BROMSGROVE DISTRICT COUNCIL

Retail Study

Final draft report

17 October 2013

FINAL DRAFT

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APPENDICES

1.0 Introduction

BACKGROUND

1.1 Bromsgrove District Council is currently preparing the Bromsgrove District Plan, which will guide development in the district between 2011 and 2030. It will:

- Provide a spatial strategy specific to the needs of Bromsgrove, including the town centre
- Contain a set of primary policies for delivering the overall strategy and identify strategic allocations for development.

1.2 In order for the document to be 'sound' it must be founded on a robust evidence base, including an up to date retail study. Bromsgrove District Council has instructed CBRE to prepare that study.

AIM OF STUDY

1.3 The aim of the study is to provide Bromsgrove District Council with a report that will inform the overall strategy for retail and town centre development in its District Plan.

OUTPUTS OF THE STUDY

1.4 The required outputs of the study can be summarised under five headings, each of which forms a section of this report:

- Section 2: A summary and analysis of planning and other policy relating to retail and town centres, as well as a summary of the key issues facing the retail sector now and in the future
- Section 3: A short profile of the role of and aspirations for Bromsgrove town centre and the 'Large Settlements' of Alvechurch, Barnt Green, Catshill, Hagley, Rubery and Wythall, as well as Aston Fields close to Bromsgrove railway station
- Section 4: An assessment of the quantitative need (or 'capacity') for new retail floorspace, based on a new survey of people resident in and around Bromsgrove district
- Section 5: Advice on a broad strategy for accommodating any identified 'capacity' for new retail floorspace, if any.

2.0 The current position: policy and the economy

BACKGROUND

2.1 In this section we provide a summary and analysis of planning and other policy relating to retail and town centres. We then identify wider trends affecting retail, including:

- Changes in consumer preferences and retail trends (including the decline of some retail sectors and growth in 'special forms of trading'); and
- The current economic situation.

2.2 We do so by drawing on our knowledge of the retail sector and on the latest forecasts and projections published by Oxford Economics on long-term growth (though short-term decline) in consumer expenditure and growth in special forms of trading (non-store retail sales that do not take place through traditional store-based outlets), particularly the anticipated growth in online spend. We address convenience goods (day-to-day groceries) and comparison goods (less frequently purchased, often durable, goods) separately.

POLICY AND TECHNICAL GUIDANCE

National Policy and Guidance

National Planning Policy Framework (March 2012)

2.3 The National Planning Policy Framework (NPPF) was published in March 2012. It replaced a large number of planning policy documents, including PPS4 which dealt with retail and other town centre uses.

2.4 The NPPF introduced a 'presumption in favour of sustainable development'. It explains that for plan-making this means that:

- Local planning authorities should positively seek opportunities to meet the development needs of their area; and
- 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, when assessed against the policies in the Framework taken as a whole; or
  - Specific policies in the Framework indicate development should be restricted.

2.5 This retail study contributes to those policy aspirations, identifying the need and then recommending ways in which it could be met.

2.6 In terms of policies relating specifically to retail and town centres, paragraph 23 says that in drawing up Local Plans, local planning authorities should:

- Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality
- Define a network and hierarchy of centres that is resilient to anticipated future economic changes
- Define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations
- Promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres

2.0 The current position: policy and the economy

- Retain and enhance existing markets and, where appropriate, reintroduce or create new ones, ensuring that markets remain attractive and competitive
- Allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres
- 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, plan positively for their future to encourage economic activity.

2.7 Notably, the NPPF says that:

- Need for retail, leisure, office and other main town centre uses should be met in full and should not be compromised by limited site availability; and
- Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites.

2.8 This study proceeds on that basis, identifying the full extent of the need for new retail floorspace together with broad advice on a strategy to meet that need. Future studies will identify individual sites if necessary.

Practice Guidance on Need, Impact and the Sequential Approach (December 2009)

2.9 The Practice Guidance was published by CLG in December 2009 and was designed to support PPS4. Although PPS4 has been superseded by the NPPF, we have been advised by CLG that the guidance remains extant.

2.10 We therefore draw on the guidance throughout the study and reference relevant sections where we do so.

Regional Policy and Strategies

Regional Strategy for the West Midlands (January 2008)

2.11 The Regional Strategy for the West Midlands was revoked on 20 May 2013. As a result, no weight should be attached to it in plan-making or development management (although the evidence which informed its preparation may be of some value).

2.0 The current position: policy and the economy

Other Cross Boundary Strategies

Worcestershire County Structure Plan 1996-2011 (June 2001)

2.12 Those policies 'saved' beyond the Plan's end date of 2011 were revoked on 20 May 2013. As a result, no weight should be attached to the Structure Plan in plan-making or development management.

Worcestershire Local Enterprise Partnership: Vision and Ambition/Objectives (undated)

2.13 Bromsgrove District falls within the area covered by the Worcestershire LEP. It aims[1] to:

[C]reate the right economic environment to inspire businesses, encourage investment and to create lasting and sustainable employment in Worcestershire by 2017 and beyond.

2.14 It has four key objectives[2]:

- Strategic Objective 1: National profile and promotion – to raise Worcestershire's profile and position itself to increase its share of business investment
- Strategic Objective 2: Access to finance – to ensure that businesses can access support to produce a deliverable business plan for investment and which, in turn, gives confidence to the lender
- Strategic Objective 3: Employment and skills – to work, through the Worcestershire Employment and Skills Board, with partners to strengthen current skills provision and co-ordination to meet private sector needs; and
- Strategic Objective 4: Planning, development and infrastructure – to work with the Place Shaping Group of the Worcestershire Partnership to support joint aspirations for planning, development and infrastructure (see below).

2.15 Retail is not identified as one of the key sectors which the LEP seeks to support, although it will seek to encourage tourism, including hotels with ancillary retail services alongside[3].

Greater Birmingham & Solihull Local Enterprise Partnership: Strategy for Growth (May 2013)

2.16 Bromsgrove District also falls within the area covered by the Greater Birmingham & Solihull LEP. Its Strategy for Growth[4] identifies a mission for the LEP:

To create jobs and grow the economy – and, in doing so, raise the quality of life for all of the LEP's population.

2.17 It also identifies a vision for the area:

To re-establish Greater Birmingham's role as the major driver of the UK economy outside London.

