports, M&S)	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Banbury Town Centre	1.3%	7	0.0%	0	1.4%	1	0.0%	0	4.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.7%	4
Coventry City Centre	10.4%	59	1.4%	1	6.3%	3	7.0%	4	1.2%	1	28.5%	11	41.8%	34	8.8%	4	0.0%	0	0.0%	0	1.1%	1
Kenilworth Town Centre	2.7%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	1.7%	1	25.2%	12	0.0%	0	1.4%	1	2.2%	1
Leamington Spa Town Centre	22.2%	126	59.4%	40	42.6%	22	50.8%	31	31.2%	18	2.5%	1	4.7%	4	12.2%	6	0.0%	0	2.8%	2	7.8%	4
Rugby Town Centre	0.6%	3	0.0%	0	0.0%	0	0.0%	0	3.6%	2	2.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Solihull Town Centre	8.6%	49	0.0%	0	2.4%	1	0.0%	0	1.2%	1	0.0%	0	6.6%	5	3.7%	2	55.1%	35	5.7%	3	3.6%	2

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Stratford-upon-Avon Town Centre	5.4%	31	0.0%	0	2.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1	1.2%	1	29.8%	17	23.8%	11
Southam Town Centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	4.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Warwick Town Centre	1.3%	8	0.0%	0	9.8%	5	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	2	0.0%	0
Abroad	1.5%	9	2.3%	2	1.4%	1	0.0%	0	2.7%	2	0.0%	0	1.7%	1	0.0%	0	1.1%	1	4.9%	3	0.0%	0
Internet / catalogue / TV shopping	22.3%	127	19.9%	13	23.5%	12	5.9%	4	24.7%	14	31.0%	12	26.8%	22	31.4%	14	10.4%	7	33.4%	19	22.2%	10
Birmingham City Centre	4.1%	23	1.2%	1	3.5%	2	1.1%	1	0.0%	0	7.0%	3	6.0%	5	2.8%	1	16.3%	10	1.4%	1	0.0%	0
Cardiff City Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Central London	1.1%	6	1.1%	1	0.0%	0	0.0%	0	1.2%	1	10.2%	4	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0
East Midlands Designer Outlet, Mansfield Road, South Normanton, Alfreton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Guildford Town Centre	0.1%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ikea, Croft Road, Coventry	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Knowle Village Centre	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	3	0.0%	0	0.0%	0
Nuneaton Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Redditch Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0
Sainsbury's, Fletchamstead Highway, Canley, Coventry	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Loxley Road, Wellesbourne	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1
Sidmouth Town entre	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sutton Coldfield Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Weighted base:		569		67		50		62		58		40		81		46		64		56		45
Sample:		548		52		58		53		55		45		47		61		64		54		59

MeanScore: number of visits per year

Q20 How often do you or your household visit Leamington Spa for shopping and other town centre uses?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Daily	3.1%	31	20.6%	23	0.0%	0	4.6%	5	0.8%	1	0.6%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
4-6 days a week	1.0%	10	5.9%	7	1.7%	2	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-3 days a week	7.9%	80	18.1%	20	14.4%	15	24.2%	26	6.6%	6	7.8%	7	1.7%	2	1.6%	1	1.5%	1	0.7%	1	0.0%	0
One day a week	15.3%	154	26.4%	29	24.4%	26	21.0%	22	29.8%	28	4.8%	4	5.7%	8	21.1%	17	4.1%	4	7.8%	9	9.3%	7
Every two weeks	14.1%	142	9.9%	11	35.6%	38	17.3%	18	16.7%	16	8.0%	7	10.9%	16	33.8%	28	1.6%	1	2.3%	3	6.9%	5
Monthly	14.8%	148	7.9%	9	8.3%	9	14.8%	16	21.3%	20	8.9%	8	10.5%	15	22.8%	19	11.4%	11	28.6%	32	15.6%	12
Once every two months	5.9%	60	3.0%	3	6.8%	7	6.1%	6	6.0%	6	4.2%	4	5.5%	8	4.1%	3	1.7%	2	5.4%	6	19.9%	15
Three-four times a year	9.1%	91	0.7%	1	1.9%	2	6.1%	6	3.3%	3	15.7%	13	14.1%	20	2.5%	2	13.6%	13	17.3%	19	14.9%	11
Once a year	5.2%	53	0.0%	0	0.7%	1	0.5%	1	1.5%	1	6.2%	5	10.4%	15	5.0%	4	8.5%	8	9.6%	11	9.3%	7
Less often	4.7%	48	3.5%	4	5.2%	5	0.0%	0	4.1%	4	11.1%	9	9.4%	14	2.2%	2	3.5%	3	4.3%	5	2.0%	2
Never	17.4%	175	0.9%	1	1.1%	1	2.5%	3	9.2%	9	27.9%	24	30.1%	43	5.6%	5	54.1%	51	23.2%	26	18.5%	14
(Don’t know)	0.4%	4	0.0%	0	0.0%	0	0.6%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	3.0%	2
(Varies)	1.0%	10	3.1%	3	0.0%	0	0.6%	1	0.0%	0	4.8%	4	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.7%	0
Mean:		*38.85*		*135.69*		*46.46*		*71.15*		*34.46*		*19.72*		*16.38*		*25.30*		*6.59*		*10.18*		*10.70*
Weighted base:		1005		110		105		106		94		86		144		82		94		110		75
Sample:		1005		100		100		100		100		104		101		100		100		100		100

Q21 What do you like about Leamington Spa? [MR]
Those who visit Leamington Spa for shopping and other town centre uses at Q20:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Attractive environment / nice place	21.0%	174	19.1%	21	22.9%	24	31.6%	33	20.9%	18	19.7%	12	22.6%	23	25.2%	19	18.3%	8	10.0%	8	13.5%	8
Close to friends or relatives	0.8%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	2	2.4%	2	0.7%	1	3.8%	2	0.0%	0	0.0%	0
Close to home	17.9%	148	34.9%	38	29.8%	31	28.9%	30	27.5%	23	5.1%	3	6.2%	6	9.7%	7	3.4%	1	4.4%	4	6.3%	4
Close to work	0.6%	5	3.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.9%	1	0.0%	0
Compact	5.2%	43	2.8%	3	2.4%	2	7.2%	7	7.2%	6	2.7%	2	8.4%	8	13.0%	10	5.1%	2	1.9%	2	0.0%	0
Easy to get to by bike	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Easy to get to by bus	1.1%	9	3.0%	3	2.2%	2	1.2%	1	0.8%	1	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Easy to get to by car	4.1%	34	7.4%	8	5.3%	5	0.0%	0	3.7%	3	11.0%	7	3.8%	4	5.2%	4	0.0%	0	2.1%	2	1.7%	1
Easy to park	8.2%	68	9.7%	11	8.7%	9	5.6%	6	6.5%	6	9.0%	6	7.3%	7	5.7%	4	1.7%	1	15.6%	13	9.3%	6
Good facilities in general	2.3%	19	1.4%	2	6.6%	7	0.6%	1	4.5%	4	0.0%	0	3.5%	4	0.0%	0	0.0%	0	0.9%	1	2.5%	2
Good food stores	0.8%	7	0.7%	1	0.6%	1	1.2%	1	0.0%	0	0.0%	0	1.1%	1	0.8%	1	3.4%	1	0.9%	1	0.0%	0
Good pubs, cafés or restaurants	6.4%	53	6.0%	7	1.8%	2	2.2%	2	6.5%	6	7.1%	4	5.1%	5	13.5%	10	25.5%	11	5.3%	4	1.7%	1
Good range of non-food shops	10.7%	89	9.2%	10	16.2%	17	11.2%	12	9.3%	8	15.3%	9	8.9%	9	4.5%	3	7.2%	3	5.6%	5	20.5%	13
Good range of independent shops	13.3%	110	9.1%	10	5.6%	6	2.5%	3	10.2%	9	10.3%	6	28.6%	29	18.6%	14	26.7%	11	4.7%	4	29.8%	18
Good range of 'high street' retailers/ multiples	14.0%	116	8.2%	9	10.5%	11	1.4%	1	9.4%	8	25.5%	16	7.0%	7	17.3%	13	15.9%	7	30.6%	26	29.1%	18
Affordable shops	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
High quality shops	2.1%	17	0.7%	1	0.6%	1	0.6%	1	1.0%	1	4.3%	3	4.8%	5	2.5%	2	3.4%	1	0.0%	0	6.0%	4
The street market	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Makes a change from other places	1.8%	15	0.0%	0	0.6%	1	0.5%	1	1.0%	1	2.6%	2	7.0%	7	0.0%	0	1.7%	1	3.5%	3	1.0%	1
Quiet	2.3%	19	0.9%	1	4.7%	5	8.7%	9	0.0%	0	0.8%	0	1.1%	1	0.0%	0	0.0%	0	1.1%	1	2.8%	2
Safe and secure	1.3%	11	0.9%	1	4.7%	5	1.3%	1	0.0%	0	0.0%	0	2.2%	2	0.8%	1	1.7%	1	0.0%	0	0.0%	0
Traditional	0.5%	5	1.6%	2	0.0%	0	0.5%	1	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	2.3%	19	1.4%	2	2.0%	2	2.7%	3	0.0%	0	8.2%	5	3.5%	4	0.8%	1	1.7%	1	0.9%	1	2.8%	2
Friendly atmosphere	0.7%	6	1.1%	1	0.0%	0	1.1%	1	0.8%	1	0.8%	0	1.3%	1	0.7%	1	1.7%	1	0.0%	0	0.0%	0
Good range of charity shops	0.4%	3	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	2
Good range of shops in general	1.2%	10	0.0%	0	1.8%	2	0.0%	0	1.0%	1	1.6%	1	3.5%	4	2.7%	2	0.0%	0	0.0%	0	0.8%	0
Has everything I need	0.4%	4	0.9%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	1.1%	1	1.0%	1
Home town / familiarity / habit	1.5%	12	2.3%	3	0.0%	0	0.5%	1	8.1%	7	0.8%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	0
Wide pavements	0.4%	4	2.4%	3	0.0%	0	0.5%	1	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Dont know)	3.2%	27	0.0%	0	0.6%	1	2.3%	2	1.8%	2	7.4%	5	6.5%	7	7.7%	6	3.8%	2	1.9%	2	3.3%	2
(Nothing / very little)	13.2%	110	13.5%	15	13.4%	14	17.0%	18	17.0%	14	10.1%	6	1.3%	1	11.1%	9	6.8%	3	26.6%	23	12.6%	8
Weighted base:		830		109		104		103		85		62		101		77		43		85		61
Sample:		817		99		98		96		91		72		73		92		46		74		76

Q22 What could be improved about Leamington Spa that would make you visit more often? [MR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Better access by road	1.2%	12	0.7%	1	0.6%	1	0.6%	1	0.8%	1	2.5%	2	0.9%	1	0.6%	1	0.8%	1	0.7%	1	4.8%	4
Better public transport	1.3%	13	1.4%	2	0.6%	1	0.0%	0	1.5%	1	0.6%	0	2.6%	4	0.6%	1	0.8%	1	2.9%	3	0.7%	0
Better signposting	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Cleaner streets	1.3%	13	8.7%	10	1.2%	1	0.5%	1	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Facilities which would assist you if shopping with children	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Free car parking	12.6%	127	13.9%	15	15.8%	17	11.6%	12	20.2%	19	1.3%	1	14.4%	21	16.0%	13	8.0%	7	11.7%	13	10.7%	8
More / better town centre events	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better comparison retailers (i.e. non-food shops)	2.1%	21	2.8%	3	1.8%	2	10.2%	11	0.7%	1	0.0%	0	0.9%	1	1.4%	1	0.8%	1	0.9%	1	0.7%	0
More / better value or affordable shops	0.8%	8	1.8%	2	0.8%	1	3.5%	4	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0
More / better entertainment	0.3%	3	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.8%	1	0.0%	0	0.0%	0
More / better places for eating out (e.g. cafes and restaurants)	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better food shops	0.2%	2	1.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better parking	17.4%	175	20.0%	22	13.3%	14	21.0%	22	11.2%	10	13.7%	12	25.6%	37	22.0%	18	15.6%	15	13.6%	15	14.1%	11
More / better pedestrianised streets	0.5%	5	0.7%	1	0.0%	0	2.6%	3	1.5%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
More / better public conveniences	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better seats / flower displays	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better services	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More advertising	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More national multiple shops / High Street shops	8.8%	89	7.0%	8	5.4%	6	16.1%	17	10.0%	9	6.5%	6	1.5%	2	11.8%	10	9.1%	8	18.9%	21	2.9%	2
More independent shops	5.1%	51	10.8%	12	5.1%	5	10.9%	12	4.1%	4	0.6%	0	2.1%	3	6.0%	5	0.8%	1	8.3%	9	0.7%	1
Street markets - physical improvements	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Street markets - better range and quality of offer	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Protection from the weather (ie. covered shopping malls)	0.3%	3	0.0%	0	0.6%	1	0.5%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Shops / services open on Sundays	0.0%	0	0.0%	0	0.0%	0	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	3.7%	37	15.3%	17	0.6%	1	6.1%	6	2.6%	2	3.7%	3	0.0%	0	6.0%	5	1.0%	1	1.1%	1	1.4%	1
Address the homeless issue	2.8%	28	4.7%	5	5.2%	5	11.3%	12	0.8%	1	2.5%	2	0.0%	0	0.6%	1	0.0%	0	0.0%	0	2.3%	2
Better pavements	0.5%	5	1.6%	2	1.1%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.7%	1	0.0%	0
Better range of clothes / shoe	0.7%	7	0.0%	0	1.7%	2	1.8%	2	2.6%	2	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.7%	1	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
shops																						
Better range of shops in general	0.6%	6	3.1%	3	0.6%	1	1.1%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Cheaper car parking	0.3%	3	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Fewer cafés / coffee shops	1.4%	14	4.6%	5	1.2%	1	4.3%	5	2.6%	2	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
If it was nearer	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	2.5%	2	1.4%	2	0.0%	0
Less traffic	1.0%	10	0.7%	1	1.9%	2	5.5%	6	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Less vacant shops	1.7%	17	0.7%	1	1.4%	1	6.3%	7	3.5%	3	0.0%	0	0.0%	0	1.3%	1	2.7%	3	0.0%	0	1.3%	1
Lower the shop rents / rates	0.3%	3	1.4%	2	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Open a John Lewis store	0.5%	5	0.9%	1	0.0%	0	1.4%	1	0.9%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.7%	1	0.0%	0
Refurbishment of shops	0.6%	6	0.7%	1	1.1%	1	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.6%	1	0.8%	1	0.0%	0	1.7%	1
(Don’t know)	6.8%	68	2.1%	2	2.3%	2	1.9%	2	5.9%	6	10.9%	9	6.2%	9	5.1%	4	14.8%	14	10.3%	11	11.1%	8
(Nothing)	41.8%	420	22.5%	25	49.8%	52	21.1%	22	40.8%	38	48.6%	42	55.0%	79	38.9%	32	49.1%	46	41.8%	46	49.7%	37
Weighted base:		1005		110		105		106		94		86		144		82		94		110		75
Sample:		1005		100		100		100		100		104		101		100		100		100		100

MeanScore: number of visits per year

Q23 How often do you or your household visit Warwick for shopping and other town centre uses?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Daily	1.4%	14	0.9%	1	4.4%	5	0.0%	0	0.0%	0	4.8%	4	0.8%	1	0.0%	0	0.0%	0	3.2%	4	0.0%	0
4-6 days a week	0.3%	3	0.7%	1	1.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
2-3 days a week	3.7%	37	4.2%	5	16.4%	17	1.1%	1	0.9%	1	5.4%	5	0.0%	0	0.8%	1	1.6%	1	4.9%	5	1.3%	1
One day a week	5.1%	51	9.6%	11	22.6%	24	1.8%	2	5.1%	5	2.3%	2	0.0%	0	1.3%	1	2.3%	2	3.7%	4	0.7%	1
Every two weeks	2.8%	28	1.9%	2	9.6%	10	2.2%	2	7.5%	7	0.6%	0	0.0%	0	2.3%	2	1.7%	2	1.4%	2	0.7%	1
Monthly	6.4%	64	10.3%	11	6.7%	7	11.6%	12	4.5%	4	1.3%	1	6.2%	9	3.5%	3	3.5%	3	9.0%	10	3.8%	3
Once every two months	3.7%	37	4.4%	5	5.5%	6	2.9%	3	4.1%	4	1.3%	1	2.6%	4	8.3%	7	2.5%	2	0.7%	1	6.6%	5
Three-four times a year	7.7%	77	6.5%	7	2.9%	3	10.9%	12	9.2%	9	0.6%	0	7.1%	10	15.9%	13	8.1%	8	5.9%	6	11.7%	9
Once a year	5.7%	58	3.0%	3	0.0%	0	2.3%	2	9.2%	9	5.4%	5	9.7%	14	5.8%	5	5.4%	5	7.3%	8	9.3%	7
Less often	6.8%	68	9.7%	11	4.2%	4	8.1%	9	9.2%	9	9.3%	8	3.1%	4	10.1%	8	10.0%	9	1.4%	2	6.1%	5
Never	55.4%	557	48.2%	53	26.0%	27	56.4%	60	50.2%	47	69.1%	59	70.5%	101	46.6%	38	63.6%	60	61.0%	67	58.4%	44
(Don’t know)	0.8%	8	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	5.3%	4	1.2%	1	0.7%	1	0.0%	0
(Varies)	0.3%	3	0.7%	1	0.6%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Mean:		*15.75*		*17.82*		*56.25*		*6.75*		*7.06*		*26.16*		*4.08*		*4.07*		*4.71*		*23.82*		*3.72*
Weighted base:		1005		110		105		106		94		86		144		82		94		110		75
Sample:		1005		100		100		100		100		104		101		100		100		100		100

Q24 What do you like about Warwick? [MR]
Those who visit Warwick for shopping and other town centre uses at Q23:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Attractive environment / nice place	28.0%	126	17.8%	10	34.8%	27	36.8%	17	26.3%	12	44.9%	12	17.2%	7	35.4%	15	22.4%	8	26.0%	11	18.5%	6
Close to friends or relatives	1.5%	7	0.0%	0	0.0%	0	9.8%	5	0.0%	0	6.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1
Close to home	10.0%	45	1.4%	1	33.3%	26	9.8%	5	3.4%	2	3.7%	1	2.6%	1	0.0%	0	9.1%	3	14.1%	6	2.0%	1
Close to work	1.0%	4	1.4%	1	0.8%	1	2.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	2	0.0%	0
Compact	5.0%	22	3.0%	2	1.9%	1	4.3%	2	0.0%	0	1.8%	0	0.0%	0	10.4%	5	4.3%	1	20.8%	9	5.2%	2
Easy to get to by bike	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Easy to get to by bus	0.3%	1	0.0%	0	0.7%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Easy to get to by car	0.6%	3	0.0%	0	2.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Easy to park	1.5%	7	1.4%	1	0.9%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	2.6%	1	8.2%	4	0.0%	0
Good facilities in general	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	0	3.2%	1	2.4%	1	0.0%	0	0.0%	0	0.0%	0
Good food stores	1.7%	8	11.4%	6	0.0%	0	0.0%	0	0.0%	0	1.8%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0
Good pubs, cafés or restaurants	10.9%	49	12.2%	7	6.5%	5	11.3%	5	7.0%	3	2.3%	1	12.8%	5	16.0%	7	23.2%	8	4.5%	2	18.4%	6
Good range of non-food shops	1.3%	6	0.0%	0	0.8%	1	2.6%	1	1.5%	1	0.0%	0	0.0%	0	1.2%	1	4.3%	1	2.3%	1	1.6%	1
Good range of independent shops	14.0%	63	7.1%	4	23.0%	18	8.1%	4	12.7%	6	6.0%	2	3.2%	1	30.1%	13	11.2%	4	16.8%	7	13.8%	4
Good range of 'high street' retailers/ multiples	2.0%	9	0.0%	0	1.8%	1	0.0%	0	0.0%	0	17.4%	5	0.0%	0	1.2%	1	2.1%	1	0.0%	0	5.3%	2
Affordable shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
High quality shops	2.3%	10	1.7%	1	0.0%	0	0.0%	0	14.0%	7	1.8%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0	4.1%	1
The street markets	2.6%	12	4.4%	2	5.2%	4	0.0%	0	6.6%	3	2.3%	1	0.0%	0	1.5%	1	2.1%	1	0.0%	0	0.0%	0
Makes a change from other places	1.5%	7	1.4%	1	0.8%	1	2.6%	1	0.0%	0	0.0%	0	2.6%	1	1.5%	1	0.0%	0	0.0%	0	7.2%	2
Quiet	5.1%	23	11.4%	6	11.1%	9	2.6%	1	1.8%	1	0.0%	0	0.0%	0	2.4%	1	4.8%	2	3.7%	2	4.8%	2
Safe and secure	0.4%	2	0.0%	0	0.8%	1	1.4%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The street markets	3.3%	15	1.4%	1	2.3%	2	3.0%	1	7.0%	3	0.0%	0	6.3%	3	0.0%	0	0.0%	0	5.9%	3	7.5%	2
Traditional	11.3%	51	17.9%	10	6.2%	5	5.3%	2	6.4%	3	0.0%	0	25.4%	11	7.7%	3	24.8%	8	10.5%	5	10.1%	3
Traffic free shopping 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
Other	3.6%	16	0.0%	0	1.1%	1	1.4%	1	1.8%	1	8.3%	2	17.1%	7	1.2%	1	4.8%	2	1.8%	1	4.1%	1
Friendly atmosphere	0.9%	4	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	1	0.0%	0	4.3%	1	0.0%	0	1.6%	1
Good cultural attractions (theatres, museums, concerts etc.)	0.9%	4	0.0%	0	0.0%	0	1.2%	1	0.0%	0	1.8%	0	2.6%	1	4.1%	2	0.0%	0	0.0%	0	0.0%	0
Good range of shops in general	0.5%	2	1.4%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0
Historical aspects (e.g. the castle)	2.2%	10	7.4%	4	0.0%	0	4.0%	2	0.0%	0	5.6%	1	2.6%	1	1.5%	1	0.0%	0	0.0%	0	1.6%	1
Home town / familiarity / habit	1.0%	4	0.0%	0	2.3%	2	4.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0
(Dont know)	2.7%	12	1.4%	1	6.3%	5	8.2%	4	0.0%	0	0.0%	0	2.6%	1	2.7%	1	0.0%	0	0.0%	0	2.0%	1
(Nothing / very little)	13.3%	60	17.0%	10	4.7%	4	16.3%	8	21.2%	10	14.7%	4	13.5%	6	7.4%	3	10.8%	4	18.2%	8	15.2%	5
Weighted base:		448		57		78		46		47		26		43		44		34		43		31

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
Sample:	450	51	86	51	44	30	26	48	34	35	45

Q25 What could be improved about Warwick that would make you visit more often? [MR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Better access by road	2.0%	20	3.5%	4	2.2%	2	0.5%	1	0.9%	1	7.2%	6	0.8%	1	1.3%	1	1.7%	2	0.0%	0	3.0%	2
Better public transport	0.8%	8	0.7%	1	0.6%	1	1.8%	2	0.8%	1	0.0%	0	0.9%	1	0.6%	1	0.0%	0	1.4%	2	0.7%	0
Better signposting	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cleaner streets	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Facilities which would assist you if shopping with children	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Free car parking	7.4%	74	10.1%	11	5.4%	6	8.8%	9	9.6%	9	5.1%	4	2.6%	4	13.0%	11	4.7%	4	7.1%	8	10.6%	8
More / better town centre events	0.2%	2	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better comparison retailers (i.e. non-food shops)	1.4%	14	5.4%	6	0.6%	1	0.0%	0	1.5%	1	0.7%	1	0.8%	1	1.3%	1	1.6%	1	0.0%	0	2.3%	2
More / better value or affordable shops	0.5%	5	0.7%	1	1.4%	1	0.0%	0	1.5%	1	0.6%	0	0.0%	0	0.6%	1	0.8%	1	0.0%	0	0.0%	0
More / better entertainment	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
More / better places for eating out (e.g. cafes and restaurants)	0.6%	6	0.7%	1	0.0%	0	0.6%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	2.3%	2
More / better food shops	0.4%	4	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.7%	1	2.2%	2
More / better parking	16.7%	168	11.7%	13	12.0%	13	28.9%	31	13.0%	12	8.2%	7	15.8%	23	11.7%	10	15.7%	15	26.7%	29	21.6%	16
More / better pedestrianised streets	0.3%	3	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.9%	1	0.0%	0
More / better public conveniences	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better seats / flower displays	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better services	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More advertising	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.8%	1	4.8%	4	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More national multiple shops / High Street shops	13.0%	131	10.1%	11	18.3%	19	14.6%	15	10.6%	10	7.1%	6	9.3%	13	13.7%	11	15.9%	15	22.5%	25	6.4%	5
More independent shops	6.1%	61	8.2%	9	11.0%	12	9.0%	10	4.1%	4	0.6%	0	5.1%	7	5.7%	5	6.1%	6	2.9%	3	8.2%	6
Street markets - physical improvements	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0
Street markets - better range and quality of offer	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.9%	1	0.0%	0
Shops / services open on Sundays	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	2.9%	30	2.3%	3	4.4%	5	1.3%	1	5.6%	5	5.9%	5	3.2%	5	2.6%	2	0.0%	0	2.3%	3	2.0%	2
Better range of shops in general	0.6%	6	0.0%	0	1.7%	2	0.0%	0	0.9%	1	0.0%	0	0.8%	1	0.6%	1	0.8%	1	0.9%	1	0.0%	0
Fewer cafés / coffee shops	0.2%	2	0.0%	0	1.1%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
If it was nearer	0.3%	3	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	1.5%	1
Improve the roads / layout	0.8%	8	0.7%	1	0.6%	1	1.1%	1	0.7%	1	0.6%	0	1.5%	2	0.0%	0	0.0%	0	1.4%	2	0.0%	0
Larger shopping area	0.4%	4	0.7%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	1.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Less traffic	2.5%	25	0.7%	1	8.8%	9	5.6%	6	1.5%	1	1.7%	1	0.0%	0	0.6%	1	0.0%	0	3.7%	4	2.0%	2
(Don't know)	10.4%	104	5.3%	6	1.2%	1	5.7%	6	4.1%	4	17.5%	15	8.9%	13	22.1%	18	14.2%	13	12.8%	14	18.6%	14
(Nothing)	46.9%	472	52.4%	58	46.8%	49	48.0%	51	52.0%	49	46.9%	40	56.1%	81	38.1%	31	48.9%	46	36.8%	41	36.1%	27
Weighted base:		1005		110		105		106		94		86		144		82		94		110		75
Sample:		1005		100		100		100		100		104		101		100		100		100		100

MeanScore: number of visits per year

Q26 How often do you or your household visit Kenilworth for shopping and other town centre uses?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Daily	1.2%	12	0.0%	0	0.6%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	12.8%	10	0.0%	0	0.0%	0	0.0%	0
4-6 days a week	1.7%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	20.1%	16	0.0%	0	0.0%	0	0.0%	0
2-3 days a week	3.9%	39	0.0%	0	1.1%	1	0.0%	0	0.0%	0	1.1%	1	3.6%	5	38.7%	32	0.0%	0	0.0%	0	0.7%	1
One day a week	5.1%	51	4.2%	5	5.9%	6	0.5%	1	3.3%	3	7.1%	6	9.8%	14	17.8%	15	0.0%	0	1.4%	2	0.7%	0
Every two weeks	3.0%	30	6.6%	7	5.3%	6	3.1%	3	0.0%	0	5.2%	4	5.3%	8	1.9%	2	0.0%	0	0.0%	0	0.0%	0
Monthly	6.0%	61	8.9%	10	15.8%	17	3.9%	4	3.5%	3	5.4%	5	8.7%	12	6.0%	5	1.7%	2	1.6%	2	2.0%	2
Once every two months	3.6%	36	7.5%	8	2.8%	3	1.8%	2	6.6%	6	2.4%	2	8.8%	13	0.0%	0	0.8%	1	0.9%	1	0.8%	1
Three-four times a year	5.7%	58	7.6%	8	4.4%	5	8.0%	8	1.9%	2	4.4%	4	14.5%	21	0.0%	0	1.0%	1	3.9%	4	6.1%	5
Once a year	3.5%	35	2.1%	2	4.4%	5	7.6%	8	3.3%	3	1.9%	2	2.3%	3	0.0%	0	7.7%	7	2.3%	3	3.1%	2
Less often	4.6%	46	5.2%	6	3.5%	4	2.0%	2	5.6%	5	10.9%	9	8.7%	13	0.0%	0	2.3%	2	3.2%	4	2.0%	2
Never	59.4%	597	55.7%	61	54.4%	57	72.4%	77	73.9%	69	56.8%	49	32.3%	46	2.6%	2	85.3%	80	83.5%	92	84.0%	63
(Don't know)	1.2%	12	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	6	0.0%	0	1.2%	1	3.2%	4	0.0%	0
(Varies)	1.1%	11	1.4%	2	1.9%	2	0.8%	1	1.1%	1	4.8%	4	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Mean:		*18.95*		*5.87*		*10.43*		*2.02*		*5.48*		*7.93*		*16.04*		*159.99*		*0.38*		*1.20*		*1.79*
Weighted base:		1005		110		105		106		94		86		144		82		94		110		75
Sample:		1005		100		100		100		100		104		101		100		100		100		100

Q27 What do you like about Kenilworth? [MR]
Those who visit Kenilworth for shopping and other town centre uses at Q26:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Attractive environment / nice place	13.9%	57	5.1%	2	10.6%	5	8.8%	3	14.9%	4	21.7%	8	20.1%	20	8.5%	7	5.3%	1	24.7%	4	26.9%	3
Close to friends or relatives	1.6%	6	1.6%	1	1.2%	1	1.8%	1	2.9%	1	1.3%	0	3.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Close to home	17.1%	70	1.6%	1	12.3%	6	0.0%	0	0.0%	0	4.0%	1	7.3%	7	67.2%	53	5.3%	1	0.0%	0	4.2%	1
Close to work	0.6%	3	1.6%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Compact	8.5%	35	3.2%	2	6.1%	3	14.2%	4	12.7%	3	2.7%	1	13.3%	13	8.2%	7	5.4%	1	4.3%	1	8.4%	1
Easy to get to by bike	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Easy to get to by bus	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Easy to get to by car	0.9%	4	2.0%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	0	1.1%	1	0.7%	1	0.0%	0	0.0%	0	4.2%	1
Easy to park	6.7%	27	9.5%	5	8.8%	4	4.1%	1	9.8%	2	0.0%	0	7.8%	8	4.5%	4	11.8%	2	8.6%	2	4.2%	0
Good facilities in general	1.8%	7	1.6%	1	1.9%	1	0.0%	0	0.0%	0	0.0%	0	4.1%	4	1.5%	1	0.0%	0	0.0%	0	4.2%	0
Good food stores	3.3%	13	3.2%	2	5.4%	3	0.0%	0	3.5%	1	0.0%	0	5.2%	5	4.1%	3	0.0%	0	0.0%	0	0.0%	0
Good pubs, cafés or restaurants	9.3%	38	5.1%	3	11.6%	6	2.3%	1	2.9%	1	9.2%	3	20.8%	20	3.1%	2	6.5%	1	0.0%	0	10.6%	1
Good range of non-food shops	3.6%	15	4.7%	2	5.5%	3	10.5%	3	2.8%	1	1.6%	1	1.4%	1	1.5%	1	0.0%	0	13.0%	2	4.2%	0
Good range of independent shops	10.0%	41	11.5%	6	11.8%	6	11.1%	3	15.6%	4	2.9%	1	3.9%	4	16.1%	13	28.8%	4	5.3%	1	0.0%	0
Good range of 'high street' retailers/ multiples	3.9%	16	0.0%	0	6.3%	3	6.0%	2	3.5%	1	2.7%	1	3.9%	4	2.9%	2	5.3%	1	9.7%	2	4.2%	1
Affordable shops	1.8%	7	14.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
High quality shops	0.6%	3	2.0%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	4.2%	1
The street markets	0.9%	4	1.6%	1	4.2%	2	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Makes a change from other places	1.6%	6	0.0%	0	2.4%	1	2.3%	1	6.4%	2	2.6%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0	5.1%	1
Quiet	2.0%	8	1.6%	1	1.9%	1	0.0%	0	0.0%	0	1.3%	0	1.4%	1	2.8%	2	0.0%	0	14.0%	3	0.0%	0
Safe and secure	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	14.4%	2
The street markets	0.7%	3	0.0%	0	0.0%	0	1.8%	1	0.0%	0	2.6%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Traditional	0.9%	4	2.0%	1	1.9%	1	1.8%	1	0.0%	0	1.3%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Traffic free shopping centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	2.7%	11	0.0%	0	0.0%	0	8.2%	2	0.0%	0	12.7%	5	2.3%	2	1.3%	1	0.0%	0	0.0%	0	5.1%	1
Friendly people / atmosphere	3.6%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.1%	4	6.4%	6	1.3%	1	0.0%	0	9.6%	2	12.5%	1
Good range of charity shops	3.1%	13	4.8%	2	1.9%	1	6.8%	2	9.8%	2	0.0%	0	2.8%	3	0.0%	0	0.0%	0	4.3%	1	14.4%	2
Good range of shops in general	0.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	2	1.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Has a Waitrose supermarket	3.7%	15	1.6%	1	6.6%	3	6.4%	2	4.4%	1	0.0%	0	6.4%	6	0.8%	1	10.5%	1	0.0%	0	0.0%	0
Has everything I need	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Historical aspects (e.g. the castle)	0.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
My medical practitioner is located there (e.g. dentist, optician, chiropracter etc.)	0.7%	3	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Small / not too big	0.7%	3	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Dont know)	4.6%	19	3.2%	2	0.0%	0	22.9%	7	2.9%	1	0.0%	0	6.3%	6	0.0%	0	6.5%	1	14.9%	3	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
(Nothing / very little)	15.6%	64	32.8%	16	25.6%	12	11.5%	3	25.6%	6	22.6%	8	5.0%	5	4.3%	3	42.2%	6	9.6%	2	12.6%	2
Weighted base:		408		49		48		29		24		37		98		79		14		18		12
Sample:		419		44		56		37		23		42		68		97		17		17		18

Q28 What could be improved about Kenilworth that would make you visit more often? [MR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Better access by road	1.5%	15	1.6%	2	0.6%	1	0.6%	1	0.0%	0	6.1%	5	2.4%	4	0.6%	1	0.0%	0	2.5%	3	0.0%	0
Better public transport	0.4%	4	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.4%	2	0.7%	0
Better signposting	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cleaner streets	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Facilities which would assist you if shopping with children	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Free car parking	2.1%	22	5.2%	6	3.8%	4	0.0%	0	0.0%	0	0.6%	0	0.0%	0	9.8%	8	0.8%	1	1.8%	2	0.8%	1
More / better town centre events	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better comparison retailers (i.e. non-food shops)	1.1%	11	1.6%	2	0.6%	1	0.0%	0	0.8%	1	0.0%	0	1.2%	2	7.2%	6	0.8%	1	0.0%	0	0.0%	0
More / better value or affordable shops	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	2	0.8%	1	0.0%	0	0.0%	0
More / better entertainment	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better places for eating out (e.g. cafes and restaurants)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
More / better food shops	0.8%	9	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	2.6%	4	2.1%	2	0.8%	1	0.7%	1	0.0%	0
More / better parking	3.0%	31	5.4%	6	3.0%	3	4.3%	5	0.7%	1	0.6%	0	2.6%	4	8.5%	7	2.3%	2	1.5%	2	1.5%	1
More / better pedestrianised streets	0.3%	4	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.7%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
More / better public conveniences	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better seats / flower displays	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better services	0.1%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More advertising	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	4	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
More national multiple shops / High Street shops	9.1%	91	9.1%	10	6.3%	7	12.0%	13	3.5%	3	8.5%	7	10.0%	14	28.1%	23	1.6%	1	8.5%	9	4.5%	3
More independent shops	4.9%	49	8.3%	9	0.6%	1	1.0%	1	1.5%	1	1.7%	1	7.2%	10	14.3%	12	1.6%	1	9.3%	10	2.2%	2
Street markets - physical improvements	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Street markets - better range and quality of offer	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	5.3%	4	0.0%	0	0.0%	0	0.0%	0
Shops / services open on Sundays	0.0%	0	0.0%	0	0.0%	0	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	2.6%	26	3.0%	3	5.2%	5	0.5%	1	0.9%	1	6.1%	5	1.5%	2	6.2%	5	1.2%	1	0.0%	0	3.0%	2
Better layout / more compact	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.7%	0
Better pavements	0.8%	8	5.9%	6	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Better quality shops	0.3%	3	0.0%	0	0.6%	1	0.0%	0	0.0%	0	3.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better railway links	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.8%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Better range of clothes / shoe shops	0.5%	5	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0	4.0%	3	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Better range of shops in general	0.8%	8	0.7%	1	1.2%	1	0.0%	0	2.4%	2	0.6%	0	0.9%	1	0.6%	1	1.0%	1	0.7%	1	0.0%	0
Fewer charity shops	1.2%	12	0.0%	0	0.0%	0	0.5%	1	1.5%	1	1.1%	1	1.5%	2	8.8%	7	0.0%	0	0.0%	0	0.0%	0
If it was nearer	1.5%	15	0.0%	0	4.7%	5	4.9%	5	1.8%	2	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	2.2%	2
Improve the general appearance	0.6%	6	1.4%	2	1.2%	1	0.0%	0	0.0%	0	2.0%	2	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Less traffic / better traffic-calming measures	0.7%	7	0.7%	1	3.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.7%	1	0.0%	0
(Don’t know)	13.7%	138	8.5%	9	24.7%	26	19.1%	20	8.7%	8	13.7%	12	2.8%	4	3.0%	2	12.7%	12	19.2%	21	30.5%	23
(Nothing)	59.3%	596	58.3%	64	49.9%	53	59.9%	63	75.0%	70	53.5%	46	65.6%	94	26.4%	22	76.2%	71	61.3%	68	60.0%	45
Weighted base:		1005		110		105		106		94		86		144		82		94		110		75
Sample:		1005		100		100		100		100		104		101		100		100		100		100

Q29 Do you or your household visit the following leisure attractions? [MR/PR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Bingo / casino / bookmaker	3.5%	36	3.0%	3	5.6%	6	7.0%	7	9.4%	9	5.7%	5	1.7%	2	0.0%	0	1.6%	1	0.0%	0	2.0%	2
Cinema	52.9%	531	43.4%	48	60.8%	64	56.2%	60	60.7%	57	51.5%	44	42.2%	61	53.5%	44	56.1%	52	51.2%	56	60.9%	46
Gym / health club / sports facility	28.3%	284	20.3%	22	38.4%	40	36.8%	39	15.7%	15	17.7%	15	26.0%	38	43.7%	36	32.9%	31	20.3%	22	35.5%	27
Theatre / concert / music venue	41.0%	412	33.4%	37	32.2%	34	43.5%	46	47.2%	44	32.3%	28	40.6%	59	47.1%	38	57.2%	54	32.8%	36	49.6%	37
Museum / gallery or place of historical / cultural interest	29.5%	297	30.5%	33	26.9%	28	36.4%	39	23.2%	22	30.4%	26	38.7%	56	29.4%	24	23.8%	22	17.0%	19	36.8%	28
Pub / bar / nightclub	50.8%	510	43.2%	48	56.0%	59	64.1%	68	62.1%	58	47.2%	40	40.7%	59	54.2%	44	48.9%	46	43.5%	48	54.1%	40
Restaurant / café	78.6%	789	75.8%	83	86.6%	91	82.1%	87	81.9%	77	72.6%	62	76.2%	110	84.3%	69	78.8%	74	76.5%	84	69.9%	52
Family entertainment (e.g. tenpin bowling, skating rink)	19.2%	192	10.3%	11	25.6%	27	29.9%	32	24.9%	23	23.2%	20	18.8%	27	22.3%	18	3.3%	3	11.7%	13	24.0%	18
Other activity	0.3%	3	0.7%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.7%	0
(Don't visit ANY leisure activities)	8.2%	82	12.4%	14	8.9%	9	7.1%	8	5.4%	5	6.0%	5	7.4%	11	4.2%	3	7.6%	7	11.4%	13	10.1%	8
Weighted base:		1005		110		105		106		94		86		144		82		94		110		75
Sample:		1005		100		100		100		100		104		101		100		100		100		100