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[1] See http://www.wlep.co.uk/about-wlep/vision-and-ambition/ Access date: 26 June 2013

[2] See http://www.wlep.co.uk/about-wlep/objectives/ Access date: 26 June 2013

[3] See http://www.wlep.co.uk/key-sectors/ Access date: 26 June 2013

[4] Available: http://centreofenterprise.com/strategy-for-growth-delivering-growth/ Access date: 20 June 2013

2.0 The current position: policy and the economy

2.18 The strategy identifies six enablers of growth:

- Growing the number of successful businesses
- Building on our sector strengths and opportunities
- Stimulating innovation in products, processes, services and business structures
- Improving our skills talent pool
- Improving physical and digital connectivity; and
- Optimising physical, cultural and environmental assets.

2.19 Retail is not identified as one of the key sectors which the LEP seeks to support, although tourism and hospitality is identified as a 'high volume, high job creation' sector.

The Worcestershire Partnership: A Single Sustainable Community Strategy for Worcestershire (undated)

2.20 The community strategy for Worcestershire[5], which covers the period 2011-2021, sets out a vision for Worcestershire as:

A county with safe, cohesive, healthy and inclusive communities, a strong and diverse economy and a valued and cherished environment.

2.21 It also identifies three key priorities:

- A skilled and prosperous economy
- An environment that is cherished and resilient; and
- Improved health and well-being.

The strategy notes that Bromsgrove town centre is *'a major area of economic concern and its extensive redevelopment is underway'*. It continues: *'Improving shopping and other facilities has come up as a key issue for residents.'*

Local Policy and Strategies

Bromsgrove District Plan (formerly Core Strategy) (in preparation)

2.22 The Bromsgrove District Plan will provide a spatial strategy specific to the needs of the district. It will contain a set of primary policies for delivering the overall strategy and identify strategic allocations for development. A proposals map will illustrate these broad locations for strategic development and other policy designations. The District Plan will cover the period 2011-2030.

2.23 We understand that the Council was seeking to produce a publication version of the District Plan by September/October 2012, following the successful completion of the Draft Core Strategy 2 consultation period in April 2011. However, under the duty to cooperate provisions of the Localism Act, a formal request has now been received from Redditch Borough Council for help in accommodating the growth needs of Redditch which cannot be delivered sustainably within the Borough. Bromsgrove District Council has responded to this approach and has agreed to work with Redditch on this issue. A consultation on accommodating new homes duly took place in April and May 2013.

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[5] Available: http://www.worcestershirepartnership.org.uk/cms/sustainable-community-strategy.aspx
Access date: 20 June 2013

2.0 The current position: policy and the economy

2.24 Draft Core Strategy 2 addressed Bromsgrove town centre at Core Policy 15. It says that:

- Significant change and conservation is needed;
- An Area Action Plan is proposed which will provide a planning framework to guide and promote future development
- Sustainable travel will be promoted by improving pedestrian priority, linkages and mobility within and across the town centre; improving pedestrian and cycle linkages between Bromsgrove railway station and the town centre, and improving key junctions including Birmingham Road/Stourbridge Road
- Significant improvements in public transport will be encouraged, particularly to bus services, in order to provide an integrated and regular bus service which will connect new and existing residential areas to the Railway Station, with the town centre acting as the focal transport hub
- The Council will support proposals to improve the range and quality of the retail offer including:
  - Encouraging redevelopment of key sites including the Market Hall site
  - Continuing to support small specialist shops, whilst creating opportunities for new retailers to enter the town;
  - Improving the range of the evening economy uses within the town centre to feature, including a mix of entertainment uses for all groups, including leisure and culture, a choice of bars, cafes and restaurants;
  - Providing a regular outdoor market in the High Street
- The Council will support proposals to deliver high quality housing which provides a mix of unit sizes and tenure including provision for the elderly.

2.25 In addition, Core Policy 4(A) identifies a number of 'town expansion sites' which should include supporting retail facilities.

Bromsgrove Town Centre Draft Area Action Plan (January 2011)

2.26 A Town Centre AAP was drafted and set out a strategy to guide the regeneration of the whole of the town centre and adjoining areas. It will not be progressed further, but much of the content will be incorporated within the Bromsgrove District Plan 2011-2030.

2.27 The Draft Area Action Plan offers a vision of *'a thriving market town which attracts residents and visitors into the Town Centre, both for the shopping experience and its programme of events, activities and markets'*. It continues: *'The Town Centre will be significantly enhanced with an attractive and safe environment which will provide a focal point for the community.'*

2.28 The objectives for retail and the local economy are to:

- Improve the retail offer through the development of new sites and an extended Primary Shopping Zone
- Improve the range and quality of evening economy uses within the town centre, including a choice of bars, cafes and restaurants
- Maintain the number of employment sites for light industrial use
- Promote local and niche shops in traditional High Street premises
- Establish a regular high quality outdoor market in the High Street; and

2.0 The current position: policy and the economy

- Instigate an extended events programme.

2.29 Policy TC 1 addresses the regeneration of Bromsgrove town centre and says that:

- The centre will be the focus of a number of complementary strategies and policies which will secure its long term future enhancing its vitality and vibrancy, fixing its place within the West Midlands and beyond as a desirable place to live, work, shop and invest
- The focus will be on the historic core of the High Street and Conservation Area and its surrounding street and lanes, opportunities for physical public realm improvement and new development which complement this core area are detailed in subsequent policies
- All development in the town centre or that will impact on the town centre must have regard to the policies of the AAP and the Bromsgrove Core Strategy (now the Bromsgrove District Plan); and
- The regeneration will be phased over 15 years in conjunction with the development identified in the Bromsgrove Core Strategy (now the Bromsgrove District Plan).

2.30 Policy TC 2 sets out the town centre land use strategy. It says that:

- All new development is required to be appropriate, in terms of scale, quantity and use, to the character and function of the town centre
- Bromsgrove town centre will continue to be the main retail centre of the District with extended Primary and Secondary Shopping Zones being the focus
- New opportunities for expanding the retail offer will be welcomed on sites identified where they clearly meet with the other polices of the AAP.

2.31 The remainder of Policy TC 2, which deals with other town centre uses, and the remainder of the AAP, which deals with issues including movement, are of limited relevance to this study.

WIDER TRENDS

Economic Growth and Impact on Retail Spend

2.32 The UK saw sustained growth in real household disposable income (RHDI) between the early 1980s and the early part of first decade of the 21st century[6]. With that growth in disposable income came significant growth in spending on retail goods, with real terms spending more than doubling in the 25 years between 1983 and 2008, albeit with a minor contraction in 1991 and 1992[7]. Notably, growth in comparison goods retail spend was much greater than that for convenience goods retail sales: between 1983 and 2008, the real terms increase in convenience goods spend was some 18%, but for comparison goods it was more than 340%.

2.33 The recession in 2008/09 saw growth in convenience retail spend fall to -3.6% in 2008 and -3.9% in 2009. Negative growth had, however, started before that, with growth falling to -0.7% in 2007.

[6] See http://web.oxfordeconomics.com/FREE/PDFS/UKMFEAT2_0712.PDF Access date: 20 June 2013

[7] See Table 3.2, Retail Expenditure Guide 2012/2013 (Pitney Bowes Business Insight/Oxford Economics, August 2012)

2.0 The current position: policy and the economy

2.34 Spending on comparison goods proved more resilient, with no negative growth until 2009. This is likely to reflect consumers' preference for cutting back on 'big ticket' items (such as expensive holidays) and on transport, recreation and culture, rather than on clothing and footwear, along with more careful grocery shopping, whereby shoppers opt for cheaper lines and purchase less.

2.35 As the UK economy began to recover, comparison goods spend saw positive growth (at 2.5% in 2010 and 0.5% in 2011). In the convenience sector, negative growth continued (at -0.8% in 2010 and -3.2% in 2011).

2.36 Oxford Economics' forecasts for future growth are:

- Continued negative growth in convenience goods spend in 2012 and 2013 (at -1.1% and -0.8% respectively), before a return to positive growth in the following nine years (though only of between 0.8% and1.2% per year); and
- Continued positive growth in comparison goods spend forecast in 2012 and 2013 (at 0.4% and 2.5% respectively), with higher levels of growth in the following nine years (though only of between 4.5% and 5.5% per year).

Key Issues and Outlook for Town Centres, Neighbourhood Centres and Out Of Centre Retail

2.37 Verdict's UK Town Centre Retailing 2012 report usefully summarises some of the key issues facing town centres[8] and, in particular, comparison goods retailers. It notes that:

- Retailers are seeking to improve their margins by closing underperforming town centre stores, and they will continue to do so
- Those retailers who are expanding are going out-of-town, where rents are lower and larger units are available, allowing for deeper and wider ranges
- As retailers cut back on space they are moving towards opening larger flagship stores in strategic markets which are then supported by smaller satellite stores and transactional websites
- The town centre will increasingly be used:
  - For leisure activities, with more bars, restaurants, food-to-go outlets and community spaces opening in vacant units
  - To support the e-retail channel, with click and collect points and safe drop boxes for customers to collect their online orders as well as satellite stores for customers to make online purchases; and
  - For residential use, as secondary and tertiary space which is surplus to requirements is converted.

2.38 Verdict also consider retailing outside town centres in their UK Out-of-Town Retailing 2012 report. In terms of comparison goods retail, the report notes that:

- While retailers continue to look towards out-of-town space for expansion, consumers cutting back on 'big ticket' items has had an impact on the sales of out of town stores; and

[8] Verdict define town centres as all areas that offer comparison shopping (as opposed to the mainly convenience shopping available at neighbourhood stores and destination shopping missions to out-of-town retail park superstores).

2.0 The current position: policy and the economy

- With sales growth in bigger ticket markets more challenging, the main area of focus for out-of-town retailers will be protecting their margins and positioning themselves to benefit from the uplift in demand when the market improves. Retailers are therefore examining their portfolios and shedding underperforming space where possible.

2.39 Turning to the convenience sector, recent research by CBRE[9] found that grocery pipeline increases finally appear to be tailing-off, following five years of unbroken growth. The research notes that it is too early to say if the grocery pipeline will now begin to contract, but makes clear that Tesco's announcement in early 2012 that they were paring back their ambitious hypermarket expansion programme has, to date, had little impact on the overall grocery pipeline figures.

2.40 The research goes on to note that the net increase in grocery store branches has remained pretty well constant, despite the rapid increase in grocery pipeline floorspace: it is convenience store growth that has raced ahead. As we noted in a press release accompanying the research[10], while Tesco and Sainsbury's continue to increase their convenience store (c-store) market share, Morrisons and Waitrose have also created c-store formats. In addition, Co-operative Food has moved away from supermarket development to concentrate on c-store formats. Asda, meanwhile, is trialling a new c-store format in petrol stations and even Aldi opened their first small town centre store earlier this year.

Growth of Multi-Channel Retailing and Implications for Retail Floorspace

2.41 There is, inevitably, a close relationship between retail spend and the demand for new floorspace, but this has been complicated in recent years by growth in multi-channel retailing. Multi-channel retailing is the sale of goods to the public via more than one distribution channel: through mail order catalogues, 'bricks and mortar' stores, online, and via mobile technology.

2.42 In the convenience sector there has been growth in home delivery of groceries in recent years. However, that does not negate the need for new retail floorspace, as most convenience retailers fulfil home delivery orders by shelf-picking from stores. Only Ocado source products solely from warehouses, with Tesco and Waitrose using a mixture of shelf-picking from both stores and warehouses.

2.43 With that in mind, we follow advice from Oxford Economics[11], which suggests we might reasonably assume that only 10% of all online convenience goods expenditure is directed towards goods sourced from non-retail floorspace. In other words, 10% of online expenditure on groceries is spent with retailers such as Ocado (and, to a lesser extent, Tesco and Waitrose) who source goods from warehouses, and the remaining 90% with retailers who source goods direct from stores.

2.44 There has also been significant growth in online spend in the comparison sector, and much of this has been through retailers such as Amazon, who source products from warehouses

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[9] Available: http://portal.cbre.eu/portal/page/portal/RRP/ResearchReportPublicFiles/Grocery_Pipeline_Jun_2013.pdf Access date: 27 June 2013

[10] Available: http://www.cbre.co.uk/uk_en/news_events/news_detail?p_id=15033&title=Supermarket_Pipeline_Growth_Slows Access date: 28 June 2013

[11] See pages 28-29, Retail Expenditure Guide 2012/2013 (Pitney Bowes Business Insight/Oxford Economics, August 2012)

2.0 The current position: policy and the economy

for home delivery. However, 'click and collect', whereby products are ordered (and sometimes, though not always, paid for) online is becoming increasingly popular. It has been growing strongly, whilst growth in home delivery sales has actually proved sluggish[12]. In addition, 'bricks and mortar' stores are increasingly used as showrooms, with the purchase made at a later date via a computer, or in situ via a mobile phone, and not necessarily from the same retailer.