MeanScore: number of visits per year

Q30 How often do you or your household play bingo or visit casinos or bookmakers?
Those who visit bingo / casino / bookmakers at Q29:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
More than once a week	9.9%	4	0.0%	0	0.0%	0	20.3%	1	7.9%	1	0.0%	0	55.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a week	18.8%	7	0.0%	0	10.0%	1	61.6%	5	0.0%	0	32.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a fortnight	10.8%	4	29.2%	1	12.1%	1	0.0%	0	0.0%	0	34.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	33.8%	1
Once a month	16.3%	6	23.6%	1	33.9%	2	9.1%	1	9.7%	1	20.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	33.1%	0
Once every two months	21.5%	8	23.6%	1	0.0%	0	9.1%	1	43.1%	4	12.4%	1	44.8%	1	0.0%	0	49.5%	1	0.0%	0	0.0%	0
Once every six months	19.7%	7	23.6%	1	43.9%	3	0.0%	0	27.2%	2	0.0%	0	0.0%	0	0.0%	0	50.5%	1	0.0%	0	33.1%	0
Once a year or less	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Dont know / varies)	3.0%	1	0.0%	0	0.0%	0	0.0%	0	12.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*40.64*		*12.31*		*13.30*		*81.11*		*25.83*		*29.13*		*132.00*		*0.00*		*3.98*		*0.00*		*13.42*
Weighted base:		36		3		6		7		9		5		2		0		1		0		2
Sample:		35		4		5		5		7		7		2		0		2		0		3

Q31 Where do you or members of your household normally go to play bingo or visit casinos or bookmakers?
Those who visit bingo / casino / bookmakers at Q29: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Gala Bingo, North Bar Street, Banbury	3.8%	1	0.0%	0	0.0%	0	0.0%	0	12.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	33.1%	0
Gala Bingo, Brade Drive, Walsgrave, Coventry	19.4%	6	0.0%	0	56.1%	3	9.1%	1	0.0%	0	50.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gala Bingo, Fairfax Street, Coventry	10.6%	3	23.6%	1	43.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gala Bingo, Savoy Buildings, Radford Road, Coventry	7.0%	2	52.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	33.8%	1
Beacon Bingo, Weedon Road, Northampton	7.6%	2	0.0%	0	0.0%	0	0.0%	0	43.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Knowle Village Centre	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	49.5%	1	0.0%	0	0.0%	0
Lillington Local Centre	2.4%	1	23.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mecca Bingo, Stockfield Road, Birmingham	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	50.5%	1	0.0%	0	0.0%	0
Shipston-on-Stour Town Centre	1.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	33.1%	0
Southam Town Centre	7.6%	2	0.0%	0	0.0%	0	0.0%	0	43.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sydenham District Centre	16.4%	5	0.0%	0	0.0%	0	70.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Willenhall Town Centre	6.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	50.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
William Hill, High Street, Leamington Spa	4.7%	1	0.0%	0	0.0%	0	20.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
William Hill, Quinton Park, Cheylesmore	7.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		32		3		6		7		6		4		2		0		1		0		2
Sample:		30		4		5		5		3		6		2		0		2		0		3

MeanScore: number of visits per year

Q32 How often do you or your household go to the cinema?
Those who visit the cinema at Q29:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
More than once a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a week	1.2%	7	0.0%	0	0.9%	1	0.0%	0	2.5%	1	3.8%	2	1.8%	1	0.0%	0	0.0%	0	0.0%	0	3.8%	2
Once a fortnight	10.2%	54	15.8%	8	3.7%	2	9.9%	6	12.8%	7	19.7%	9	8.4%	5	14.1%	6	9.0%	5	7.0%	4	5.5%	3
Once a month	29.3%	156	20.6%	10	32.2%	21	27.4%	16	5.2%	3	41.7%	18	17.5%	11	40.2%	18	47.1%	25	32.2%	18	36.2%	16
Once every two months	34.9%	185	43.0%	21	34.1%	22	36.6%	22	43.9%	25	14.4%	6	53.9%	33	27.6%	12	29.1%	15	28.4%	16	29.9%	14
Once every six months	16.8%	89	15.7%	8	22.1%	14	22.1%	13	15.2%	9	6.0%	3	14.4%	9	5.3%	2	14.9%	8	28.9%	16	16.8%	8
Once a year or less	1.5%	8	0.0%	0	0.9%	1	0.9%	1	3.7%	2	0.0%	0	1.8%	1	1.5%	1	0.0%	0	3.4%	2	2.2%	1
(Dont know / varies)	6.2%	33	4.9%	2	6.1%	4	3.1%	2	16.8%	10	14.2%	6	2.2%	1	11.3%	5	0.0%	0	0.0%	0	5.5%	3
Mean:		*9.85*		*9.95*		*8.31*		*8.77*		*9.84*		*15.29*		*8.95*		*11.57*		*10.03*		*7.98*		*10.47*
Weighted base:		531		48		64		60		57		44		61		44		52		56		46
Sample:		489		45		51		49		55		37		39		57		50		50		56

Q33 Where do you or members of your household normally go to the cinema?
Those who visit the cinema at Q29: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Cineworld,Leicester Road, Rugby	4.5%	24	0.0%	0	0.0%	0	0.0%	0	26.3%	14	14.4%	6	4.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cineworld,47 Mill Lane Arcade, Touchwood, Solihull	10.3%	54	0.0%	0	4.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	87.1%	46	9.9%	5	0.0%	0
Odeon, Horsefair, Banbury	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1
Odeon, Skydome,Croft Road, Coventry	9.0%	47	0.0%	0	4.1%	3	0.0%	0	0.0%	0	20.8%	9	41.1%	25	24.4%	10	0.0%	0	0.0%	0	0.0%	0
Royal Cinema, Royal Spa Centre, Nebold Terrace, Leamington Spa	2.5%	13	11.6%	5	0.9%	1	0.0%	0	8.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	2	1.1%	0
Showcase,Gielgud Way, Cross Point Business Park, Walsgrave, Coventry	18.1%	95	8.7%	4	9.3%	6	8.4%	5	23.6%	13	62.5%	28	32.1%	20	39.9%	17	0.0%	0	1.4%	1	5.0%	2
Stratford-upon-Avon Picture House, Windsor Place, Stratford-upon-Avon	9.4%	49	0.0%	0	0.0%	0	1.1%	1	2.8%	2	0.0%	0	0.0%	0	0.0%	0	2.8%	1	38.0%	21	55.2%	25
Vue Cinema, Portland Place, Leamington Spa	37.5%	196	74.8%	35	81.7%	52	89.6%	53	34.4%	19	1.1%	0	4.4%	3	23.0%	10	2.8%	1	19.2%	11	27.5%	12
Warwick Arts Centre, Gibbet Hill Road, Coventry	3.5%	18	4.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.4%	9	12.8%	5	1.4%	1	1.8%	1	0.0%	0
Abroad	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberdeen City Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birmingham City Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Cineworld, New Bond Street, Weymouth	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cineworld, Pendigo Way, Birmingham	0.3%	1	0.0%	0	0.0%	0	0.9%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Everyman, Bell Court, Wood Street, Stratford-upon-Avon	3.5%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	26.5%	15	8.7%	4
Everyman, Mailbox, The Mailbox, Birmingham	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Odeon, New Street, Birmingham	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0
The Electric, Station Street, Birmingham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Vue Cinema, Leisure Level Kingfisher Centre, Redditch	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Weighted base:		524		47		64		59		55		44		61		42		52		55		45
Sample:		479		44		51		48		53		37		39		55		50		48		54

MeanScore: number of visits per year

Q34 How often do you or your household use a gym / healthclub / sports facility?
Those who go to the gym / healthclub / sports facilities at Q29:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
More than once a week	72.6%	206	81.8%	18	73.5%	30	74.2%	29	82.5%	12	84.9%	13	61.8%	23	66.7%	24	73.0%	22	84.3%	19	61.2%	16
Once a week	14.8%	42	7.8%	2	13.0%	5	21.0%	8	0.0%	0	11.9%	2	5.8%	2	18.2%	6	24.6%	8	3.6%	1	30.7%	8
Once a fortnight	3.9%	11	3.5%	1	12.1%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.7%	5	0.0%	0	0.0%	0	1.9%	1
Once a month	4.7%	13	3.4%	1	1.5%	1	0.0%	0	0.0%	0	3.2%	0	28.0%	10	1.5%	1	0.0%	0	0.0%	0	1.9%	1
Once every two months	0.3%	1	0.0%	0	0.0%	0	0.0%	0	5.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once every six months	0.5%	2	0.0%	0	0.0%	0	1.7%	1	5.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a year or less	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Dont know / varies)	3.2%	9	3.5%	1	0.0%	0	3.1%	1	5.8%	1	0.0%	0	4.4%	2	0.0%	0	2.4%	1	12.2%	3	4.2%	1
Mean:		*185.02*		*203.84*		*181.94*		*190.49*		*205.53*		*205.25*		*157.99*		*169.29*		*188.09*		*226.58*		*166.98*
Weighted base:		284		22		40		39		15		15		38		36		31		22		27
Sample:		241		18		26		28		16		20		22		38		23		18		32

Q35 Where do you or members of your household normally go to use a gym / healthclub / sports facility?
Those who go to the gym / healthclub / sports facilities at Q29: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Alveston Manor Health Centre, Stratford-upon-Avon	2.2%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.4%	3	13.3%	3
Anytime Fitness, Unit 4, The Swan Centre, Rugby	1.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.2%	4	0.0%	0	0.0%	0	0.0%	0
Ardencote Manor Leisure Club, Lye Green Road, Claverdon, Warwick	0.4%	1	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Bannatyne Health Club & Spa, Oxford Road, Banbury	0.6%	2	0.0%	0	0.0%	0	0.0%	0	7.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	1	0.0%	0
Bizz Fitness, Spencer Street, Leamington Spa	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Castle Farm Recreation Centre, Fishponds Road, Kenilworth	3.9%	10	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	27.4%	10	0.0%	0	0.0%	0	0.0%	0
Chesford Grange Health Club, Kenilworth Road, Kenilworth	0.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.8%	2	0.0%	0	0.0%	0	0.0%	0
Curves of Kenilworth, Talisman Square, Kenilworth	2.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1	11.6%	4	0.0%	0	0.0%	0	0.0%	0
Daventry Leisure Centre, Lodge Road, Daventry	0.6%	2	0.0%	0	0.0%	0	0.0%	0	12.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
David Lloyd Coventry, Abbey Road, Coventry	3.3%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.4%	2	14.6%	5	1.5%	1	0.0%	0	0.0%	0	2.1%	1
David Lloyd Leisure, Cranmore Boulevard, Solihull	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0
Fitness First, Cannon Park, Coventry	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fitness Worx, Cattel Road, Warwick	1.0%	3	0.0%	0	5.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0
L A Fitness, Welton Road, Warwick	0.4%	1	0.0%	0	3.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leamington Tennis Club, Guys Cliffe Avenue, Leamington Spa	0.3%	1	3.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newbold Comyn Leisure Centre, Newbold Terrace East, Leamington Spa	7.7%	21	48.0%	11	3.5%	1	23.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nuffield Health, Macbeth Approach, Gallagher Business Park, Warwick	9.6%	25	11.3%	3	18.2%	6	42.7%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	1	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Peak Fitness, The Saltisford, Warwick	0.3%	1	3.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pinx Gym, Radford Road, Leamington Spa	0.9%	2	0.0%	0	0.0%	0	0.0%	0	19.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pure Healthclub/ Gym, Bedford Street, Leamington Spa	4.3%	12	7.0%	2	16.4%	6	10.1%	4	0.0%	0	4.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Southam Leisure Centre, Welsh Road, Southam	2.1%	6	3.5%	1	0.0%	0	0.0%	0	40.1%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St Nicholas Park Leisure Centre / Gym, Warwick	3.0%	8	4.3%	1	7.3%	3	12.2%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Menzies Spa & Golf Club, Warwick Road, Stratford-upon-Avon	0.6%	2	0.0%	0	0.0%	0	0.0%	0	7.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	1	0.0%	0
The Warwickshire Golf & Country Club, Leek Wootton, Warwick	5.4%	14	4.3%	1	1.7%	1	5.0%	2	0.0%	0	4.0%	1	2.9%	1	22.2%	8	5.1%	1	0.0%	0	0.0%	0
The Workout Mill, Regent Place, Leamington Spa	0.3%	1	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Urban Sports and Fitness, Collins Road, Warwick	1.8%	5	0.0%	0	14.3%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Virgin Active, Leicester Road, Rugby	0.3%	1	0.0%	0	0.0%	0	0.0%	0	7.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walton Hall, Country Club / Gym, Stratford-upon-Avon	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1
Anytime Fitness, Maybrook Road, Stratford-upon-Avon	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.1%	2
Anytime Fitness, Tailsman Square, Kenilworth	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0
Bannatyne Health Club & Spa, Alcester Road, Wildmoor, Stratford-upon-Avon	1.9%	5	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	23.8%	4	0.0%	0
Bannatyne Health Club & Spa, Saintbury Drive, Shirley, Solihull	4.2%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	38.6%	11	0.0%	0	0.0%	0
Bardello Health Club, Monkspath Business Park, Highlands Road, Shirley, Solihull	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.6%	2	0.0%	0	0.0%	0
Brandon Hall Hotel & Spa, Main Street, Brandon, Coventry	0.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
British Military Fitness, St Nicholas Park, Warwick	0.8%	2	0.0%	0	5.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Cardiff City Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1
Club Moativation, Crowne Plaza, Homer Road, Solihull	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1	0.0%	0	0.0%	0
Coventry Sports & Leisure Centre, Fairfax, Coventry	0.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crowne Plaza, Bridge Foot, Stratford-upon-Avon	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	1	0.0%	0
Edmondscote Athletics Track, River Close, Leamington Spa	0.2%	1	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fitness Factory, Santos Close, Coventry	0.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Freedom Leisure, Welton Road, Warwick	2.1%	6	0.0%	0	14.3%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	1	0.0%	0
Gymophobics, Matthews Street, Rugby	0.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leamington Lawn Tennis & Squash Club, Guy's Cliffe Avenue, Leamington Spa	0.5%	1	3.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Leamington Spa Town Centre	0.5%	1	4.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1
Lear Fitness, Bedford Street, Leamington Spa	0.3%	1	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Macdonald Alveston Manor Hotel, Clopton Bridge, Stratford-upon-Avon	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	1	0.0%	0
Mallory Court Country House Hotel & Spa, Harbury Lane, Leamington Spa	0.3%	1	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Myton School, Myton Road, Warwick	0.2%	1	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nuffield Health Fitness & Wellbeing Gym, Junction 1 Retail Park, Leicester Road, Rugby	0.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pilates Place, Payton House, Packwood Court, Guild Street, Sreatford-upon-Avon	0.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	0
Pure Gym, Ropewalk Shopping Centre, Chapel Street, Nuneaton	0.2%	1	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pure Gym, The Skydome, Croft Road, Coventry	1.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	25.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Revolution Training	0.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Coventry Ltd., Willenhall Lane, Binley, Coventry																						
Royal Leamington Spa Canoe Club, Adelaide Road, Leamington Spa	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Simply Gym, Cannon Park Shopping Centre, Lynchgate Road, Coventry	1.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sports Connexion Leisure Club, Leamington Road, Ryton-on-Dunsmore, Coventry	0.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sportsdirect Fitness, Webb Ellis Road, Rugby	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St. Peters Celtic Football Club, Blackdown, Leamington Spa	0.3%	1	3.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stratford Leisure Centre, Bridgeway, Stratford-upon-Avon	6.6%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	31.3%	6	48.2%	12
Stratford-upon-Avon High School, Alcester Road, Stratford-upon-Avon	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0
Sydenham Community Centre, Chesterton Drive, Leamington Spa	0.3%	1	3.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Queen's Diamond Jubilee Centre, Bruce Williams Way, Rugby	0.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Xcel Leisure Centre, Mitchell Avenue, Canley, Coventry	8.6%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	44.8%	17	0.0%	0	21.1%	6	0.0%	0	0.0%	0
Village Hotel, Coventry Business Park, Dolomite Lane, Coventry	1.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.5%	2	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Virgin Active, Blythe Valley Park, Blythe Gate, Solihull	1.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.9%	5	0.0%	0	0.0%	0
Warwick Sport, University of Warwick, University Road, Coventry	2.5%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.9%	2	12.2%	4	0.0%	0	0.0%	0	0.0%	0
Welcombe Hotel, Warwick Road, Stratford-upon-Avon	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	1	2.5%	1
Wellesbourne Sports & Community Centre, Loxley Close, Wellesbourne, Warwick	1.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.4%	4

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Windmill Village & Golf Club, Birmingham Road, Allesley, Coventry	0.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Woodrush Sports Centre, Shawhurst Lane, Hollywood, Birmingham	0.5%	1	0.0%	0	0.0%	0	0.0%	0	5.9%	1	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0
Weighted base:		266		22		34		37		12		15		38		36		29		19		24
Sample:		224		18		23		25		13		20		22		38		21		16		28

MeanScore: number of visits per year

Q36 How often do you or your household visit a theatre / concert / music venue?
Those who visit the theatre / concert / music venues at Q29:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
More than once a week	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a week	2.0%	8	2.6%	1	0.0%	0	2.9%	1	1.6%	1	6.1%	2	4.2%	2	0.0%	0	1.4%	1	0.0%	0	1.4%	1
Once a fortnight	2.3%	9	0.0%	0	1.7%	1	0.0%	0	3.2%	1	0.0%	0	6.4%	4	2.7%	1	1.4%	1	0.0%	0	4.8%	2
Once a month	10.3%	42	19.3%	7	8.7%	3	0.0%	0	10.9%	5	17.9%	5	8.3%	5	16.6%	6	10.1%	5	8.7%	3	7.5%	3
Once every two months	28.2%	116	20.8%	8	26.7%	9	30.6%	14	20.5%	9	14.6%	4	30.6%	18	30.8%	12	39.6%	21	25.6%	9	32.4%	12
Once every six months	40.4%	166	45.8%	17	24.9%	8	51.7%	24	38.2%	17	36.9%	10	36.2%	21	32.9%	13	45.9%	25	53.8%	19	33.5%	12
Once a year or less	10.9%	45	7.3%	3	34.2%	12	5.9%	3	17.8%	8	7.9%	2	6.0%	4	11.0%	4	0.0%	0	11.9%	4	16.1%	6
(Dont know / varies)	5.8%	24	4.2%	2	3.9%	1	9.0%	4	7.8%	3	16.6%	5	6.4%	4	6.1%	2	1.7%	1	0.0%	0	4.4%	2
Mean:		*6.41*		*6.12*		*3.91*		*4.84*		*5.46*		*8.36*		*12.57*		*5.59*		*5.66*		*3.72*		*5.80*
Weighted base:		412		37		34		46		44		28		59		38		54		36		37
Sample:		446		40		36		41		50		35		46		59		51		39		49

Q37 Where do you or members of your household normally go to visit the theatre, watch a concert or watch live music?
Those who visit the theatre / concert / music venues at Q29: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Belgrade Theatre, Belgrade Square, Coventry	15.1%	54	10.3%	4	19.0%	6	3.0%	1	14.0%	5	38.8%	10	41.8%	21	20.4%	5	0.0%	0	4.8%	2	2.9%	1
Loft Theatre, Victoria Collonade, Leamington Spa	4.7%	17	2.2%	1	15.9%	5	12.7%	5	9.7%	3	0.0%	0	2.6%	1	0.0%	0	1.4%	1	2.4%	1	0.0%	0
Royal Shakespeare Theatre, Stratford-upon-Avon	18.3%	65	4.9%	2	19.4%	6	6.0%	2	19.3%	6	4.4%	1	0.0%	0	24.5%	6	9.2%	5	63.5%	21	46.8%	16
Royal Spa Centre, Newbold Terrace, Leamington Spa	9.3%	33	30.6%	11	5.7%	2	11.4%	5	27.9%	9	0.0%	0	0.0%	0	2.1%	1	1.4%	1	7.8%	3	10.1%	4
Rugby Theatre, Henry Street, Rugby	0.7%	2	0.0%	0	0.0%	0	0.0%	0	4.4%	1	3.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Swan Theatre, Waterside, Stratford-upon-Avon	2.1%	7	0.0%	0	0.0%	0	11.3%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	6.5%	2
Talisman Theatre, Barrow Road, Kenilworth	0.8%	3	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	8.7%	2	0.0%	0	0.0%	0	0.0%	0
The Albany Theatre, Butts Road, Coventry	1.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.7%	2	4.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Attic Theatre, Bridgefoot, Stratford-upon-Avon	1.2%	4	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	8.3%	3	0.0%	0
The Core Theatre, Theatre Square, Solihull	0.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	3	0.0%	0	0.0%	0
The Dream Factory, Shelley Avenue, Warwick	1.3%	5	0.0%	0	1.9%	1	0.0%	0	0.0%	0	16.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Priory Theatre, Rosemary Hill, Kenilworth	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	2	0.0%	0	0.0%	0	0.0%	0
Union Theatre, Christ Church, Solihull	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0
Warwick Arts Centre, University, Coventry	10.3%	37	7.1%	2	2.3%	1	27.5%	11	9.6%	3	0.0%	0	27.3%	14	16.9%	4	1.4%	1	0.0%	0	1.5%	1
Abroad	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Birmingham City Centre	8.1%	29	7.2%	3	1.9%	1	1.3%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	1	39.2%	20	4.8%	2	10.0%	3
Birmingham Hippodrome, Hurst Street, Southside, Birmingham	5.9%	21	4.9%	2	2.3%	1	0.0%	0	4.3%	1	0.0%	0	4.8%	2	12.8%	3	20.1%	10	2.4%	1	1.5%	1
Birmingham Royal Ballet, Thorp Street, Birmingham	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0
Brighton City Centre	0.2%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central London / West End	7.8%	28	18.6%	7	3.8%	1	9.3%	4	2.2%	1	15.1%	4	7.4%	4	4.6%	1	5.7%	3	3.0%	1	9.4%	3
Courtyard Theatre, Southern Lane, Stratford-upon-Avon	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Criterion Theatre, Berkeley	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Road South, Coventry																						
Hall Green Little Theatre, Pemberley Road, Birmingham	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Kenilworth Town Centre	0.2%	1	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leeds City Centre	1.4%	5	0.0%	0	15.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milton Keynes Town Centre	0.2%	1	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
National Exhibition Centre (NEC), North Avenue, Marston Green, Birmingham	2.5%	9	2.7%	1	6.1%	2	1.7%	1	4.3%	1	0.0%	0	4.3%	2	0.0%	0	1.4%	1	3.0%	1	0.0%	0
New Alexandra Theatre, Suffolk Street Queensway, Birmingham	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	0	2.6%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1
O2 Academy, Horse Fair, Birmingham	2.3%	8	0.0%	0	3.8%	1	11.3%	5	0.0%	0	2.0%	0	2.6%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Oxford City Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Stratford-upon-Avon Town Centre	0.4%	2	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1
Symphony Hall, Broad Street, Birmingham	1.5%	5	6.6%	2	0.0%	0	1.3%	1	0.0%	0	2.0%	0	0.0%	0	2.0%	1	2.9%	1	0.0%	0	0.0%	0
The Bear Pit Theatre, Rother Street, Stratford-upon-Avon	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	1
The Old Rep Theatre, Station Street, Birmingham	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Warwick Town Centre	0.3%	1	2.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		358		35		31		40		32		25		51		25		51		33		35
Sample:		386		38		34		33		35		32		40		43		50		37		44

MeanScore: number of visits per year

Q38 How often do you or your household go to a museum, gallery, or other place of historical / cultural interest?
Those who visit museum / gallery or place of historical / cultural interest at Q29:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
More than once a week	0.2%	1	0.0%	0	0.0%	0	0.0%	0	3.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a week	1.2%	4	0.0%	0	7.1%	2	1.4%	1	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a fortnight	2.7%	8	0.0%	0	2.1%	1	3.5%	1	0.0%	0	0.0%	0	9.7%	5	2.2%	1	0.0%	0	0.0%	0	0.0%	0
Once a month	17.5%	52	22.4%	7	11.2%	3	16.7%	6	3.2%	1	30.2%	8	30.1%	17	16.7%	4	7.3%	2	14.5%	3	3.6%	1
Once every two months	21.3%	63	13.2%	4	48.9%	14	8.0%	3	39.1%	9	2.3%	1	11.7%	7	25.3%	6	25.2%	6	27.1%	5	34.0%	9
Once every six months	28.5%	85	40.8%	14	16.5%	5	32.3%	12	34.5%	8	11.8%	3	28.0%	16	19.5%	5	53.6%	12	13.6%	3	30.7%	8
Once a year or less	16.9%	50	11.6%	4	14.2%	4	36.8%	14	13.6%	3	14.8%	4	14.1%	8	9.1%	2	7.3%	2	25.2%	5	17.3%	5
(Dont know / varies)	11.7%	35	12.0%	4	0.0%	0	1.4%	1	6.4%	1	40.8%	11	4.4%	2	27.2%	7	6.6%	1	19.7%	4	14.4%	4
Mean:		*6.70*		*4.95*		*8.90*		*5.01*		*11.86*		*6.89*		*8.88*		*6.22*		*3.74*		*4.68*		*3.71*
Weighted base:		297		33		28		39		22		26		56		24		22		19		28
Sample:		274		34		25		29		29		23		34		35		19		15		31

Q39 Where do you or members of your household normally go to a museum, gallery, or other place of historical / cultural interest?
Those who visit museum / gallery or place of historical / cultural interest at Q29: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Banbury Museum,Spiceball Park Road, Banbury	0.4%	1	0.0%	0	0.0%	0	0.0%	0	5.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coventry Transport Museum, Millenium Place, Coventry	7.2%	14	0.0%	0	0.0%	0	15.5%	5	5.7%	1	6.8%	1	14.6%	6	5.7%	1	3.6%	1	7.3%	1	0.0%	0
Herbert Art Gallery and Museum, Jordans Well, Coventry	17.3%	34	3.0%	1	6.2%	1	6.4%	2	18.4%	2	26.8%	4	54.6%	22	11.4%	1	0.0%	0	0.0%	0	5.2%	1
Leamington Art Gallery and Museum, Royal Pump Rooms, Parade, Leamington Spa	5.8%	11	17.9%	5	7.0%	1	14.6%	4	5.6%	1	0.0%	0	0.0%	0	5.6%	1	0.0%	0	0.0%	0	0.0%	0
National Motorcycle Museum, Coventry Road, Bickenhill, Solihull	0.9%	2	3.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Royal Regiment of Fusiliers Museum, St Johns House, St Johns, Warwick	1.1%	2	6.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.6%	1	0.0%	0	0.0%	0	0.0%	0
Shakespeares Birthplace Trust Museum, High Street Stratford-upon-Avon	0.4%	1	3.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St Johns House Museum, 11-41 St Johns, Warwick	0.9%	2	0.0%	0	3.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	1	0.0%	0	0.0%	0	3.4%	1
The Queens Own Hussars Museum, High Street Warwick	0.8%	2	0.0%	0	6.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	0
Warwickshire County Museum, Market Place, Warwick	11.3%	22	3.7%	1	70.4%	13	11.0%	3	19.5%	2	3.8%	1	3.3%	1	0.0%	0	3.5%	1	0.0%	0	0.0%	0
Abroad	4.1%	8	0.0%	0	0.0%	0	0.0%	0	7.0%	1	10.6%	2	5.3%	2	18.2%	2	0.0%	0	16.3%	2	0.0%	0
Ashmolean Museum, Beaumont Street, Oxford	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	1	0.0%	0	0.0%	0	7.3%	1	3.4%	1
Belfast City Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.9%	1	0.0%	0	0.0%	0	0.0%	0
Birmingham City Centre	3.1%	6	3.0%	1	3.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.4%	4	9.0%	1	0.0%	0
Birmingham Museum & Art Gallery, Chamberlain Square, Birmingham	2.3%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.7%	2	0.0%	0	6.9%	1	8.6%	2	0.0%	0	0.0%	0
British Motor Museum, Banbury Road, Gaydon, Warwick	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	1	0.0%	0	0.0%	0
Central London	27.8%	55	22.3%	6	0.0%	0	52.5%	15	24.1%	3	35.1%	6	10.1%	4	26.9%	2	23.5%	5	60.1%	6	50.5%	7
Charlecote Park, Charlecote, Warwick	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	2	0.0%	0	0.0%	0	0.0%	0	3.4%	1

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Chester City Centre	3.3%	6	24.9%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Compton Verney Art Gallery, Compton Verney	1.3%	3	3.0%	1	3.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.6%	1
Coventry City Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.9%	1	0.0%	0	0.0%	0	0.0%	0
Dover Castle, Castle Hill Road, Dover	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kenilworth Castle, Castle Green, Kenilworth	0.4%	1	0.0%	0	0.0%	0	0.0%	0	7.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leamington Spa Town Centre	0.9%	2	6.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Museum of Scotland, Chambers Street, Edinburgh	0.4%	1	0.0%	0	0.0%	0	0.0%	0	7.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Oxford University Museum of Natural History, Parks Road, Oxford	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1
Stratford Arts House, Rother Street, Stratford-upon-Avon	0.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	0
Stratford-upon-Avon Town Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1
Theatre Royal, Theatre Square, Nottingham	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	1	0.0%	0	0.0%	0
Thinktank, Birmingham Science Museum, Millennium Point, Curzon Street, Birmingham	0.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.7%	2
Turner Contemporary, Rendezvous, Margate	0.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Warwick Castle, Warwick	3.8%	8	3.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	32.9%	7	0.0%	0	0.0%	0
Weighted base:		198		26		19		29		12		16		41		9		21		11		15
Sample:		175		25		16		18		16		17		24		16		17		10		16

MeanScore: number of visits per year

Q40 How often do you or your household go to pubs / bars / nightclubs?
Those who visit pubs / bars / nightclubs at Q29:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
More than once a week	14.9%	76	33.4%	16	19.2%	11	17.0%	12	19.6%	11	7.8%	3	6.4%	4	15.7%	7	8.7%	4	3.7%	2	15.3%	6
Once a week	35.9%	183	25.5%	12	26.0%	15	34.5%	23	36.0%	21	34.2%	14	46.7%	27	31.0%	14	64.0%	29	30.0%	14	31.2%	13
Once a fortnight	18.9%	96	19.1%	9	20.9%	12	28.8%	20	9.3%	5	23.7%	10	11.6%	7	21.0%	9	9.9%	5	24.6%	12	19.4%	8
Once a month	19.6%	100	13.8%	7	28.4%	17	12.1%	8	27.7%	16	22.9%	9	17.0%	10	20.3%	9	11.8%	5	23.4%	11	18.9%	8
Once every two months	5.0%	25	4.9%	2	2.2%	1	2.6%	2	2.4%	1	4.9%	2	7.0%	4	5.2%	2	1.6%	1	10.6%	5	10.8%	4
Once every six months	1.6%	8	1.7%	1	1.0%	1	1.6%	1	2.4%	1	1.2%	0	1.9%	1	2.6%	1	0.0%	0	2.0%	1	1.2%	0
Once a year or less	0.5%	2	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	1.9%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0
(Dont know / varies)	3.7%	19	1.7%	1	2.2%	1	3.6%	2	1.2%	1	5.4%	2	7.4%	4	3.0%	1	4.0%	2	5.7%	3	3.2%	1
Mean:		*63.42*		*100.00*		*69.05*		*69.17*		*71.26*		*47.88*		*48.50*		*62.92*		*60.01*		*36.11*		*62.03*
Weighted base:		510		48		59		68		58		40		59		44		46		48		40
Sample:		481		42		53		50		57		46		39		55		42		48		49

Q41 What location (e.g. town centre, street/area, shopping centre, retail/ leisure park) do you or members of your household normally go to when visiting pubs / bars / nightclubs?
Those who visit pubs / bars / nightclubs at Q29: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Cubbington Waterworks Play Area, Cubbington Road, Leamington Spa	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alderminster Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	0
Baginton Village Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Banbury Town Centre	0.7%	3	0.0%	0	0.0%	0	0.0%	0	7.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Barford Village Centre	1.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.4%	4	0.0%	0
Birmingham City Centre	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bishops Itchington Village Centre	1.0%	4	0.0%	0	0.0%	0	0.0%	0	12.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bubbenhall Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Budbrooke Village Centre	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	2	0.0%	0
Cardiff City Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Central London	0.2%	1	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheylesmore Local Centre	0.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Claverdon Village Centre	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1	2.5%	1	0.0%	0
Coventry City Centre	13.2%	52	0.0%	0	0.0%	0	0.0%	0	2.8%	1	62.9%	20	75.6%	29	3.2%	1	0.0%	0	0.0%	0	0.0%	0
Cubbington Village Centre	0.6%	2	5.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dorridge Village Centre	0.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.5%	3	0.0%	0	0.0%	0
Earlswood Village Centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	2	0.0%	0	0.0%	0
Ettington Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1
Hatton Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0
Henley-in-Arden Town Centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	2.5%	1	0.0%	0
Hockley Heath Village Centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	2	0.0%	0	0.0%	0
Hunningham Village Centre	0.2%	1	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kenilworth Town Centre	9.1%	36	0.0%	0	0.0%	0	0.0%	0	2.3%	1	1.5%	0	10.4%	4	91.7%	30	0.0%	0	0.0%	0	1.4%	1
Kineton Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	0
Knowle Village Centre	1.2%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0	12.4%	4	0.0%	0	0.0%	0
Lapworth Village Centre	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.4%	3	0.0%	0	0.0%	0
Leamington Spa Town Centre	29.6%	116	82.7%	36	21.1%	9	87.9%	53	17.0%	5	7.0%	2	0.0%	0	3.5%	1	0.0%	0	6.9%	3	19.2%	7
Long Itchington Village Centre	0.8%	3	0.0%	0	1.6%	1	0.0%	0	7.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Long Lawford Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Middle Tyso Village Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1
Napton-on-the-Hill Village Centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	5.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Packington Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rugby Town Centre	1.6%	6	0.0%	0	0.0%	0	0.0%	0	7.4%	2	12.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Snitterfield Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0
Solihull Town Centre	4.5%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	48.6%	16	0.0%	0	1.4%	1

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Southam Town Centre	2.4%	9	0.0%	0	0.0%	0	0.0%	0	30.0%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stockton Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stratford-upon-Avon Town Centre	10.7%	42	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	54.3%	21	57.2%	21
Stretton-on-Dunsmore Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tanworth-in-Arden Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0
Tewkesbury Town Centre	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tiddington Village Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	1
Warwick Town Centre	12.9%	50	8.3%	4	77.3%	34	8.5%	5	0.0%	0	0.0%	0	4.3%	2	0.0%	0	2.2%	1	12.5%	5	0.0%	0
Wellesbourne Village Centre	0.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0	7.3%	3
Whitnash Town Centre	0.3%	1	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Willenhall Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Willoughby Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wolston Village Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wootton Wawen Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0
Wyken Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		392		43		45		60		31		33		39		33		34		39		36
Sample:		380		39		43		41		36		35		25		42		36		40		43

MeanScore: number of visits per year

Q42 How often do you or your household eat out (e.g. visit cafes and restaurants)?
Those who visit restaurants / cafés at Q29:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
More than once a week	11.2%	89	22.8%	19	13.5%	12	17.5%	15	5.9%	5	13.8%	9	5.4%	6	8.4%	6	4.9%	4	15.0%	13	1.9%	1
Once a week	26.5%	209	13.0%	11	28.1%	26	28.1%	24	34.4%	26	23.4%	15	20.5%	22	31.1%	21	48.5%	36	22.4%	19	16.5%	9
Once a fortnight	21.8%	172	21.0%	18	14.7%	13	16.7%	15	19.2%	15	22.6%	14	29.9%	33	20.7%	14	18.7%	14	23.1%	19	34.3%	18
Once a month	27.0%	213	25.4%	21	33.5%	31	24.9%	22	28.9%	22	21.1%	13	25.9%	28	33.9%	23	18.0%	13	27.4%	23	31.1%	16
Once every two months	8.3%	65	12.0%	10	5.9%	5	10.5%	9	6.6%	5	9.0%	6	10.6%	12	3.0%	2	6.4%	5	7.9%	7	9.5%	5
Once every six months	1.5%	12	3.0%	2	1.4%	1	0.0%	0	1.8%	1	4.1%	3	1.0%	1	0.9%	1	1.0%	1	0.9%	1	2.1%	1
Once a year or less	0.5%	4	0.0%	0	0.0%	0	0.8%	1	1.1%	1	0.0%	0	1.0%	1	0.8%	1	0.0%	0	0.0%	0	1.0%	1
(Dont know / varies)	3.2%	25	2.8%	2	2.9%	3	1.5%	1	2.0%	2	5.9%	4	5.7%	6	1.2%	1	2.5%	2	3.2%	3	3.6%	2
Mean:		*51.14*		*71.38*		*56.10*		*64.59*		*41.38*		*56.86*		*37.02*		*46.04*		*45.32*		*58.48*		*27.31*
Weighted base:		789		83		91		87		77		62		110		69		74		84		52
Sample:		770		79		85		78		77		66		78		86		76		76		69

Q43 What location (e.g. town centre, street/area, shopping centre, retail/ leisure park) do you or members of your household normally go to for eating out (e.g. cafes and restaurants)?
Those who visit restaurants / cafés at Q29: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Jephson Gardens, Leamington Spa	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroad	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alcester Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0
Alvis Retail Park, Holyhead Road, Coventry	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Arena Shopping Park, Classic Drive, Rowleys Green, Coventry	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Atherstone Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Baginton Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Banbury Town Centre	0.7%	4	0.0%	0	0.0%	0	0.8%	1	6.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Binley Local Centre	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birmingham City Centre	0.6%	3	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0	1.3%	1	1.5%	1	0.0%	0
Bishop's Tachbrook Village Centre	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bishops Itchington Village Centre	0.5%	3	0.0%	0	0.0%	0	0.0%	0	6.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardiff City Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Central London	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chadwick End Village Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	3	0.0%	0	0.0%	0
Charlecote Park, Warwick	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Claverdon Village Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	2	0.0%	0	0.0%	0
Coseley Local Centre	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coventry City Centre	12.2%	72	0.0%	0	0.0%	0	0.0%	0	0.0%	0	54.5%	23	60.8%	47	3.1%	2	0.0%	0	0.0%	0	0.0%	0
Daventry Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dorridge Village Centre	1.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.9%	6	0.0%	0	0.0%	0
Earlsdon Local Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Earlswood Village Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	2	0.0%	0	0.0%	0
Finham Local Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hanwell Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hatton Village Centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Henley-in-Arden Town Centre	0.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	3	2.8%	2	0.0%	0
Hockley Heath Village Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	3	0.0%	0	0.0%	0
Hunningham Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kenilworth Town Centre	9.9%	58	2.4%	2	1.7%	1	0.0%	0	1.4%	1	4.9%	2	6.6%	5	91.8%	47	0.0%	0	0.0%	0	1.3%	1
Knowle Village Centre	1.4%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.8%	8	0.0%	0	0.0%	0
Ladbroke Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lapworth Village Centre	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	3	0.0%	0	0.0%	0
Leamington Spa Town Centre	32.0%	188	82.1%	59	39.0%	27	90.0%	58	42.6%	22	12.7%	5	8.8%	7	2.1%	1	2.6%	1	4.3%	3	10.8%	4

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Leeds City Centre	0.1%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leicester City Centre	0.2%	1	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lighthorne Village Centre	0.1%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Long Itchington Village Centre	0.2%	1	0.0%	0	1.0%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Loxley Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0
Marton Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Moreton Valence Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Napton-on-the-Hill Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
National Exhibition Centre (NEC), North Avenue, Marston Green, Birmingham	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nottingham City Centre	0.3%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0
Radford Semele Village Centre	0.4%	2	2.2%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Reddich Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rugby Town Centre	1.7%	10	0.0%	0	0.0%	0	0.0%	0	10.6%	5	7.3%	3	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shires Gate Retail Park, Tachbrook Park Drive, Leamington Spa	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Shirley District Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0
Solihull Town Centre	3.1%	18	0.0%	0	1.7%	1	0.0%	0	0.0%	0	1.2%	0	3.9%	3	1.0%	1	23.5%	13	0.0%	0	0.0%	0
Southam Town Centre	0.9%	5	0.0%	0	0.0%	0	0.0%	0	10.3%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stratford-upon-Avon Town Centre	14.0%	82	2.4%	2	0.0%	0	0.0%	0	1.7%	1	0.0%	0	1.7%	1	1.0%	1	2.6%	1	75.2%	47	71.8%	29
Stretton-on-Dunsmore Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Studley Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0
Tiddington Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Walsgrave-on-Sowe Village Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Warwick Town Centre	11.4%	66	9.6%	7	52.9%	37	0.9%	1	4.7%	2	1.2%	0	1.4%	1	1.0%	1	13.8%	8	10.9%	7	7.4%	3
Wellesbourne Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	1.2%	0
Whitnash Town Centre	0.6%	3	0.0%	0	0.0%	0	5.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Willoughby Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wolston Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Worcester City Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Weighted base:		585		72		70		64		51		42		77		51		55		63		40
Sample:		578		67		67		58		54		48		53		61		61		58		51

MeanScore: number of visits per year

Q44 How often do you or your household go to family entertainment venues?
Those who partake in family entertainment activities at Q29:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
More than once a week	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	1	0.0%	0	0.0%	0	0.0%	0
Once a week	3.0%	6	0.0%	0	17.1%	5	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	1
Once a fortnight	4.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.9%	6	0.0%	0	0.0%	0	27.2%	4	0.0%	0
Once a month	15.8%	30	13.8%	2	6.6%	2	9.3%	3	3.0%	1	23.2%	5	33.8%	9	18.4%	3	52.5%	2	27.2%	4	6.3%	1
Once every two months	20.9%	40	0.0%	0	11.9%	3	26.1%	8	42.0%	10	13.5%	3	6.2%	2	21.3%	4	23.8%	1	45.7%	6	22.7%	4
Once every six months	24.6%	47	79.2%	9	47.7%	13	16.4%	5	21.1%	5	11.1%	2	4.1%	1	8.6%	2	23.8%	1	0.0%	0	54.0%	10
Once a year or less	18.0%	35	0.0%	0	9.2%	2	38.0%	12	23.6%	6	8.5%	2	18.9%	5	37.3%	7	0.0%	0	0.0%	0	5.7%	1
(Dont know / varies)	12.6%	24	6.9%	1	7.5%	2	8.0%	3	10.3%	2	43.8%	9	15.1%	4	11.6%	2	0.0%	0	0.0%	0	8.5%	2
Mean:		*8.23*		*3.49*		*12.33*		*4.68*		*3.82*		*6.86*		*12.14*		*11.85*		*8.20*		*13.06*		*5.14*
Weighted base:		192		11		27		32		23		20		27		18		3		13		18
Sample:		145		7		21		22		18		13		11		22		4		9		18

Q45 Where do you or members of your household normally go for family entertainment?
Those who partake in family entertainment activities at Q29: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Acocks Green Bowl, Westley Road, Acocks Green, Birmingham	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	54.8%	1	0.0%	0	0.0%	0
Alton Towers, Farley Lane, Alton, Stoke-on-Trent	0.5%	1	0.0%	0	3.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cadbury World, Linden Road, Bournville, Birmingham	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	1	0.0%	0	0.0%	0	0.0%	0
Coventry City Centre	17.1%	23	0.0%	0	10.9%	2	0.0%	0	24.6%	2	7.8%	1	93.4%	15	8.4%	1	0.0%	0	0.0%	0	3.1%	1
Drayton Manor Theme Park, Drayton Manor Drive, Fazeley, Mile Oak, Tamworth	0.5%	1	0.0%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leamington Spa Town Centre	29.2%	38	84.1%	8	61.6%	11	0.0%	0	28.9%	3	0.0%	0	6.6%	1	50.4%	7	45.2%	1	72.2%	6	6.2%	1
National Exhibition Centre (NEC), North Avenue, Marston Green, Birmingham	0.6%	1	7.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shires Gate Retail Park, Tachbrook Park Drive, Leamington Spa	1.5%	2	0.0%	0	0.0%	0	5.9%	1	7.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sky Dome Arena, Croft Road, Coventry	1.9%	3	0.0%	0	10.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	1	0.0%	0	0.0%	0	0.0%	0
Stratford-upon-Avon Town Centre	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.3%	1	3.8%	1
Tenpin, Crosspoint Business Park, Olivier Way, Coventry	6.1%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	56.3%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tenpin, Shires Retail Park, Tachbrook Park Drive, Leamington Spa	36.6%	48	8.0%	1	12.8%	2	91.2%	21	39.2%	4	0.0%	0	0.0%	0	33.6%	5	0.0%	0	18.5%	2	86.9%	14
Walsgrave-on-Sowe Village Centre	3.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	32.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Warwick Town Centre	0.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		132		10		19		23		10		14		16		14		2		9		16
Sample:		99		5		14		18		9		9		5		16		2		6		15

MeanScore: number of visits per year

Q46 How often do you or your household do (OTHER ACTIVITY FROM Q29)?
Those who go to other leisure attractions at Q29:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
More than once a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a week	45.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	1	0.0%	0	99.9%	0
Once a fortnight	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a month	25.9%	1	0.0%	0	0.0%	0	0.0%	0	100.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once every two months	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once every six months	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a year or less	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Dont know / varies)	28.6%	1	100.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*37.51*		*0.00*		*0.00*		*0.00*		*12.00*		*0.00*		*0.00*		*0.00*		*52.00*		*0.00*		*52.00*
Weighted base:		3		1		0		0		1		0		0		0		1		0		0
Sample:		4		1		0		0		1		0		0		0		1		0		1

Q47 Where do you or members of your household normally go for (OTHER ACTIVITY FROM Q29)?
Those who go to other leisure attractions at Q29: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Silverstone Circuit, Towcester	36.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	1	0.0%	0	0.0%	0
Tiddington Village Centre	25.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	99.9%	0
Warwick Arts Centre, University of Warwick, Gibbet Hill Road, Coventry	38.6%	1	100.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		2		1		0		0		0		0		0		0		1		0		0
Sample:		3		1		0		0		0		0		0		0		1		0		1

Q48 What improvements could be made to the leisure offer in the Warwick District Council area that would make you visit / partake in leisure activities more often? [MR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
A casino	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
A swimming pool	3.7%	37	7.6%	8	2.5%	3	9.6%	10	5.0%	5	3.8%	3	2.6%	4	4.4%	4	0.0%	0	0.7%	1	0.0%	0
A theatre	0.6%	6	0.0%	0	0.7%	1	4.3%	5	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
A multi-screen cinema	1.1%	11	1.4%	2	1.9%	2	0.0%	0	0.8%	1	0.0%	0	0.0%	0	4.8%	4	3.3%	3	0.0%	0	0.0%	0
An art house cinema	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Bingo	0.2%	2	0.9%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheaper prices	2.9%	29	1.6%	2	4.4%	5	8.6%	9	0.8%	1	0.6%	0	0.9%	1	6.3%	5	0.8%	1	0.7%	1	5.6%	4
Improved access by foot and cycle	1.0%	10	0.7%	1	0.0%	0	0.6%	1	0.0%	0	2.0%	2	0.0%	0	2.2%	2	2.7%	3	0.7%	1	3.0%	2
Improved public transport	1.1%	11	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.9%	1	5.3%	4	0.8%	1	0.7%	1	3.7%	3
Improved security / CCTV	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improved street furniture	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improvements in the built environment	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
More / better car parking	3.4%	34	3.1%	3	7.0%	7	0.6%	1	2.4%	2	5.9%	5	2.8%	4	0.0%	0	0.0%	0	10.1%	11	0.0%	0
More / better cultural facilities	0.2%	2	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better disabled access	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
More / better health clubs / gyms	2.1%	21	0.0%	0	0.6%	1	3.4%	4	5.7%	5	0.6%	0	0.0%	0	3.4%	3	4.5%	4	3.2%	4	0.7%	0
More / better policing	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better public houses	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	1.4%	1
More / better seats	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
More / better signposting and information	0.7%	7	0.0%	0	4.7%	5	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More better parks / green spaces	1.8%	18	0.7%	1	0.6%	1	4.3%	5	0.8%	1	8.7%	7	0.0%	0	0.0%	0	0.8%	1	0.7%	1	3.0%	2
More for children	5.7%	58	9.4%	10	2.4%	2	1.8%	2	0.0%	0	11.4%	10	15.2%	22	1.4%	1	1.6%	1	6.1%	7	2.7%	2
More local sports & recreation facilities	2.0%	20	0.0%	0	2.2%	2	0.0%	0	4.2%	4	2.5%	2	0.0%	0	0.6%	1	0.8%	1	6.1%	7	4.7%	4
More nightclubs	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More pavement cafes	0.2%	2	0.9%	1	0.6%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More quality restaurants	0.4%	4	1.6%	2	0.0%	0	0.0%	0	0.8%	1	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
More street cleaning	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Provision of public toilets	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Ten-pin bowling	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.8%	1	0.6%	1	0.0%	0	4.3%	5	1.4%	1
Other	4.1%	41	5.4%	6	6.7%	7	5.9%	6	2.3%	2	7.9%	7	4.0%	6	1.6%	1	3.3%	3	0.7%	1	2.7%	2
Art house / classes	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0
Better leisure facilities in general	1.2%	12	1.6%	2	1.1%	1	0.0%	0	0.0%	0	0.0%	0	3.2%	5	3.5%	3	1.0%	1	0.9%	1	0.0%	0
Better shopping facilities	1.6%	16	0.7%	1	0.0%	0	0.0%	0	1.5%	1	7.7%	7	4.3%	6	0.8%	1	0.8%	1	0.0%	0	0.0%	0
Dance halls / classes	0.3%	3	0.7%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Free car parking	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ice skating rink	0.7%	7	2.1%	2	2.5%	3	0.6%	1	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Improve / repair roads	1.0%	10	0.0%	0	0.0%	0	1.1%	1	0.0%	0	5.4%	5	1.7%	2	0.0%	0	0.0%	0	1.4%	2	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Less traffic	0.2%	2	0.0%	0	1.1%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Live music / concerts	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.7%	0
More / better advertising of events	1.8%	18	0.0%	0	1.1%	1	4.9%	5	0.0%	0	0.0%	0	1.9%	3	0.0%	0	6.5%	6	0.7%	1	3.0%	2
More / better libraries	0.2%	2	0.7%	1	0.7%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More fitness for older people	0.2%	2	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
More for teenagers / young adults	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.7%	1	3.0%	2
Skateboarding parks	0.3%	3	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	2.3%	2
(Dont do leisure activities)	4.0%	41	4.7%	5	1.8%	2	7.5%	8	4.7%	4	2.9%	2	3.0%	4	2.7%	2	1.5%	1	5.0%	5	7.0%	5
(Don’t know)	7.7%	78	7.4%	8	2.5%	3	7.3%	8	9.1%	9	10.2%	9	8.8%	13	6.8%	6	4.3%	4	9.0%	10	13.1%	10
(Nothing)	55.1%	554	52.8%	58	61.3%	65	43.5%	46	64.7%	61	46.0%	39	48.7%	70	60.9%	50	71.5%	67	54.1%	60	51.9%	39
Weighted base:		1005		110		105		106		94		86		144		82		94		110		75
Sample:		1005		100		100		100		100		104		101		100		100		100		100

GEN Gender of respondent:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Male	35.7%	358	45.4%	50	52.6%	55	42.8%	45	24.9%	23	31.9%	27	29.5%	42	41.8%	34	29.8%	28	33.8%	37	20.7%	15
Female	64.3%	647	54.6%	60	47.4%	50	57.2%	61	75.1%	71	68.1%	58	70.5%	102	58.2%	47	70.2%	66	66.2%	73	79.3%	59
Weighted base:		1005		110		105		106		94		86		144		82		94		110		75
Sample:		1005		100		100		100		100		104		101		100		100		100		100

AGE Can I ask how old you are please?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
18-24	6.1%	61	11.8%	13	9.3%	10	8.6%	9	6.2%	6	0.0%	0	6.4%	9	5.3%	4	6.5%	6	0.0%	0	5.6%	4
25-34	12.6%	126	5.9%	6	23.3%	25	25.7%	27	0.0%	0	28.8%	25	6.4%	9	21.3%	17	6.5%	6	6.0%	7	5.6%	4
35-44	16.2%	163	14.5%	16	17.2%	18	17.6%	19	20.5%	19	17.7%	15	7.8%	11	11.0%	9	5.4%	5	27.1%	30	27.7%	21
45-54	17.1%	172	17.1%	19	14.7%	15	7.3%	8	28.7%	27	16.3%	14	13.9%	20	19.4%	16	15.8%	15	19.6%	22	23.1%	17
55-64	17.8%	179	13.8%	15	12.3%	13	23.9%	25	23.8%	22	13.4%	11	27.0%	39	17.2%	14	17.2%	16	12.3%	14	11.5%	9
65+	26.0%	261	33.6%	37	19.9%	21	12.2%	13	18.5%	17	23.9%	20	34.0%	49	20.9%	17	37.9%	35	30.6%	34	23.3%	17
(Refused)	4.2%	42	3.2%	4	3.4%	4	4.7%	5	2.3%	2	0.0%	0	4.6%	7	4.9%	4	10.7%	10	4.4%	5	3.1%	2
Weighted base:		1005		110		105		106		94		86		144		82		94		110		75
Sample:		1005		100		100		100		100		104		101		100		100		100		100

CAR How many cars does your household own or have the use of?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
None	6.1%	61	6.3%	7	4.3%	5	8.0%	8	3.9%	4	10.1%	9	9.4%	14	3.2%	3	2.3%	2	3.9%	4	8.1%	6
One	31.7%	319	38.4%	42	23.9%	25	41.6%	44	20.4%	19	40.7%	35	32.7%	47	38.5%	31	19.0%	18	34.5%	38	25.8%	19
Two	40.0%	402	32.2%	35	35.2%	37	35.7%	38	59.0%	55	32.4%	28	39.7%	57	43.5%	35	45.9%	43	42.0%	46	34.9%	26
Three or more	18.5%	186	19.5%	21	33.5%	35	13.2%	14	14.8%	14	16.3%	14	13.1%	19	8.6%	7	22.6%	21	16.7%	18	28.8%	22
(Refused)	3.8%	38	3.6%	4	3.1%	3	1.6%	2	1.9%	2	0.6%	0	5.1%	7	6.3%	5	10.2%	10	2.9%	3	2.4%	2
Weighted base:		1005		110		105		106		94		86		144		82		94		110		75
Sample:		1005		100		100		100		100		104		101		100		100		100		100

EMP Which of the following best describes the chief wage earner of your household's current employment situation? [PR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Working full time	47.8%	480	39.7%	44	70.2%	74	62.3%	66	56.1%	53	45.2%	39	30.0%	43	54.6%	45	34.5%	32	39.1%	43	56.1%	42
Working part time	10.9%	109	13.0%	14	4.1%	4	11.7%	12	10.5%	10	9.2%	8	10.0%	14	11.0%	9	9.6%	9	20.6%	23	7.3%	5
Unemployed	1.0%	10	0.0%	0	0.7%	1	0.0%	0	1.5%	1	6.8%	6	0.0%	0	0.0%	0	0.0%	0	0.7%	1	1.5%	1
Retired	28.9%	291	32.0%	35	19.3%	20	18.0%	19	21.9%	21	30.2%	26	44.6%	64	22.3%	18	36.9%	35	32.7%	36	22.4%	17
A housewife	1.2%	12	3.1%	3	0.0%	0	1.4%	1	1.7%	2	0.6%	0	1.9%	3	0.0%	0	0.0%	0	2.2%	2	0.0%	0
A student	1.1%	11	0.9%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	6.4%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Self employed	3.2%	32	8.3%	9	1.1%	1	1.8%	2	5.5%	5	3.3%	3	1.9%	3	7.2%	6	0.8%	1	0.0%	0	3.0%	2
Sick / disabled	0.6%	6	0.0%	0	0.0%	0	2.5%	3	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	2
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Refused)	5.4%	54	2.9%	3	3.9%	4	2.2%	2	1.9%	2	4.8%	4	5.3%	8	4.9%	4	18.1%	17	4.7%	5	6.5%	5
Weighted base:		1005		110		105		106		94		86		144		82		94		110		75
Sample:		1005		100		100		100		100		104		101		100		100		100		100

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
PC Postcode Sector																						
B93 0	1.8%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	19.5%	18	0.0%	0	0.0%	0
B93 8	2.1%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	22.9%	21	0.0%	0	0.0%	0
B94 5	1.4%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.1%	14	0.0%	0	0.0%	0
B94 6	2.7%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	29.4%	27	0.0%	0	0.0%	0
B95 5	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	6	0.0%	0	0.0%	0
B95 6	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0
CV238	1.4%	14	0.0%	0	0.0%	0	0.0%	0	15.2%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CV239	1.4%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.1%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CV3 3	3.6%	36	0.0%	0	0.0%	0	0.0%	0	0.0%	0	41.7%	36	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CV3 4	1.5%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.9%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CV3 5	4.7%	47	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	32.5%	47	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CV3 6	5.2%	52	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	36.0%	52	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CV311	3.1%	31	0.0%	0	0.0%	0	29.3%	31	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CV312	6.0%	61	0.0%	0	0.0%	0	57.3%	61	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CV313	1.4%	14	0.0%	0	0.0%	0	13.5%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CV324	0.8%	8	7.7%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CV325	1.1%	11	9.9%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CV326	3.2%	32	29.0%	32	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CV327	5.8%	59	53.4%	59	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CV339	1.1%	11	0.0%	0	0.0%	0	0.0%	0	11.6%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CV344	1.1%	11	0.0%	0	10.1%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CV345	4.0%	41	0.0%	0	38.6%	41	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CV346	5.4%	54	0.0%	0	51.3%	54	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CV350	1.9%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	25.1%	19
CV357	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.1%	7	0.0%	0	0.0%	0
CV358	2.5%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	23.0%	25	0.0%	0
CV359	2.4%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	31.9%	24
CV370	3.0%	30	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	27.3%	30	0.0%	0
CV376	1.4%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.1%	14	0.0%	0
CV377	3.2%	32	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	43.0%	32
CV379	3.9%	39	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	35.1%	39	0.0%	0
CV4 7	2.8%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	19.3%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CV4 8	1.8%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.2%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CV470	0.5%	5	0.0%	0	0.0%	0	0.0%	0	5.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CV471	1.7%	17	0.0%	0	0.0%	0	0.0%	0	17.8%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CV472	3.0%	30	0.0%	0	0.0%	0	0.0%	0	32.1%	30	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CV478	0.6%	6	0.0%	0	0.0%	0	0.0%	0	6.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CV479	1.1%	11	0.0%	0	0.0%	0	0.0%	0	11.4%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CV8 1	3.6%	36	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	44.3%	36	0.0%	0	0.0%	0	0.0%	0
CV8 2	4.5%	45	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	55.7%	45	0.0%	0	0.0%	0	0.0%	0
CV8 3	2.1%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	24.3%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		1005		110		105		106		94		86		144		82		94		110		75
Sample:		1005		100		100		100		100		104		101		100		100		100		100

QUOTA Zone

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Zone 1	10.9%	110	100.0%	110	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 2	10.5%	105	0.0%	0	100.0%	105	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 3	10.5%	106	0.0%	0	0.0%	0	100.0%	106	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 4	9.3%	94	0.0%	0	0.0%	0	0.0%	0	100.0%	94	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 5	8.5%	86	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	86	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 6	14.3%	144	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	144	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 7	8.1%	82	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	82	0.0%	0	0.0%	0	0.0%	0
Zone 8	9.3%	94	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	94	0.0%	0	0.0%	0
Zone 9	11.0%	110	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	110	0.0%	0
Zone 10	7.5%	75	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	75
Weighted base:		1005		110		105		106		94		86		144		82		94		110		75
Sample:		1005		100		100		100		100		104		101		100		100		100		100

Appendix 2:

Other Responses – Summary Counts

Warwick District Council: Retail & Leisure Study
For Carter Jonas
'Other' Responses

Q02 What do you like about (LOCATION MENTIONED AT Q01)?

Convenient for the school run	1
Exclusive products	1
German efficiency	1
Has Click & Collect service	1
Has Scan & Shop facility	1
Has an explore learning centre	1
Provides trolleys for babies	1
Self-service checkouts	1
Sells Asian food	1
Sells local produce	1
Sells organic food	1
Support the charity they sponsor	1
Wide aisles	1
Total	**13**

Q04 When you visit (LOCATION MENTIONED AT Q01) 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.)?

Yes - dog walking	2
Yes - medical appointment (doctors, dentist, opticians etc.)	2
Yes - sightseeing	2
Yes - amenity tip	1
Yes - car wash	1
Yes - going to blind club	1
Yes - going to dance school	1
Yes - voluntary driving	1
Total	**11**

Q21 What do you like about Leamington Spa?

Financial services (e.g. bank, post office, building society etc.)	2
Free parking	2
Good library	2
Good pedestrianisation	2
Not pedestrianised	2
Cultural attractions (e.g. art gallery, museum, theatre etc.)	1
General diversity	1
Good public transport links to other towns	1
Good range of services (e.g. hairdressers, solicitors, travel agents etc.)	1
Has a cinema	1
Has charging points for electric cars	1
Indoor shopping centre	1
Range of betting shops	1
Student-friendly	1
Wide roads	1
Total	**20**

Q22 What could be improved about Leamington Spa that would make you visit more often?

Better air quality	2
Longer opening hours	2
Open a Primark store	2
Better disabled facilities	1
Better environment in general	1
Better layout / more compact	1
Better policing / security	1
Better roads	1
Cheaper public transport	1
Cheaper taxis	1
Fewer students	1
Friendlier people	1
Larger Marks & Spencer store	1
Less fast food restaurants / takeaways	1
Less roadworks and delays	1
Less traffic	1
More / better cultural entertainment (e.g. theatres, art galleries, museums etc.)	1
More / better financial services (e.g. banks, post offices, building societies etc.)	1
More cycle lanes	1
More department stores	1
More open spaces	1
More shops for older people	1
Open a Debenhams store	1
Restrict traffic when parades are on	1
Stop development in Tavistock Street	1
Stop spoiling the character of the town with cheap shops	1
Total	**29**

Q24 What do you like about Warwick?

Clean / tidy	2
Good range of antique shops	2
Good range of shops in general	2
Has a race course	2
Has everything I need	2
Cheap parking	1
Good art shops	1
Good for an overall day out	1
Good for browsing	1
Good hospital	1
Good library	1
Good range of Christmas shops	1
Total	**17**

Q25 What could be improved about Warwick that would make you visit more often?

Better quality shops	2
Less busy / quieter	2
Protection from the weather (i.e. covered shopping malls)	2
A complete refurbishment of the town centre	1
Better layout	1
Better pubs	1
Better range of clothes / shoe shops	1
Build a Park & Ride facility	1
Cheaper parking	1
Cheaper pubs	1
Fewer charity shops	1
Fewer houses	1
Fewer speed bumps	1
Fewer tourists	1
Have a tram system	1
Improve the attractions at the castle	1
Larger shopping area	1
Less vacant shops	1
Longer opening hours	1
More / better cycle paths	1
More banks	1
More diversity in general	1
More housing for students	1
More modern shops	1
More pedestrian crossings	1
More petrol stations	1
No parking on the main through road	1
Open a Debenhams store	1
Open a John Lewis store	1
Open a Marks & Spencer store	1
Reduce speed limits	1
Refurbish the library	1
Refurbishment of shops	1
Total	**36**

Q27 What do you like about Kenilworth?

Cheap car parking	2
Good hairdressers	2
Home town / familiarity / habit	2
Good facilities for older people	1
Has a good nail bar	1
Large town	1
Total	**9**

Q28 What could be improved about Kenilworth that would make you visit more often?

Build a bypass road	2
Fewer hairdressers	2
Larger town	2
Less student-orientated	2
Lower the shop rents / rates	2
Address the homeless issue	1
Fewer cafés / coffee shops	1
Fewer pubs	1
Friendlier people	1
More / better policing / security	1
More attractive environment	1
More bicycle parking facilities	1
More events at the castle	1
More modern-looking	1
More public seating	1
More shops for young people	1
Open a John Lewis store	1
Open a mobility shop	1
Protection from the weather (i.e. covered shopping malls)	1
Quieter library	1
Total	**25**

Q29 Do you or your household visit the following leisure attractions?

Dancing	1
Flower arrangement class	1
Horse racing	1
Motor racing	1
Total	**4**

Q48 What improvements could be made to the leisure offer in the Warwick District Council area that would make you visit / partake in leisure activities more often?

Less student-orientated facilities	2
More general facilities for the disabled	2
More museums	2
More special events (e.g. festivals)	2
A community centre	1
A complete refurbishment of Cannon Park	1
Better access by train	1
Better gates on dog walks	1
Better pavements	1
Better pedestrianisation	1
Better quality of leisure facilities in general	1
Better shows at the theatre	1
Better taxi service	1
Change the museums into something more entertaining	1
Climbing walls	1
Enclosed dog play park	1
Fewer bars and cafés	1
Finish new leisure centre	1
Golf course	1
Improve Victoria Park	1
Indoor bowls	1
Less busy streets	1
Less roadworks	1
Less student accommodation in the centre	1
Martial arts classes	1
More / better cocktail bars	1
More electric car charging points	1
More family offers on swimming	1
More housing	1
More multi-cultural facilities	1
Open-water swimming	1
Roller-skating	1
Special offers for pensioners	1
Trampoline park	1
Water park	1
Total	**39**

Appendix 3:

Sample Questionnaire

Job No. 050318
Warwick District Council: Retail & Leisure Study

Good morning / afternoon / evening, I am …… from NEMS Market Research and we are conducting a short survey in your area about shopping and leisure activities, on behalf of Warwick District Council. Do you have time to answer some questions please? It will take about five to ten minutes.

QA Are you the person responsible, or jointly responsible for food and non-food shopping in your household?

YES – CONTINUE INTERVIEW.
NO – ASK TO SPEAK TO THE PERSON WHO IS RESPONSIBLE FOR MOST OF THE household's SHOPPING, IF NOT AVAILABLE THANK AND CLOSE INTERVIEW.

Q01 Where do you NORMALLY shop for all your household's main food and grocery shopping needs (i.e. primarily bulk trolley purchases)?

DO NOT READ OUT. ONE ANSWER ONLY. INTERVIEWER INCLUDE STORES FULL NAME (E.G. TESCO EXTRA, TESCO EXPRESS, ETC) AND ADDRESS. IF VARIES ASK IF THERE IS A LOCATION THEY USE MORE THAN OTHERS EVEN IF SLIGHTLY AS THEY CAN STATE ANOTHER LOCATION AT Q06, IF STILL VARIES ASK THE PLACE THEY USED LAST.

#Food Food list

CLOSE IF VARIES/DON'T KNOW/DON'T DO

Those who do their main food shopping via the Internet at Q01:

Q01A Which retailer do you purchase your main food internet / home delivery shopping from?
DO NOT READ OUT. ONE ANSWER ONLY.

#NetF Internet food list **GO TO Q06**

Excluding those who do their main food shopping via the Internet at Q01:

Q02 What do you like about (LOCATION MENTIONED AT Q01)?
DO NOT READ OUT. CODE UP TO THREE RESPONSES ONLY.

001 Clean store
002 Close to family / friends
003 Convenient to home
004 Convenient to work
005 Delivery service
006 Easy to get to by car
007 Easy to get to by foot
008 Easy to get to by public transport
009 Ethical policy
010 Friendly / helpful staff
011 Good layout / easy to get around
012 Good offers
013 Habit / always used it
014 Has a cafe
015 Has a petrol station
016 Large store
017 Long opening hours
018 Low prices / value for money
019 Loyalty scheme / reward points
020 Online shopping is convenient
021 Only one in the area
022 Parking is free
023 Parking prices are low
024 Parking provision is good
025 Pleasant shopping environment
026 Preference for retailer
027 Quality of food goods available
028 Self-service checkouts
029 Quality of non-food goods available
030 Range of food goods available
031 Range of non-food goods available
032 Safe shopping environment
033 Small / quiet store
034 Staff discount / work there
035 Supporting local business
036 Other (PLEASE WRITE IN)
037 (Don't know / nothing)

Excluding those who do their main food shopping via the Internet at Q01:

Q03 How do you normally travel to (STORE MENTIONED AT Q01)?
DO NOT READ OUT. ONE ANSWER ONLY.

1 Car / van (as driver)
2 Car / van (as passenger)
3 Bus, minibus or coach
4 Using park & ride facility
5 Motorcycle, scooter or moped
6 Walk
7 Taxi
8 Train
9 Bicycle
A Mobility scooter / wheelchair
B Other (PLEASE WRITE IN)
C (Don't know)
D (Varies)

Excluding those who do their main food shopping via the Internet at Q01:

Q04 When you visit (STORE MENTIONED AT Q01) 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.)?

DO NOT READ OUT. CAN BE MULTICODED. PROBE FULLY. Anywhere else?

001	Yes - non-food shopping	GO TO Q05
002	Yes - other food shopping	GO TO Q05
003	Yes - bars / pubs	GO TO Q05
004	Yes - bingo	GO TO Q05
005	Yes - cafés	GO TO Q05
006	Yes - cinemas	GO TO Q05
007	Yes - get petrol	GO TO Q05
008	Yes - go to park	GO TO Q05
009	Yes - gyms / health and fitness	GO TO Q05
010	Yes - library	GO TO Q05
011	Yes - markets	GO TO Q05
012	Yes - meeting family	GO TO Q05
013	Yes - meeting friends	GO TO Q05
014	Yes - museums / art gallery	GO TO Q05
015	Yes - other service (e.g. travel agent, estate agent etc.)	GO TO Q05
016	Yes - personal service (e.g. hairdressers, beauty salon etc.)	GO TO Q05
017	Yes - restaurants	GO TO Q05
018	Yes - swimming	GO TO Q05
019	Yes - theatre	GO TO Q05
020	Yes - visiting services such as banks and other financial institutions	GO TO Q05
021	Yes - work	GO TO Q05
022	Yes - other (PLEASE WRITE IN)	GO TO Q05
023	(No)	**GO TO Q06**
024	(Don't know)	**GO TO Q06**

Those who combine their main food shopping trip with other activities at Q04:

Q05 When you combine your trip with other activities, where do you normally go?

DO NOT READ OUT. ONE ANSWER ONLY. IF RESPONDENT SAYS THE LOCATION VARIES - ASK FOR THE LOCATION THEY USE THE MOST.

#NonF Non Food List

Q06 In addition to (LOCATION MENTIONED AT Q01), is there anywhere else you regularly use for your main-food shopping?

DO NOT READ OUT. ONE ANSWER ONLY. INTERVIEWER - INCLUDE STORES FULL NAME (E.G. TESCO EXTRA, TESCO EXPRESS, ETC) AND ADDRESS. IF VARIES ASK IF THERE IS A LOCATION THEY USE MORE THAN OTHERS EVEN IF SLIGHTLY, IF STILL VARIES ASK THE PLACE THEY USED LAST (EXCLUDING LOCATION MENTIONED AT Q01).

#Food Food list

Those who do their main food shopping via the Internet at Q06:

Q06A Which internet / home delivery retailer do you also use for your main food shopping?

DO NOT READ OUT. ONE ANSWER ONLY.

#NetF Internet food list

Q07 In addition to your main food shopping, where do you normally 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. ONE ANSWER ONLY. INTERVIEWER - INCLUDE STORES FULL NAME (E.G. TESCO EXTRA, TESCO EXPRESS, ETC) AND ADDRESS. IF VARIES ASK IF THERE IS A LOCATION THEY USE MORE THAN OTHERS EVEN IF SLIGHTLY AS THEY CAN STATE ANOTHER LOCATION AT Q08, IF STILL VARIES ASK THE PLACE THEY USED LAST.

#Food Food List

Those who do their top-up food shopping via the Internet at Q07:

Q07A Which retailer do you purchase your top-up food internet / home delivery shopping from?

DO NOT READ OUT. ONE ANSWER ONLY.

#NetF Internet food list

Those who do top-up shopping at Q07:

Q08 In addition to (LOCATION MENTIONED AT Q07), is there anywhere else you regularly use for your household's small scale top-up food shopping?

DO NOT READ OUT. ONE ANSWER ONLY. INTERVIEWER - INCLUDE STORES FULL NAME (E.G. TESCO EXTRA, TESCO EXPRESS, ETC) AND ADDRESS. IF VARIES ASK IF THERE IS A LOCATION THEY USE MORE THAN OTHERS EVEN IF SLIGHTLY, IF STILL VARIES ASK THE PLACE THEY USED LAST (EXCLUDING LOCATION MENTIONED AT Q07).

#Food Food List

Those who also do top-up shopping via the Internet at Q08:

Q08A Which internet / home delivery retailer do you also use for your top-up food shopping?

DO NOT READ OUT. ONE ANSWER ONLY.

#NetF Internet food list

Those who do top-up shopping at Q07:

Q09 Of all the money you spend on your main and top-up food shopping, what share goes to your main food shopping?

DO NOT READ OUT. PLEASE WRITE IN TO THE NEAREST WHOLE %

X % (PLEASE WRITE IN)
Y (Dont know)
Z (Refused)

READ OUT: I would now like to ask you some questions about your non-food shopping habits / preferences.

Q10 Where do you normally do most of your household's shopping for men's, women's, children's and baby clothing and footwear? NOTE we mean fashion items - NOT sports clothing and footwear

DO NOT READ OUT. ONE ANSWER ONLY.
INTERVIEWER NOTE: PLEASE PROBE FULLY FOR ROAD NAME AND LOCATION IF LOCATED OUT OF CENTRE.

#NonF Non-Food List

Those who buy clothing and footwear (excluding via the Internet) at Q10:

Q11 How do you normally travel to (STORE OR CENTRE MENTIONED AT Q10)?
DO NOT READ OUT. ONE ANSWER ONLY

1 Car / van (as driver)
2 Car / van (as passenger)
3 Bus, minibus or coach
4 Using park & ride facility
5 Motorcycle, scooter or moped
6 Walk
7 Taxi
8 Train
9 Bicycle
A Mobility scooter / wheelchair
B Other (PLEASE WRITE IN)
C (Don't know)
D (Varies)

Q12 Where do you normally do most of your household's shopping for recording media for pictures and sound (e.g. records, pre-recorded and unrecorded CDs & DVDs, unexposed films for photographic use, etc.) (Excluding video games)?
DO NOT READ OUT. ONE ANSWER ONLY.
INTERVIEWER NOTE: PLEASE PROBE FULLY FOR ROAD NAME AND LOCATION IF LOCATED OUT OF CENTRE.

#NonF Non-Food List

Q13 Where do you normally do most of your household's shopping for audio visual, photographic, computer items (such as TVs, cameras, ipads, telephones etc) and all other domestic electrical goods (such as irons, kettles, fridges, freezers, dishwashers etc)?
DO NOT READ OUT. ONE ANSWER ONLY.
INTERVIEWER NOTE: PLEASE PROBE FULLY FOR ROAD NAME AND LOCATION IF LOCATED OUT OF CENTRE.

#NonF Non-Food List

Q14 Where do you normally do most of your household's shopping for books (incl. dictionaries, encyclopaedias, text books, guidebooks and musical scores) and stationary (incl. writing pads, envelopes pens, diaries, etc.) and drawing materials?
INTERVIEWER NOTE: PLEASE PROBE FULLY FOR ROAD NAME AND LOCATION IF LOCATED OUT OF CENTRE.

#NonF Non-Food List

Q15 Where do you normally do most of your household's shopping for games & toys; pets and pet products; hobby items; sport clothing / footwear and equipment; camping goods; bicycles; and musical instruments?

DO NOT READ OUT. ONE ANSWER ONLY.

#NonF Non-Food List

Q16 Where do you normally do most of your household's shopping for furniture, carpets, other floor coverings and household textiles (includes beds, sofas, tables, etc)?
INTERVIEWER NOTE: PLEASE PROBE FULLY FOR ROAD NAME AND LOCATION IF LOCATED OUT OF CENTRE.

#NonF Non-Food List

Q17 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)?

INTERVIEWER NOTE: PLEASE PROBE FULLY FOR ROAD NAME AND LOCATION IF LOCATED OUT OF CENTRE.

#NonF Non-Food List

Q18 Where do you normally do most of your household's shopping on all goods for personal care (including, electric razors, hair dryers, bathroom scales, cosmetics, perfume, toothpaste, etc), other medical and pharmaceutical products (e.g. vitamins, plasters) and therapeutic appliances (e.g. spectacles, hearing aids, wheelchairs, contact lenses etc)?
INTERVIEWER NOTE: PLEASE PROBE FULLY FOR ROAD NAME AND LOCATION IF LOCATED OUT OF CENTRE.

#NonF Non-Food List

Q19 Where do you normally do most of your household's shopping on all other goods including jewellery & watches; glassware, china, tableware and household utensils; and other personal effects (e.g. travel goods, suitcases, prams, sunglasses)?
INTERVIEWER NOTE: PLEASE PROBE FULLY FOR ROAD NAME AND LOCATION IF LOCATED OUT OF CENTRE.

#NonF Non-Food List

Q20 How often do you or your household visit Leamington Spa for shopping and other town centre uses?
DO NOT READ OUT. ONE ANSWER ONLY.