2.45 Oxford Economics do not provide an estimate for the amount of online comparison goods expenditure directed towards goods sourced from non-retail floorspace. In the absence of such an estimate, we surmise that some 90% of online spend is directed towards goods sourced from non-retail floorspace. More information is provided in footnotes to the tables in Appendix A and B.

2.46 Looking to the future, it is difficult to forecast future internet market share. However, Oxford Economics note in their 2012 publication Retail Expenditure Guide 2012/2013:

Internet sales penetration is already very high in the UK and is much higher than in continental Europe and even higher than in the USA. This means that we have no clear indication of a possible future saturation point.

2.47 However, they acknowledge that:

Recent increases have ... been very rapid and it is difficult to see why they should suddenly level off when internet usage is still increasing and the use of smart-phone technology in retailing is only just taking off.

2.48 Others are more sceptical: CBRE's Retail Research team argues[13] that the range of electronically transferrable retail items (such as e-books, music, film and computer software) remains far too narrow for the internet to make significant inroads into retailing as a direct channel. Moreover, the home delivery business model remains problematic: hence the belated shift to click-and-collect.

2.49 However, both CBRE's Retail Research team and Oxford Economics agree that the rate of growth in internet sales is likely to decline. Perhaps with that in mind, Oxford Economics' main forecast suggests that internet market share for comparison goods will level off at 14.7% by 2020 and that for convenience goods at 6.5% in the same year. We use this forecast in our quantitative assessment of need. More information is provided in footnotes to the tables in Appendix A and B.

Improvements in Sales Densities

2.50 Sales densities are the value of goods sold through retail outlets divided by the available floorspace (i.e. the turnover of retail floorspace per given area, usually square feet or square metres). As Oxford Economics note[14], any increase in sales densities reduces the future need for retail floorspace. This is because shoppers have a finite amount of money to spend; if more of that money is directed to existing floorspace, there is a lower requirement for new floorspace.

[12] See http://www.cbre.eu/portal/pls/portal/res_rep.show_report?report_id=1845 Access date: 25 June 2013

[13] See http://www.cbre.eu/portal/pls/portal/res_rep.show_report?report_id=1845 Access date: 25 June 2013

[14] See page 29, Retail Expenditure Guide 2012/2013 (Pitney Bowes Business Insight/Oxford Economics, August 2012)

2.0 The current position: policy and the economy

2.51 Recent years have seen significant increases in sales densities. Oxford Economics believe that the past rate of increase is unlikely to be sustainable partly because they were due to one-off changes, such as Sunday trading and 24-hour opening, both of which gave shoppers more opportunity to shop and, as a result, allowed stores to increase their turnovers. However, Oxford Economics consider it unlikely that there will be no future increases in sales densities, and settle on an increase of 0.3% per annum for convenience goods and 1.8% for comparison goods[15]. In accordance with this guidance, our quantitative assessment has made this allowance for the improvement in sales densities.

[15] See page 30, Retail Expenditure Guide 2012/2013 (Pitney Bowes Business Insight/Oxford Economics, August 2012)

3.0 The current position: centre profiles

BACKGROUND

3.1 In this section we provide a short profile of the role of and aspirations for Bromsgrove town centre and the 'Large Settlements' of Alvechurch, Barnt Green, Catshill, Hagley, Rubery and Wythall, as well as the retail frontages at Aston Fields close to Bromsgrove railway station.

3.2 In doing so we draw on our visits to each of the centre, emerging planning policy and the results of the household survey undertaken to inform this study.

BROMSGROVE TOWN CENTRE

3.3 Bromsgove town centre is centred on a pedestrianised High Street which, as the Bromsgrove Town Centre Draft Area Action Plan (January 2011) notes, follows the route of a Roman road and contains a number of historic buildings, some of which are listed and/or fall within a conservation area. There is, however, some evidence of unsympathetic infilling, inappropriate replacement shopfronts and signage within the town centre.

3.4 The Draft Area Action Plan (January 2011) rightly describes the centre as one which caters for the needs of local residents. As the household survey indicates (see section 4), the centre does not attract a significant number of shoppers from outside the survey zone in which the centre is located.

3.5 The Draft Area Action Plan goes on to note that retail accommodation in the town centre is mixed, and that many independent businesses occupy small premises that do not lend themselves to redevelopment, with a lack of larger retail units which suit modern retailing needs.

3.6 National multiples present in the centre include Dorothy Perkins, Burton, Argos, Sport Direct, WHSmith, The Works, Poundland (which took the unit previously occupied by Woolworths), M&Co and Ryman. The main convenience offer is an Asda store, together with an Iceland store. The food and drink offer includes Pizza Express, Prezzo and Costa, together with independent cafes, restaurants and pubs/bars. Service uses includes dry cleaners, estate agents, building societies/banks and hair salons.

3.7 A short distance to the north east of the centre is a small retail park occupied by Co-operative Food and two vacant retail warehouse units, on which permission has been granted for a new Sainsbury's store. Officers have advised us that work is expected to start on the redevelopment of the site once Co-operative Food have vacated their unit.

3.8 Parking is available at Recreation Road (adjacent to the Asda store) which operates a pay-on-foot barrier system, at the Churchfields multi-storey car park behind the Asda store (which operates a pay-on-foot barrier system) and at the retail park occupied by Co-operative Food (which is currently free for customers).

3.9 We visited the centre with officers shortly before midday on a Tuesday in late July. The market was trading (as it does every Tuesday, Friday and Saturday, with a farmers market also taking place every second Saturday of the month). Footfall was reasonably strong. We identified several vacant units, the largest of which are the former Waterstones store and the former McDonald's restaurant (which later operated as a YMCA charity shop).

3.10 Officers pointed out a number of development opportunities, most notably at the site of the former market Hall/George House, to the west of the existing Co-operative Food store and the Mill Lane shopping precinct. The former presents a key opportunity to develop a new anchor store for the centre.

3.0 The current position: centre profiles

CENTRES IN LARGE SETTLEMENTS

Alvechurch

3.11 Alvechurch is centred on The Square, Red Lion Street and Bear Hill. We visited the centre with officers shortly after 0930 on a Tuesday in late July. It offers top-up and specialist convenience shopping (in the form of a Co-operative Food store, butcher, off licence and newsagent), services (such as a hairdresser, estate agents and post office) and a limited food and drink offer.