1	Daily	GO TO Q21
2	4-6 days a week	GO TO Q21
3	2-3 days a week	GO TO Q21
4	One day a week	GO TO Q21
5	Every two weeks	GO TO Q21
6	Monthly	GO TO Q21
7	Once every two months	GO TO Q21
8	Three-four times a year	GO TO Q21
9	Once a year	GO TO Q21
A	Less often	GO TO Q21
B	Never	**GO TO Q22**
C	(Don't know)	GO TO Q21
D	(Varies)	GO TO Q21

Those who visit Leamington Spa for shopping and other town centre uses at Q20:

Q21 What do you like about Leamington Spa?
DO NOT READ OUT. CODE UP TO THREE RESPONSES ONLY.
IF THE RESPONDENT STATES THEY LIKE A SPECIFIC SHOP OR ATTRACTION USE THE OTHER BOX TO GIVE FULL DETAILS OF THE SHOP AND IT'S NAME OR THE ATTRACTION AND IT'S NAME

001 Attractive environment / nice place
002 Close to friends or relatives
003 Close to home
004 Close to work
005 Compact
006 Easy to get to by bike
007 Easy to get to by bus
008 Easy to get to by car
009 Easy to park
010 Good facilities in general
011 Good food stores
012 Good pubs, cafés or restaurants
013 Good range of non-food shops
014 Good range of independent shops
015 Good range of 'high street' retailers/ multiples
016 Affordable shops
017 High quality shops
018 The street market
019 Makes a change from other places
020 Quiet
021 Safe and secure
022 Traditional
023 Other (PLEASE WRITE IN)
024 (Dont know)
025 (Nothing / very little)

Q22 What could be improved about Leamington Spa that would make you visit more often?
DO NOT READ OUT. CODE UP TO THREE RESPONSES ONLY

001 Better access by road
002 Better public transport
003 Better signposting
004 Cleaner streets
005 Facilities which would assist you if shopping with children
006 Free car parking
007 More / better town centre events
008 More / better comparison retailers (i.e. non-food shops)
009 More / better value or affordable shops
010 More / better entertainment
011 More / better places for eating out (e.g. cafes and restaurants)
012 More / better food shops
013 More / better parking
014 More / better pedestrianised streets
015 More / better public conveniences
016 More / better seats / flower displays
017 More / better services
018 More advertising
019 More national multiple shops / High Street shops
020 More independent shops
021 Street markets - physical improvements
022 Street markets - better range and quality of offer
023 Protection from the weather (ie. covered shopping malls)
024 Shops / services open on Sundays
025 Other (PLEASE WRITE IN)
026 (Don't know)
027 (Nothing)

Q23 How often do you or your household visit Warwick for shopping and other town centre uses?
DO NOT READ OUT. ONE ANSWER ONLY.

1	Daily	GO TO Q24
2	4-6 days a week	GO TO Q24
3	2-3 days a week	GO TO Q24
4	One day a week	GO TO Q24
5	Every two weeks	GO TO Q24
6	Monthly	GO TO Q24
7	Once every two months	GO TO Q24
8	Three-four times a year	GO TO Q24
9	Once a year	GO TO Q24
A	Less often	GO TO Q24
B	Never	**GO TO Q25**
C	(Don't know)	GO TO Q24
D	(Varies)	GO TO Q24

Those who visit Warwick for shopping and other town centre uses at Q23:

Q24 What do you like about Warwick?
DO NOT READ OUT. CODE UP TO THREE RESPONSES ONLY.
IF THE RESPONDENT STATES THEY LIKE A SPECIFIC SHOP OR ATTRACTION USE THE OTHER BOX TO GIVE FULL DETAILS OF THE SHOP AND IT'S NAME OR THE ATTRACTION AND IT'S NAME

001 Attractive environment / nice place
002 Close to friends or relatives
003 Close to home
004 Close to work
005 Compact
006 Easy to get to by bike
007 Easy to get to by bus
008 Easy to get to by car
009 Easy to park
010 Good facilities in general
011 Good food stores
012 Good pubs, cafés or restaurants
013 Good range of non-food shops
014 Good range of independent shops
015 Good range of 'high street' retailers/ multiples
016 Affordable shops
017 High quality shops
018 The street markets
019 Makes a change from other places
020 Quiet
021 Safe and secure
022 The street markets
023 Traditional
024 Traffic free shopping centre
025 Other (PLEASE WRITE IN)
026 (Dont know)
027 (Nothing / very little)

Q25 What could be improved about Warwick that would make you visit more often?
DO NOT READ OUT. CODE UP TO THREE RESPONSES ONLY

001 Better access by road
002 Better public transport
003 Better signposting
004 Cleaner streets
005 Facilities which would assist you if shopping with children
006 Free car parking
007 More / better town centre events
008 More / better comparison retailers (i.e. non-food shops)
009 More / better value or affordable shops
010 More / better entertainment
011 More / better places for eating out (e.g. cafes and restaurants)
012 More / better food shops
013 More / better parking
014 More / better pedestrianised streets
015 More / better public conveniences
016 More / better seats / flower displays
017 More / better services
018 More advertising
019 More national multiple shops / High Street shops
020 More independent shops
021 Street markets - physical improvements
022 Street markets - better range and quality of offer
023 Shops / services open on Sundays
024 Other (PLEASE WRITE IN)
025 (Don't know)
026 (Nothing)

Q26 How often do you or your household visit Kenilworth for shopping and other town centre uses?
DO NOT READ OUT. ONE ANSWER ONLY.

1	Daily	GO TO Q27
2	4-6 days a week	GO TO Q27
3	2-3 days a week	GO TO Q27
4	One day a week	GO TO Q27
5	Every two weeks	GO TO Q27
6	Monthly	GO TO Q27
7	Once every two months	GO TO Q27
8	Three-four times a year	GO TO Q27
9	Once a year	GO TO Q27
A	Less often	GO TO Q27
B	Never	**GO TO Q28**
C	(Don't know)	GO TO Q27
D	(Varies)	GO TO Q27

Those who visit Kenilworth for shopping and other town centre uses at Q26:

Q27 What do you like about Kenilworth?
DO NOT READ OUT. CODE UP TO THREE RESPONSES ONLY.
IF THE RESPONDENT STATES THEY LIKE A SPECIFIC SHOP OR ATTRACTION USE THE OTHER BOX TO GIVE FULL DETAILS OF THE SHOP AND IT'S NAME OR THE ATTRACTION AND IT'S NAME

001 Attractive environment / nice place
002 Close to friends or relatives
003 Close to home
004 Close to work
005 Compact
006 Easy to get to by bike
007 Easy to get to by bus
008 Easy to get to by car
009 Easy to park
010 Good facilities in general
011 Good food stores
012 Good pubs, cafés or restaurants
013 Good range of non-food shops
014 Good range of independent shops
015 Good range of 'high street' retailers/ multiples
016 Affordable shops
017 High quality shops
018 The street markets
019 Makes a change from other places
020 Quiet
021 Safe and secure
022 The street markets
023 Traditional
024 Traffic free shopping centre
025 Other (PLEASE WRITE IN)
026 (Dont know)
027 (Nothing / very little)

Q28 What could be improved about Kenilworth that would make you visit more often?
DO NOT READ OUT. CODE UP TO THREE RESPONSES ONLY

001 Better access by road
002 Better public transport
003 Better signposting
004 Cleaner streets
005 Facilities which would assist you if shopping with children
006 Free car parking
007 More / better town centre events
008 More / better comparison retailers (i.e. non-food shops)
009 More / better value or affordable shops
010 More / better entertainment
011 More / better places for eating out (e.g. cafes and restaurants)
012 More / better food shops
013 More / better parking
014 More / better pedestrianised streets
015 More / better public conveniences
016 More / better seats / flower displays
017 More / better services
018 More advertising
019 More national multiple shops / High Street shops
020 More independent shops
021 Street markets - physical improvements
022 Street markets - better range and quality of offer
023 Shops / services open on Sundays
024 Other (PLEASE WRITE IN)
025 (Don't know)
026 (Nothing)

Q29 Do you or your household visit the following leisure attractions?
READ OUT. CODE ALL THAT APPLY.

001	Bingo / casino / bookmaker	GO TO Q30
002	Cinema	GO TO Q32
003	Gym / health club / sports facility	GO TO Q34
004	Theatre / concert / music venue	GO TO Q36
005	Museum / gallery or place of historical / cultural interest	GO TO Q38
006	Pub / bar / nightclub	GO TO Q40
007	Restaurant / café	GO TO Q42
008	Family entertainment (e.g. tenpin bowling, skating rink)	GO TO Q44
009	Other activity (PLEASE WRITE IN)	GO TO Q46
010	(Don't visit **ANY** leisure activities)	**GO TO Q48**

Those who visit bingo / casino / bookmakers at Q26:

Q30 How often do you or your household play bingo or visit casinos or bookmakers?
ONE ANSWER ONLY. DO NOT READ OUT.

1 More than once a week
2 Once a week
3 Once a fortnight
4 Once a month
5 Once every two months
6 Once every six months
7 Once a year or less
8 (Dont know / varies)

Those who visit bingo / casino / bookmakers at Q26:

Q31 Where do you or members of your household normally go to play bingo or visit casinos or bookmakers?
DO NOT READ OUT. ONE ANSWER ONLY.
IF OTHER OR RESPONDENTS STATES A PARTICULAR FACILITY, PLEASE SPECIFY THE FACILITY NAME, RETAIL PARK / LEISURE PARK, ROAD NAME AND AREA

#Bingo Bingo List

Those who visit the cinema at Q26:

Q32 How often do you or your household go to the cinema?
ONE ANSWER ONLY. DO NOT READ OUT.

1 More than once a week
2 Once a week
3 Once a fortnight
4 Once a month
5 Once every two months
6 Once every six months
7 Once a year or less
8 (Dont know / varies)

Those who visit the cinema at Q26:

Q33 Where do you or members of your household normally go to the cinema?
DO NOT READ OUT. ONE ANSWER ONLY.
IF OTHER OR RESPONDENTS STATES A PARTICULAR FACILITY, PLEASE SPECIFY THE FACILITY NAME, RETAIL PARK / LEISURE PARK, ROAD NAME AND AREA

#Cinema Cinema List

Those who go to the gym / healthclub / sports facilities at Q26:

Q34 How often do you or your household use a gym / healthclub / sports facility?
ONE ANSWER ONLY. DO NOT READ OUT.

1 More than once a week
2 Once a week
3 Once a fortnight
4 Once a month
5 Once every two months
6 Once every six months
7 Once a year or less
8 (Dont know / varies)

Those who go to the gym / healthclub / sports facilities at Q26:

Q35 Where do you or members of your household normally go to use a gym / healthclub / sports facility?
DO NOT READ OUT. ONE ANSWER ONLY.
IF OTHER OR RESPONDENTS STATES A PARTICULAR FACILITY, PLEASE SPECIFY THE FACILITY NAME, RETAIL PARK / LEISURE PARK, ROAD NAME AND AREA

#Health Healthclub List

Those who visit the theatre / concert / music venues at Q26:

Q36 How often do you or your household visit a theatre / concert / music venue?
ONE ANSWER ONLY. DO NOT READ OUT.

1 More than once a week
2 Once a week
3 Once a fortnight
4 Once a month
5 Once every two months
6 Once every six months
7 Once a year or less
8 (Dont know / varies)

Those who visit the theatre / concert / music venues at Q26:

Q37 **Where do you or members of your household normally go to visit the theatre, watch a concert or watch live music?**

DO NOT READ OUT. ONE ANSWER ONLY.

#Theatre Theatre List

Those who visit museum / gallery or place of historical / cultural interest at Q26:

Q38 **How often do you or your household go to a museum, gallery, or other place of historical / cultural interest?**

ONE ANSWER ONLY. DO NOT READ OUT.

1 More than once a week
2 Once a week
3 Once a fortnight
4 Once a month
5 Once every two months
6 Once every six months
7 Once a year or less
8 (Dont know / varies)

Those who visit museum / gallery or place of historical / cultural interest at Q26:

Q39 **Where do you or members of your household normally go to a museum, gallery, or other place of historical / cultural interest?**
DO NOT READ OUT. ONE ANSWER ONLY.

#Museum Museum List

Those who visit pubs / bars / nightclubs at Q26:

Q40 **How often do you or your household go to pubs / bars / nightclubs?**
ONE ANSWER ONLY. DO NOT READ OUT.

1 More than once a week
2 Once a week
3 Once a fortnight
4 Once a month
5 Once every two months
6 Once every six months
7 Once a year or less
8 (Dont know / varies)

Those who visit pubs / bars / nightclubs at Q26:

Q41 **What location (e.g. town centre, street/area, shopping centre, retail/ leisure park) do you or members of your household normally go to when visiting pubs / bars / nightclubs?**
DO NOT READ OUT. ONE ANSWER ONLY.

#Leisure Leisure List

Those who visit restaurants / cafés at Q26:

Q42 **How often do you or your household eat out (e.g. visit cafes and restaurants)?**
ONE ANSWER ONLY. DO NOT READ OUT.

1 More than once a week
2 Once a week
3 Once a fortnight
4 Once a month
5 Once every two months
6 Once every six months
7 Once a year or less
8 (Dont know / varies)

Those who visit restaurants / cafés at Q26:

Q43 **What location (e.g. town centre, street/area, shopping centre, retail/ leisure park) do you or members of your household normally go to for eating out (e.g. cafes and restaurants)?**

DO NOT READ OUT. ONE ANSWER ONLY.

#Leisure Leisure List

Those who partake in family entertainment activities at Q26:

Q44 **How often do you or your household go to family entertainment venues?**
ONE ANSWER ONLY. DO NOT READ OUT.

1 More than once a week
2 Once a week
3 Once a fortnight
4 Once a month
5 Once every two months
6 Once every six months
7 Once a year or less
8 (Dont know / varies)

Those who partake in family entertainment activities at Q26:

Q45 **Where do you or members of your household normally go for family entertainment?**
DO NOT READ OUT. ONE ANSWER ONLY.
IF OTHER OR RESPONDENTS STATES A PARTICULAR FACILITY, PLEASE SPECIFY THE FACILITY NAME, RETAIL PARK / LEISURE PARK, ROAD NAME AND AREA

#Leisure Leisure List

Those who go to other leisure attractions at Q26:

Q46 How often do you or your household do (OTHER ACTIVITY FROM Q29)?
ONE ANSWER ONLY. DO NOT READ OUT.

1 More than once a week
2 Once a week
3 Once a fortnight
4 Once a month
5 Once every two months
6 Once every six months
7 Once a year or less
8 (Dont know / varies)

Those who go to other leisure attractions at Q26:

Q47 Where do you or members of your household normally go for (OTHER ACTIVITY FROM Q29)?
DO NOT READ OUT. ONE ANSWER ONLY.

#Leisure Leisure List

Q48 What improvements could be made to the leisure offer in the Warwick District Council area that would make you visit / partake in leisure activities more often?
DO NOT READ OUT. CODE UP TO THREE RESPONSES ONLY.

001 A casino
002 A swimming pool
003 A theatre
004 A multi-screen cinema
005 An art house cinema
006 Bingo
007 Cheaper prices
008 Improved access by foot and cycle
009 Improved public transport
010 Improved security / CCTV
011 Improved street furniture
012 Improvements in the built environment
013 More / better car parking
014 More / better cultural facilities
015 More / better disabled access
016 More / better health clubs / gyms
017 More / better policing
018 More / better public houses
019 More / better seats
020 More / better signposting and information
021 More better parks / green spaces
022 More for children
023 More local sports & recreation facilities
024 More nightclubs
025 More pavement cafes
026 More quality restaurants
027 More street cleaning
028 Provision of public toilets
029 Ten-pin bowling
030 Other (PLEASE WRITE IN)
031 (Dont do leisure activities)
032 (Don't know)
033 (Nothing)

GEN Gender of respondent:
DO NOT READ OUT. CODE FROM OBSERVATION.

1 Male
2 Female

AGE Can I ask how old you are please?
DO NOT READ OUT. ONE ANSWER ONLY.

1 18-24
2 25-34
3 35-44
4 45-54
5 55-64
6 65+
7 (Refused)

CAR How many cars does your household own or have the use of?
DO NOT READ OUT. ONE ANSWER ONLY.

1 None
2 One
3 Two
4 Three or more
5 (Refused)

EMP Which of the following best describes the chief wage earner of your household's current employment situation?
READ OUT. ONE ANSWER ONLY.

1 Working full time
2 Working part time
3 Unemployed
4 Retired
5 A housewife
6 A student
7 Self employed
8 Sick / disabled
9 Other (PLEASE WRITE IN)
A (Refused)

OCC What is the occupation of the chief income earner of your household?
DO NOT PROMPT. ONE ANSWER ONLY.

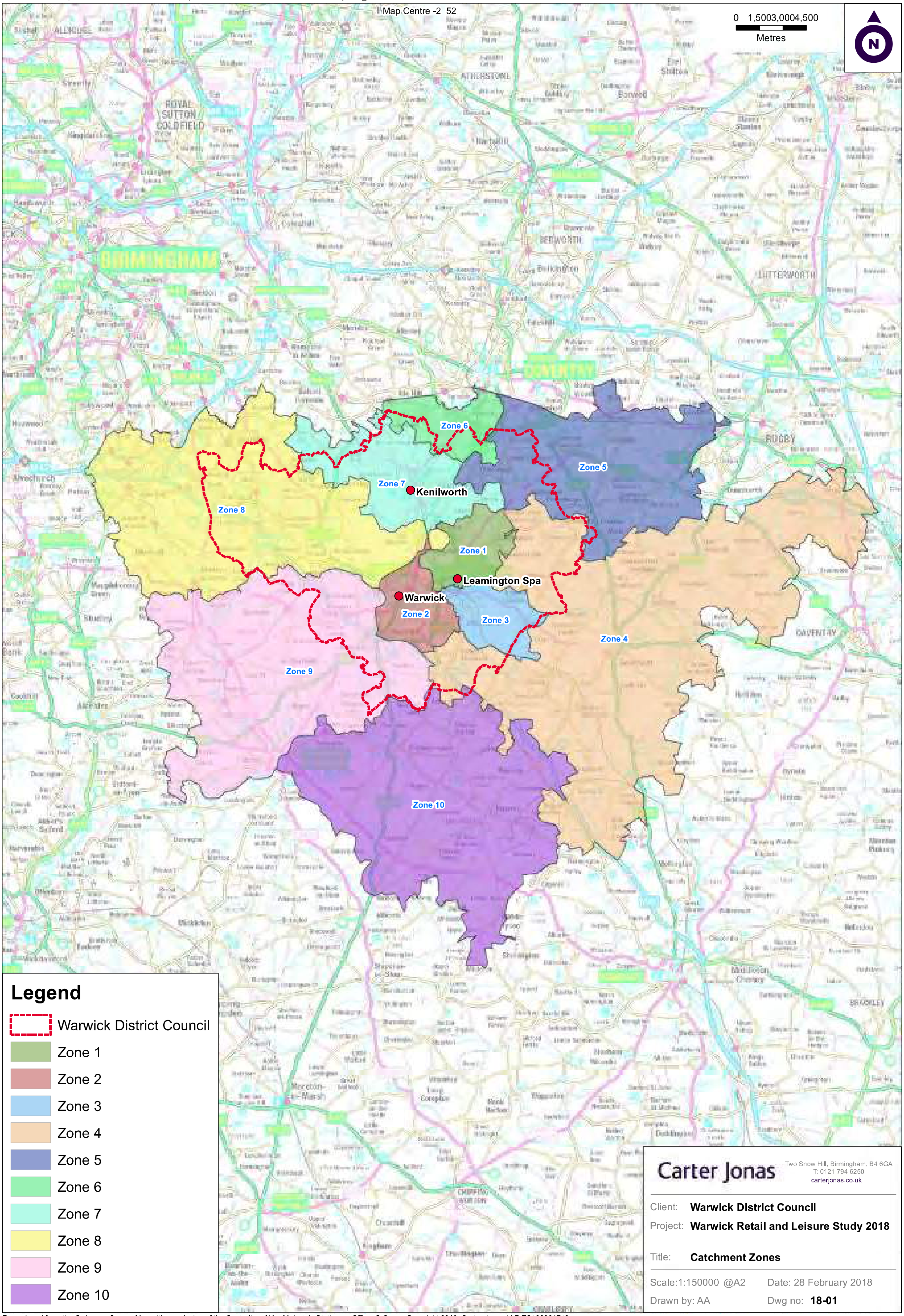
1 Occupation / job description
2 Retired - Basic state pension
3 (Refused)

Thank & Close

Appendix 4:

Map

Path: C:\MMG3 Output\Warwick Retail and Leisure Study 2018\18-01 Warwick Retail and Leisure Study2018_WGS84.mxd



APPENDIX 5: CONVENIENCE GOODS MARKET SHARES

ALL CONVENIENCE GOODS - 2018 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	WDC AREA (Zones 1,2,3&7)	TOTAL STUDY AREA	CORE EAST Zone 1 & 3	CORE WEST (Warwick) - Zone 2	KENILWORTH Zone 7	NORTH - Zone 5&6	EAST ZONE Zone 4&10	WEST ZONE Zone 8&9
Royal Leamington Spa Town Centre:																		
Co-Op (Clemens Street)	0.0%	0.0%	0.2%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	0.3%	0.0%
Co-Op (Parade)	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.1%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland (Bath Street)	0.0%	0.7%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.4%	0.2%	0.4%	0.7%	0.0%	0.0%	0.0%	0.0%
Mark and Spencer (Parade)	2.8%	1.1%	1.3%	0.2%	0.3%	0.4%	0.6%	0.0%	0.0%	0.0%	1.5%	0.7%	2.1%	1.1%	0.6%	0.4%	0.1%	0.0%
Spar (Bath Street)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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 (Parade)	9.0%	0.8%	1.5%	0.1%	0.0%	1.1%	0.0%	0.1%	0.2%	0.0%	3.0%	1.3%	5.3%	0.8%	0.0%	0.7%	0.1%	0.2%
Other Convenience Floorspace	5.5%	0.2%	2.5%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	2.2%	0.8%	4.0%	0.2%	0.0%	0.0%	0.0%	0.1%
Sub-total	17.3%	2.8%	6.9%	0.9%	0.3%	1.5%	0.6%	0.3%	0.2%	0.1%	7.3%	3.2%	12.2%	2.8%	0.6%	1.0%	0.5%	0.2%
Warwick Town Centre:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Marks and Spencer (Market Street)	0.0%	0.9%	0.0%	0.1%	0.1%	0.0%	0.2%	0.0%	1.8%	0.0%	0.3%	0.3%	0.0%	0.9%	0.2%	0.0%	0.1%	0.9%
Sainsburys (Saltisford)	0.1%	4.1%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	2.6%	0.4%	1.1%	0.9%	0.1%	4.1%	0.0%	0.0%	0.2%	2.0%
Other convenience floorspace	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.1%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%
Sub-total	0.1%	5.6%	0.0%	0.1%	0.1%	0.0%	0.2%	1.3%	4.3%	0.4%	1.5%	1.2%	0.1%	5.6%	0.2%	0.0%	0.3%	2.9%
Kenilworth Town Centre:																		
Iceland (Warwick Road)	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.2%	0.0%	0.4%	0.2%	0.0%	0.4%	1.3%	0.0%	0.0%	0.1%
Sainsburys (Warwick Road)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	30.5%	0.0%	0.0%	0.1%	6.4%	2.4%	0.0%	0.0%	30.5%	0.0%	0.0%	0.0%
Waitrose (Bertie Road)	0.3%	0.4%	0.1%	0.0%	0.0%	4.4%	25.2%	0.0%	0.0%	0.7%	5.5%	2.8%	0.2%	0.4%	25.2%	2.9%	0.3%	0.0%
Other convenience floorspace	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.4%	0.2%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%
Sub-total	0.3%	0.8%	0.1%	0.0%	0.0%	4.4%	59.0%	0.0%	0.2%	0.8%	12.7%	5.5%	0.2%	0.8%	59.0%	2.9%	0.3%	0.1%
Sub-total: Town Centre Stores / Centres	17.8%	9.3%	7.0%	1.0%	0.4%	5.8%	59.8%	1.5%	4.8%	1.3%	21.5%	9.9%	12.5%	9.3%	59.8%	3.9%	1.1%	3.2%
OUT OF TOWN STORES/LOCATIONS																		
Leamington Spa																		
Aldi-Queensway	2.4%	13.0%	3.9%	14.7%	0.1%	0.0%	2.4%	0.5%	0.0%	1.1%	5.5%	3.7%	3.1%	13.0%	2.4%	0.0%	8.7%	0.2%
Asda-Chesterton Drive	7.9%	1.4%	30.0%	6.1%	0.1%	0.0%	0.8%	0.0%	0.0%	1.5%	10.5%	4.7%	18.7%	1.4%	0.8%	0.0%	4.1%	0.0%
Lidl-Myton Road	1.3%	2.9%	1.0%	0.4%	0.0%	0.0%	1.9%	0.0%	0.1%	0.4%	1.8%	0.8%	1.2%	2.9%	1.9%	0.0%	0.4%	0.1%
Morrisons-Old Warwick Road	9.5%	5.9%	11.6%	1.7%	0.0%	0.6%	0.0%	0.5%	1.6%	1.1%	7.1%	3.3%	10.5%	5.9%	0.0%	0.4%	1.4%	1.1%
Sainsbury's-Tachbrook Drive	8.0%	8.1%	11.6%	4.2%	0.3%	0.0%	0.6%	0.5%	2.3%	0.9%	7.4%	3.6%	9.8%	8.1%	0.6%	0.1%	2.7%	1.4%
Warwick																		
Sainsbury's Local-Coten End	0.1%	5.3%	0.0%	0.4%	0.3%	1.3%	0.0%	0.6%	2.1%	0.4%	1.4%	1.1%	0.1%	5.3%	0.0%	1.0%	0.4%	1.4%
Tesco-Emscote Road	22.4%	19.5%	2.0%	2.9%	0.4%	0.0%	1.6%	1.3%	1.7%	0.1%	12.0%	5.2%	12.4%	19.5%	1.6%	0.1%	1.6%	1.5%
All Other Centres / Stores in the District	10.6%	16.8%	13.7%	1.6%	0.4%	2.1%	7.7%	1.6%	2.4%	0.6%	12.4%	5.7%	12.1%	16.8%	7.7%	1.5%	1.1%	2.0%
Sub-total: Out-of-Town Centre Stores / Centres	62.1%	72.9%	73.8%	32.0%	1.8%	4.0%	15.0%	4.9%	10.3%	6.1%	58.1%	28.0%	67.8%	72.9%	15.0%	3.3%	20.5%	7.7%
WARWICK DISTRICT COUNCIL AREA	79.8%	82.2%	80.7%	33.0%	2.1%	9.9%	74.7%	6.4%	15.0%	7.4%	79.6%	37.9%	80.3%	82.2%	74.7%	7.2%	21.6%	10.9%
OTHER CENTRES/STORES OUTSIDE WDC AREA																		
Banbury	0.0%	0.0%	0.0%	4.7%	0.1%	0.0%	0.0%	0.1%	0.0%	5.9%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	5.2%	0.1%
Birmingham	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%
Coventry	2.5%	0.4%	0.0%	1.1%	69.0%	74.2%	9.6%	1.2%	0.0%	0.0%	2.8%	17.9%	1.3%	0.4%	9.6%	72.4%	0.6%	0.6%
Rugby	0.4%	0.0%	0.0%	11.6%	11.7%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	2.1%	0.2%	0.0%	0.0%	4.0%	6.5%	0.0%
Solihull	0.1%	0.0%	1.1%	0.0%	0.4%	0.0%	0.0%	67.0%	0.5%	0.4%	0.3%	7.2%	0.6%	0.0%	0.0%	0.1%	0.2%	32.4%
Southam	0.0%	0.0%	0.0%	30.5%	0.3%	0.8%	0.0%	0.0%	0.4%	0.6%	0.0%	3.2%	0.0%	0.0%	0.0%	0.6%	17.1%	0.2%
Stratford-upon-Avon	0.0%	0.3%	0.0%	0.7%	0.3%	0.6%	0.0%	1.2%	66.7%	43.4%	0.1%	11.3%	0.0%	0.3%	0.0%	0.5%	19.7%	35.3%
ALL OTHER CENTRES / STORES:	12.2%	14.7%	13.4%	16.5%	14.0%	12.2%	11.6%	19.9%	13.2%	35.8%	13.1%	15.9%	12.8%	14.7%	11.6%	12.8%	25.1%	16.4%
Sub-Total All other Centres / stores	15.3%	15.5%	14.6%	65.0%	95.9%	87.8%	21.2%	89.4%	80.9%	86.2%	16.4%	58.5%	14.9%	15.5%	21.2%	90.6%	74.4%	85.0%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING:	4.8%	2.2%	4.7%	1.9%	2.0%	2.3%	4.0%	4.2%	4.0%	6.4%	4.0%	3.6%	4.8%	2.2%	4.0%	2.2%	4.0%	4.1%
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%**	**100.0%**

MAIN FOOD PURCHASES - 2018 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	WDC AREA (Zones 1,2,3&7)	TOTAL STUDY AREA	CORE EAST Zone 1 & 3	CORE WEST (Warwick) - Zone 2	KENILWORTH Zone 7	NORTH - Zone 5&6	EAST ZONE Zone 4&10	WEST ZONE Zone 8&9
Royal Leamington Spa Town Centre:																		
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%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-Op (Parade)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland (Bath Street)	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.1%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%
Mark and Spencer (Parade)	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.7%	0.3%	1.2%	0.0%	0.6%	0.0%	0.0%	0.0%
Spar (Bath Street)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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 (Parade)	10.7%	0.7%	1.8%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	3.5%	1.5%	6.3%	0.7%	0.0%	0.6%	0.0%	0.0%
Other Convenience Floorspace	0.9%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.1%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	13.8%	1.4%	2.3%	0.0%	0.0%	1.0%	0.6%	0.0%	0.0%	0.0%	4.8%	2.0%	8.1%	1.4%	0.6%	0.6%	0.0%	0.0%
Warwick Town Centre:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Marks and Spencer (Market Street)	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.1%	0.1%	0.0%	0.6%	0.0%	0.0%	0.0%	0.4%
Sainsburys (Saltisford)	0.0%	4.6%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	3.9%	0.7%	1.2%	1.1%	0.0%	4.6%	0.0%	0.0%	0.3%	2.8%
Other convenience floorspace	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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	0.0%	5.1%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	4.6%	0.7%	1.3%	1.2%	0.0%	5.1%	0.0%	0.0%	0.3%	3.2%
Kenilworth Town Centre:																		
Iceland (Warwick Road)	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%
Sainsburys (Warwick Road)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	40.7%	0.0%	0.0%	0.0%	8.5%	3.2%	0.0%	0.0%	40.7%	0.0%	0.0%	0.0%
Waitrose (Bertie Road)	0.0%	0.0%	0.0%	0.0%	0.0%	6.2%	32.1%	0.0%	0.0%	0.7%	6.7%	3.5%	0.0%	0.0%	32.1%	4.1%	0.3%	0.0%
Other convenience floorspace	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%
Sub-total	0.0%	0.6%	0.0%	0.0%	0.0%	6.2%	73.4%	0.0%	0.0%	0.7%	15.5%	6.8%	0.0%	0.6%	73.4%	4.1%	0.3%	0.0%
Sub-total: Town Centre Stores / Centres	13.8%	7.0%	2.3%	0.0%	0.0%	7.2%	74.0%	1.6%	4.6%	1.3%	21.6%	10.0%	8.1%	7.0%	74.0%	4.7%	0.6%	3.2%
OUT OF TOWN STORES/LOCATIONS																		
Leamington Spa																		
Aldi-Queensway	0.9%	18.7%	3.3%	22.4%	0.0%	0.0%	3.5%	0.8%	0.0%	1.3%	6.7%	4.9%	2.1%	18.7%	3.5%	0.0%	13.0%	0.4%
Asda-Chesterton Drive	10.8%	1.1%	42.0%	6.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	14.2%	6.1%	26.1%	1.1%	0.0%	0.0%	4.2%	0.0%
Lidl-Myton Road	1.4%	2.5%	0.5%	0.0%	0.0%	0.0%	2.8%	0.0%	0.0%	0.7%	1.7%	0.7%	1.0%	2.5%	2.8%	0.0%	0.3%	0.0%
Morrisons-Old Warwick Road	13.9%	8.4%	15.6%	2.3%	0.0%	0.8%	0.0%	0.8%	2.5%	0.7%	10.0%	4.5%	14.7%	8.4%	0.0%	0.5%	1.6%	1.7%
Sainsbury's-Tachbrook Drive	10.7%	8.8%	13.3%	5.0%	0.6%	0.0%	0.6%	0.8%	2.3%	0.8%	8.8%	4.3%	12.0%	8.8%	0.6%	0.2%	3.2%	1.6%
Warwick																		
Sainsbury's Local-Coten End	0.0%	5.0%	0.0%	0.0%	0.6%	2.2%	0.0%	0.8%	3.0%	0.7%	1.3%	1.3%	0.0%	5.0%	0.0%	1.6%	0.3%	1.9%
Tesco-Emscote Road	33.5%	28.7%	1.8%	4.3%	0.6%	0.0%	1.9%	1.5%	0.9%	0.0%	17.4%	7.3%	18.0%	28.7%	1.9%	0.2%	2.4%	1.2%
All Other Centres / Stores in the District	3.7%	15.7%	11.3%	0.9%	0.0%	0.0%	2.4%	0.8%	0.9%	0.0%	8.5%	3.5%	7.4%	15.7%	2.4%	0.0%	0.5%	0.8%
Sub-total: Out-of-Town Centre Stores / Centres	75.0%	88.8%	87.7%	40.8%	1.7%	3.0%	11.3%	5.5%	9.5%	6.2%	68.6%	32.6%	81.3%	88.8%	11.3%	2.5%	25.4%	7.6%
WARWICK DISTRICT COUNCIL AREA	88.8%	95.8%	90.0%	40.8%	1.7%	10.1%	85.3%	7.0%	14.2%	7.5%	90.2%	42.7%	89.4%	95.8%	85.3%	7.2%	26.0%	10.7%
OTHER CENTRES/STORES OUTSIDE WDC AREA																		
Banbury	0.0%	0.0%	0.0%	5.7%	0.0%	0.0%	0.0%	0.0%	0.0%	9.3%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	7.3%	0.0%
Birmingham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Coventry	2.8%	0.0%	0.0%	0.7%	79.9%	84.4%	9.3%	0.0%	0.0%	0.0%	2.7%	20.1%	1.4%	0.0%	9.3%	82.9%	0.4%	0.0%
Rugby	0.7%	0.0%	0.0%	12.8%	13.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	2.4%	0.4%	0.0%	0.0%	4.7%	7.1%	0.0%
Solihull	0.0%	0.0%	1.8%	0.0%	0.7%	0.0%	0.0%	79.0%	0.0%	0.7%	0.5%	8.5%	0.9%	0.0%	0.0%	0.2%	0.3%	37.9%
Southam	0.0%	0.0%	0.0%	31.0%	0.0%	1.0%	0.0%	0.0%	0.7%	0.7%	0.0%	3.3%	0.0%	0.0%	0.0%	0.6%	17.5%	0.4%
Stratford-upon-Avon	0.0%	0.0%	0.0%	0.9%	0.6%	0.8%	0.0%	1.2%	77.0%	49.6%	0.0%	13.0%	0.0%	0.0%	0.0%	0.7%	22.6%	40.6%
ALL OTHER CENTRES / STORES:	0.0%	0.6%	0.5%	5.0%	0.6%	0.0%	0.0%	6.0%	1.6%	22.4%	0.3%	3.2%	0.3%	0.6%	0.0%	0.2%	12.8%	3.7%
Sub-Total All other Centres / stores	3.5%	0.6%	2.3%	56.1%	95.4%	86.2%	9.3%	86.2%	79.3%	82.6%	3.6%	51.7%	2.9%	0.6%	9.3%	89.4%	67.9%	82.6%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING:	7.7%	3.6%	7.7%	3.1%	2.9%	3.7%	5.4%	6.8%	6.5%	9.8%	6.2%	5.6%	7.7%	3.6%	5.4%	3.4%	6.1%	6.7%
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%**	**100.0%**