3.12 We identified only one vacant unit, and it is under offer. The centre is well maintained and attractive. Car parking is plentiful. There are no development opportunities.

Barnt Green

3.13 Barnt Green is a linear centre running along Hewell Road, from the junction of Station Road at the northern end to the junction of Sandhills Road in the south. We visited the centre with officers shortly before 0930 on a Tuesday in late July.

3.14 The convenience offer includes a Tesco Express store, a butcher, baker and delicatessen, while the comparison goods retailers include a DIY goods shop, and antiques/second hand furniture shop, a gift shop and boutique clothes stores.

3.15 The centre also offers a range of services including an opticians, post office, pharmacist, estate agents and hairdressers. A small number of cafes and restaurants make up the food and drink offer.

3.16 There are no vacant units and the centre is well maintained and attractive. There is car parking available in marked bays along Hewell Road, as well as behind the row of shops anchored by the Tesco Express store. There are no development opportunities.

Catshill

3.17 Catshill is formed of two terraces of retail units lying on the southern side of Golden Cross Lane. We visited the centre with officers at around 1120 on a Tuesday in late July.

3.18 The terrace has a significant number of take away and restaurant uses, but also includes a butcher, baker and Spar convenience store, as well as a pharmacy, tattoo parlour, pet and garden supplies shop, barber and dentist.

3.19 There are no vacant units and the centre is reasonably well maintained. Car parking is available in front of the units and at the western end of the retail terrace. The only realistic development opportunities are:

- The builder’s yard and car park which separate the two terraces, although the site is compromised by an electricity sub-station and there is no evidence that the builder’s merchant would vacate the site; and
- The car park at the end of the western end of the western terrace, but it is likely to be required for that purpose.

Hagley

3.20 Hagley is a linear centre running along Worcester Lane, a short distance north of its junction with Kidderminster Road. We visited the centre with officers shortly before 1100 on a Tuesday in late July.

3.0 The current position: centre profiles

3.21 Service uses dominate, and include a dentist, a number of banks, funeral director, optician, a number of hairdressers/barbers, a beauty salon, a dry cleaner, estate agents, a travel agent, a shoe repairer and a post office.

3.22 The convenience offer includes a Spar store, greengrocer, two butchers, a delicatessen, an off licence. The comparison goods offer includes a small clothes store, sports goods shop, kitchen shop and bridal wear shop. The food and drink offer includes a small number of restaurants, pubs/bars and a take away.

3.23 There are no vacant units and the centre is well maintained and attractive. There is car parking available in marked bays along Worcester Lane and in a dedicated shoppers' car park. There are no development opportunities.

Rubery

3.24 Rubery is a long, linear centre running along New Road, running from Library Way in the west to Beverley Road in the east. We visited the centre with officers shortly after 1030 on a Tuesday in late July.

3.25 The main convenience offer is formed of a Tesco Metro store, Farmfoods store, Co-operative Food store and Costcutter store, complemented by specialist stores including a butcher and baker. The comparison offer is fairly limited, but includes several charity shops, a toy/hobby store, a DIY/hardware goods shop and cycle store.

3.26 The centre offers a number of service uses, including several beauty/tanning salons, building societies/banks, travel agents and a post office. The centre also offers some food and drink uses, including restaurants, take aways and a pub. Finally, some community uses are located in the centre, including a police station, youth centre and social club.

3.27 There is car parking available along New Road. Off-street parking is also available, close to the foodstores. There are some vacant units, spread throughout the centre. The centre is reasonably tidy but would benefit from some improvements to street furniture and shopfronts.

Wythall

3.28 Wythall is formed of three terraces, each some distance from one another. We visited them all with officers between 1000 and 1020 on a Tuesday in late July.

3.29 The first is located on Station Road and offers a pharmacy, health and beauty salon, cards/gifts/jewellery store, fish and chip shop, Chinese take away and Londis convenience store. There are no vacancies and there is off street parking in front of the shops. There are no development opportunities.

3.30 The second is located on Drakes Cross Parade on Alcester Road on Shawhurst Lane and offers a Spar store, optician, florist, hairdresser, barber, One Stop convenience store/post office and estate agent. There are no vacancies and there is off street parking in front of the shops. There are no development opportunities.

3.31 The third is located on May Lane and includes a restaurant, take away, hairdresser, barber, butcher, pharmacy and Costcutter convenience store. There are no vacancies and there is off street parking in front of the shops. There are no development opportunities.

3.0 The current position: centre profiles

OTHER IMPORTANT CENTRES

Aston Fields

3.32 Aston Fields lies close to Bromsgrove railway station at the crossroads of New Road, Stoke Road and Finstall Road. We visited the centre with officers at around 1240 on a Tuesday in late July. The centre has a limited convenience goods offer, with a small Co-operative Food store and a farm shop/cafe; the comparison offer includes a kitchen showroom, carpet retailer and florist.

3.33 The focus is on services and food and drink uses. Services include a hairdresser, dentist, betting shop and gym; food a drink uses include two take aways, a cafe, a pub and a restaurant, as well as the cafe which forms a key part of the farm shop. A Travelodge hotel lies on the edge of the centre close to the railway station.

3.34 The centre has two vacancies. It is tidy and reasonably maintained.

4.0 The need for new development

OVERALL APPROACH

4.1 In this section we consider the quantitative need for new development, taking into account the latest forecasts of the growth/decline in expenditure per capita; population; Special Forms of Trading (SFT)[16], most notably online spend; and overtrading; and

4.2 We have undertaken a household survey to inform the need assessment. This provides an up to date picture of trading patterns. Our assessment of need is founded on the basis that:

- There are two main types of goods:
  - Convenience – day-to-day groceries; and
  - Comparison – less frequently purchased, often durable, goods
- In the study area, each individual is forecast to spend a given amount per year on each of these types of goods; and
- The market is currently in equilibrium – this assumes that under current shopping patterns there is enough floorspace to support available spend.

4.3 Building upon the baseline 'equilibrium' position, we explore the capacity for further convenience and comparison retail floorspace at the agreed test dates of 2013; 2018; 2023; 2028 and 2030.

4.4 The assessment of future need is prepared on the basis that capacity can arise through one or more of:

- Population growth and/or growth in expenditure per person – more people with more money available to spend means that more floorspace is required
- Improved market share (including 'clawing back' expenditure which is 'leaking' to other locations); and
- Addressing 'overtrading' (typically only for convenience floorspace).

4.5 Key data inputs include:

- The results of the household telephone survey
- Estimates of population in the survey area, both now and at each of the test dates
- Available expenditure in the survey area, both now and at each of the test dates; and
- Floorspace data.

4.6 The 'spare' expenditure we identify, if any, is converted to a floorspace requirement.

The Study Area

4.7 The study area, illustrated in Appendix C, provided the basis for the household survey. It was designed with a view to developing an understanding of the market share of Bromsgrove town centre and other centres in Bromsgrove District in the immediate and wider area.

[16] Non-store retail sales that do not take place through traditional store-based outlets.

4.0 The need for new development

Population Data

4.8 Pitney Bowes Business Insight have provided the current population of the study area and each of the zones within it, as well as population projections for each year up to 2022. For the years beyond 2022 we assume that population increases by the same number of people each year as it has done in each of the years from 2018-2022. The populations this implies are set out on the first page of the capacity analyses at Appendix A and B.

4.9 The population projections are based on the latest available ONS mid-year population estimates and a set of demographic assumptions about future fertility, mortality and migration based on analysis of trends and expert advice. They are produced using the internationally accepted cohort component method. This method accounts for changes which increase or decrease the population (births, deaths and net migration) and models the effect of these changes and the passage of time on the age structure of the population.

4.10 The population projections provide the population levels and age structure that would result if underlying assumptions about future fertility, mortality and migration were to be realised.

The Household Survey

4.11 A telephone-based household survey (Appendix D) was undertaken by RMG Clarity in July 2013 in order to provide information on shopping patterns in the study area. The sample size was 1,000 respondents, sufficient to provide an accurate picture of the 'market share' (the proportion of expenditure captured) of different stores and centres in the study area.

Commitments

4.12 Commitments refer to new retail floorspace which has been granted planning permission but that has not yet been implemented. Commitments must be taken into account as they will not yet be reflected in the responses of the household survey, but will have an impact on available expenditure once they have been implemented and are occupied.

CONVENIENCE GOODS

Capacity arising through increase in population and expenditure per person

4.13 Estimates of expenditure per capita on convenience goods have been sourced from Pitney Bowes Business Insight. This source provides the most up-to-date data from 2012, and growth rate projections provided by Pitney Bowes Business Insight are used to estimate expenditure per capita in our base year of 2013 and our forecast years of 2018, 2023, 2028 and 2030.

4.14 The population of the study area is then multiplied by the forecast spend per person. This provides us with the total expenditure available to support spending on convenience goods (and therefore to support convenience retail floorspace). In summary, £894.2m is available across the study area in 2013, rising to £932.2m in 2018, £976.8m in 2023, £1,023.3m in 2028 and £1,042.5m in 2030.

4.15 The results of the household survey are then used to identify where people shop for convenience goods, and therefore the 'market share' for stores and centres in Bromsgrove District. We then produce a composite market share for convenience goods which combines the responses to the questions on 'main food' shopping and 'top-up' shopping, weighted in favour of main food (80% of expenditure) to reflect the fact that more money is generally spent on main food shopping trips than on top-up (20% of expenditure) shopping.

4.0 The need for new development

4.16 The detailed market shares are summarised in Table A3 in Appendix A. The spending patterns they imply, and the market share of stores in Bromsgrove District in each zone and the study area as a whole, are in Table A4. It indicates some 21% of all available convenience expenditure in the study area is currently spent on trips to stores in the district. This equates to around £188.7m in 2013. The remaining 79% is currently flowing to centres and stores outside the council's administrative boundary.

4.17 We assume that 90% of all web-based shopping (SFT) is sourced from stores, rather than from a warehouse, as many of the home delivery services operated by the leading supermarkets rely on in store 'shelf picking'. Of this, we assume that around the same proportion is derived from stores in Bromsgrove district as for conventional shopping. This equates to around £1.3m of all available expenditure (see Appendix A, Table A4).

4.18 Stores in Bromsgrove District therefore capture £190.0 (£188.7m + £1.3m) in 2013. This is a little over 21% of all available convenience expenditure in the study area.

4.19 After this, 'commitments' are identified and the anticipated turnover is calculated. Commitments are new convenience retail floorspace which have permission but have not yet been implemented. The anticipated turnover is worked out by multiplying the committed floorspace by the anticipated turnover for each store based on company averages or CBRE assumptions where not available. We also deduct floorspace which will be lost as a result of redevelopment. This is set out in Appendix A, Table A5. It indicates that new convenience floorspace in Bromsgrove District will turnover at some £30.6m at 2017, allowing for floorspace which will be lost.

4.20 We then turn to examine the capacity (or 'need') for new floorspace. The district-wide analysis is set out at Table A6 of Appendix A. As noted above, our starting point is to assume that in 2013 the market is in equilibrium, i.e. there is sufficient floorspace to support available expenditure, and no more floorspace is required. There is, therefore, enough floorspace to support the £190.0m identified in Table A4, together with some inflow of expenditure, which we estimate at 2% of all expenditure, equivalent to £3.9m. This implies a total expenditure of £193.9m supported by existing floorspace.

4.21 By 2018 assuming a constant market share of 21%, and continued inflow of 2% of all expenditure, some £202.1m is available. Existing stores turnover at only £193.9m, suggesting capacity (or 'headroom') of £8.2m (£202.1m - £193.9m).

4.22 We then make a deduction of £2.9m for improvements in floorspace efficiency, assuming an improvement in the sales density of existing floorspace of 0.3% per annum, for the reasons explained in section 2.

4.23 We also make a deduction of £0.1m for an increased proportion of expenditure being spent via the web for home delivery, though only where it would be sourced from warehouses rather than in store shelf picking. The headroom therefore falls to £5.2m (£8.2m - £2.9m - £0.1m).

4.24 Finally, we factor in the convenience commitments identified in Table B5. We assume all of these are built and trading by 2017, with a turnover of £30.6m. This leaves a negative capacity for new floorspace, of -£25.4m. Translated to floorspace, by assuming a notional turnover for new floorspace of £12,000/sqm at 2013 (grown in future years to reflect improvements in floorspace efficiency), there is a forecast oversupply of 2,084sqm net convenience floorspace by 2018 (Appendix A, Table A6).