OTHER ('SECONDARY') MAIN FOOD PURCHASES - 2018 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	WDC AREA (Zones 1,2,3&7)	TOTAL STUDY AREA	CORE EAST Zone 1 & 3	CORE WEST (Warwick) - Zone 2	KENILWORTH Zone 7	NORTH - Zone 5&6	EAST ZONE Zone 4&10	WEST ZONE Zone 8&9
Royal Leamington Spa Town Centre:																		
Co-Op (Clemens Street)	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-Op (Parade)	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland (Bath Street)	0.0%	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.5%	0.3%	1.0%	0.0%	0.0%	0.0%	0.3%	0.0%
Mark and Spencer (Parade)	5.1%	3.1%	2.9%	1.5%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	3.1%	1.3%	4.0%	3.1%	0.6%	0.0%	0.8%	0.0%
Spar (Bath Street)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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 (Parade)	2.9%	0.6%	1.4%	0.7%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	1.3%	0.6%	2.2%	0.6%	0.0%	0.0%	0.4%	0.4%
Other Convenience Floorspace	8.4%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	0.9%	4.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	16.4%	3.7%	8.0%	2.2%	0.0%	0.0%	0.6%	0.8%	0.0%	0.7%	7.6%	3.2%	12.3%	3.7%	0.6%	0.0%	1.5%	0.4%
Warwick Town Centre:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Marks and Spencer (Market Street)	0.0%	2.0%	0.0%	0.9%	0.6%	0.0%	0.0%	0.0%	1.8%	0.0%	0.5%	0.5%	0.0%	2.0%	0.0%	0.2%	0.5%	0.9%
Sainsburys (Saltisford)	0.7%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.5%	0.3%	0.4%	1.1%	0.0%	0.0%	0.0%	0.4%
Other convenience floorspace	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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	0.7%	3.1%	0.0%	0.9%	0.6%	0.0%	0.0%	0.8%	1.8%	0.0%	1.0%	0.8%	0.4%	3.1%	0.0%	0.2%	0.5%	1.3%
Kenilworth Town Centre:																		
Iceland (Warwick Road)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%	0.0%	0.0%	0.0%	0.6%	0.2%	0.0%	0.0%	3.0%	0.0%	0.0%	0.0%
Sainsburys (Warwick Road)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	17.2%	0.0%	0.0%	0.7%	3.6%	1.4%	0.0%	0.0%	17.2%	0.0%	0.3%	0.0%
Waitrose (Bertie Road)	2.2%	1.9%	0.6%	0.0%	0.0%	3.3%	14.1%	0.0%	0.0%	0.7%	4.2%	2.1%	1.4%	1.9%	14.1%	2.1%	0.3%	0.0%
Other convenience floorspace	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.3%	0.1%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%
Sub-total	2.2%	1.9%	0.6%	0.0%	0.0%	3.3%	35.6%	0.0%	0.0%	1.3%	8.7%	3.9%	1.4%	1.9%	35.6%	2.1%	0.6%	0.0%
Sub-total: Town Centre Stores / Centres	19.3%	8.7%	8.6%	3.1%	0.6%	3.3%	36.3%	1.6%	1.8%	2.0%	17.3%	7.9%	14.1%	8.7%	36.3%	2.3%	2.6%	1.7%
OUT OF TOWN STORES/LOCATIONS																		
Leamington Spa																		
Aldi-Queensway	3.6%	10.1%	8.9%	5.6%	0.7%	0.0%	1.3%	0.0%	0.0%	2.2%	6.2%	3.1%	6.2%	10.1%	1.3%	0.2%	4.1%	0.0%
Asda-Chesterton Drive	5.2%	0.6%	2.6%	13.7%	0.0%	0.0%	5.3%	0.0%	0.0%	1.3%	3.4%	2.7%	3.9%	0.6%	5.3%	0.0%	8.2%	0.0%
Lidl-Myton Road	2.2%	5.5%	2.8%	0.7%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	2.9%	1.2%	2.5%	5.5%	0.6%	0.0%	0.4%	0.0%
Morrisons-Old Warwick Road	4.4%	4.2%	10.7%	1.7%	0.0%	0.9%	0.0%	0.0%	0.7%	4.5%	5.1%	2.6%	7.5%	4.2%	0.0%	0.6%	2.9%	0.4%
Sainsbury's-Tachbrook Drive	5.9%	12.9%	15.4%	3.0%	0.0%	0.0%	1.4%	0.0%	1.4%	1.4%	9.3%	4.1%	10.6%	12.9%	1.4%	0.0%	2.3%	0.8%
Warwick																		
Sainsbury's Local-Coten End	0.7%	0.7%	0.0%	2.6%	0.0%	0.0%	0.0%	0.8%	0.7%	0.0%	0.4%	0.6%	0.4%	0.7%	0.0%	0.0%	1.4%	0.8%
Tesco-Emscote Road	6.9%	9.1%	6.0%	0.7%	0.6%	0.0%	2.7%	1.0%	3.4%	0.7%	6.4%	3.1%	6.5%	9.1%	2.7%	0.2%	0.7%	2.2%
All Other Centres / Stores in the District	14.4%	3.5%	1.9%	2.2%	1.3%	0.9%	3.6%	1.6%	5.0%	3.0%	6.1%	3.7%	8.3%	3.5%	3.6%	1.1%	2.6%	3.4%
Sub-total: Out-of-Town Centre Stores / Centres	43.3%	46.5%	48.4%	30.1%	2.6%	1.9%	15.0%	3.3%	11.3%	13.0%	39.5%	21.0%	45.8%	46.5%	15.0%	2.1%	22.5%	7.5%
WARWICK DISTRICT COUNCIL AREA	62.6%	55.1%	57.0%	33.3%	3.2%	5.2%	51.3%	4.9%	13.1%	15.0%	56.9%	28.9%	59.9%	55.1%	51.3%	4.5%	25.1%	9.1%
OTHER CENTRES/STORES OUTSIDE WDC AREA																		
Banbury	0.0%	0.0%	0.0%	3.2%	0.6%	0.0%	0.0%	0.8%	0.0%	1.5%	0.0%	0.6%	0.0%	0.0%	0.0%	0.2%	2.4%	0.4%
Birmingham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Coventry	3.8%	0.0%	0.0%	4.4%	48.2%	58.0%	5.5%	8.1%	0.0%	0.0%	2.2%	14.6%	1.9%	0.0%	5.5%	54.6%	2.4%	3.9%
Rugby	0.0%	0.0%	0.0%	11.8%	9.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	3.4%	6.6%	0.0%
Solihull	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	36.9%	0.7%	0.0%	0.2%	4.0%	0.5%	0.0%	0.0%	0.0%	0.0%	18.1%
Southam	0.0%	0.0%	0.0%	10.8%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.4%	6.0%	0.0%
Stratford-upon-Avon	0.0%	1.8%	0.0%	0.7%	0.0%	0.9%	0.0%	1.6%	49.0%	32.0%	0.5%	8.6%	0.0%	1.8%	0.0%	0.6%	14.6%	26.3%
ALL OTHER CENTRES / STORES:	32.0%	42.5%	42.3%	35.0%	35.3%	35.2%	37.8%	47.0%	37.2%	47.9%	38.6%	38.9%	37.0%	42.5%	37.8%	35.2%	40.7%	41.9%
Sub-Total All other Centres / stores	36.6%	44.3%	42.3%	66.0%	95.1%	94.1%	43.4%	94.3%	86.9%	81.3%	41.5%	69.8%	39.4%	44.3%	43.4%	94.4%	72.8%	90.5%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING:	0.7%	0.6%	0.6%	0.8%	1.8%	0.8%	5.3%	0.8%	0.0%	3.7%	1.6%	1.3%	0.7%	0.6%	5.3%	1.1%	2.1%	0.4%
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

TOP UP FOOD PURCHASES - 2018 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	WDC AREA (Zones 1,2,3&7)	TOTAL STUDY AREA	CORE EAST Zone 1 & 3	CORE WEST (Warwick) - Zone 2	KENILWORTH Zone 7	NORTH - Zone 5&6	EAST ZONE Zone 4&10	WEST ZONE Zone 8&9
Royal Leamington Spa Town Centre:																		
Co-Op (Clemens Street)	0.0%	0.0%	0.6%	3.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.4%	0.3%	0.0%	0.0%	0.0%	2.1%	0.0%
Co-Op (Parade)	0.0%	0.0%	3.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.3%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland (Bath Street)	0.0%	0.0%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.2%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Mark and Spencer (Parade)	4.8%	4.4%	1.4%	0.0%	1.8%	1.6%	0.0%	0.0%	0.0%	0.0%	2.8%	1.4%	3.2%	4.4%	0.0%	1.7%	0.0%	0.0%
Spar (Bath Street)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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 (Parade)	14.4%	2.0%	1.4%	0.0%	0.0%	3.2%	0.0%	0.0%	1.4%	0.0%	4.8%	2.4%	8.0%	2.0%	0.0%	2.1%	0.0%	0.7%
Other Convenience Floorspace	21.0%	1.2%	10.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.7%	3.3%	15.7%	1.2%	0.0%	0.0%	0.0%	0.0%
Sub-total	40.2%	7.6%	19.7%	3.8%	1.8%	4.8%	0.0%	0.0%	1.4%	0.0%	18.0%	8.2%	30.1%	7.6%	0.0%	3.8%	2.1%	0.7%
Warwick Town Centre:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Marks and Spencer (Market Street)	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	4.1%	0.0%	0.7%	0.7%	0.0%	2.0%	1.1%	0.0%	0.0%	2.1%
Sainsburys (Saltisford)	0.0%	7.4%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	1.7%	0.0%	1.9%	1.1%	0.0%	7.4%	0.0%	0.0%	0.0%	1.6%
Other convenience floorspace	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.2%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	0.0%	11.3%	0.0%	0.0%	0.0%	0.0%	1.1%	1.5%	5.8%	0.0%	3.1%	2.0%	0.0%	11.3%	1.1%	0.0%	0.0%	3.7%
Kenilworth Town Centre:																		
Iceland (Warwick Road)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.6%	0.0%	1.4%	0.0%	0.8%	0.4%	0.0%	0.0%	3.6%	0.0%	0.0%	0.7%
Sainsburys (Warwick Road)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	18.5%	0.0%	0.0%	0.0%	3.9%	1.5%	0.0%	0.0%	18.5%	0.0%	0.0%	0.0%
Waitrose (Bertie Road)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	19.8%	0.0%	0.0%	1.1%	4.1%	1.7%	0.0%	0.0%	19.8%	0.0%	0.5%	0.0%
Other convenience floorspace	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.3%	0.0%	0.0%	0.0%	1.5%	0.6%	0.0%	0.0%	7.3%	0.0%	0.0%	0.0%
Sub-total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	49.2%	0.0%	1.4%	1.1%	10.3%	4.1%	0.0%	0.0%	49.2%	0.0%	0.5%	0.7%
Sub-total: Town Centre Stores / Centres	40.2%	18.8%	19.7%	3.8%	1.8%	4.8%	50.2%	1.5%	8.5%	1.1%	31.4%	14.3%	30.1%	18.8%	50.2%	3.8%	2.6%	5.1%
OUT OF TOWN STORES/LOCATIONS																		
Leamington Spa																		
Aldi-Queensway	8.1%	2.0%	3.5%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.6%	1.7%	5.8%	2.0%	0.0%	0.0%	1.7%	0.0%
Asda-Chesterton Drive	3.3%	4.4%	27.5%	1.4%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	9.2%	3.7%	15.2%	4.4%	0.0%	0.3%	0.8%	0.0%
Lidl-Myton Road	1.0%	1.0%	1.4%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	1.1%	0.4%	1.2%	1.0%	0.9%	0.0%	0.0%	0.0%
Morrisons-Old Warwick Road	1.0%	1.0%	3.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.6%	2.4%	1.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's-Tachbrook Drive	4.3%	5.6%	7.8%	4.7%	0.0%	0.0%	0.0%	0.0%	1.7%	1.3%	4.6%	2.5%	6.0%	5.6%	0.0%	0.0%	3.2%	0.9%
Warwick																		
Sainsbury's Local-Coten End	0.0%	14.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	3.7%	1.5%	0.0%	14.2%	0.0%	0.0%	0.0%	0.7%
Tesco-Emscote Road	7.9%	5.9%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	4.7%	0.0%	3.7%	2.1%	4.0%	5.9%	0.0%	0.0%	0.8%	2.4%
All Other Centres / Stores in the District	31.3%	42.6%	36.3%	2.8%	0.9%	12.3%	29.9%	3.2%	7.7%	1.1%	35.2%	16.8%	33.8%	42.6%	29.9%	8.3%	2.0%	5.5%
Sub-total: Out-of-Town Centre Stores / Centres	56.9%	76.6%	80.3%	13.4%	1.8%	12.3%	30.7%	3.2%	15.4%	2.3%	62.6%	29.2%	68.4%	76.6%	30.7%	8.7%	8.5%	9.5%
WARWICK DISTRICT COUNCIL AREA	97.1%	95.4%	100.0%	17.1%	3.6%	17.1%	81.0%	4.6%	23.9%	3.4%	94.0%	43.5%	98.5%	95.4%	81.0%	12.4%	11.0%	14.7%
OTHER CENTRES/STORES OUTSIDE WDC AREA																		
Banbury	0.0%	0.0%	0.0%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%
Birmingham	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.1%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%
Coventry	1.9%	2.4%	0.0%	0.0%	74.8%	73.9%	18.1%	0.0%	0.0%	0.0%	4.9%	18.9%	1.0%	2.4%	18.1%	74.2%	0.0%	0.0%
Rugby	0.0%	0.0%	0.0%	12.7%	10.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%	0.0%	0.0%	3.6%	7.1%	0.0%
Solihull	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	75.3%	0.0%	0.0%	0.0%	7.8%	0.0%	0.0%	0.0%	0.0%	0.0%	36.1%
Southam	0.0%	0.0%	0.0%	53.7%	0.9%	1.6%	0.0%	0.0%	0.0%	1.1%	0.0%	5.7%	0.0%	0.0%	0.0%	1.4%	30.2%	0.0%
Stratford-upon-Avon	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	71.7%	39.6%	0.0%	11.2%	0.0%	0.0%	0.0%	0.0%	17.7%	37.3%
ALL OTHER CENTRES / STORES:	0.0%	1.2%	0.0%	12.0%	10.1%	7.5%	0.9%	20.1%	4.4%	55.9%	0.5%	10.3%	0.0%	1.2%	0.9%	8.4%	31.6%	11.9%
Sub-Total All other Centres / stores	1.9%	4.6%	0.0%	82.9%	96.4%	82.9%	19.0%	95.4%	76.1%	96.6%	5.7%	56.4%	1.0%	4.6%	19.0%	87.6%	89.0%	85.3%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING:	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.1%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%
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%**	**100.0%**

OTHER TOP UP FOOD PURCHASES - 2018 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	WDC AREA (Zones 1,2,3&7)	TOTAL STUDY AREA
Royal Leamington Spa Town Centre:												
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%	0.0%
Co-Op (Parade)	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.1%
Iceland (Bath Street)	0.0%	3.2%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.4%
Mark and Spencer (Parade)	0.0%	0.0%	6.0%	0.0%	0.0%	1.6%	0.9%	0.0%	0.0%	0.0%	1.8%	0.9%
Spar (Bath Street)	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 (Parade)	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 Convenience Floorspace	5.7%	0.0%	5.7%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	3.0%	1.3%
Sub-total	5.7%	3.2%	13.4%	0.0%	0.0%	1.6%	0.9%	1.5%	0.0%	0.0%	6.1%	2.7%
Warwick Town Centre:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Marks and Spencer (Market Street)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.4%	0.0%	0.0%	0.5%
Sainsburys (Saltisford)	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.1%
Other convenience floorspace	0.0%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.3%
Sub-total	0.0%	4.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.4%	0.0%	1.0%	0.9%
Kenilworth Town Centre:												
Iceland (Warwick Road)	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	3.3%	0.0%	0.0%	0.0%	1.0%	0.4%
Sainsburys (Warwick Road)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.3%	0.0%	0.0%	0.0%	1.5%	0.6%
Waitrose (Bertie Road)	0.0%	0.9%	0.0%	0.0%	0.0%	1.6%	9.2%	0.0%	0.0%	0.0%	2.2%	1.1%
Other convenience floorspace	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.1%	0.0%	0.0%	0.0%	0.6%	0.2%
Sub-total	0.0%	2.1%	0.0%	0.0%	0.0%	1.6%	22.8%	0.0%	0.0%	0.0%	5.3%	2.2%
Sub-total: Town Centre Stores / Centres	5.7%	9.3%	13.4%	0.0%	0.0%	3.2%	23.8%	1.5%	4.4%	0.0%	12.4%	5.8%
OUT OF TOWN STORES/LOCATIONS												
Leamington Spa												
Aldi-Queensway	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.5%	0.2%
Asda-Chesterton Drive	1.0%	0.0%	2.9%	3.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	1.0%	0.8%
Lidl-Myton Road	0.0%	4.2%	0.7%	2.7%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	1.3%	0.9%
Morrisons-Old Warwick Road	3.2%	0.9%	0.8%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.6%
Sainsbury's-Tachbrook Drive	0.0%	1.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	4.4%	0.0%	0.6%	0.7%
Warwick												
Sainsbury's Local-Coten End	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.1%
Tesco-Emscote Road	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	0.0%	0.2%	0.3%
All Other Centres / Stores in the District	15.1%	5.1%	11.6%	2.7%	1.0%	1.3%	12.7%	4.5%	0.0%	0.0%	11.1%	5.2%
Sub-total: Out-of-Town Centre Stores / Centres	20.2%	12.2%	18.1%	9.7%	1.0%	1.3%	13.7%	6.3%	5.6%	1.1%	16.2%	8.7%
WARWICK DISTRICT COUNCIL AREA	25.9%	21.5%	31.6%	9.7%	1.0%	4.5%	37.4%	7.8%	10.0%	1.1%	28.6%	14.5%
OTHER CENTRES/STORES OUTSIDE WDC AREA												
Banbury	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.2%
Birmingham	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.1%
Coventry	0.0%	0.0%	0.0%	0.0%	26.1%	37.6%	4.4%	0.0%	0.0%	0.0%	0.9%	8.1%
Rugby	0.0%	0.0%	0.0%	2.7%	4.6%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.7%
Solihull	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	27.6%	4.4%	0.0%	0.0%	3.4%
Southam	0.0%	0.0%	0.0%	22.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%
Stratford-upon-Avon	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%	23.9%	28.8%	0.0%	5.2%
ALL OTHER CENTRES / STORES:	74.1%	78.5%	67.8%	64.0%	68.4%	58.0%	58.1%	62.4%	60.4%	68.0%	70.3%	65.5%
Sub-Total All other Centres / stores	74.1%	78.5%	68.4%	90.3%	99.0%	95.5%	62.6%	92.2%	88.7%	98.9%	71.4%	85.3%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.1%
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%

	CORE EAST Zone 1 & 3	CORE WEST (Warwick) - Zone 2	KENILWORTH Zone 7	NORTH - Zone 5&6	EAST ZONE Zone 4&10	WEST ZONE Zone 8&9
Royal Leamington Spa Town Centre:						
Co-Op (Clemens Street)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-Op (Parade)	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland (Bath Street)	0.5%	3.2%	0.0%	0.0%	0.0%	0.0%
Mark and Spencer (Parade)	2.9%	0.0%	0.9%	1.0%	0.0%	0.0%
Spar (Bath Street)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco (Parade)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Convenience Floorspace	5.7%	0.0%	0.0%	0.0%	0.0%	0.7%
Sub-total	9.5%	3.2%	0.9%	1.0%	0.0%	0.7%
Warwick Town Centre:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Marks and Spencer (Market Street)	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%
Sainsburys (Saltisford)	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%
Other convenience floorspace	0.0%	3.1%	0.0%	0.0%	0.0%	0.0%
Sub-total	0.0%	4.0%	0.0%	0.0%	0.0%	2.3%
Kenilworth Town Centre:						
Iceland (Warwick Road)	0.0%	1.2%	3.3%	0.0%	0.0%	0.0%
Sainsburys (Warwick Road)	0.0%	0.0%	7.3%	0.0%	0.0%	0.0%
Waitrose (Bertie Road)	0.0%	0.9%	9.2%	1.0%	0.0%	0.0%
Other convenience floorspace	0.0%	0.0%	3.1%	0.0%	0.0%	0.0%
Sub-total	0.0%	2.1%	22.8%	1.0%	0.0%	0.0%
Sub-total: Town Centre Stores / Centres	9.5%	9.3%	23.8%	2.1%	0.0%	3.0%
OUT OF TOWN STORES/LOCATIONS						
Leamington Spa						
Aldi-Queensway	0.5%	0.0%	1.0%	0.0%	0.0%	0.0%
Asda-Chesterton Drive	1.9%	0.0%	0.0%	0.0%	2.1%	0.0%
Lidl-Myton Road	0.3%	4.2%	0.0%	0.0%	1.5%	0.7%
Morrisons-Old Warwick Road	2.0%	0.9%	0.0%	0.0%	0.8%	0.0%
Sainsbury's-Tachbrook Drive	0.7%	1.0%	0.0%	0.0%	0.0%	2.3%
Warwick						
Sainsbury's Local-Coten End	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%
Tesco-Emscote Road	0.3%	0.0%	0.0%	0.0%	0.0%	0.9%
All Other Centres / Stores in the District	13.4%	5.1%	12.7%	1.2%	1.5%	2.1%
Sub-total: Out-of-Town Centre Stores / Centres	19.2%	12.2%	13.7%	1.2%	5.8%	6.0%
WARWICK DISTRICT COUNCIL AREA	28.7%	21.5%	37.4%	3.3%	5.8%	8.9%
OTHER CENTRES/STORES OUTSIDE WDC AREA						
Banbury	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%
Birmingham	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Coventry	0.0%	0.0%	4.4%	33.6%	0.0%	0.0%
Rugby	0.0%	0.0%	0.0%	1.6%	2.0%	0.0%
Solihull	0.0%	0.0%	0.0%	0.0%	0.0%	15.5%
Southam	0.0%	0.0%	0.0%	0.0%	12.3%	0.0%
Stratford-upon-Avon	0.0%	0.0%	0.0%	0.0%	12.8%	13.5%
ALL OTHER CENTRES / STORES:	71.0%	78.5%	58.1%	61.5%	65.8%	61.4%
Sub-Total All other Centres / stores	71.3%	78.5%	62.6%	96.7%	94.2%	90.4%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING:	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

APPENDIX 6: COMPARISON GOODS MARKET SHARES

TABLE 1: ALL COMPARISON GOODS - 2018 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	WDC AREA (Zones 1,2,3&7)	TOTAL STUDY AREA	CORE EAST Zone 1 & 3	CORE WEST (Warwick) - Zone 2	KENILWORTH Zone 7	NORTH - Zone 5&6	EAST ZONE Zone 4&10	WEST ZONE Zone 8&9
TOWN CENTRE LOCATIONS																		
Royal Leamington Spa Town Centre	44.6%	23.6%	35.7%	19.2%	4.1%	6.6%	14.3%	2.1%	5.1%	7.5%	30.2%	15.8%	40.4%	23.6%	14.3%	5.8%	13.8%	3.6%
Warwick Town Centre	1.5%	8.2%	0.4%	0.8%	0.3%	0.2%	0.7%	1.1%	2.7%	0.7%	2.8%	1.7%	1.0%	8.2%	0.7%	0.2%	0.7%	1.9%
Kenilworth Town Centre	1.9%	0.9%	0.3%	0.1%	0.1%	1.8%	27.9%	0.0%	0.3%	0.6%	7.0%	3.0%	1.2%	0.9%	27.9%	1.3%	0.3%	0.1%
Sub-total: Town Centre Store Locations	47.9%	32.8%	36.4%	20.2%	4.5%	8.6%	42.9%	3.2%	8.1%	8.8%	40.0%	20.5%	42.5%	32.8%	42.9%	7.3%	14.9%	5.6%
OUT OF TOWN CENTRE LOCATIONS																		
Leamington Spa																		
Chesterton Drive-Asda	2.2%	0.4%	7.7%	2.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.8%	2.6%	1.2%	4.8%	0.4%	0.0%	0.1%	1.4%	0.0%
Myton Road-Benson for Beds	0.2%	0.0%	0.0%	0.0%	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%
Myton Road-Homebase	1.4%	1.8%	2.4%	0.9%	0.0%	0.0%	1.1%	0.0%	0.3%	0.3%	1.7%	0.8%	1.9%	1.8%	1.1%	0.0%	0.6%	0.1%
Myton Road-Lidl	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton Road-Pets_at_Home	0.3%	0.6%	0.5%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.5%	0.2%	0.4%	0.6%	0.3%	0.0%	0.0%	0.0%
Myton_Rd-Dreams	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Old Warwick Road-Morrisons	0.7%	0.2%	0.1%	0.1%	0.2%	0.0%	0.0%	0.0%	0.1%	0.5%	0.3%	0.2%	0.4%	0.2%	0.0%	0.1%	0.3%	0.1%
Queensway-Aldi	0.1%	0.9%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.1%	0.1%	0.9%	0.0%	0.0%	0.2%	0.0%
Rugby Road-Jewsons	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tachbrook Park Drive-Leamington Shopping Park (Argos, Debenhams, New Look, Next, Outfit, Carpetright, Clarks, Mamas & Papa	1.7%	5.2%	4.7%	7.7%	0.4%	0.7%	3.0%	0.0%	1.7%	0.5%	3.6%	2.5%	3.1%	5.2%	3.0%	0.6%	4.4%	0.8%
Tachbrook Park Drive-Shires Gate Retail Park (Currys, Mothercare World)	7.2%	9.3%	9.8%	10.9%	0.1%	0.5%	1.3%	1.1%	2.8%	3.3%	7.1%	4.5%	8.4%	9.3%	1.3%	0.4%	7.4%	2.0%
Tachbrook Park Drive-Sainsbury's	1.9%	2.1%	2.4%	1.6%	0.0%	0.0%	0.3%	0.1%	0.6%	0.8%	1.7%	0.9%	2.2%	2.1%	0.3%	0.0%	1.2%	0.4%
Tachbrook Park Drive-Screwfix	0.2%	0.0%	0.5%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.3%	0.1%	0.4%	0.0%	0.4%	0.0%	0.0%	0.0%
Sub-total	15.9%	20.6%	28.1%	23.8%	1.1%	1.2%	6.4%	1.3%	5.5%	6.1%	18.0%	10.5%	21.7%	20.6%	6.4%	1.2%	15.6%	3.4%
Warwick																		
Emscote Road-Homebase	0.4%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.4%	0.2%	0.2%	1.0%	0.0%	0.0%	0.0%	0.0%
Emscote Road-Owens Electrical	0.0%	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%	0.0%	0.0%	0.0%
Emscote Road-Tesco	0.8%	3.2%	0.2%	0.3%	0.4%	0.0%	0.3%	0.1%	0.3%	0.1%	1.2%	0.5%	0.5%	3.2%	0.3%	0.1%	0.2%	0.2%
Wharf Street-Furnishing & Floors 4 Less	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Godiva Carpets	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Pine Plus	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Plumbase	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-The Cabinet Workshop	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Wallabys	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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	1.2%	4.2%	0.2%	0.4%	0.4%	0.0%	0.3%	0.2%	0.3%	0.3%	1.6%	0.7%	0.7%	4.2%	0.3%	0.1%	0.3%	0.3%
ALL OTHER LOCATIONS IN DISTRICT	0.5%	0.0%	1.2%	0.0%	0.0%	0.0%	0.3%	0.5%	0.3%	0.0%	0.5%	0.3%	0.8%	0.0%	0.3%	0.0%	0.0%	0.4%
WARWICK DISTRICT COUNCIL AREA	65.4%	57.6%	66.0%	44.3%	5.9%	9.8%	49.9%	5.1%	14.2%	15.2%	60.1%	32.0%	65.7%	57.6%	49.9%	8.6%	30.9%	9.7%
OTHER CENTRES/STORES OUTSIDE WDC AREA																		
Banbury	0.8%	0.6%	0.6%	7.8%	0.4%	0.0%	0.2%	0.0%	0.0%	12.1%	0.5%	1.9%	0.7%	0.6%	0.2%	0.1%	9.8%	0.0%
Birmingham	1.9%	2.8%	0.5%	0.0%	0.6%	2.2%	0.7%	6.2%	1.1%	0.2%	1.5%	1.8%	1.2%	2.8%	0.7%	1.7%	0.1%	3.6%
Coventry	8.7%	5.7%	8.4%	5.7%	49.0%	60.2%	17.2%	16.7%	2.6%	1.9%	9.7%	19.4%	8.6%	5.7%	17.2%	56.8%	3.9%	9.7%
Rugby	0.6%	0.2%	0.0%	9.3%	10.1%	0.1%	0.1%	0.0%	0.0%	0.0%	0.2%	1.7%	0.3%	0.2%	0.1%	3.1%	5.0%	0.0%
Solihull	1.3%	3.2%	3.5%	0.5%	0.6%	2.8%	3.2%	44.2%	5.6%	3.1%	2.8%	7.4%	2.4%	3.2%	3.2%	2.1%	1.7%	24.9%
Southam	0.2%	0.0%	0.0%	6.3%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.1%	0.0%	0.0%	0.0%	3.4%	0.0%
Stratford-upon-Avon	0.0%	4.0%	2.5%	0.7%	0.0%	0.0%	2.0%	2.4%	52.4%	38.3%	2.1%	10.1%	1.2%	4.0%	2.0%	0.0%	18.0%	27.4%
ALL OTHER CENTRES / STORES:	1.5%	1.3%	0.4%	3.1%	8.1%	3.0%	0.5%	7.8%	5.3%	4.5%	1.0%	3.5%	1.0%	1.3%	0.5%	4.5%	3.7%	6.6%
Sub-Total All other Centres / stores	14.9%	17.7%	15.9%	33.5%	68.9%	68.3%	23.9%	77.4%	67.0%	60.0%	17.9%	46.4%	15.4%	17.7%	23.9%	68.5%	45.7%	72.2%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING:	19.6%	24.8%	18.1%	22.2%	25.2%	21.9%	26.2%	17.5%	18.8%	24.8%	22.0%	21.6%	18.9%	24.8%	26.2%	22.9%	23.4%	18.1%
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%	100.0%

TABLE 2: CLOTHING & FOOTWEAR - 2018 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	WDC AREA (Zones 1,2,3&7)	TOTAL STUDY AREA	CORE EAST Zone 1 & 3	CORE WEST (Warwick) - Zone 2	KENILWORTH Zone 7	NORTH - Zone 5&6	EAST ZONE Zone 4&10	WEST ZONE Zone 8&9
TOWN CENTRE LOCATIONS																		
Royal Leamington Spa Town Centre	53.4%	33.6%	41.6%	25.3%	8.2%	11.6%	26.6%	2.5%	6.8%	11.0%	39.6%	21.9%	47.6%	33.6%	26.6%	10.6%	18.5%	4.7%
Warwick Town Centre	0.0%	1.7%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.2%	0.0%	1.7%	0.0%	0.2%	0.0%	0.0%
Kenilworth Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.4%	0.0%	0.0%	0.0%	0.9%	0.4%	0.0%	0.0%	4.4%	0.0%	0.0%	0.0%
Sub-total: Town Centre Store Locations	53.4%	35.3%	41.6%	25.3%	8.8%	11.6%	31.0%	2.5%	6.8%	11.0%	41.0%	22.5%	47.6%	35.3%	31.0%	10.8%	18.5%	4.7%
OUT OF TOWN CENTRE LOCATIONS																		
Leamington Spa																		
Chesterton Drive-Asda	2.3%	0.6%	4.1%	2.7%	0.6%	0.0%	0.0%	0.0%	0.0%	0.7%	1.9%	1.0%	3.2%	0.6%	0.0%	0.2%	1.8%	0.0%
Myton Road-Benson for Beds	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton Road-Homebase	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton Road-Lidl	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton Road-Pets_at_Home	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton_Rd-Dreams	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Old Warwick Road-Morrisons	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.1%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Queensway-Aldi	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Rugby Road-Jewsons	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tachbrook Park Drive-Leamington Shopping Park (Argos, Debenhams, New Look, Next, Outfit, Carpetright, Clarks, Mamas & Pap	0.9%	3.9%	5.2%	5.0%	0.6%	1.9%	5.7%	0.0%	2.6%	0.0%	3.8%	2.5%	3.0%	3.9%	5.7%	1.5%	2.6%	1.3%
Tachbrook Park Drive-Shires Gate Retail Park (Currys, Mothercare World)	5.6%	8.4%	12.0%	16.3%	0.0%	0.9%	1.4%	0.0%	3.9%	3.2%	7.1%	5.0%	8.8%	8.4%	1.4%	0.6%	10.1%	1.9%
Tachbrook Park Drive-Sainsbury's	2.0%	0.0%	1.2%	4.6%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	0.8%	0.9%	1.6%	0.0%	0.0%	0.0%	2.4%	0.8%
Tachbrook Park Drive-Screwfix	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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	11.6%	12.9%	22.4%	28.6%	1.3%	2.7%	7.1%	0.0%	8.1%	3.9%	13.8%	9.5%	16.9%	12.9%	7.1%	2.3%	16.9%	4.1%
Warwick																		
Emscote Road-Homebase	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Emscote Road-Owens Electrical	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Emscote Road-Tesco	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%	0.7%	0.0%	0.4%	0.0%
Wharf Street-Furnishing & Floors 4 Less	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Godiva Carpets	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Pine Plus	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Plumbase	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-The Cabinet Workshop	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Wallabys	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%	0.7%	0.0%	0.4%	0.0%
ALL OTHER LOCATIONS IN DISTRICT	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%
WARWICK DISTRICT COUNCIL AREA	65.0%	48.1%	64.0%	54.6%	10.1%	14.3%	38.8%	3.3%	15.0%	14.9%	55.0%	32.2%	64.5%	48.1%	38.8%	13.0%	35.7%	9.1%
OTHER CENTRES/STORES OUTSIDE WDC AREA																		
Banbury	2.6%	0.7%	0.5%	8.6%	0.6%	0.0%	0.7%	0.0%	0.0%	7.9%	1.2%	1.8%	1.6%	0.7%	0.7%	0.2%	8.3%	0.0%
Birmingham	0.8%	4.7%	1.3%	0.0%	0.0%	4.8%	0.7%	7.0%	2.6%	0.0%	1.9%	2.6%	1.0%	4.7%	0.7%	3.3%	0.0%	4.8%
Coventry	3.8%	2.4%	7.2%	1.7%	33.1%	54.5%	23.9%	0.0%	2.3%	0.0%	8.5%	15.0%	5.5%	2.4%	23.9%	48.1%	0.9%	1.1%
Rugby	0.0%	0.6%	0.0%	8.9%	14.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	1.8%	0.0%	0.6%	0.0%	4.4%	4.7%	0.0%
Solihull	1.6%	3.7%	7.4%	1.0%	1.4%	2.5%	2.2%	72.0%	7.3%	4.8%	3.8%	10.9%	4.5%	3.7%	2.2%	2.2%	2.8%	39.7%
Southam	0.0%	0.0%	0.0%	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%
Stratford-upon-Avon	0.0%	10.2%	1.9%	0.8%	0.0%	0.0%	3.5%	4.6%	61.3%	41.9%	3.9%	11.8%	1.0%	10.2%	3.5%	0.0%	20.4%	32.9%
ALL OTHER CENTRES / STORES:	2.3%	0.6%	0.0%	1.0%	9.8%	1.7%	0.7%	1.8%	4.7%	4.5%	0.9%	2.4%	1.2%	0.6%	0.7%	4.1%	2.7%	3.2%
Sub-Total All other Centres / stores	11.1%	22.8%	18.3%	25.5%	59.6%	63.4%	31.6%	85.4%	78.0%	59.2%	20.3%	46.7%	14.7%	22.8%	31.6%	62.3%	41.5%	81.7%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING:	23.9%	29.1%	17.6%	19.9%	30.4%	22.2%	29.6%	11.3%	7.0%	25.9%	24.8%	21.1%	20.8%	29.1%	29.6%	24.7%	22.8%	9.2%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

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TABLE 3: RECORDING MEDIA - 2018 MARKET SHARE ANALYSIS (%)
Including Internet Shopping and other Special Forms of Trading

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	WDC AREA (Zones 1,2,3&7)	TOTAL STUDY AREA	CORE EAST Zone 1 & 3	CORE WEST (Warwick) - Zone 2	KENILWORTH Zone 7	NORTH - Zone 5&6	EAST ZONE Zone 4&10	WEST ZONE Zone 8&9
TOWN CENTRE LOCATIONS																		
Royal Leamington Spa Town Centre	7.5%	17.7%	14.5%	10.1%	0.0%	0.0%	9.1%	3.3%	0.0%	4.0%	12.3%	6.2%	10.9%	17.7%	9.1%	0.0%	7.7%	1.7%
Warwick Town Centre	0.0%	3.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	3.6%	2.0%	0.9%	1.0%	0.0%	3.3%	0.0%	0.0%	0.8%	2.6%
Kenilworth Town Centre	1.2%	4.5%	0.0%	0.0%	0.0%	1.8%	10.0%	0.0%	0.0%	0.0%	3.7%	1.6%	0.6%	4.5%	10.0%	1.2%	0.0%	0.0%
Sub-total: Town Centre Store Locations	8.7%	25.5%	14.5%	10.1%	0.0%	1.8%	19.1%	4.9%	3.6%	6.0%	16.9%	8.8%	11.6%	25.5%	19.1%	1.2%	8.5%	4.3%
OUT OF TOWN CENTRE LOCATIONS																		
Leamington Spa																		
Chesterton Drive-Asda	4.3%	1.3%	7.2%	3.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	1.6%	5.7%	1.3%	0.0%	0.0%	2.3%	0.0%
Myton Road-Benson for Beds	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton Road-Homebase	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton Road-Lidl	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton Road-Pets_at_Home	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton_Rd-Dreams	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Old Warwick Road-Morrisons	1.2%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.2%	0.6%	1.3%	0.0%	0.0%	0.0%	0.0%
Queensway-Aldi	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Rugby Road-Jewsons	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tachbrook Park Drive-Leamington Shopping Park (Argos, Debenhams, New Look, Next, Outfit, Carpetright, Clarks, Mamas & Papa	1.5%	0.0%	1.3%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.4%	1.4%	0.0%	0.0%	0.0%	0.9%	0.0%
Tachbrook Park Drive-Shires Gate Retail Park (Currys, Mothercare World)	1.2%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	2.0%	0.0%	0.3%	0.4%	0.6%	0.0%	0.0%	0.4%	0.0%	1.0%
Tachbrook Park Drive-Sainsbury's	7.1%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	2.2%	0.7%	3.6%	0.0%	1.4%	0.0%	0.0%	0.0%
Tachbrook Park Drive-Screwfix	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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	15.4%	2.6%	8.5%	5.2%	1.4%	0.0%	1.4%	0.0%	2.0%	0.0%	7.2%	3.4%	12.0%	2.6%	1.4%	0.4%	3.2%	1.0%
Warwick																		
Emscote Road-Homebase	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Emscote Road-Owens Electrical	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Emscote Road-Tesco	1.3%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.3%	0.6%	2.6%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Furnishing & Floors 4 Less	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Godiva Carpets	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Pine Plus	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Plumbase	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-The Cabinet Workshop	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Wallabys	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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	1.3%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.3%	0.6%	2.6%	0.0%	0.0%	0.0%	0.0%
ALL OTHER LOCATIONS IN DISTRICT	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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 COUNCIL AREA	25.4%	30.7%	23.0%	15.3%	1.4%	1.8%	20.5%	4.9%	5.6%	6.0%	25.1%	12.5%	24.2%	30.7%	20.5%	1.7%	11.7%	5.2%
OTHER CENTRES/STORES OUTSIDE WDC AREA																		
Banbury	1.2%	0.0%	0.0%	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%	4.3%	0.3%	0.9%	0.6%	0.0%	0.0%	0.0%	3.7%	0.0%
Birmingham	0.0%	0.0%	1.3%	1.5%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.3%	0.7%	0.6%	0.0%	0.0%	1.5%	0.9%	0.0%
Coventry	1.2%	0.0%	2.4%	0.0%	30.8%	27.1%	4.4%	1.7%	0.0%	0.0%	1.9%	7.2%	1.8%	0.0%	4.4%	28.2%	0.0%	0.9%
Rugby	0.0%	0.0%	0.0%	5.2%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.7%	3.2%	0.0%
Solihull	0.0%	1.3%	0.0%	0.0%	1.2%	1.8%	1.6%	23.9%	0.0%	1.6%	0.7%	3.5%	0.0%	1.3%	1.6%	1.6%	0.6%	12.4%
Southam	0.0%	0.0%	0.0%	4.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	2.8%	0.0%
Stratford-upon-Avon	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	15.4%	7.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	2.7%	7.4%
ALL OTHER CENTRES / STORES:	0.0%	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	3.6%	1.6%	0.0%	0.7%	0.0%	0.0%	0.0%	0.7%	0.6%	1.7%
Sub-Total All other Centres / stores	2.5%	1.3%	3.6%	14.7%	36.5%	31.1%	6.0%	25.6%	19.0%	14.6%	3.3%	16.6%	3.1%	1.3%	6.0%	32.7%	14.7%	22.4%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING:	72.1%	67.9%	73.4%	70.0%	62.1%	67.2%	73.5%	69.5%	75.5%	79.4%	71.6%	70.9%	72.7%	67.9%	73.5%	65.7%	73.6%	72.4%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

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TABLE 4: AUDIO VISUAL, PHOTOGRAPHIC & COMPUTER ITEMS - 2018 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	WDC AREA (Zones 1,2,3&7)	TOTAL STUDY AREA	CORE EAST Zone 1 & 3	CORE WEST (Warwick) - Zone 2	KENILWORTH Zone 7	NORTH - Zone 5&6	EAST ZONE Zone 4&10	WEST ZONE Zone 8&9
TOWN CENTRE LOCATIONS																		
Royal Leamington Spa Town Centre	19.8%	15.9%	9.6%	5.1%	0.0%	1.9%	8.8%	0.0%	7.9%	3.3%	13.7%	6.9%	14.7%	15.9%	8.8%	1.3%	4.3%	4.0%
Warwick Town Centre	0.0%	3.0%	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%	0.9%	0.8%	0.8%	0.7%	0.0%	3.0%	0.0%	0.0%	1.7%	0.4%
Kenilworth Town Centre	0.0%	0.0%	0.7%	0.0%	0.0%	1.7%	6.6%	0.0%	0.0%	0.0%	1.7%	0.9%	0.4%	0.0%	6.6%	1.2%	0.0%	0.0%
Sub-total: Town Centre Store Locations	19.8%	18.9%	10.3%	7.4%	0.0%	3.6%	15.4%	0.0%	8.8%	4.1%	16.1%	8.5%	15.0%	18.9%	15.4%	2.4%	6.0%	4.4%
OUT OF TOWN CENTRE LOCATIONS																		
Leamington Spa																		
Chesterton Drive-Asda	0.0%	0.0%	2.7%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.5%	1.3%	0.0%	0.0%	0.0%	1.1%	0.0%
Myton Road-Benson for Beds	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton Road-Homebase	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton Road-Lidl	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton Road-Pets_at_Home	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton_Rd-Dreams	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Old Warwick Road-Morrisons	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.2%	0.1%	0.4%	0.0%	0.0%	0.0%	0.4%	0.0%
Queensway-Aldi	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.1%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%
Rugby Road-Jewsons	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tachbrook Park Drive-Leamington Shopping Park (Argos, Debenhams, New Look, Next, Outfit, Carpetright, Clarks, Mamas & Pap	2.7%	11.0%	5.1%	6.3%	0.0%	0.0%	8.0%	0.0%	4.0%	3.3%	6.7%	3.8%	3.9%	11.0%	8.0%	0.0%	5.0%	2.0%
Tachbrook Park Drive-Shires Gate Retail Park (Currys, Mothercare World)	20.1%	17.5%	27.8%	27.1%	0.8%	0.0%	7.0%	5.1%	10.5%	15.0%	18.4%	12.7%	24.0%	17.5%	7.0%	0.3%	21.9%	7.8%
Tachbrook Park Drive-Sainsbury's	1.6%	0.6%	1.8%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	2.8%	1.2%	0.7%	1.7%	0.6%	0.9%	0.0%	1.2%	0.0%
Tachbrook Park Drive-Screwfix	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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	25.2%	29.8%	37.4%	35.4%	0.8%	0.0%	15.9%	5.1%	14.5%	22.0%	27.4%	17.8%	31.3%	29.8%	15.9%	0.3%	29.6%	9.8%
Warwick																		
Emscote Road-Homebase	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.1%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%
Emscote Road-Owens Electrical	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.1%	0.1%	0.3%	0.0%	0.0%	0.0%	0.4%	0.0%
Emscote Road-Tesco	0.8%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.2%	0.4%	1.2%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Furnishing & Floors 4 Less	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Godiva Carpets	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Pine Plus	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Plumbase	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-The Cabinet Workshop	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Wallabys	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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	0.8%	2.1%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.9%	0.4%	0.7%	2.1%	0.0%	0.0%	0.4%	0.0%
ALL OTHER LOCATIONS IN DISTRICT	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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 COUNCIL AREA	45.8%	50.8%	48.3%	42.8%	0.8%	3.6%	31.3%	5.1%	23.3%	27.0%	44.4%	26.7%	47.1%	50.8%	31.3%	2.7%	36.0%	14.3%
OTHER CENTRES/STORES OUTSIDE WDC AREA																		
Banbury	0.0%	0.0%	4.7%	2.7%	0.0%	0.0%	0.0%	0.0%	0.0%	15.9%	1.2%	2.1%	2.4%	0.0%	0.0%	0.0%	8.4%	0.0%
Birmingham	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%
Coventry	10.9%	1.2%	1.3%	3.6%	57.2%	59.2%	18.5%	43.0%	4.0%	1.7%	7.6%	21.5%	6.1%	1.2%	18.5%	58.6%	2.8%	23.3%
Rugby	0.0%	0.0%	0.0%	8.4%	8.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	2.6%	4.8%	0.0%
Solihull	1.8%	4.6%	10.1%	0.0%	0.0%	9.8%	7.5%	21.6%	12.0%	5.6%	6.0%	7.9%	6.0%	4.6%	7.5%	6.7%	2.4%	16.7%
Southam	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Stratford-upon-Avon	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	9.5%	10.7%	0.2%	2.2%	0.0%	0.6%	0.0%	0.0%	4.6%	5.7%
ALL OTHER CENTRES / STORES:	0.8%	0.0%	0.0%	0.9%	2.7%	0.0%	0.0%	0.9%	2.9%	0.0%	0.2%	0.8%	0.4%	0.0%	0.0%	0.9%	0.5%	1.9%
Sub-Total All other Centres / stores	13.6%	6.4%	16.1%	15.6%	68.2%	70.1%	26.0%	67.4%	28.3%	33.8%	15.2%	36.2%	14.8%	6.4%	26.0%	69.5%	23.5%	47.7%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING:	40.6%	42.8%	35.6%	41.6%	31.0%	26.4%	42.8%	27.5%	48.4%	39.2%	40.4%	37.1%	38.1%	42.8%	42.8%	27.8%	40.6%	38.1%
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%	100.0%

TABLE 5: **BOOKS, STATIONERY & DRAWING MATERIALS - 2018 MARKET SHARE ANALYSIS (%)**
Including Internet Shopping and other Special Forms of Trading

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	WDC AREA (Zones 1,2,3&7)	TOTAL STUDY AREA	CORE EAST Zone 1 & 3	CORE WEST (Warwick) - Zone 2	KENILWORTH Zone 7	NORTH - Zone 5&6	EAST ZONE Zone 4&10	WEST ZONE Zone 8&9
TOWN CENTRE LOCATIONS																		
Royal Leamington Spa Town Centre	45.8%	23.2%	53.5%	39.6%	3.0%	8.3%	7.2%	4.8%	6.2%	5.4%	33.3%	19.5%	49.4%	23.2%	7.2%	6.8%	23.2%	5.5%
Warwick Town Centre	1.8%	10.5%	0.0%	0.0%	0.0%	0.0%	0.0%	3.9%	5.4%	0.0%	3.0%	2.2%	0.9%	10.5%	0.0%	0.0%	0.0%	4.6%
Kenilworth Town Centre	1.8%	0.0%	0.0%	0.0%	0.0%	1.8%	59.4%	0.0%	0.0%	0.8%	14.5%	5.9%	0.9%	0.0%	59.4%	1.3%	0.4%	0.0%
Sub-total: Town Centre Store Locations	49.4%	33.7%	53.5%	39.6%	3.0%	10.2%	66.6%	8.7%	11.6%	6.1%	50.7%	27.7%	51.3%	33.7%	66.6%	8.2%	23.5%	10.1%
OUT OF TOWN CENTRE LOCATIONS																		
Leamington Spa																		
Chesterton Drive-Asda	0.9%	0.0%	9.3%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	2.6%	1.2%	4.8%	0.0%	0.0%	0.0%	1.1%	0.0%
Myton Road-Benson for Beds	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton Road-Homebase	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton Road-Lidl	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton Road-Pets_at_Home	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton_Rd-Dreams	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Old Warwick Road-Morrisons	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%
Queensway-Aldi	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Rugby Road-Jewsons	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tachbrook Park Drive-Leamington Shopping Park (Argos, Debenhams, New Look, Next, Outfit, Carpetright, Clarks, Mamas & Papa	0.9%	2.5%	1.5%	1.1%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	1.7%	0.7%	1.2%	2.5%	2.0%	0.0%	0.6%	0.0%
Tachbrook Park Drive-Shires Gate Retail Park (Currys, Mothercare World)	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.2%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Tachbrook Park Drive-Sainsbury's	0.0%	6.9%	1.1%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	1.9%	1.0%	0.5%	6.9%	0.0%	0.0%	1.4%	0.0%
Tachbrook Park Drive-Screwfix	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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	1.8%	9.4%	13.4%	3.5%	0.0%	0.0%	2.0%	0.0%	0.0%	3.1%	6.5%	3.1%	7.3%	9.4%	2.0%	0.0%	3.3%	0.0%
Warwick																		
Emscote Road-Homebase	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Emscote Road-Owens Electrical	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Emscote Road-Tesco	0.0%	5.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	1.3%	0.6%	0.0%	5.7%	0.0%	0.0%	0.4%	0.0%
Wharf Street-Furnishing & Floors 4 Less	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Godiva Carpets	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Pine Plus	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Plumbase	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-The Cabinet Workshop	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Wallabys	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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	0.0%	5.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	1.3%	0.6%	0.0%	5.7%	0.0%	0.0%	0.4%	0.0%
ALL OTHER LOCATIONS IN DISTRICT	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
WARWICK DISTRICT COUNCIL AREA	51.2%	48.8%	66.9%	43.2%	3.0%	10.2%	68.5%	8.7%	12.8%	10.0%	58.6%	31.5%	58.6%	48.8%	68.5%	8.2%	27.2%	10.7%
OTHER CENTRES/STORES OUTSIDE WDC AREA																		
Banbury	0.0%	0.0%	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	7.9%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	5.1%	0.0%
Birmingham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	3.3%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	2.6%
Coventry	0.0%	0.0%	0.0%	0.0%	45.2%	51.1%	3.3%	1.9%	0.0%	0.0%	0.8%	11.0%	0.0%	0.0%	3.3%	49.5%	0.0%	1.0%
Rugby	0.0%	0.0%	0.0%	7.1%	7.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	2.0%	3.7%	0.0%
Solihull	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.8%	45.7%	1.9%	0.0%	0.2%	5.8%	0.0%	0.0%	0.8%	0.3%	0.0%	24.4%
Southam	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%
Stratford-upon-Avon	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.9%	49.9%	41.9%	0.0%	9.2%	0.0%	0.0%	0.0%	0.0%	20.7%	24.7%
ALL OTHER CENTRES / STORES:	0.0%	0.0%	0.0%	0.0%	3.0%	1.8%	0.0%	3.9%	0.0%	5.5%	0.0%	1.4%	0.0%	0.0%	0.0%	2.1%	2.7%	2.0%
Sub-Total All other Centres / stores	0.0%	0.0%	0.0%	11.7%	56.6%	53.0%	4.1%	54.3%	55.1%	55.3%	1.0%	30.0%	0.0%	0.0%	4.1%	54.0%	32.7%	54.7%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING:	48.8%	51.2%	33.1%	45.1%	40.4%	36.9%	27.4%	37.0%	32.1%	34.7%	40.4%	38.5%	41.4%	51.2%	27.4%	37.9%	40.1%	34.6%
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%	100.0%

TABLE 6: **PET PRODUCTS, HOBBY ITEMS, SPORTSWEAR, CAMPING, CYCLING & MUSICAL INSTRUMENTS - 2018 MARKET SHARE ANALYSIS (%)**
Including Internet Shopping and other Special Forms of Trading

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	WDC AREA (Zones 1,2,3&7)	TOTAL STUDY AREA	CORE EAST Zone 1 & 3	CORE WEST (Warwick) - Zone 2	KENILWORTH Zone 7	NORTH - Zone 5&6	EAST ZONE Zone 4&10	WEST ZONE Zone 8&9
TOWN CENTRE LOCATIONS																		
Royal Leamington Spa Town Centre	40.2%	19.5%	29.6%	19.0%	2.7%	7.6%	23.4%	5.5%	8.3%	7.8%	28.3%	15.9%	35.1%	19.5%	23.4%	5.9%	14.0%	6.9%
Warwick Town Centre	1.5%	5.1%	0.0%	0.0%	0.0%	0.0%	3.4%	1.7%	2.3%	1.9%	2.5%	1.5%	0.8%	5.1%	3.4%	0.0%	0.8%	2.0%
Kenilworth Town Centre	10.1%	0.0%	0.0%	0.0%	0.0%	2.7%	15.7%	0.0%	1.0%	0.0%	6.2%	2.8%	5.3%	0.0%	15.7%	1.8%	0.0%	0.5%
Sub-total: Town Centre Store Locations	51.8%	24.6%	29.6%	19.0%	2.7%	10.3%	42.5%	7.2%	11.6%	9.7%	37.0%	20.3%	41.2%	24.6%	42.5%	7.7%	14.8%	9.4%
OUT OF TOWN CENTRE LOCATIONS																		
Leamington Spa																		
Chesterton Drive-Asda	1.2%	0.8%	12.6%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	3.6%	1.7%	6.6%	0.8%	0.0%	0.0%	1.8%	0.0%
Myton Road-Benson for Beds	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton Road-Homebase	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton Road-Lidl	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton Road-Pets_at_Home	2.5%	4.4%	4.0%	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	3.3%	1.2%	3.2%	4.4%	2.3%	0.0%	0.0%	0.0%
Myton_Rd-Dreams	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Old Warwick Road-Morrisons	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Queensway-Aldi	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%
Rugby Road-Jewsons	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tachbrook Park Drive-Leamington Shopping Park (Argos, Debenhams, New Look, Next, Outfit, Carpetright, Clarks, Mamas & Pap	0.0%	8.6%	1.1%	15.0%	0.8%	0.0%	1.0%	0.0%	0.0%	0.0%	2.8%	2.6%	0.5%	8.6%	1.0%	0.3%	8.3%	0.0%
Tachbrook Park Drive-Shires Gate Retail Park (Currys, Mothercare World)	4.2%	7.6%	7.4%	2.2%	0.0%	0.0%	2.1%	0.0%	1.3%	0.0%	5.4%	2.4%	5.7%	7.6%	2.1%	0.0%	1.2%	0.6%
Tachbrook Park Drive-Sainsbury's	0.0%	3.8%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	0.6%	1.1%	3.8%	0.0%	0.0%	0.0%	0.0%
Tachbrook Park Drive-Screwfix	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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	7.8%	25.1%	27.3%	20.9%	0.8%	0.0%	5.4%	0.0%	1.3%	0.9%	16.7%	8.6%	17.1%	25.1%	5.4%	0.3%	11.9%	0.6%
Warwick																		
Emscote Road-Homebase	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Emscote Road-Owens Electrical	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Emscote Road-Tesco	0.0%	2.4%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.8%	0.4%	0.3%	2.4%	0.0%	0.0%	0.0%	0.5%
Wharf Street-Furnishing & Floors 4 Less	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Godiva Carpets	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Pine Plus	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Plumbase	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-The Cabinet Workshop	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Wallabys	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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	0.0%	2.4%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.8%	0.4%	0.3%	2.4%	0.0%	0.0%	0.0%	0.5%
ALL OTHER LOCATIONS IN DISTRICT	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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 COUNCIL AREA	59.6%	52.0%	57.6%	39.9%	3.4%	10.3%	47.9%	7.2%	14.0%	10.6%	54.5%	29.3%	58.7%	52.0%	47.9%	8.0%	26.7%	10.6%
OTHER CENTRES/STORES OUTSIDE WDC AREA																		
Banbury	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	2.6%	0.0%
Birmingham	10.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	11.5%	0.0%	0.0%	2.7%	2.3%	5.3%	0.0%	0.0%	0.0%	0.0%	5.7%
Coventry	6.6%	5.4%	13.5%	2.5%	47.8%	53.4%	18.3%	16.8%	2.1%	0.0%	10.5%	17.4%	9.8%	5.4%	18.3%	51.5%	1.4%	9.4%
Rugby	4.2%	0.0%	0.0%	9.7%	12.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	2.3%	2.2%	0.0%	0.0%	4.1%	5.4%	0.0%
Solihull	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	20.1%	1.1%	0.0%	0.0%	2.4%	0.0%	0.0%	0.0%	0.3%	0.0%	10.6%
Southam	1.2%	0.0%	0.0%	6.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.8%	0.6%	0.0%	0.0%	0.0%	3.5%	0.0%
Stratford-upon-Avon	0.0%	2.4%	0.7%	1.4%	0.0%	0.0%	3.4%	2.1%	55.4%	30.9%	1.6%	9.8%	0.3%	2.4%	3.4%	0.0%	14.7%	28.8%
ALL OTHER CENTRES / STORES:	0.0%	0.0%	1.8%	5.2%	8.0%	7.3%	1.0%	2.7%	1.0%	3.9%	0.7%	3.2%	0.8%	0.0%	1.0%	7.6%	4.6%	1.9%
Sub-Total All other Centres / stores	22.0%	7.8%	15.9%	27.5%	68.6%	60.7%	22.7%	53.3%	59.6%	37.9%	16.9%	38.7%	19.1%	7.8%	22.7%	63.4%	32.2%	56.4%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING:	18.3%	40.1%	26.5%	32.7%	28.0%	29.0%	29.4%	39.5%	26.5%	51.5%	28.7%	32.0%	22.2%	40.1%	29.4%	28.6%	41.1%	33.0%
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%	100.0%

TABLE 7: FURNITURE, CARPETS, OTHER FLOOR COVERINGS AND HOUSEHOLD TEXTILES - 2018 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	WDC AREA (Zones 1,2,3&7)	TOTAL STUDY AREA	CORE EAST Zone 1 & 3	CORE WEST (Warwick) - Zone 2	KENILWORTH Zone 7	NORTH - Zone 5&6	EAST ZONE Zone 4&10	WEST ZONE Zone 8&9
TOWN CENTRE LOCATIONS																		
Royal Leamington Spa Town Centre	31.1%	5.0%	23.1%	7.6%	4.4%	5.9%	7.6%	1.2%	1.0%	7.4%	17.0%	9.1%	27.6%	5.0%	7.6%	5.4%	7.5%	1.1%
Warwick Town Centre	1.2%	5.2%	0.8%	2.6%	0.0%	1.6%	0.0%	1.2%	3.4%	0.9%	1.9%	1.8%	1.0%	5.2%	0.0%	1.1%	1.8%	2.3%
Kenilworth Town Centre	2.4%	4.9%	2.4%	1.0%	0.0%	3.9%	27.3%	0.0%	0.0%	1.9%	8.7%	4.1%	2.4%	4.9%	27.3%	2.7%	1.4%	0.0%
Sub-total: Town Centre Store Locations	34.7%	15.0%	26.4%	11.2%	4.4%	11.4%	34.8%	2.3%	4.4%	10.1%	27.6%	15.0%	31.1%	15.0%	34.8%	9.3%	10.7%	3.3%
OUT OF TOWN CENTRE LOCATIONS																		
Leamington Spa																		
Chesterton Drive-Asda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton Road-Benson for Beds	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.1%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton Road-Homebase	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton Road-Lidl	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton Road-Pets_at_Home	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton_Rd-Dreams	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Old Warwick Road-Morrisons	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Queensway-Aldi	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Rugby Road-Jewsons	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tachbrook Park Drive-Leamington Shopping Park (Argos, Debenhams, New Look, Next, Outfit, Carpetright, Clarks, Mamas & Papa	5.3%	10.7%	6.4%	6.6%	0.0%	0.0%	2.2%	0.0%	0.0%	0.9%	6.3%	3.0%	5.8%	10.7%	2.2%	0.0%	3.9%	0.0%
Tachbrook Park Drive-Shires Gate Retail Park (Currys, Mothercare World)	15.0%	17.5%	4.9%	2.1%	0.0%	0.0%	0.0%	2.3%	1.0%	2.1%	10.1%	4.5%	10.6%	17.5%	0.0%	0.0%	2.1%	1.7%
Tachbrook Park Drive-Sainsbury's	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tachbrook Park Drive-Screwfix	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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	21.5%	28.2%	11.4%	8.7%	0.0%	0.0%	2.2%	2.3%	1.0%	3.0%	16.7%	7.6%	17.0%	28.2%	2.2%	0.0%	6.0%	1.7%
Warwick																		
Emscote Road-Homebase	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Emscote Road-Owens Electrical	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Emscote Road-Tesco	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Furnishing & Floors 4 Less	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Godiva Carpets	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Pine Plus	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Plumbase	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-The Cabinet Workshop	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Wallabys	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ALL OTHER LOCATIONS IN DISTRICT	2.4%	0.0%	3.7%	0.0%	0.0%	0.0%	2.2%	1.2%	0.0%	0.0%	2.0%	0.9%	3.0%	0.0%	2.2%	0.0%	0.0%	0.6%
WARWICK DISTRICT COUNCIL AREA	58.5%	43.2%	41.5%	19.9%	4.4%	11.4%	39.2%	5.8%	5.4%	13.1%	46.3%	23.5%	51.1%	43.2%	39.2%	9.3%	16.8%	5.6%
OTHER CENTRES/STORES OUTSIDE WDC AREA																		
Banbury	0.0%	1.9%	0.0%	19.2%	0.0%	0.0%	0.0%	0.0%	0.0%	23.6%	0.5%	3.9%	0.0%	1.9%	0.0%	0.0%	21.2%	0.0%
Birmingham	1.2%	7.3%	0.0%	0.0%	0.0%	1.3%	2.2%	7.5%	1.0%	0.9%	2.8%	2.3%	0.7%	7.3%	2.2%	0.9%	0.4%	4.3%
Coventry	23.2%	25.0%	26.5%	25.2%	49.8%	52.6%	22.2%	33.8%	8.7%	12.3%	24.2%	29.0%	24.6%	25.0%	22.2%	51.7%	19.2%	21.5%
Rugby	0.0%	0.0%	0.0%	10.0%	6.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	2.1%	5.4%	0.0%
Solihull	5.3%	8.3%	1.5%	1.3%	0.0%	4.8%	9.7%	36.3%	12.0%	7.2%	6.3%	9.3%	3.7%	8.3%	9.7%	3.4%	4.0%	24.4%
Southam	0.0%	0.0%	0.0%	8.1%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.4%	4.3%	0.0%
Stratford-upon-Avon	0.0%	2.7%	8.8%	0.0%	0.0%	0.0%	1.1%	1.4%	42.9%	31.3%	2.9%	8.6%	3.9%	2.7%	1.1%	0.0%	14.5%	21.8%
ALL OTHER CENTRES / STORES:	2.9%	6.5%	0.7%	3.4%	10.1%	1.3%	0.0%	2.6%	6.1%	0.9%	2.7%	3.3%	1.9%	6.5%	0.0%	4.0%	2.3%	4.3%
Sub-Total All other Centres / stores	32.6%	51.6%	37.5%	67.1%	67.9%	60.0%	35.2%	81.7%	70.8%	76.2%	39.4%	58.6%	34.8%	51.6%	35.2%	62.4%	71.3%	76.3%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING:	8.9%	5.2%	21.0%	13.0%	27.7%	28.6%	25.6%	12.5%	23.8%	10.7%	14.3%	17.9%	14.2%	5.2%	25.6%	28.3%	11.9%	18.1%
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%	100.0%

TABLE 8: DIY GOODS, DECORATING SUPPLIES AND GARDEN PRODUCTS - 2018 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	WDC AREA (Zones 1,2,3&7)	TOTAL STUDY AREA	CORE EAST Zone 1 & 3	CORE WEST (Warwick) - Zone 2	KENILWORTH Zone 7	NORTH - Zone 5&6	EAST ZONE Zone 4&10	WEST ZONE Zone 8&9
TOWN CENTRE LOCATIONS																		
Royal Leamington Spa Town Centre	9.3%	11.4%	8.5%	9.4%	0.6%	0.0%	6.4%	1.0%	2.8%	6.2%	8.9%	5.0%	8.9%	11.4%	6.4%	0.2%	7.9%	1.8%
Warwick Town Centre	7.7%	8.7%	1.4%	1.3%	0.0%	0.0%	0.0%	0.0%	2.4%	1.1%	4.6%	2.1%	4.9%	8.7%	0.0%	0.0%	1.2%	1.2%
Kenilworth Town Centre	0.0%	0.6%	0.0%	0.0%	0.0%	1.9%	18.0%	0.0%	0.0%	0.0%	4.7%	1.9%	0.0%	0.6%	18.0%	1.3%	0.0%	0.0%
Sub-total: Town Centre Store Locations	17.0%	20.8%	9.9%	10.7%	0.6%	1.9%	24.3%	1.0%	5.2%	7.3%	18.2%	9.1%	13.8%	20.8%	24.3%	1.5%	9.1%	3.0%
OUT OF TOWN CENTRE LOCATIONS																		
Leamington Spa																		
Chesterton Drive-Asda	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.1%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton Road-Benson for Beds	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton Road-Homebase	28.4%	38.8%	54.6%	16.3%	0.6%	0.0%	19.5%	0.0%	5.4%	5.5%	34.6%	14.7%	40.1%	38.8%	19.5%	0.2%	11.3%	2.6%
Myton Road-Lidl	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton Road-Pets_at_Home	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton_Rd-Dreams	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Old Warwick Road-Morrisons	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Queensway-Aldi	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Rugby Road-Jewsons	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tachbrook Park Drive-Leamington Shopping Park (Argos, Debenhams, New Look, Next, Outfit, Carpetright, Clarks, Mamas & Papa	3.8%	8.3%	2.5%	11.9%	0.0%	0.0%	1.5%	0.0%	3.8%	0.9%	4.1%	3.1%	3.3%	8.3%	1.5%	0.0%	6.8%	1.8%
Tachbrook Park Drive-Shires Gate Retail Park (Currys, Mothercare World)	5.3%	2.1%	7.9%	3.8%	0.0%	0.0%	0.0%	1.9%	0.8%	0.7%	3.7%	2.0%	6.5%	2.1%	0.0%	0.0%	2.4%	1.4%
Tachbrook Park Drive-Sainsbury's	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tachbrook Park Drive-Screwfix	4.7%	0.6%	11.5%	0.0%	0.0%	0.0%	7.0%	0.0%	0.0%	0.0%	5.7%	2.0%	7.7%	0.6%	7.0%	0.0%	0.0%	0.0%
Sub-total	42.2%	49.8%	78.0%	31.9%	0.6%	0.0%	28.0%	1.9%	10.0%	7.1%	48.4%	21.9%	58.2%	49.8%	28.0%	0.2%	20.4%	5.8%
Warwick																		
Emscote Road-Homebase	8.5%	20.0%	0.0%	0.8%	0.0%	0.0%	0.8%	0.9%	0.8%	0.7%	7.6%	3.0%	4.7%	20.0%	0.8%	0.0%	0.8%	0.9%
Emscote Road-Owens Electrical	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Emscote Road-Tesco	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Furnishing & Floors 4 Less	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Godiva Carpets	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Pine Plus	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Plumbase	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-The Cabinet Workshop	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Wallabys	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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%	20.0%	0.0%	0.8%	0.0%	0.0%	0.8%	0.9%	0.8%	0.7%	7.6%	3.0%	4.7%	20.0%	0.8%	0.0%	0.8%	0.9%
ALL OTHER LOCATIONS IN DISTRICT	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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 COUNCIL AREA	67.7%	90.5%	87.8%	43.5%	1.3%	1.9%	53.1%	3.8%	16.1%	15.1%	74.2%	33.9%	76.7%	90.5%	53.1%	1.7%	30.3%	9.7%
OTHER CENTRES/STORES OUTSIDE WDC AREA																		
Banbury	0.0%	0.0%	0.0%	16.4%	0.0%	0.0%	0.0%	0.0%	0.0%	17.7%	0.0%	3.2%	0.0%	0.0%	0.0%	0.0%	17.0%	0.0%
Birmingham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Coventry	28.4%	2.6%	9.2%	10.5%	88.6%	94.5%	38.9%	78.4%	3.6%	0.7%	20.3%	39.5%	19.8%	2.6%	38.9%	92.8%	6.0%	42.3%
Rugby	0.0%	0.0%	0.0%	11.7%	7.5%	1.0%	1.5%	0.0%	0.0%	0.0%	0.4%	2.0%	0.0%	0.0%	1.5%	2.9%	6.3%	0.0%
Solihull	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	7.3%	0.0%	0.0%	0.1%	0.9%	0.3%	0.0%	0.0%	0.0%	0.0%	3.8%
Southam	0.0%	0.0%	0.0%	5.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	3.0%	0.0%
Stratford-upon-Avon	0.0%	0.6%	1.7%	3.9%	0.0%	0.0%	3.2%	4.7%	78.3%	60.5%	1.3%	15.7%	0.8%	0.6%	3.2%	0.0%	30.1%	40.2%
ALL OTHER CENTRES / STORES:	0.0%	0.0%	0.0%	6.5%	2.0%	0.9%	0.8%	3.0%	1.0%	5.0%	0.2%	1.9%	0.0%	0.0%	0.8%	1.2%	5.8%	2.1%
Sub-Total All other Centres / stores	28.4%	3.2%	11.5%	54.7%	98.1%	96.4%	44.3%	93.4%	82.9%	84.0%	22.3%	63.8%	20.9%	3.2%	44.3%	96.9%	68.2%	88.3%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING:	3.8%	6.3%	0.7%	1.9%	0.7%	1.7%	2.6%	2.9%	1.0%	0.9%	3.4%	2.2%	2.4%	6.3%	2.6%	1.4%	1.4%	2.0%
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%	100.0%

TABLE 9: PERSONAL CARE, NON-ELECTRIC APPLIANCES, COSMETICS - 2018 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	WDC AREA (Zones 1,2,3&7)	TOTAL STUDY AREA	CORE EAST Zone 1 & 3	CORE WEST (Warwick) - Zone 2	KENILWORTH Zone 7	NORTH - Zone 5&6	EAST ZONE Zone 4&10	WEST ZONE Zone 8&9
TOWN CENTRE LOCATIONS																		
Royal Leamington Spa Town Centre	56.4%	22.6%	47.9%	21.5%	2.5%	3.0%	0.7%	0.8%	0.9%	4.8%	32.8%	15.6%	52.5%	22.6%	0.7%	2.9%	13.7%	0.9%
Warwick Town Centre	3.9%	26.6%	0.6%	1.0%	0.6%	0.0%	1.5%	3.3%	7.1%	0.7%	8.4%	4.5%	2.4%	26.6%	1.5%	0.2%	0.8%	5.3%
Kenilworth Town Centre	0.7%	1.1%	0.0%	0.0%	0.0%	2.7%	82.1%	0.0%	0.0%	0.7%	19.4%	7.8%	0.4%	1.1%	82.1%	1.9%	0.3%	0.0%
Sub-total: Town Centre Store Locations	61.1%	50.3%	48.5%	22.5%	3.1%	5.7%	84.2%	4.2%	8.0%	6.2%	60.7%	27.9%	55.3%	50.3%	84.2%	4.9%	14.9%	6.2%
OUT OF TOWN CENTRE LOCATIONS																		
Leamington Spa																		
Chesterton Drive-Asda	6.1%	0.6%	23.2%	3.7%	0.6%	0.0%	0.0%	0.0%	0.0%	2.8%	7.3%	3.4%	14.0%	0.6%	0.0%	0.2%	3.3%	0.0%
Myton Road-Benson for Beds	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton Road-Homebase	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton Road-Lidl	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%
Myton Road-Pets_at_Home	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton_Rd-Dreams	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Old Warwick Road-Morrisons	2.2%	1.1%	0.5%	0.8%	1.2%	0.0%	0.0%	0.0%	0.7%	2.4%	1.0%	0.8%	1.4%	1.1%	0.0%	0.4%	1.5%	0.4%
Queensway-Aldi	0.7%	5.2%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.7%	0.4%	5.2%	0.0%	0.0%	0.4%	0.0%
Rugby Road-Jewsons	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tachbrook Park Drive-Leamington Shopping Park (Argos, Debenhams, New Look, Next, Outfit, Carpetright, Clarks, Mamas & Pap:	0.7%	0.0%	4.3%	9.1%	0.6%	1.0%	0.0%	0.0%	2.5%	0.0%	1.2%	1.8%	2.4%	0.0%	0.0%	0.9%	4.8%	1.3%
Tachbrook Park Drive-Shires Gate Retail Park (Currys, Mothercare World)	6.0%	10.2%	7.2%	13.6%	0.0%	0.8%	0.0%	1.7%	1.6%	4.7%	6.0%	4.4%	6.6%	10.2%	0.0%	0.6%	9.4%	1.7%
Tachbrook Park Drive-Sainsbury's	6.1%	7.5%	8.5%	2.7%	0.0%	0.0%	1.3%	0.8%	0.9%	0.9%	5.9%	2.8%	7.2%	7.5%	1.3%	0.0%	1.8%	0.9%
Tachbrook Park Drive-Screwfix	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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	21.8%	24.6%	43.7%	30.7%	3.0%	1.9%	1.3%	2.5%	5.8%	10.7%	23.0%	13.8%	31.9%	24.6%	1.3%	2.2%	21.3%	4.2%
Warwick																		
Emscote Road-Homebase	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Emscote Road-Owens Electrical	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Emscote Road-Tesco	4.0%	14.6%	0.6%	0.8%	2.4%	0.0%	0.7%	0.8%	0.7%	0.7%	5.2%	2.4%	2.4%	14.6%	0.7%	0.7%	0.7%	0.8%
Wharf Street-Furnishing & Floors 4 Less	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Godiva Carpets	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Pine Plus	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Plumbase	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-The Cabinet Workshop	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Wallabys	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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	4.0%	14.6%	0.6%	0.8%	2.4%	0.0%	0.7%	0.8%	0.7%	0.7%	5.2%	2.4%	2.4%	14.6%	0.7%	0.7%	0.7%	0.8%
ALL OTHER LOCATIONS IN DISTRICT	0.9%	0.0%	4.8%	0.0%	0.0%	0.0%	0.0%	0.8%	1.5%	0.0%	1.4%	0.8%	2.7%	0.0%	0.0%	0.0%	0.0%	1.2%
WARWICK DISTRICT COUNCIL AREA	87.8%	89.5%	97.6%	53.9%	8.6%	7.6%	86.2%	8.3%	16.1%	17.7%	90.2%	44.9%	92.3%	89.5%	86.2%	7.9%	37.0%	12.3%
OTHER CENTRES/STORES OUTSIDE WDC AREA																		
Banbury	0.0%	0.0%	0.0%	6.4%	0.7%	0.0%	0.0%	0.0%	0.0%	11.4%	0.0%	1.6%	0.0%	0.0%	0.0%	0.2%	8.7%	0.0%
Birmingham	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.7%	0.1%	0.2%	0.0%	0.6%	0.0%	0.0%	0.3%	0.5%
Coventry	6.7%	0.0%	0.0%	3.2%	67.5%	82.0%	1.6%	8.4%	0.0%	0.0%	2.2%	19.8%	3.6%	0.0%	1.6%	77.6%	1.7%	4.1%
Rugby	0.0%	0.0%	0.0%	10.2%	8.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	2.7%	5.4%	0.0%
Solihull	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	1.5%	41.3%	0.8%	0.0%	1.0%	4.9%	0.0%	2.5%	1.5%	0.0%	0.0%	20.4%
Southam	0.0%	0.0%	0.0%	16.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	8.6%	0.0%
Stratford-upon-Avon	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.8%	68.7%	55.4%	0.1%	12.5%	0.2%	0.0%	0.0%	0.0%	25.9%	35.9%
ALL OTHER CENTRES / STORES:	0.0%	0.6%	0.0%	5.3%	7.9%	5.8%	0.0%	34.3%	12.8%	10.3%	0.1%	8.0%	0.0%	0.6%	0.0%	6.5%	7.6%	23.2%
Sub-Total All other Centres / stores	6.7%	3.6%	0.5%	41.1%	85.0%	87.9%	3.1%	85.9%	82.3%	77.8%	3.6%	50.0%	3.9%	3.6%	3.1%	87.0%	58.3%	84.0%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING:	5.5%	6.9%	1.8%	4.9%	6.4%	4.6%	10.7%	5.8%	1.7%	4.5%	6.2%	5.1%	3.8%	6.9%	10.7%	5.1%	4.7%	3.7%
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%	100.0%

TABLE 10: ALL OTHER GOODS (JEWLLERY,GLASSWARE, TABLEWARE HOUSEHOLD UTENSILS - 2018 MARKET SHARE ANALYSIS (%)

Including Internet Shopping and other Special Forms of Trading

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	WDC AREA (Zones 1,2,3&7)	TOTAL STUDY AREA	CORE EAST Zone 1 & 3	CORE WEST (Warwick) - Zone 2	KENILWORTH Zone 7	NORTH - Zone 5&6	EAST ZONE Zone 4&10	WEST ZONE Zone 8&9
TOWN CENTRE LOCATIONS																		
Royal Leamington Spa Town Centre	67.1%	43.8%	54.7%	32.4%	2.5%	4.7%	12.2%	0.0%	7.7%	7.8%	45.9%	22.4%	61.3%	43.8%	12.2%	4.0%	21.1%	3.9%
Warwick Town Centre	0.0%	9.8%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	3.1%	0.0%	2.9%	1.4%	0.6%	9.8%	0.0%	0.0%	0.0%	1.6%
Kenilworth Town Centre	0.0%	0.0%	0.0%	0.0%	1.2%	1.7%	31.7%	0.0%	1.4%	2.2%	7.0%	3.2%	0.0%	0.0%	31.7%	1.5%	1.0%	0.7%
Sub-total: Town Centre Store Locations	67.1%	53.6%	56.1%	32.4%	3.7%	6.3%	43.9%	0.0%	12.2%	10.0%	55.8%	27.0%	61.9%	53.6%	43.9%	5.5%	22.1%	6.2%
OUT OF TOWN CENTRE LOCATIONS																		
Leamington Spa																		
Chesterton Drive-Asda	2.3%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.4%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton Road-Benson for Beds	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton Road-Homebase	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton Road-Lidl	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton Road-Pets_at_Home	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton_Rd-Dreams	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Old Warwick Road-Morrisons	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Queensway-Aldi	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%
Rugby Road-Jewsons	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tachbrook Park Drive-Leamington Shopping Park (Argos, Debenhams, New Look, Next, Outfit, Carpetright, Clarks, Mamas & Papa	1.1%	0.0%	9.8%	5.5%	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	3.1%	1.7%	5.2%	0.0%	1.7%	0.0%	3.0%	0.0%
Tachbrook Park Drive-Shires Gate Retail Park (Currys, Mothercare World)	1.1%	2.6%	6.1%	12.5%	0.0%	1.4%	0.0%	0.0%	1.7%	0.0%	2.5%	2.5%	3.4%	2.6%	0.0%	0.9%	6.7%	0.9%
Tachbrook Park Drive-Sainsbury's	1.2%	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.8%	0.8%	0.6%	1.5%	0.0%	0.0%	0.0%	1.8%	0.0%
Tachbrook Park Drive-Screwfix	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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	5.8%	2.6%	19.8%	19.2%	0.0%	1.4%	1.7%	0.0%	1.7%	3.8%	7.5%	5.3%	12.3%	2.6%	1.7%	0.9%	12.1%	0.9%
Warwick																		
Emscote Road-Homebase	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Emscote Road-Owens Electrical	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Emscote Road-Tesco	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.1%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Furnishing & Floors 4 Less	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Godiva Carpets	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Pine Plus	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Plumbase	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-The Cabinet Workshop	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Wallabys	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.1%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%
ALL OTHER LOCATIONS IN DISTRICT	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	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 COUNCIL AREA	72.8%	57.4%	75.8%	51.6%	3.7%	7.7%	45.6%	0.0%	13.9%	13.9%	63.5%	32.4%	74.2%	57.4%	45.6%	6.4%	34.2%	7.1%
OTHER CENTRES/STORES OUTSIDE WDC AREA																		
Banbury	0.0%	1.4%	0.0%	4.2%	1.2%	0.0%	0.0%	0.0%	0.0%	20.2%	0.4%	2.3%	0.0%	1.4%	0.0%	0.4%	11.6%	0.0%
Birmingham	1.2%	3.5%	1.1%	0.0%	7.0%	6.0%	2.8%	16.3%	1.4%	0.0%	2.1%	4.2%	1.1%	3.5%	2.8%	6.3%	0.0%	8.7%
Coventry	1.4%	7.5%	7.9%	1.2%	41.2%	49.5%	11.3%	0.0%	0.0%	1.1%	6.7%	13.2%	4.4%	7.5%	11.3%	46.9%	1.2%	0.0%
Rugby	0.0%	0.0%	0.0%	9.0%	4.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	1.3%	4.9%	0.0%
Solihull	0.0%	2.4%	1.1%	1.2%	0.0%	6.6%	4.9%	64.6%	7.4%	3.6%	1.9%	10.4%	0.5%	2.4%	4.9%	4.6%	2.3%	35.5%
Southam	0.0%	0.0%	0.0%	4.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%
Stratford-upon-Avon	0.0%	2.9%	7.4%	0.0%	0.0%	0.0%	2.3%	1.2%	37.3%	35.4%	3.1%	8.6%	3.4%	2.9%	2.3%	0.0%	16.3%	19.5%
ALL OTHER CENTRES / STORES:	4.6%	1.4%	0.9%	3.9%	11.7%	3.3%	1.7%	7.6%	6.6%	3.6%	2.2%	4.5%	2.9%	1.4%	1.7%	5.9%	3.8%	7.1%
Sub-Total All other Centres / stores	7.2%	19.1%	18.3%	23.7%	65.3%	65.5%	23.0%	89.6%	52.7%	64.0%	16.5%	44.6%	12.4%	19.1%	23.0%	65.4%	42.3%	70.8%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING:	19.9%	23.5%	5.9%	24.7%	31.0%	26.8%	31.4%	10.4%	33.4%	22.2%	20.0%	22.9%	13.4%	23.5%	31.4%	28.1%	23.5%	22.1%
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%	100.0%