4.25 This picture continues to 2023, to 2028 and to 2030, during which period we make an allowance for existing and committed floorspace to improve its efficiency, as well as

4.0 The need for new development

assuming a higher notional turnover for future floorspace, again allowing for greater efficiency. Although available expenditure continues to increase, it is still insufficient to 'soak up' the turnover of new floorspace. The oversupply of floorspace therefore remains across the plan period. A summary of the capacity for new floorspace, or rather lack of it, is set out in Table 4.1.

Table 4.1

District-wide capacity for new convenience floorspace

	2013	2018	2023	2028	2030
Net sales floorspace (sqm)	-	-2,034	-1,549	-1,001	-778
Gross floorspace (sqm)	-	-2,977	-2,213	-1,430	-1,111

Source: Table A6, Appendix A

Capacity arising through improved market share

4.26 If a study area's market share is low, it may be sensible to improve this, i.e. to 'clawback' some of the residents' spending which is leaking to other locations. But this must be realistic; there is little prospect of clawing back expenditure if several large superstores lie outside but close to the edge of the study area.

4.27 Moreover, there must be some benefit in planning terms. Either the vitality and viability of an existing centre must improve as a result, or there would need to be a reduction in unsustainable travel.

4.28 Having examined the market shares in Table B4 we see that in Zone 1, within which Bromsgrove lies, stores in the district secure around 80% of convenience expenditure available from residents of that zone, with only 20% flowing outside. That is a strong position which will be consolidated through opening of the proposed new Sainsbury's store at Birmingham Road Retail Park. We therefore see no case for seeking to improve market share.

Capacity arising through overtrading

4.29 Overtrading means, in quantitative terms, that stores are trading above the average for the operator. If overtrading is left unchecked a store may not be able to cater to shoppers needs and two outcomes may result - customers will seek alternative stores, or development will come forward which will satisfy the identified overtrading.

4.30 In Table A7 we examine each of the main convenience stores in Bromsgrove District and the extent to which they are trading above their company average. We assume that any turnover which is above the company average is available to support new floorspace.

4.31 In Table A8 the additional capacity arising from overtrading is added to the available expenditure and converted to a floorspace requirement. The exercise is otherwise exactly the same as in Table A6. Table 4.2 provides a summary of the capacity that arises.

4.0 The need for new development

Table 4.2

District-wide capacity for new convenience floorspace (allowing for overtrading)

	2013	2018	2023	2028	2030
Net sales floorspace (sqm)	-	762	1,255	1,761	1,968
Gross floorspace (sqm)	-	1,089	1,792	2,516	2,811

Source: Table A8, Appendix A

4.32 However, if overtrading is to be used as the basis for seeking additional floorspace it should be backed up by 'on the ground', qualitative evidence of overtrading (such as long queues at checkouts, narrow or congested aisles and difficulties in keeping shelves full). If 'on the ground' evidence is absent then there is unlikely to be a requirement to provide for new floorspace.

Comparison Goods

Capacity arising through increase in population and expenditure per person

4.33 In assessing the capacity for comparison goods we have taken the same broad approach as for convenience goods.

4.34 Table B6 in Appendix B illustrates that the district as a whole has a market share of some 8.4%, i.e. people living in the study area make just under a third of their purchases (by value) in Bromsgrove district. Given the competing centres around the study area, this comes as no surprise. We then make an allowance for internet-based shopping sourced from stores and an allowance for inflow of expenditure.

4.35 Assuming 'equilibrium' in the base year (2013) and a constant market share, population growth and expenditure per capita growth increases total available expenditure to £159.1m in 2018. Existing stores turnover at £120.7m. Once an allowance has been made for increased internet-based spending, for improvements in sales densities and for trading of commitments, available surplus expenditure in 2018 is £5.2m. Assuming a notional turnover for new floorspace of £4,000/sqm (in 2013, and then grown to allow for improvements in floorspace efficiency), that implies a requirement for some 1,179 sqm net, by 2013, 5,778sqm net by 2022, 10,843 by 2027 and 13,027sqm by 2030. This is shown in detail in Appendix B, Table B6 and summarised in Table 4.3 below.

Table 4.3

District-wide capacity for new comparison floorspace

	2013	2017	2022	2027	2031
Net sales floorspace (sqm)	0	1,179	5,778	10,843	13,027
Gross floorspace (sqm)	0	1,474	7,222	13,554	16,283

Source: Table B6, Appendix B

Capacity arising through improved market share

4.36 Within the wider study area the district's comparison goods market share is low, at only 8.4%. However, given the proximity of competing retail destinations that comes a little surprise.

4.37 The picture is, however, a little healthier in Zone 1, within which Bromsgrove lies. Stores in Bromsgrove secure some 35.4% of comparison expenditure available from residents of Zone 1. That is a reasonable market share, given the proximity of Redditch, Birmingham

4.0 The need for new development

and Worcester, and the fact that the internet secures some 10% of available spend. We therefore see no case for seeking to improve Bromsgrove District's market share at this time.

Capacity arising through overtrading

4.38 Given the nature of comparison goods shopping patterns, it is not appropriate to quantitatively analysis the implied trading of comparison goods stores against company averages. Overtrading is not, therefore, addressed.

5.0 Summary and recommendations

SUMMARY

5.1 The aim of this study is to provide Bromsgrove District Council with a report that will inform the overall strategy for retail and town centre development in its District Plan.

5.2 It provides a summary and analysis of planning and other policy relating to retail and town centres, as well as a summary of the key issues facing the retail sector now and in the future. It goes on to provide a short profile of the role of and aspirations for Bromsgrove town centre and the 'Large Settlements' of Alvechurch, Barnt Green, Catshill, Hagley, Rubery and Wythall, as well as Aston Fields close to Bromsgrove railway station. This includes identification of development opportunities.

5.3 It then turns to examine the quantitative need (or 'capacity') for new retail floorspace, based on a survey of people resident in and around Bromsgrove District. Dealing first with convenience floorspace, our assessment indicates that there will be an oversupply of convenience floorspace until at least 2030, assuming no allowance is made for overtrading, as shown in Table 5.1 below.

Table 5.1
District-wide capacity for new convenience floorspace

	2013	2018	2023	2028	2030
Net sales floorspace (sqm)	-	-2,034	-1,549	-1,001	-778
Gross floorspace (sqm)	-	-2,977	-2,213	-1,430	-1,111

Source: Table A6, Appendix A

5.4 If an allowance is made for overtrading, stores which are trading above the average for the operator, some capacity arises, as illustrated in Table 5.2 below. However, that will only be justified if there is evidence of overtrading 'on the ground' (such as long queues at checkouts, narrow or congested aisles and difficulties in keeping shelves full).