APPENDIX 7: FORECAST CONVENIENCE GOODS TURNOVER

Convenience Goods: Turnover (Excluding SFT) (£m)

TABLE 1: ALL CONVENIENCE GOODS - 2018 MARKET SHARE ANALYSIS (%)
Excluding Internet Shopping and other Special Forms of Trading

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	WDC AREA (Zones 1,2,3&7)	TOTAL STUDY AREA
Royal Leamington Spa Town Centre:												
Co-Op (Clemens Street)	0.0%	0.0%	0.2%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Co-Op (Parade)	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.1%
Iceland (Bath Street)	0.0%	0.8%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.4%	0.2%
Mark and Spencer (Parade)	3.0%	1.2%	1.3%	0.2%	0.3%	0.4%	0.6%	0.0%	0.0%	0.0%	1.6%	0.7%
Spar (Bath Street)	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 (Parade)	9.4%	0.8%	1.6%	0.1%	0.0%	1.1%	0.0%	0.1%	0.2%	0.0%	3.2%	1.4%
Other Convenience Floorspace	5.8%	0.2%	2.6%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	2.3%	0.9%
Sub-total	18.2%	2.9%	7.2%	0.9%	0.3%	1.5%	0.6%	0.3%	0.2%	0.1%	7.6%	3.3%
Warwick Town Centre:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Marks and Spencer (Market Street)	0.0%	0.9%	0.0%	0.1%	0.1%	0.0%	0.2%	0.0%	1.8%	0.0%	0.3%	0.3%
Sainsburys (Saltisford)	0.1%	4.2%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	2.7%	0.4%	1.1%	0.9%
Other convenience floorspace	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.1%
Sub-total	0.1%	5.8%	0.0%	0.1%	0.1%	0.0%	0.2%	1.3%	4.5%	0.4%	1.6%	1.3%
Kenilworth Town Centre:												
Iceland (Warwick Road)	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.2%	0.0%	0.4%	0.2%
Sainsburys (Warwick Road)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	31.7%	0.0%	0.0%	0.1%	6.6%	2.5%
Waitrose (Bertie Road)	0.3%	0.4%	0.1%	0.0%	0.0%	4.5%	26.3%	0.0%	0.0%	0.7%	5.7%	2.9%
Other convenience floorspace	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%	0.0%	0.0%	0.4%	0.2%
Sub-total	0.3%	0.8%	0.1%	0.0%	0.0%	4.5%	61.5%	0.0%	0.2%	0.8%	13.2%	5.7%
Sub-total: Town Centre Stores / Centres	18.7%	9.5%	7.3%	1.1%	0.4%	6.0%	62.3%	1.6%	5.0%	1.4%	22.4%	10.3%
OUT OF TOWN STORES/LOCATIONS												
Leamington Spa												
Aldi-Queensway	2.5%	13.3%	4.0%	15.0%	0.1%	0.0%	2.5%	0.5%	0.0%	1.2%	5.7%	3.8%
Asda-Chesterton Drive	8.3%	1.4%	31.5%	6.3%	0.1%	0.0%	0.8%	0.0%	0.0%	1.6%	10.9%	4.9%
Lidl-Myton Road	1.4%	2.9%	1.1%	0.4%	0.0%	0.0%	2.0%	0.0%	0.1%	0.4%	1.8%	0.8%
Morrisons-Old Warwick Road	10.0%	6.0%	12.2%	1.8%	0.0%	0.6%	0.0%	0.5%	1.7%	1.2%	7.4%	3.4%
Sainsbury's-Tachbrook Drive	8.4%	8.3%	12.2%	4.3%	0.3%	0.0%	0.6%	0.5%	2.4%	1.0%	7.7%	3.7%
Warwick												
Sainsbury's Local-Coten End	0.1%	5.4%	0.0%	0.4%	0.3%	1.3%	0.0%	0.6%	2.2%	0.4%	1.5%	1.2%
Tesco-Emscote Road	23.5%	19.9%	2.1%	2.9%	0.4%	0.0%	1.6%	1.3%	1.8%	0.1%	12.5%	5.4%
All Other Centres / Stores in the District	11.1%	17.2%	14.3%	1.6%	0.4%	2.2%	8.1%	1.7%	2.5%	0.6%	12.9%	5.9%
Sub-total: Out-of-Town Centre Stores / Centres	65.2%	74.6%	77.4%	32.6%	1.8%	4.1%	15.6%	5.1%	10.7%	6.6%	60.5%	29.0%
WARWICK DISTRICT COUNCIL AREA	83.9%	84.1%	84.7%	33.7%	2.2%	10.1%	77.9%	6.7%	15.7%	7.9%	82.9%	39.3%
OTHER CENTRES/STORES OUTSIDE WDC AREA												
Banbury	0.0%	0.0%	0.0%	4.8%	0.1%	0.0%	0.0%	0.1%	0.0%	6.3%	0.0%	1.0%
Birmingham	0.0%	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%
Coventry	2.7%	0.4%	0.0%	1.1%	70.4%	76.0%	10.0%	1.3%	0.0%	0.0%	2.9%	18.5%
Rugby	0.4%	0.0%	0.0%	11.9%	11.9%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	2.2%
Solihull	0.1%	0.0%	1.1%	0.0%	0.4%	0.0%	0.0%	69.9%	0.6%	0.4%	0.3%	7.5%
Southam	0.0%	0.0%	0.0%	31.1%	0.3%	0.8%	0.0%	0.0%	0.4%	0.6%	0.0%	3.4%
Stratford-upon-Avon	0.0%	0.3%	0.0%	0.7%	0.3%	0.6%	0.0%	1.2%	69.5%	46.4%	0.1%	11.7%
ALL OTHER CENTRES / STORES:	12.8%	15.1%	14.1%	16.8%	14.3%	12.5%	12.1%	20.8%	13.8%	38.3%	13.6%	16.5%
Sub-Total All other Centres / stores	16.1%	15.9%	15.3%	66.3%	97.8%	89.9%	22.1%	93.3%	84.3%	92.1%	17.1%	60.7%
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%**

TABLE 2: 2018 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)

ALL CONVENIENCE GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA

Excluding Internet Shopping and other Special Forms of Trading

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	WDC AREA (Zones 1,2,3&7)	TOTAL STUDY AREA
TOTAL AVAILABLE SPEND (excluding SFT):	**70.9**	**68.0**	**68.1**	**68.0**	**54.6**	**104.1**	**54.8**	**71.9**	**78.0**	**54.7**	**261.8**	**693.1**
Royal Leamington Spa Town Centre:												
Co-Op (Clemens Street)	0.0	0.0	0.1	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.5
Co-Op (Parade)	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.5
Iceland (Bath Street)	0.0	0.5	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.1	1.1	1.1
Mark and Spencer (Parade)	2.1	0.8	0.9	0.2	0.1	0.4	0.3	0.0	0.0	0.0	4.1	4.8
Spar (Bath Street)	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 (Parade)	6.7	0.6	1.1	0.1	0.0	1.1	0.0	0.1	0.2	0.0	8.2	9.7
Other Convenience Floorspace	4.1	0.1	1.8	0.0	0.0	0.0	0.0	0.1	0.0	0.0	6.0	6.0
Sub-total	12.9	2.0	4.9	0.6	0.1	1.6	0.3	0.2	0.2	0.1	20.0	22.7
Warwick Town Centre:												
Marks and Spencer (Market Street)	0.0	0.6	0.0	0.1	0.0	0.0	0.1	0.0	1.4	0.0	0.7	2.3
Sainsburys (Saltisford)	0.1	2.9	0.0	0.0	0.0	0.0	0.0	1.0	2.1	0.2	3.0	6.2
Other convenience floorspace	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.4
Sub-total	0.1	3.9	0.0	0.1	0.0	0.0	0.1	1.0	3.5	0.2	4.2	9.0
Kenilworth Town Centre:												
Iceland (Warwick Road)	0.0	0.3	0.0	0.0	0.0	0.0	0.8	0.0	0.2	0.0	1.1	1.2
Sainsburys (Warwick Road)	0.0	0.0	0.0	0.0	0.0	0.0	17.4	0.0	0.0	0.1	17.4	17.4
Waitrose (Bertie Road)	0.2	0.3	0.1	0.0	0.0	4.7	14.4	0.0	0.0	0.4	15.0	20.0
Other convenience floorspace	0.0	0.0	0.0	0.0	0.0	0.0	1.1	0.0	0.0	0.0	1.1	1.1
Sub-total	0.2	0.6	0.1	0.0	0.0	4.7	33.7	0.0	0.2	0.4	34.6	39.8
Sub-total: Town Centre Stores / Centres	13.2	6.5	5.0	0.7	0.2	6.2	34.1	1.2	3.9	0.7	58.7	71.4
OUT OF TOWN STORES/LOCATIONS												
Leamington Spa												
Aldi-Queensway	1.8	9.1	2.8	10.2	0.1	0.0	1.4	0.3	0.0	0.7	15.0	26.4
Asda-Chesterton Drive	5.9	1.0	21.5	4.3	0.1	0.0	0.5	0.0	0.0	0.9	28.6	33.7
Lidl-Myton Road	1.0	2.0	0.7	0.3	0.0	0.0	1.1	0.0	0.1	0.2	4.8	5.4
Morrisons-Old Warwick Road	7.1	4.1	8.3	1.2	0.0	0.7	0.0	0.4	1.3	0.6	19.4	23.5
Sainsbury's-Tachbrook Drive	5.9	5.7	8.3	2.9	0.2	0.0	0.3	0.3	1.9	0.5	20.2	26.0
Warwick												
Sainsbury's Local-Coten End	0.1	3.7	0.0	0.3	0.2	1.4	0.0	0.4	1.7	0.2	3.8	8.1
Tesco-Emscote Road	16.6	13.5	1.5	2.0	0.2	0.0	0.9	0.9	1.4	0.1	32.6	37.2
All Other Centres / Stores in the District	7.9	11.7	9.8	1.1	0.2	2.2	4.4	1.2	2.0	0.4	33.8	40.9
Sub-total: Out-of-Town Centre Stores / Centres	46.2	50.7	52.8	22.2	1.0	4.3	8.6	3.7	8.4	3.6	158.3	201.1
WARWICK DISTRICT COUNCIL AREA	59.5	57.2	57.7	22.9	1.2	10.5	42.7	4.8	12.2	4.3	217.1	272.5
OTHER CENTRES/STORES OUTSIDE WDC AREA												
Banbury	0.0	0.0	0.0	3.2	0.0	0.0	0.0	0.1	0.0	3.4	0.0	6.8
Birmingham	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.2
Coventry	1.9	0.3	0.0	0.8	38.5	79.1	5.5	0.9	0.0	0.0	7.6	128.5
Rugby	0.3	0.0	0.0	8.1	6.5	0.0	0.0	0.0	0.0	0.1	0.3	15.2
Solihull	0.1	0.0	0.8	0.0	0.2	0.0	0.0	50.3	0.4	0.2	0.8	51.7
Southam	0.0	0.0	0.0	21.1	0.2	0.9	0.0	0.0	0.3	0.3	0.0	23.2
Stratford-upon-Avon	0.0	0.2	0.0	0.5	0.2	0.7	0.0	0.9	54.2	25.3	0.2	80.9
ALL OTHER CENTRES / STORES:	9.1	10.3	9.6	11.4	7.8	13.0	6.6	14.9	10.8	20.9	35.6	114.1
Sub-Total All other Centres / stores	11.4	10.8	10.4	45.1	53.4	93.6	12.1	67.1	65.8	50.3	44.7	420.6
TOTAL	**70.9**	**68.0**	**68.1**	**68.0**	**54.6**	**104.1**	**54.8**	**71.9**	**78.0**	**54.7**	**261.8**	**693.1**

TABLE 3: 2023 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)

ALL CONVENIENCE GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA

Excluding Internet Shopping and other Special Forms of Trading

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	WDC AREA (Zones 1,2,3&7)	TOTAL STUDY AREA
TOTAL AVAILABLE SPEND (excluding SFT):	74.9	71.9	72.1	70.1	56.3	111.7	58.5	74.0	80.3	56.3	277.4	726.1
Royal Leamington Spa Town Centre:												
Co-Op (Clemens Street)	0.0	0.0	0.1	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.5
Co-Op (Parade)	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.5
Iceland (Bath Street)	0.0	0.5	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.1	1.1	1.2
Mark and Spencer (Parade)	2.2	0.8	0.9	0.2	0.2	0.5	0.3	0.0	0.0	0.0	4.4	5.1
Spar (Bath Street)	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 (Parade)	7.1	0.6	1.1	0.1	0.0	1.2	0.0	0.1	0.2	0.0	8.7	10.2
Other Convenience Floorspace	4.3	0.1	1.9	0.0	0.0	0.0	0.0	0.1	0.0	0.0	6.3	6.3
Sub-total	13.6	2.1	5.2	0.6	0.2	1.7	0.3	0.2	0.2	0.1	21.2	23.8
Warwick Town Centre:												
Marks and Spencer (Market Street)	0.0	0.7	0.0	0.1	0.1	0.0	0.1	0.0	1.5	0.0	0.8	2.4
Sainsburys (Saltisford)	0.1	3.0	0.0	0.0	0.0	0.0	0.0	1.0	2.2	0.2	3.2	6.5
Other convenience floorspace	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.4
Sub-total	0.1	4.1	0.0	0.1	0.1	0.0	0.1	1.0	3.6	0.2	4.4	9.4
Kenilworth Town Centre:												
Iceland (Warwick Road)	0.0	0.3	0.0	0.0	0.0	0.0	0.8	0.0	0.2	0.0	1.1	1.3
Sainsburys (Warwick Road)	0.0	0.0	0.0	0.0	0.0	0.0	18.6	0.0	0.0	0.1	18.4	18.2
Waitrose (Bertie Road)	0.3	0.3	0.1	0.0	0.0	5.0	15.4	0.0	0.0	0.4	15.9	21.0
Other convenience floorspace	0.0	0.0	0.0	0.0	0.0	0.0	1.2	0.0	0.0	0.0	1.2	1.2
Sub-total	0.3	0.6	0.1	0.0	0.0	5.0	36.0	0.0	0.2	0.5	36.6	41.7
Sub-total: Town Centre Stores / Centres	14.0	6.8	5.3	0.7	0.2	6.7	36.4	1.2	4.0	0.8	62.2	74.8
OUT OF TOWN STORES/LOCATIONS												
Leamington Spa												
Aldi-Queensway	1.9	9.6	2.9	10.5	0.1	0.0	1.4	0.4	0.0	0.7	15.9	27.7
Asda-Chesterton Drive	6.2	1.0	22.7	4.4	0.1	0.0	0.5	0.0	0.0	0.9	30.3	35.3
Lidl-Myton Road	1.0	2.1	0.8	0.3	0.0	0.0	1.2	0.0	0.1	0.2	5.1	5.7
Morrisons-Old Warwick Road	7.5	4.3	8.8	1.2	0.0	0.7	0.0	0.4	1.3	0.6	20.6	24.6
Sainsbury's-Tachbrook Drive	6.3	6.0	8.8	3.0	0.2	0.0	0.4	0.4	1.9	0.5	21.4	27.2
Warwick												
Sainsbury's Local-Coten End	0.1	3.9	0.0	0.3	0.2	1.5	0.0	0.5	1.8	0.2	4.1	8.5
Tesco-Emscote Road	17.6	14.3	1.5	2.1	0.2	0.0	1.0	1.0	1.5	0.1	34.5	38.9
All Other Centres / Stores in the District	8.3	12.4	10.3	1.1	0.2	2.4	4.7	1.3	2.0	0.4	35.8	42.8
Sub-total: Out-of-Town Centre Stores / Centres	48.8	53.7	55.8	22.9	1.0	4.6	9.1	3.8	8.6	3.7	167.8	210.7
WARWICK DISTRICT COUNCIL AREA	62.8	60.5	61.0	23.6	1.2	11.3	45.6	5.0	12.6	4.5	230.0	285.5
OTHER CENTRES/STORES OUTSIDE WDC AREA												
Banbury	0.0	0.0	0.0	3.3	0.0	0.0	0.0	0.1	0.0	3.6	0.0	7.1
Birmingham	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.2
Coventry	2.0	0.3	0.0	0.8	39.6	84.9	5.9	0.9	0.0	0.0	8.1	134.6
Rugby	0.3	0.0	0.0	8.3	6.7	0.0	0.0	0.0	0.0	0.1	0.3	15.9
Solihull	0.1	0.0	0.8	0.0	0.2	0.0	0.0	51.8	0.5	0.2	0.9	54.2
Southam	0.0	0.0	0.0	21.8	0.2	0.9	0.0	0.0	0.4	0.3	0.0	24.3
Stratford-upon-Avon	0.0	0.2	0.0	0.5	0.2	0.7	0.0	0.9	55.8	26.1	0.2	84.8
ALL OTHER CENTRES / STORES:	9.6	10.8	10.2	11.8	8.0	13.9	7.1	15.4	11.1	21.6	37.7	119.5
Sub-Total All other Centres / stores	12.0	11.4	11.0	46.5	55.0	100.5	12.9	69.1	67.7	51.9	47.4	440.6
TOTAL	**74.9**	**71.9**	**72.1**	**70.1**	**56.3**	**111.7**	**58.5**	**74.0**	**80.3**	**56.3**	**277.4**	**726.1**

TABLE 4: 2026 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)
ALL CONVENIENCE GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA
Excluding Internet Shopping and other Special Forms of Trading

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	WDC AREA (Zones 1,2,3&7)	TOTAL STUDY AREA
TOTAL AVAILABLE SPEND (excluding SFT):	77.8	74.8	74.9	71.5	57.4	118.2	60.7	75.5	81.9	57.4	288.2	750.1
Royal Leamington Spa Town Centre:												
Co-Op (Clemens Street)	0.0	0.0	0.1	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.6
Co-Op (Parade)	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.5
Iceland (Bath Street)	0.0	0.6	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.1	1.2	1.2
Mark and Spencer (Parade)	2.3	0.9	1.0	0.2	0.2	0.5	0.4	0.0	0.0	0.0	4.5	5.2
Spar (Bath Street)	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 (Parade)	7.3	0.6	1.2	0.1	0.0	1.3	0.0	0.1	0.2	0.0	9.1	10.5
Other Convenience Floorspace	4.5	0.1	2.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	6.6	6.5
Sub-total	14.2	2.2	5.4	0.7	0.2	1.8	0.4	0.2	0.2	0.1	22.0	24.6
Warwick Town Centre:												
Marks and Spencer (Market Street)	0.0	0.7	0.0	0.1	0.1	0.0	0.1	0.0	1.5	0.0	0.8	2.5
Sainsburys (Saltisford)	0.1	3.1	0.0	0.0	0.0	0.0	0.0	1.0	2.2	0.2	3.3	6.8
Other convenience floorspace	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.5
Sub-total	0.1	4.3	0.0	0.1	0.1	0.0	0.1	1.0	3.7	0.2	4.6	9.7
Kenilworth Town Centre:												
Iceland (Warwick Road)	0.0	0.3	0.0	0.0	0.0	0.0	0.8	0.0	0.2	0.0	1.2	1.3
Sainsburys (Warwick Road)	0.0	0.0	0.0	0.0	0.0	0.0	19.3	0.0	0.0	0.1	19.1	18.8
Waitrose (Bertie Road)	0.3	0.3	0.1	0.0	0.0	5.3	16.0	0.0	0.0	0.4	16.5	21.7
Other convenience floorspace	0.0	0.0	0.0	0.0	0.0	0.0	1.3	0.0	0.0	0.0	1.3	1.2
Sub-total	0.3	0.6	0.1	0.0	0.0	5.3	37.4	0.0	0.2	0.5	38.1	43.0
Sub-total: Town Centre Stores / Centres	14.5	7.1	5.5	0.8	0.2	7.1	37.8	1.2	4.1	0.8	64.6	77.3
OUT OF TOWN STORES/LOCATIONS												
Leamington Spa												
Aldi-Queensway	1.9	10.0	3.0	10.7	0.1	0.0	1.5	0.4	0.0	0.7	16.6	28.6
Asda-Chesterton Drive	6.4	1.1	23.6	4.5	0.1	0.0	0.5	0.0	0.0	0.9	31.4	36.5
Lidl-Myton Road	1.1	2.2	0.8	0.3	0.0	0.0	1.2	0.0	0.1	0.2	5.3	5.8
Morrisons-Old Warwick Road	7.8	4.5	9.1	1.3	0.0	0.7	0.0	0.4	1.4	0.7	21.4	25.4
Sainsbury's-Tachbrook Drive	6.5	6.2	9.1	3.0	0.2	0.0	0.4	0.4	2.0	0.5	22.2	28.1
Warwick												
Sainsbury's Local-Coten End	0.1	4.1	0.0	0.3	0.2	1.6	0.0	0.5	1.8	0.3	4.2	8.7
Tesco-Emscote Road	18.3	14.9	1.6	2.1	0.3	0.0	1.0	1.0	1.5	0.1	35.9	40.2
All Other Centres / Stores in the District	8.7	12.9	10.7	1.1	0.3	2.6	4.9	1.3	2.1	0.4	37.2	44.2
Sub-total: Out-of-Town Centre Stores / Centres	50.7	55.8	58.0	23.3	1.0	4.9	9.5	3.8	8.8	3.8	174.3	217.6
WARWICK DISTRICT COUNCIL AREA	65.3	62.9	63.4	24.1	1.2	11.9	47.3	5.1	12.8	4.5	238.9	295.0
OTHER CENTRES/STORES OUTSIDE WDC AREA												
Banbury	0.0	0.0	0.0	3.4	0.1	0.0	0.0	0.1	0.0	3.6	0.0	7.3
Birmingham	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.2
Coventry	2.1	0.3	0.0	0.8	40.4	89.8	6.1	1.0	0.0	0.0	8.4	139.1
Rugby	0.3	0.0	0.0	8.5	6.9	0.0	0.0	0.0	0.0	0.1	0.3	16.5
Solihull	0.1	0.0	0.8	0.0	0.2	0.0	0.0	52.8	0.5	0.3	0.9	55.9
Southam	0.0	0.0	0.0	22.2	0.2	1.0	0.0	0.0	0.4	0.3	0.0	25.1
Stratford-upon-Avon	0.0	0.2	0.0	0.5	0.2	0.7	0.0	0.9	56.9	26.6	0.2	87.6
ALL OTHER CENTRES / STORES:	10.0	11.3	10.6	12.0	8.2	14.8	7.4	15.7	11.3	22.0	39.2	123.4
Sub-Total All other Centres / stores	12.5	11.9	11.4	47.4	56.1	106.3	13.4	70.5	69.1	52.9	49.2	455.2
TOTAL	**77.8**	**74.8**	**74.9**	**71.5**	**57.4**	**118.2**	**60.7**	**75.5**	**81.9**	**57.4**	**288.2**	**750.1**

TABLE 5: 2029 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)

ALL CONVENIENCE GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA

Excluding Internet Shopping and other Special Forms of Trading

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	WDC AREA (Zones 1,2,3&7)	TOTAL STUDY AREA
TOTAL AVAILABLE SPEND (excluding SFT):	80.8	77.7	77.8	72.9	58.6	124.3	62.7	77.0	83.6	58.6	299.0	774.0
Royal Leamington Spa Town Centre:												
Co-Op (Clemens Street)	0.0	0.0	0.1	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.6
Co-Op (Parade)	0.0	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.5
Iceland (Bath Street)	0.0	0.6	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.1	1.2	1.2
Mark and Spencer (Parade)	2.4	0.9	1.0	0.2	0.2	0.5	0.4	0.0	0.0	0.0	4.7	5.4
Spar (Bath Street)	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 (Parade)	7.6	0.6	1.2	0.1	0.0	1.3	0.0	0.1	0.2	0.0	9.4	10.8
Other Convenience Floorspace	4.7	0.1	2.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	6.8	6.8
Sub-total	14.7	2.3	5.6	0.7	0.2	1.9	0.4	0.2	0.2	0.1	22.8	25.3
Warwick Town Centre:												
Marks and Spencer (Market Street)	0.0	0.7	0.0	0.1	0.1	0.0	0.1	0.0	1.5	0.0	0.8	2.6
Sainsburys (Saltisford)	0.1	3.3	0.0	0.0	0.0	0.0	0.0	1.0	2.3	0.3	3.4	7.0
Other convenience floorspace	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.5
Sub-total	0.1	4.5	0.0	0.1	0.1	0.0	0.1	1.0	3.8	0.3	4.7	10.0
Kenilworth Town Centre:												
Iceland (Warwick Road)	0.0	0.4	0.0	0.0	0.0	0.0	0.9	0.0	0.2	0.0	1.2	1.4
Sainsburys (Warwick Road)	0.0	0.0	0.0	0.0	0.0	0.0	19.9	0.0	0.0	0.1	19.9	19.4
Waitrose (Bertie Road)	0.3	0.3	0.1	0.0	0.0	5.6	16.5	0.0	0.0	0.4	17.1	22.4
Other convenience floorspace	0.0	0.0	0.0	0.0	0.0	0.0	1.3	0.0	0.0	0.0	1.3	1.3
Sub-total	0.3	0.7	0.1	0.0	0.0	5.6	38.6	0.0	0.2	0.5	39.5	44.4
Sub-total: Town Centre Stores / Centres	15.1	7.4	5.7	0.8	0.2	7.4	39.0	1.2	4.1	0.8	67.1	79.8
OUT OF TOWN STORES/LOCATIONS												
Leamington Spa												
Aldi-Queensway	2.0	10.3	3.1	11.0	0.1	0.0	1.5	0.4	0.0	0.7	17.2	29.5
Asda-Chesterton Drive	6.7	1.1	24.5	4.6	0.1	0.0	0.5	0.0	0.0	0.9	32.6	37.7
Lidl-Myton Road	1.1	2.3	0.8	0.3	0.0	0.0	1.3	0.0	0.1	0.3	5.5	6.0
Morrisons-Old Warwick Road	8.0	4.7	9.5	1.3	0.0	0.8	0.0	0.4	1.4	0.7	22.2	26.2
Sainsbury's-Tachbrook Drive	6.8	6.5	9.5	3.1	0.2	0.0	0.4	0.4	2.0	0.6	23.1	29.0
Warwick												
Sainsbury's Local-Coten End	0.1	4.2	0.0	0.3	0.2	1.7	0.0	0.5	1.8	0.3	4.4	9.0
Tesco-Emscote Road	19.0	15.5	1.7	2.1	0.3	0.0	1.0	1.0	1.5	0.1	37.2	41.5
All Other Centres / Stores in the District	9.0	13.4	11.2	1.2	0.3	2.7	5.1	1.3	2.1	0.4	38.6	45.6
Sub-total: Out-of-Town Centre Stores / Centres	52.7	58.0	60.2	23.8	1.1	5.1	9.8	3.9	9.0	3.8	180.8	224.6
WARWICK DISTRICT COUNCIL AREA	67.8	65.4	65.9	24.6	1.3	12.5	48.8	5.2	13.1	4.6	247.9	304.4
OTHER CENTRES/STORES OUTSIDE WDC AREA												
Banbury	0.0	0.0	0.0	3.5	0.1	0.0	0.0	0.1	0.0	3.7	0.0	7.6
Birmingham	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.2
Coventry	2.2	0.3	0.0	0.8	41.2	94.4	6.3	1.0	0.0	0.0	8.7	143.5
Rugby	0.4	0.0	0.0	8.6	7.0	0.0	0.0	0.0	0.0	0.1	0.4	17.0
Solihull	0.1	0.0	0.9	0.0	0.3	0.0	0.0	53.9	0.5	0.3	1.0	57.7
Southam	0.0	0.0	0.0	22.7	0.2	1.0	0.0	0.0	0.4	0.4	0.0	25.9
Stratford-upon-Avon	0.0	0.2	0.0	0.5	0.2	0.8	0.0	0.9	58.1	27.2	0.2	90.4
ALL OTHER CENTRES / STORES:	10.4	11.7	11.0	12.2	8.4	15.5	7.6	16.0	11.5	22.4	40.7	127.4
Sub-Total All other Centres / stores	13.0	12.3	11.9	48.4	57.3	111.8	13.9	71.9	70.5	54.0	51.1	469.7
TOTAL	**80.8**	**77.7**	**77.8**	**72.9**	**58.6**	**124.3**	**62.7**	**77.0**	**83.6**	**58.6**	**299.0**	**774.0**

APPENDIX 8: FORECAST COMPARISON GOODS TURNOVER

Comparison Goods: Turnover (Excluding SFT) (£m)

TABLE 1: ALL COMPARISON GOODS - 2018 MARKET SHARE ANALYSIS (%)

Excluding Internet Shopping and other Special Forms of Trading

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	WDC AREA (Zones 1,2,3&7)	TOTAL STUDY AREA
TOWN CENTRE LOCATIONS												
Royal Leamington Spa Town Centre	55.4%	31.4%	43.6%	24.7%	5.4%	8.4%	19.4%	2.5%	6.2%	10.0%	38.7%	20.2%
Warwick Town Centre	1.8%	10.9%	0.5%	1.0%	0.4%	0.3%	1.0%	1.3%	3.4%	0.9%	3.6%	2.1%
Kenilworth Town Centre	2.4%	1.3%	0.4%	0.2%	0.1%	2.3%	37.8%	0.0%	0.3%	0.8%	9.0%	3.8%
Sub-total: Town Centre Store Locations	59.6%	43.5%	44.5%	25.9%	5.9%	11.0%	58.1%	3.8%	9.9%	11.6%	51.3%	26.2%
OUT OF TOWN CENTRE LOCATIONS												
Leamington Spa												
Chesterton Drive-Asda	2.7%	0.5%	9.4%	2.6%	0.4%	0.0%	0.0%	0.0%	0.0%	1.1%	3.3%	1.6%
Myton Road-Benson for Beds	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%
Myton Road-Homebase	1.7%	2.4%	2.9%	1.2%	0.0%	0.0%	1.5%	0.0%	0.4%	0.4%	2.2%	1.0%
Myton Road-Lidl	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Myton Road-Pets_at_Home	0.4%	0.8%	0.7%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.6%	0.2%
Myton_Rd-Dreams	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Old Warwick Road-Morrisons	0.8%	0.3%	0.1%	0.2%	0.3%	0.0%	0.0%	0.0%	0.2%	0.7%	0.3%	0.2%
Queensway-Aldi	0.2%	1.2%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.2%
Rugby Road-Jewsons	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tachbrook Park Drive-Leamington Shopping Park (Argos, Debenhams, New Look, Next, Outfit, Carpetright, Clarks, Mamas & P	2.1%	6.9%	5.7%	10.0%	0.5%	0.9%	4.0%	0.0%	2.1%	0.6%	4.6%	3.1%
Tachbrook Park Drive-Shires Gate Retail Park (Currys, Mothercare World)	8.9%	12.4%	12.0%	14.1%	0.1%	0.7%	1.7%	1.4%	3.4%	4.4%	9.1%	5.7%
Tachbrook Park Drive-Sainsbury's	2.4%	2.7%	2.9%	2.1%	0.0%	0.0%	0.4%	0.2%	0.7%	1.0%	2.2%	1.2%
Tachbrook Park Drive-Screwfix	0.3%	0.0%	0.6%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.4%	0.1%
Sub-total	19.7%	27.4%	34.3%	30.6%	1.5%	1.6%	8.6%	1.5%	6.8%	8.2%	23.1%	13.4%
Warwick												
Emscote Road-Homebase	0.5%	1.4%	0.0%	0.1%	0.0%	0.0%	0.1%	0.1%	0.1%	0.1%	0.5%	0.2%
Emscote Road-Owens Electrical	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%
Emscote Road-Tesco	0.9%	4.2%	0.2%	0.4%	0.5%	0.0%	0.4%	0.2%	0.3%	0.2%	1.5%	0.7%
Wharf Street-Furnishing & Floors 4 Less	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Godiva Carpets	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Pine Plus	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Plumbase	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-The Cabinet Workshop	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Wharf Street-Wallabys	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	1.5%	5.6%	0.3%	0.5%	0.5%	0.0%	0.5%	0.2%	0.4%	0.3%	2.0%	0.9%
ALL OTHER LOCATIONS IN DISTRICT	0.6%	0.0%	1.5%	0.0%	0.0%	0.0%	0.4%	0.6%	0.4%	0.0%	0.6%	0.3%
WARWICK DISTRICT COUNCIL AREA	81.4%	76.5%	80.5%	56.9%	7.9%	12.5%	67.6%	6.2%	17.5%	20.2%	77.1%	40.8%
OTHER CENTRES/STORES OUTSIDE WDC AREA												
Banbury	1.0%	0.8%	0.7%	10.0%	0.5%	0.0%	0.3%	0.0%	0.0%	16.1%	0.7%	2.5%
Birmingham	2.3%	3.7%	0.6%	0.0%	0.8%	2.9%	1.0%	7.5%	1.3%	0.3%	1.9%	2.3%
Coventry	10.8%	7.6%	10.3%	7.3%	65.5%	77.2%	23.3%	20.3%	3.2%	2.5%	12.5%	24.7%
Rugby	0.7%	0.2%	0.0%	12.0%	13.4%	0.1%	0.1%	0.0%	0.0%	0.0%	0.3%	2.1%
Solihull	1.6%	4.2%	4.3%	0.7%	0.8%	3.6%	4.4%	53.5%	6.9%	4.1%	3.6%	9.4%
Southam	0.2%	0.0%	0.0%	8.1%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.8%
Stratford-upon-Avon	0.0%	5.4%	3.1%	0.9%	0.0%	0.0%	2.7%	3.0%	64.5%	50.9%	2.7%	12.9%
ALL OTHER CENTRES / STORES:	1.9%	1.7%	0.5%	4.0%	10.8%	3.8%	0.7%	9.4%	6.6%	5.9%	1.2%	4.5%
Sub-Total All other Centres / stores	18.6%	23.5%	19.5%	43.1%	92.1%	87.5%	32.4%	93.8%	82.5%	79.8%	22.9%	59.2%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 2: 2018 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)

ALL COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA

Excluding Internet Shopping and other Special Forms of Trading

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	WDC AREA (Zones 1,2,3&7)	TOTAL STUDY AREA
TOTAL AVAILABLE SPEND (excluding SFT):	99.3	95.5	89.6	92.2	68.3	153.5	81.2	109.2	109.5	78.8	365.6	977.1
TOWN CENTRE LOCATIONS												
Royal Leamington Spa Town Centre	55.0	30.0	39.0	22.8	3.7	12.9	15.7	2.7	6.8	7.9	141.6	197.3
Warwick Town Centre	1.8	10.4	0.4	0.9	0.3	0.4	0.8	1.5	3.7	0.7	13.1	20.7
Kenilworth Town Centre	2.4	1.2	0.4	0.2	0.1	3.5	30.7	0.0	0.4	0.6	33.0	37.5
Sub-total: Town Centre Store Locations	59.2	41.6	39.8	23.9	4.1	16.8	47.2	4.2	10.9	9.2	187.7	255.6
OUT OF TOWN CENTRE LOCATIONS												
Leamington Spa												
Chesterton Drive-Asda	2.7	0.5	8.4	2.4	0.3	0.0	0.0	0.0	0.0	0.9	12.1	15.4
Myton Road-Benson for Beds	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.2
Myton Road-Homebase	1.7	2.3	2.6	1.1	0.0	0.0	1.2	0.0	0.4	0.3	7.9	9.7
Myton Road-Lidl	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1
Myton Road-Pets_at_Home	0.4	0.8	0.6	0.0	0.0	0.0	0.4	0.0	0.0	0.0	2.2	2.2
Myton_Rd-Dreams	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Old Warwick Road-Morrisons	0.8	0.3	0.1	0.1	0.2	0.0	0.0	0.0	0.2	0.5	1.2	2.2
Queensway-Aldi	0.1	1.2	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	1.3	1.7
Rugby Road-Jewsons	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Tachbrook Park Drive-Leamington Shopping Park (Argos, Debenhams, New Look, Next, Outfit, Carpetright, Clarks, Mamas & P	2.1	6.6	5.1	9.2	0.4	1.4	3.3	0.0	2.3	0.5	17.0	30.6
Tachbrook Park Drive-Shires Gate Retail Park (Currys, Mothercare World)	8.8	11.9	10.8	13.0	0.1	1.0	1.4	1.5	3.8	3.4	33.2	55.7
Tachbrook Park Drive-Sainsbury's	2.4	2.6	2.6	1.9	0.0	0.0	0.4	0.2	0.8	0.8	8.1	11.8
Tachbrook Park Drive-Screwfix	0.3	0.0	0.6	0.0	0.0	0.0	0.4	0.0	0.0	0.0	1.3	1.3
Sub-total	19.6	26.2	30.7	28.2	1.0	2.4	7.0	1.7	7.4	6.4	84.4	130.9
Warwick												
Emscote Road-Homebase	0.5	1.3	0.0	0.1	0.0	0.0	0.0	0.1	0.1	0.0	1.8	2.1
Emscote Road-Owens Electrical	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.1
Emscote Road-Tesco	0.9	4.0	0.2	0.4	0.4	0.0	0.3	0.2	0.4	0.2	5.4	6.8
Wharf Street-Furnishing & Floors 4 Less	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Wharf Street-Godiva Carpets	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Wharf Street-Pine Plus	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Wharf Street-Plumbase	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Wharf Street-The Cabinet Workshop	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Wharf Street-Wallabys	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	1.5	5.3	0.3	0.4	0.4	0.0	0.4	0.2	0.4	0.3	7.3	9.0
ALL OTHER LOCATIONS IN DISTRICT	0.6	0.0	1.3	0.0	0.0	0.0	0.3	0.7	0.4	0.0	2.3	3.4
WARWICK DISTRICT COUNCIL AREA	80.8	73.1	72.2	52.5	5.4	19.3	54.9	6.8	19.1	15.9	281.7	398.9
OTHER CENTRES/STORES OUTSIDE WDC AREA												
Banbury	1.0	0.7	0.6	9.2	0.4	0.0	0.2	0.0	0.0	12.7	2.6	24.2
Birmingham	2.3	3.5	0.6	0.0	0.5	4.4	0.8	8.2	1.4	0.2	7.1	22.4
Coventry	10.7	7.2	9.2	6.7	44.7	118.4	18.9	22.2	3.5	2.0	45.7	241.6
Rugby	0.7	0.2	0.0	11.1	9.2	0.1	0.1	0.0	0.0	0.0	1.0	20.9
Solihull	1.6	4.1	3.8	0.6	0.5	5.5	3.5	58.5	7.6	3.2	13.0	92.0
Southam	0.2	0.0	0.0	7.5	0.1	0.0	0.0	0.0	0.0	0.0	0.2	7.8
Stratford-upon-Avon	0.0	5.1	2.8	0.8	0.0	0.0	2.2	3.2	70.6	40.1	9.9	125.6
ALL OTHER CENTRES / STORES:	1.9	1.6	0.4	3.7	7.4	5.8	0.6	10.3	7.2	4.7	4.5	43.8
Sub-Total All other Centres / stores	18.4	22.4	17.4	39.7	62.9	134.3	26.3	102.4	90.3	62.9	83.9	578.3
TOTAL	**99.3**	**95.5**	**89.6**	**92.2**	**68.3**	**153.5**	**81.2**	**109.2**	**109.5**	**78.8**	**365.6**	**977.1**

TABLE 3: **2023 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)**

ALL COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA

Excluding Internet Shopping and other Special Forms of Trading

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	WDC AREA (Zones 1,2,3&7)	TOTAL STUDY AREA
TOTAL AVAILABLE SPEND (excluding SFT):	118.5	114.2	107.0	107.3	79.5	186.2	97.9	127.1	127.4	91.7	437.6	1156.7
TOWN CENTRE LOCATIONS												
Royal Leamington Spa Town Centre	65.7	35.9	46.6	26.5	4.3	15.6	19.0	3.2	7.9	9.1	169.5	233.6
Warwick Town Centre	2.2	12.4	0.5	1.1	0.3	0.5	1.0	1.7	4.3	0.8	15.7	24.5
Kenilworth Town Centre	2.8	1.4	0.4	0.2	0.1	4.3	37.0	0.0	0.4	0.7	39.5	44.4
Sub-total: Town Centre Store Locations	70.7	49.7	47.6	27.8	4.7	20.4	56.9	4.9	12.7	10.7	224.7	302.5
OUT OF TOWN CENTRE LOCATIONS												
Leamington Spa												
Chesterton Drive-Asda	3.2	0.6	10.0	2.7	0.3	0.0	0.0	0.0	0.0	1.0	14.5	18.3
Myton Road-Benson for Beds	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.2
Myton Road-Homebase	2.1	2.8	3.1	1.3	0.0	0.0	1.4	0.0	0.5	0.4	9.5	11.5
Myton Road-Lidl	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1
Myton Road-Pets_at_Home	0.5	1.0	0.7	0.0	0.0	0.0	0.4	0.0	0.0	0.0	2.6	2.6
Myton_Rd-Dreams	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Old Warwick Road-Morrisons	1.0	0.3	0.1	0.2	0.2	0.0	0.0	0.0	0.2	0.6	1.4	2.6
Queensway-Aldi	0.2	1.4	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	1.5	2.1
Rugby Road-Jewsons	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Tachbrook Park Drive-Leamington Shopping Park (Argos, Debenhams, New Look, Next, Outfit, Carpetright, Clarks, Mamas & P	2.5	7.9	6.1	10.7	0.4	1.7	4.0	0.0	2.6	0.6	20.3	36.2
Tachbrook Park Drive-Shires Gate Retail Park (Currys, Mothercare World)	10.6	14.2	12.9	15.1	0.1	1.2	1.7	1.7	4.4	4.0	39.7	66.0
Tachbrook Park Drive-Sainsbury's	2.9	3.1	3.1	2.3	0.0	0.0	0.4	0.2	1.0	1.0	9.7	14.0
Tachbrook Park Drive-Screwfix	0.3	0.0	0.7	0.0	0.0	0.0	0.5	0.0	0.0	0.0	1.6	1.6
Sub-total	23.4	31.3	36.7	32.8	1.2	2.9	8.5	1.9	8.6	7.5	101.0	155.0
Warwick												
Emscote Road-Homebase	0.6	1.5	0.0	0.1	0.0	0.0	0.1	0.1	0.1	0.0	2.2	2.4
Emscote Road-Owens Electrical	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.2
Emscote Road-Tesco	1.1	4.8	0.3	0.4	0.4	0.0	0.4	0.2	0.4	0.2	6.5	8.1
Wharf Street-Furnishing & Floors 4 Less	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Wharf Street-Godiva Carpets	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Wharf Street-Pine Plus	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Wharf Street-Plumbase	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Wharf Street-The Cabinet Workshop	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Wharf Street-Wallabys	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	1.7	6.4	0.3	0.5	0.4	0.0	0.5	0.3	0.5	0.3	8.7	10.6
ALL OTHER LOCATIONS IN DISTRICT	0.7	0.0	1.6	0.0	0.0	0.0	0.4	0.8	0.5	0.0	2.7	4.0
WARWICK DISTRICT COUNCIL AREA	96.5	87.4	86.2	61.1	6.3	23.4	66.2	7.9	22.3	18.5	337.2	472.2
OTHER CENTRES/STORES OUTSIDE WDC AREA												
Banbury	1.2	0.9	0.7	10.8	0.4	0.0	0.2	0.0	0.0	14.7	3.1	28.7
Birmingham	2.8	4.2	0.7	0.1	0.6	5.3	0.9	9.6	1.7	0.3	8.5	26.5
Coventry	12.8	8.6	11.0	7.8	52.0	143.6	22.9	25.8	4.1	2.3	54.6	286.0
Rugby	0.8	0.3	0.0	12.9	10.7	0.1	0.1	0.0	0.0	0.0	1.2	24.7
Solihull	1.9	4.8	4.6	0.7	0.6	6.6	4.3	68.0	8.8	3.8	15.5	108.9
Southam	0.2	0.0	0.0	8.7	0.2	0.0	0.0	0.0	0.0	0.0	0.3	9.2
Stratford-upon-Avon	0.0	6.1	3.3	0.9	0.0	0.0	2.6	3.8	82.2	46.7	11.8	148.7
ALL OTHER CENTRES / STORES:	2.3	1.9	0.5	4.3	8.6	7.1	0.7	12.0	8.4	5.4	5.4	51.9
Sub-Total All other Centres / stores	22.0	26.8	20.8	46.2	73.1	162.8	31.7	119.1	105.1	73.2	100.4	684.5
TOTAL	**118.5**	**114.2**	**107.0**	**107.3**	**79.5**	**186.2**	**97.9**	**127.1**	**127.4**	**91.7**	**437.6**	**1156.7**

TABLE 4: 2026 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)

ALL COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA

Excluding Internet Shopping and other Special Forms of Trading

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	WDC AREA (Zones 1,2,3&7)	TOTAL STUDY AREA
TOTAL AVAILABLE SPEND (excluding SFT):	134.9	130.1	121.9	119.9	88.8	215.8	111.4	142.0	142.3	102.5	498.2	1309.6
TOWN CENTRE LOCATIONS												
Royal Leamington Spa Town Centre	74.8	40.9	53.1	29.6	4.8	18.1	21.6	3.6	8.9	10.2	193.0	264.5
Warwick Town Centre	2.5	14.2	0.6	1.2	0.3	0.6	1.1	1.9	4.8	0.9	17.8	27.7
Kenilworth Town Centre	3.2	1.6	0.5	0.2	0.1	4.9	42.0	0.0	0.5	0.8	45.0	50.3
Sub-total: Town Centre Store Locations	80.4	56.6	54.2	31.1	5.3	23.7	64.7	5.5	14.2	11.9	255.8	342.5
OUT OF TOWN CENTRE LOCATIONS												
Leamington Spa												
Chesterton Drive-Asda	3.6	0.7	11.4	3.1	0.3	0.0	0.0	0.0	0.0	1.1	16.5	20.7
Myton Road-Benson for Beds	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.3
Myton Road-Homebase	2.3	3.2	3.6	1.4	0.0	0.0	1.6	0.0	0.5	0.4	10.8	13.0
Myton Road-Lidl	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1
Myton Road-Pets_at_Home	0.6	1.1	0.8	0.0	0.0	0.0	0.5	0.0	0.0	0.0	3.0	2.9
Myton_Rd-Dreams	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Old Warwick Road-Morrisons	1.1	0.4	0.1	0.2	0.2	0.0	0.0	0.0	0.2	0.7	1.6	2.9
Queensway-Aldi	0.2	1.6	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	1.7	2.3
Rugby Road-Jewsons	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Tachbrook Park Drive-Leamington Shopping Park (Argos, Debenhams, New Look, Next, Outfit, Carpetright, Clarks, Mamas & P	2.8	9.0	6.9	11.9	0.5	2.0	4.5	0.0	3.0	0.6	23.1	41.0
Tachbrook Park Drive-Shires Gate Retail Park (Currys, Mothercare World)	12.0	16.1	14.6	16.9	0.1	1.4	1.9	2.0	4.9	4.5	45.2	74.7
Tachbrook Park Drive-Sainsbury's	3.3	3.6	3.5	2.5	0.0	0.0	0.5	0.2	1.1	1.1	11.0	15.8
Tachbrook Park Drive-Screwfix	0.4	0.1	0.8	0.0	0.0	0.0	0.6	0.0	0.0	0.0	1.8	1.8
Sub-total	26.6	35.7	41.8	36.6	1.3	3.4	9.6	2.2	9.7	8.4	115.0	175.5
Warwick												
Emscote Road-Homebase	0.7	1.8	0.0	0.1	0.0	0.0	0.1	0.1	0.1	0.1	2.5	2.8
Emscote Road-Owens Electrical	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.2
Emscote Road-Tesco	1.3	5.5	0.3	0.5	0.5	0.0	0.5	0.2	0.5	0.2	7.4	9.1
Wharf Street-Furnishing & Floors 4 Less	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Wharf Street-Godiva Carpets	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Wharf Street-Pine Plus	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Wharf Street-Plumbase	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Wharf Street-The Cabinet Workshop	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Wharf Street-Wallabys	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	2.0	7.3	0.4	0.6	0.5	0.0	0.5	0.3	0.6	0.3	9.9	12.1
ALL OTHER LOCATIONS IN DISTRICT	0.8	0.0	1.8	0.0	0.0	0.0	0.4	0.9	0.5	0.0	3.1	4.5
WARWICK DISTRICT COUNCIL AREA	109.8	99.6	98.2	68.3	7.1	27.1	75.3	8.8	24.9	20.7	383.9	534.6
OTHER CENTRES/STORES OUTSIDE WDC AREA												
Banbury	1.3	1.0	0.8	12.0	0.5	0.0	0.3	0.0	0.0	16.5	3.5	32.5
Birmingham	3.1	4.8	0.8	0.1	0.7	6.2	1.1	10.7	1.9	0.3	9.7	30.0
Coventry	14.6	9.8	12.5	8.7	58.2	166.5	26.0	28.8	4.6	2.6	62.2	323.8
Rugby	0.9	0.3	0.0	14.4	11.9	0.2	0.1	0.0	0.0	0.0	1.4	28.0
Solihull	2.2	5.5	5.2	0.8	0.7	7.7	4.9	76.0	9.8	4.2	17.7	123.3
Southam	0.3	0.0	0.0	9.8	0.2	0.0	0.0	0.0	0.0	0.0	0.3	10.4
Stratford-upon-Avon	0.0	7.0	3.7	1.0	0.0	0.0	3.0	4.2	91.8	52.2	13.5	168.4
ALL OTHER CENTRES / STORES:	2.6	2.2	0.6	4.8	9.6	8.2	0.8	13.4	9.4	6.1	6.1	58.7
Sub-Total All other Centres / stores	25.1	30.5	23.7	51.6	81.7	188.7	36.1	133.2	117.5	81.9	114.3	775.0
TOTAL	**134.9**	**130.1**	**121.9**	**119.9**	**88.8**	**215.8**	**111.4**	**142.0**	**142.3**	**102.5**	**498.2**	**1309.6**

TABLE 5: **2029 SURVEY-DERIVED MARKET SHARE ANALYSIS (£m)**

ALL COMPARISON GOODS EXPENDITURE ALLOCATED TO EXISTING CENTRES, SHOPS AND STORES IN THE DEFINED STUDY AREA

Excluding Internet Shopping and other Special Forms of Trading

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	WDC AREA (Zones 1,2,3&7)	TOTAL STUDY AREA
TOTAL AVAILABLE SPEND (excluding SFT):	153.2	148.0	138.5	133.8	99.1	248.3	125.8	158.5	158.9	114.4	565.5	1478.6
TOWN CENTRE LOCATIONS												
Royal Leamington Spa Town Centre	84.9	46.5	60.4	33.1	5.4	20.9	24.4	4.0	9.9	11.4	219.1	298.6
Warwick Town Centre	2.8	16.1	0.6	1.4	0.4	0.7	1.2	2.1	5.4	1.0	20.3	31.3
Kenilworth Town Centre	3.6	1.8	0.6	0.2	0.1	5.7	47.5	0.0	0.5	0.9	51.0	56.8
Sub-total: Town Centre Store Locations	91.4	64.4	61.6	34.7	5.9	27.2	73.1	6.1	15.8	13.3	290.4	386.7
OUT OF TOWN CENTRE LOCATIONS												
Leamington Spa												
Chesterton Drive-Asda	4.1	0.8	13.0	3.4	0.4	0.0	0.0	0.0	0.0	1.2	18.7	23.3
Myton Road-Benson for Beds	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.3
Myton Road-Homebase	2.7	3.6	4.1	1.6	0.0	0.0	1.9	0.0	0.6	0.5	12.3	14.7
Myton Road-Lidl	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1
Myton Road-Pets_at_Home	0.6	1.3	0.9	0.0	0.0	0.0	0.6	0.0	0.0	0.0	3.4	3.3
Myton_Rd-Dreams	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Old Warwick Road-Morrisons	1.3	0.4	0.1	0.2	0.3	0.0	0.0	0.0	0.2	0.8	1.9	3.3
Queensway-Aldi	0.2	1.8	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	2.0	2.6
Rugby Road-Jewsons	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Tachbrook Park Drive-Leamington Shopping Park (Argos, Debenhams, New Look, Next, Outfit, Carpetright, Clarks, Mamas & P	3.2	10.2	7.9	13.3	0.5	2.3	5.1	0.0	3.3	0.7	26.2	46.3
Tachbrook Park Drive-Shires Gate Retail Park (Currys, Mothercare World)	13.7	18.4	16.6	18.8	0.1	1.6	2.1	2.2	5.5	5.0	51.3	84.3
Tachbrook Park Drive-Sainsbury's	3.7	4.1	4.0	2.8	0.0	0.0	0.6	0.3	1.2	1.2	12.5	17.9
Tachbrook Park Drive-Screwfix	0.4	0.1	0.9	0.0	0.0	0.0	0.7	0.0	0.0	0.0	2.0	2.0
Sub-total	30.2	40.5	47.5	40.9	1.5	3.9	10.9	2.4	10.8	9.4	130.6	198.1
Warwick												
Emscote Road-Homebase	0.8	2.0	0.0	0.1	0.0	0.0	0.1	0.1	0.1	0.1	2.8	3.1
Emscote Road-Owens Electrical	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.2
Emscote Road-Tesco	1.4	6.3	0.3	0.6	0.5	0.0	0.5	0.3	0.5	0.2	8.4	10.3
Wharf Street-Furnishing & Floors 4 Less	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Wharf Street-Godiva Carpets	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Wharf Street-Pine Plus	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Wharf Street-Plumbase	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Wharf Street-The Cabinet Workshop	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Wharf Street-Wallabys	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	2.2	8.3	0.4	0.6	0.5	0.0	0.6	0.4	0.6	0.4	11.3	13.6
ALL OTHER LOCATIONS IN DISTRICT	0.9	0.0	2.0	0.0	0.0	0.0	0.5	1.0	0.6	0.0	3.5	5.1
WARWICK DISTRICT COUNCIL AREA	124.8	113.2	111.6	76.2	7.9	31.2	85.0	9.9	27.8	23.1	435.8	603.6
OTHER CENTRES/STORES OUTSIDE WDC AREA												
Banbury	1.5	1.1	1.0	13.4	0.5	0.0	0.3	0.0	0.0	18.4	4.0	36.7
Birmingham	3.6	5.4	0.9	0.1	0.8	7.1	1.2	11.9	2.1	0.4	11.0	33.9
Coventry	16.6	11.2	14.3	9.7	64.9	191.6	29.3	32.2	5.1	2.9	70.6	365.6
Rugby	1.1	0.3	0.0	16.1	13.3	0.2	0.1	0.0	0.0	0.0	1.6	31.6
Solihull	2.5	6.3	5.9	0.9	0.8	8.8	5.5	84.9	11.0	4.7	20.1	139.2
Southam	0.3	0.0	0.0	10.9	0.2	0.0	0.0	0.0	0.0	0.0	0.3	11.8
Stratford-upon-Avon	0.0	7.9	4.3	1.2	0.0	0.0	3.3	4.7	102.5	58.3	15.3	190.1
ALL OTHER CENTRES / STORES:	2.9	2.5	0.7	5.4	10.7	9.5	0.9	15.0	10.5	6.8	6.9	66.3
Sub-Total All other Centres / stores	28.5	34.7	27.0	57.6	91.2	217.1	40.7	148.6	131.1	91.4	129.7	875.0
TOTAL	**153.2**	**148.0**	**138.5**	**133.8**	**99.1**	**248.3**	**125.8**	**158.5**	**158.9**	**114.4**	**565.5**	**1478.6**

APPENDIX 9: CONVENIENCE GOODS CAPACITY ASSESSMENT

Carter Jonas

TABLE 1: REVISED FORECAST CONVENIENCE GOODS TURNOVER (£m) - ALLOW FOR INFLOW FROM OUTSIDE STUDY AREA

	Estimated 'Inflow' from Outside Study Area	2018	2023	2026	2029
Royal Leamington Spa Town Centre:					
Co-Op (Clemens Street)	0%	£0.5	£0.5	£0.6	£0.6
Co-Op (Parade)	0%	£0.5	£0.5	£0.5	£0.5
Iceland (Bath Street)	0%	£1.1	£1.2	£1.2	£1.2
Mark and Spencer (Parade)	0%	£4.8	£5.1	£5.2	£5.4
Spar (Bath Street)	0%	£0.0	£0.0	£0.0	£0.0
Tesco (Parade)	0%	£9.7	£10.2	£10.5	£10.8
Other Convenience Floorspace	0%	£6.0	£6.3	£6.5	£6.8
Other Convenience Floorspace		£22.2	£23.2	£24.0	£24.8
Warwick Town Centre:					
Marks and Spencer (Market Street)	0%	£2.3	£2.4	£2.5	£2.6
Sainsburys (Saltisford)	0%	£6.2	£6.5	£6.8	£7.0
Other convenience floorspace	0%	£0.4	£0.4	£0.5	£0.5
Subtotal		£9.0	£9.4	£9.7	£10.0
Kenilworth Town Centre:					
Iceland (Warwick Road)	0%	£17.4	£18.2	£18.8	£19.4
Sainsburys (Warwick Road)	0%	£20.0	£21.0	£21.7	£22.4
Waitrose (Bertie Road)	0%	£1.1	£1.2	£1.2	£1.3
Other convenience floorspace		£38.5	£40.4	£41.7	£43.0
OUT OF TOWN STORES/LOCATIONS					
Leamington Spa					
Aldi-Queensway	0%	£26.4	£27.7	£28.6	£29.5
Asda-Chesterton Drive	0%	£33.7	£35.3	£36.5	£37.7
Lidl-Myton Road	0%	£5.4	£5.7	£5.8	£6.0
Morrisons-Old Warwick Road	0%	£23.5	£24.6	£25.4	£26.2
Sainsbury's-Tachbrook Drive	0%	£26.0	£27.2	£28.1	£29.0
Warwick					
Sainsbury's Local-Coten End	0%	£8.1	£8.5	£8.7	£9.0
Tesco-Emscote Road	0%	£37.2	£38.9	£40.2	£41.5
All Other Centres / Stores in the District	0%	£40.9	£42.8	£44.2	£45.6
Subtotal		£201.1	£210.7	£217.6	£224.6
WARWICK DISTRICT COUNCIL AREA		£270.8	£283.7	£293.1	£302.4

TABLE 2: COMMITTED CONVENIENCE FLOORSPACE

Centre	Scheme	Planning Ref	Gross Floorspace (sqm)	Net Sales Floorspace (sqm)	Sales Density 2018 (£ per sqm)	Turnover (£m) 2018	2023	2026	2029
Kenilworth[1]	Talisman Square, Warwick Road, Kenilworth	W/16/1139	1,533	537	£7,500	£4.0	£4.0	£4.0	£4.0
Warwick[2]	Land between Myton Road, and Europa Way, Warwick.	W/14/1076	500	88	£7,500	£0.7	£0.7	£0.7	£0.7
Warwick[3]	Land at Lower Heathcote Farm, Harbury Lane, Warwick	W/14/0661	1,400	196	£7,500	£1.5	£1.5	£1.5	£1.5
TOTAL			3,433	820		£6.2	£6.1	£6.2	£6.2

Notes:

(1) W/16/1139 - Mixed use development comprising 1,533 sqm gross of retail floor space at ground floor and 65 residential units (mix of cluster flats and studio rooms) above. For the purposes of this assessment a gross to net ratio of 70% has been applied. It is assumed that of the net floorspace derived this will be split equally for convenience goods and comparison goods.

(2) W/14/1076 - Outline Planning Permission for the construction of up to 735 residential units (C3); A mixed-use neighbourhood centre to include up to 500 sqm gross floor area made available for retail development (A1-A4) and/or community/health uses (D1). The Planning Statement accompanying the application states that the 500 sqm would be sub-divided into 3 units: one unit with a gross floorspace of 250 sqm, and two units each with a gross floorspace of 125 sqm (para3.4). For the purposes of this assessment a gross to net ratio of 70% has been applied. It is assumed that of the net floorspace derived the A1-A4 uses will be equally split. It is further assumed that the resulting net A1 floorspace is for convenience goods only.

(3) W/14/0661 - Residential development up to a maximum of 785 dwellings for a mixed use community hub/local centre to include retail development (Class A1 to A5 inclusive) and community buildings (Class D1). For the purposes of this assessment a gross to net ratio of 70% has been applied. It is assumed that of the net floorspace derived the A1-A5 uses will be equally split. Of the A1 floorspace derived this will be for convenience goods only.

TABLE 3: WARWICK DISTRICT COUNCIL LOCAL AUTHORITY AREA - CONVENIENCE GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

		2018	2023	2026	2029
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£270.8	£283.7	£293.1	£302.4
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m)[1]:	£270.8	£270.3	£270.8	£271.6
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£13.4	£22.3	£30.8
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)	-	£6.1	£6.2	£6.2
STEP 5:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	-	**£7.3**	**£16.1**	**£24.6**
STEP 6:	**FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:**				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,475	£12,500	£12,537
	(ii) Net Floorspace Capacity (sq m):	-	**585**	**1,290**	**1,964**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		836	1,842	2,806
STEP 7:	**FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:**				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£6,986	£7,000	£7,021
	(ii) Net Floorspace Capacity (sq m):	-	**1,045**	**2,303**	**3,507**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		1,492	3,290	5,010

STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).

STEP 2: It has been assumed for the purpose of this assessment that the LPA's convenience retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian Retail Planner Briefing Note 15 (December 2017) and other research evidence.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.

STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2023.

STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).

STEPS 6 & 7: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of supermarket and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

TABLE 4: **ROYAL LEAMINGTON SPA TOWN CENTRE- CONVENIENCE GOODS CAPACITY ASSESSMENT**
Assume Equilibrium at Base Year and Constant Market Shares

		2018	2023	2026	2029
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£22.2	£23.2	£24.0	£24.8
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m)[1]:	£22.2	£22.1	£22.2	£22.2
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£1.1	£1.8	£2.5
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)	£0.0	£0.0	£0.0	£0.0
STEP 5:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	-	**£1.1**	**£1.8**	**£2.5**
STEP 6:	**FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:**				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,475	£12,500	£12,537
	(ii) Net Floorspace Capacity (sq m):	**-**	**88**	**146**	**201**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		126	208	287
STEP 7:	**FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:**				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£6,986	£7,000	£7,021
	(ii) Net Floorspace Capacity (sq m):	**-**	**157**	**260**	**359**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		225	372	513

TABLE 5: **WARWICK TOWN CENTRE - CONVENIENCE GOODS CAPACITY ASSESSMENT**
Assume Equilibrium at Base Year and Constant Market Shares

		2018	2023	2026	2029
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£9.0	£9.4	£9.7	£10.0
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m)[1]:	£9.0	£9.0	£9.0	£9.0
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£0.4	£0.7	£1.0
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)	£0.0	£0.0	£0.0	£0.0
STEP 5:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	-	**£0.4**	**£0.7**	**£1.0**
STEP 6:	**FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:**				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,475	£12,500	£12,537
	(ii) Net Floorspace Capacity (sq m):	**-**	**36**	**59**	**81**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		51	84	116
STEP 7:	**FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:**				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£6,986	£7,000	£7,021
	(ii) Net Floorspace Capacity (sq m):	**-**	**64**	**105**	**145**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		91	151	208

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TABLE 6: KENILWORTH TOWN CENTRE - CONVENIENCE GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

		2018	2023	2026	2029
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£38.5	£40.4	£41.7	£43.0
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m)(1):	£38.5	£38.5	£38.5	£38.7
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£1.9	£3.2	£4.4
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)	-	£4.0	£4.0	£4.0
STEP 5:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	-	**-£2.1**	**-£0.9**	**£0.3**
STEP 6:	**FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:**				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,475	£12,500	£12,537
	(ii) Net Floorspace Capacity (sq m):	**-**	**-169**	**-68**	**28**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-241	-98	40
STEP 7:	**FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:**				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£6,986	£7,000	£7,021
	(ii) Net Floorspace Capacity (sq m):	**-**	**-301**	**-122**	**49**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		-430	-174	71

Notes: Commitments refer to:

(1) W/16/1139 - Mixed use development comprising 1,533 sqm gross of retail floor space at ground floor and 65 residential units (mix of cluster flats and studio rooms) above. For the purposes of this assessment a gross to net ratio of 70% has been applied. It is assumed that of the net floorspace derived this will be split equally fo convenience goods and comparison goods.

TABLE 7: ALL OUT-OF-CENTRE FLOORSPACE ACROSS DOVER DISTRICT AREA - CONVENIENCE GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

		2018	2023	2026	2029
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£201.1	£210.7	£217.6	£224.6
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m)(1):	£201.1	£200.7	£201.1	£201.7
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£10.0	£16.5	£22.9
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)	-	£2.1	£2.1	£2.1
STEP 5:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	-	**£7.9**	**£14.4**	**£20.7**
STEP 6:	**FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:**				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,475	£12,500	£12,537
	(ii) Net Floorspace Capacity (sq m):	**-**	**630**	**1,153**	**1,654**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		900	1,647	2,363
STEP 7:	**FORECAST CAPACITY FOR NEW SUPERMARKET/DISCOUNT FORMAT FLOORSPACE:**				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£6,986	£7,000	£7,021
	(ii) Net Floorspace Capacity (sq m):	**-**	**1,124**	**2,059**	**2,953**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		1,606	2,941	4,219

Notes: Commitments refer to:

(1) W/14/1076 - Outline Planning Permissom for the construction of up to 735 residential units (C3); A mixed-use neighbourhood centre to include up to 500 sqm gross floor area made available for retail development (A1-A4) and/or community/health uses (D1). The Planning Statement accompanying the application states that the 500 sqm would be sub-divided into 3 units: one unit with a gross floorspace of 250 sqm, and two units each with a gross floorspace of 125 sqm (para3.4). For the purposes of this assessment a gross to net ratio of 70% has been applied. It is assumed that of the net floorspace derived the A1-A4 uses will be equally split. It is further assumed that the resulting net floorspace is for convenience goods only.

(2) W/14/0661 - Residential development up to a maximum of 785 dwellings for a mixed use community hub/local centre to include retail development (Class A1 to A5 inclusive) and community buildings (Class D1). For the purposes of this assessment a gross to net ratio of 70% has been applied. It is assumed that of the net floorspace derived the A1-A5 uses will be equally splt. Of the A1 floorspace derived this will be for convenience goods only.

TABLE 8: **SUMMARY TABLE - CONVENIENCE GOODS CAPACITY ASSESSMENT FOR NEW SUPERSTORE FORMAT FLOORSPACE (NET SQ M)**
Assume Equilibrium at 2018 and Constant Market Shares

	2023	2026	2029
Royal Leamington Spa Town Centre:	88	146	201
Warwick Town Centre:	36	59	81
Kenilworth Town Centre:	-169	-68	28
All Out-of-Centre Floorspace	630	1,153	1,654
TOTAL DISTRICT WIDE CONVENIENCE GOODS CAPACITY	**585**	**1,290**	**1,964**

TABLE 9: **SUMMARY TABLE - CONVENIENCE GOODS CAPACITY ASSESSMENT FOR NEW SUPERSTORE FORMAT FLOORSPACE (NET SQ M)**
Assume Equilibrium at 2018 and Constant Market Shares

	2023	2026	2029
Royal Leamingt Town Centre	157	260	359
Warwick Town Centre:	64	105	145
Kenilworth Town Centre:	-301	-122	49
All Out-of-Centre Floorspace	1,124	2,059	2,953
TOTAL DISTRICT WIDE CONVENIENCE GOODS CAPACITY	**1,045**	**2,303**	**3,507**

APPENDIX 10: COMPARISON GOODS CAPACITY ASSESSMENT

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TABLE 1: REVISED FORECAST COMPARISON GOODS TURNOVER (£m) - ALLOW FOR INFLOW FROM OUTSIDE STUDY AREA

	Estimated 'Inflow' from Outside Study Area	2018	2023	2026	2029
TOWN CENTRE LOCATIONS					
Royal Leamington Spa Town Centre	10%	£219.3	£259.6	£293.9	£331.8
Warwick Town Centre	5%	£21.8	£25.8	£29.2	£32.9
Kenilworth Town Centre	5%	£39.5	£46.8	£53.0	£59.8
Subtotal		£280.5	£332.1	£376.0	£424.5
OUT OF TOWN CENTRE LOCATIONS					
Leamington Spa					
Chesterton Drive-Asda	5%	£16.2	£19.2	£21.8	£24.6
Myton Road-Benson for Beds	5%	£0.2	£0.3	£0.3	£0.3
Myton Road-Homebase	5%	£10.2	£12.1	£13.7	£15.5
Myton Road-Lidl	5%	£0.1	£0.1	£0.1	£0.1
Myton Road-Pets_at_Home	5%	£2.3	£2.7	£3.0	£3.4
Myton_Rd-Dreams	5%	£0.0	£0.0	£0.0	£0.0
Old_Warwick Road-Morrisons	5%	£2.3	£2.7	£3.1	£3.5
Queensway-Aldi	5%	£1.8	£2.2	£2.5	£2.8
Rugby Road-Jewsons	5%	£0.0	£0.0	£0.0	£0.0
Tachbrook Park Drive-Leamington Shopping Park (Argos, Debenhams, New Look, Next, Outfit, Carpetright, Clarks	5%	£32.2	£38.1	£43.1	£48.7
Tachbrook Park Drive-Shires Gate Retail Park (Currys, Mothercare World)	5%	£58.7	£69.4	£78.6	£88.7
Tachbrook Park Drive-Sainsbury's	5%	£12.4	£14.7	£16.7	£18.8
Tachbrook Park Drive-Screwfix	5%	£1.4	£1.6	£1.8	£2.1
Subtotal		£137.8	£163.2	£184.7	£208.6
Warwick					
Emscote Road-Homebase	5%	£2.2	£2.6	£2.9	£3.3
Emscote Road-Owens Electrical	5%	£0.1	£0.2	£0.2	£0.2
Emscote Road-Tesco	5%	£7.2	£8.5	£9.6	£10.8
Wharf Street-Furnishing & Floors 4 Less	5%	£0.0	£0.0	£0.0	£0.0
Wharf Street-Godiva Carpets	5%	£0.0	£0.0	£0.0	£0.0
Wharf Street-Pine Plus	5%	£0.0	£0.0	£0.0	£0.0
Wharf Street-Plumbase	5%	£0.0	£0.0	£0.0	£0.0
Wharf Street-The Cabinet Workshop	5%	£0.0	£0.0	£0.0	£0.0
Wharf Street-Wallabys	5%	£0.0	£0.0	£0.0	£0.0
Subtotal		£9.5	£11.2	£12.7	£14.3
ALL OTHER LOCATIONS IN DISTRICT	0%	£3.4	£4.0	£4.5	£5.1
Subtotal		£3.4	£4.0	£4.5	£5.1
WARWICK DISTRICT COUNCIL AREA		**£431.2**	**£510.5**	**£578.0**	**£652.5**

TABLE 2: COMMITTED COMPARISON GOODS FLOORSPACE

Centre	Scheme	Planning Ref	Gross Floorspace (sqm)	Net Sales Floorspace (sqm)	Sales Density 2018 (£ per sqm)	Turnover (£m) 2018	2023	2026	2029
Kenilworth[1]	Talisman Square, Warwick Road, Kenilworth	W/16/1139	1,533	537	£3,500	£1.9	£2.1	£2.3	£2.6
TOTAL			1,533	537		£1.9	£2.1	£2.3	£2.6

Notes:
(1) W/16/1139 - Mixed use development comprising 1,533 sqm gross of retail floor space at ground floor and 65 residential units (mix of cluster flats and studio rooms) above. For the purposes of this assessment a gross to net ratio of 70% has been applied. It is assumed that of the net floorspace derived this will be split equally for convenience goods and comparison goods.

TABLE 3: WARWICK DISTRICT COUNCIL LOCAL AUTHORITY AREA - COMPARISON GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2018	2023	2026	2029
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£431.2	£510.5	£578.0	£652.5
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m) [1]:	£431.2	£480.8	£513.2	£547.9
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£29.7	£64.7	£104.7
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)	-	£2.1	£2.3	£2.6
STEP 5:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	-	**£27.6**	**£62.4**	**£102.1**
STEP 6:	**FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:**				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,690	£7,141	£7,623
	(ii) Net Floorspace Capacity (sq m):	-	**4,125**	**8,742**	**13,396**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		5,893	12,488	19,136

STEP 1: The (survey-derived) 'current' (or 'potential') turnovers assume constant market shares over the forecast period (derived from Table 1).

STEP 2: It has been assumed for the purpose of this assessment that the LPA's comparison goods retail market is in 'equilibrium' at the base year (i.e. 'benchmark' turnovers are equivalent to the survey-derived 'current' turnover levels). The growth in the base year (survey-derived) turnover has been constrained over the forecast period assuming average annual 'productivity' growths rates informed by the latest Experian *Retail Planner Briefing Note 15* (December 2017) and other research evidence.

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2. No account is taken of commitments at this stage.

STEP 4: The turnover of all known commitments has been derived from Table 2. It is assumed for the purpose of this assessment that all commitments will be opened and will have reached 'mature' trading conditions by 2022.

STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all commitments (Step 4).

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

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TABLE 4: **ROYAL LEAMINGTON SPA TOWN CENTRE - COMPARISON GOODS CAPACITY ASSESSMENT**
Assume Equilibrium at Base Year and Constant Market Shares

		2018	2023	2026	2029
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£219.3	£259.6	£293.9	£331.8
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£219.3	£244.5	£261.0	£278.6
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£15.1	£32.9	£53.2
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0
STEP 5:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-**	**£15.1**	**£32.9**	**£53.2**
STEP 6:	**FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:**				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,690	£7,141	£7,623
	(ii) Net Floorspace Capacity (sq m):	**-**	**2,255**	**4,609**	**6,983**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		3,221	6,584	9,975

TABLE 5: **WARWICK TOWN CENTRE- COMPARISON GOODS CAPACITY ASSESSMENT**
Assume Equilibrium at Base Year and Constant Market Shares

		2018	2023	2026	2029
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£21.8	£25.8	£29.2	£32.9
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£21.8	£24.3	£25.9	£27.6
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£1.5	£3.3	£5.3
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0
STEP 5:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	**-**	**£1.5**	**£3.3**	**£5.3**
STEP 6:	**FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:**				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,690	£7,141	£7,623
	(ii) Net Floorspace Capacity (sq m):	**-**	**224**	**457**	**693**
	(iii) Assumed Net / Gross Floorspace Ratio:		70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		320	653	990

TABLE 6: **KENILWORTH TOWN CENTRE - COMPARISON GOODS CAPACITY ASSESSMENT**

Assume Equilibrium at Base Year and Constant Market Shares

		2018	2023	2026	2029
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£39.5	£46.8	£53.0	£59.8
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£39.5	£44.0	£47.0	£50.2
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£2.7	£5.9	£9.6
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)	-	£2.1	£2.3	£2.6
STEP 5:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	-	**£0.7**	**£3.6**	**£7.0**
STEP 6:	**FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:**				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,690	£7,141	£7,623
	(ii) Net Floorspace Capacity (sq m):	**-**	**98**	**508**	**921**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		139	725	1,316

Notes: Commitments refer to:

(1) W/16/1139 - Mixed use development comprising 1,533 sqm gross of retail floor space at ground floor and 65 residential units (mix of cluster flats and studio rooms) above. For the purposes of this assessment a gross to net ratio of 70% has been applied. It is assumed that of the net floorspace derived this will be split equally for convenience goods and comparison goods.

TABLE 7: **ALL OUT-OF-CENTRE FLOORSPACE ACROSS WARWICK DISTRICT AREA - COMPARISON GOODS CAPACITY ASSESSMENT**

Assume Equilibrium at Base Year and Constant Market Shares

		2018	2023	2026	2029
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE (£m):	£150.7	£178.4	£202.0	£228.0
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE (£m):	£150.7	£168.0	£179.3	£191.4
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-	£10.4	£22.6	£36.6
STEP 4:	TURNOVER OF ALL COMMITED FLOORSPACE (£m)	-	£0.0	£0.0	£0.0
STEP 5:	**NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:**	-	**£10.4**	**£22.6**	**£36.6**
STEP 6:	**FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:**				
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,690	£7,141	£7,623
	(ii) Net Floorspace Capacity (sq m):	**-**	**1,549**	**3,167**	**4,799**
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):		2,213	4,525	6,855

TABLE 8: **SUMMARY TABLE - COMPARISON GOODS CAPACITY (NET SQ M)**

Assume Equilibrium at 2018 and Constant Market Shares

	2023	2026	2029
Royal Leamington Spa Town Centre:	2,255	4,609	6,983
Warwick Town Centre:	224	457	693
Kenilworth Town Centre:	98	508	921
All Out-of-Centre Floorspace	1,549	3,167	4,799
TOTAL DISTRICT WIDE COMPARISON GOODS CAPACITY	**4,125**	**8,742**	**13,396**