Table 5.2
District-wide capacity for new convenience floorspace (allowing for overtrading)

	2013	2018	2023	2028	2030
Net sales floorspace (sqm)	-	762	1,255	1,761	1,968
Gross floorspace (sqm)	-	1,089	1,792	2,516	2,811

Source: Table A8, Appendix A

5.5 Turning to comparison goods, we have identified a relatively small requirement for new floorspace, at least in the short-term, as summarised in Table 5.3. This is driven largely by forecast increases in expenditure per capita.

Table 5.3
District-wide capacity for new comparison floorspace

	2013	2017	2022	2027	2031
Net sales floorspace (sqm)	0	1,179	5,778	10,843	13,027
Gross floorspace (sqm)	0	1,474	7,222	13,554	16,283

Source: Table B6, Appendix B

5.0 Summary and recommendations

RECOMMENDATIONS

5.6 As we note in section 2, the NPPF makes clear that the identified need for retail uses should be met in full and should not be compromised by limited site availability.

5.7 We therefore recommend that Bromsgrove District Council identifies sites to accommodate the need identified in Table 5.1 and Table 5.3. We see no case for providing for any of the additional 'need' arising through our quantitative analysis of overtrading, unless officers observe evidence of evidence of overtrading 'on the ground' as described above.

5.8 Our assessments of the centres in Bromsgrove do not suggest any major qualitative deficiencies and, in any case, most lack major development opportunities. We therefore recommend that most new development, particularly comparison goods floorspace, is directed towards Bromsgrove town centre, in order to consolidate its role as a centre which serves residents in the area immediately surrounding it.

APPENDICES

A. Convenience Modelling

BROMSGROVE DISTRICT COUNCIL

Project: RETAIL STUDY 2013
Table: CONVENIENCE RETAIL CAPACITY TABLES
Version: Draft final 17/10/2013

Study area population by zone

Zone	Postcode Sector Groupings	2013	2018	2022	2023	2028	2030
1		67,053	69,482	71,437	71,926	74,370	75,347
2		185,920	190,667	193,664	194,413	198,160	199,658
3		94,685	95,237	95,661	95,767	96,297	96,509
4		43,160	44,053	44,696	44,857	45,661	45,982
5		73,287	73,801	74,153	74,241	74,681	74,857
TOTAL		**464,105**	**473,240**	**479,611**	**481,204**	**489,168**	**492,353**

Sources/notes for frontispiece
1. Population projections based on 2001 Census; 2013-2022 derived from Pitney Bowes Business Insight Area Profile Report (4 July 2013)
2. Population growth post 2022 assumed by CBRE, based on annual trend from 2018-2022

CONVENIENCE GOODS

Table A1

Convenience expenditure per capita (£)

Zone	2012	2013	2018	2023	2028	2030
1	2,029	2,037	2,082	2,146	2,211	2,237
2	1,891	1,899	1,941	2,000	2,060	2,085
3	1,908	1,916	1,958	2,018	2,079	2,104
4	1,943	1,951	1,994	2,055	2,117	2,142
5	1,890	1,898	1,940	1,999	2,059	2,084

Sources/notes for Table A1:

1. Expenditure data for 2012 from Pitney Bowes Business Insight Area Profile Report (4 July 2013)
2. Expenditure for 2013 is based on forecast growth in spend for 2012-2013 of 0.4%.(Table 3.4 of Pitney Bowes Business Insight/Oxford Economics Retail Expenditure Guide, Spending Update 2012/2013, August 2012)
3. Expenditure for 2018 is based on forecast growth in spend of 0.6% per annum from 2014-2018 (Table 3.4 of Pitney Bowes Business Insight/Oxford Economics Retail Expenditure Guide, Spending Update 2012/2013, August 2012)
4. Expenditure for 2023 is based on forecast growth in spend of 0.6% per annum from 2019-2022 year (Table 3.4 of Pitney Bowes Business Insight/Oxford Economics Retail Expenditure Guide, Spending Update 2012/2013, August 2012) plus growth of 0.6% for 2022-2023 (CBRE assumption based on growth in previous year)
5. Expenditure for 2028 and 2030 is based on growth of 0.6% per annum (CBRE assumption based on growth in previous year)
6. No allowance for Special Forms of Trading (SFT) is made at this stage. An allowance for SFT is made in Tables A6 and A8

CONVENIENCE GOODS

Table A2

Total available expenditure (£m)

Zone	2013	2018	2023	2028	2030
1	136.59	144.68	154.32	164.41	168.57
2	352.98	370.03	388.75	408.27	416.31
3	181.38	186.49	193.22	200.19	203.04
4	84.20	87.84	92.16	96.66	98.52
5	139.07	143.15	148.38	153.79	156.00
TOTAL	**894.22**	**932.19**	**976.83**	**1,023.32**	**1,042.45**

Sources/notes for Table A2:
1. Total available expenditure is product of population (frontispiece to tables) multiplied by expenditure per capita (Table ?1)

CONVENIENCE GOODS

Table A3

Convenience Goods Allocation - Market Shares (%)

Location of stores	Zone				
	1	2	3	4	5
FOOD STORES IN BROMSGROVE DISTRICT					
Bromsgrove Town Centre	**30.97%**	**2.29%**	**1.12%**	**2.61%**	**0.63%**
Asda, Market Street, Bromsgrove	25.00%	1.79%	0.83%	2.61%	0.00%
Co-op, Birmingham Road, Bromsgrove	5.14%	0.08%	0.29%	0.00%	0.00%
Iceland, Mill Lane, Bromsgrove	0.63%	0.35%	0.00%	0.00%	0.63%
Poundland, High Street, Bromsgrove	0.21%	0.08%	0.00%	0.00%	0.00%
Bromsgrove Area	**35.90%**	**2.06%**	**0.83%**	**5.00%**	**1.08%**
Other Stores, Bromsgrove Area	**4.58%**	**0.63%**	**0.15%**	**0.00%**	**0.19%**
Alvechurch Area	**0.21%**	**0.08%**	**0.87%**	**0.00%**	**0.82%**
Barnt Green Area	**0.63%**	**1.66%**	**0.00%**	**0.00%**	**0.00%**
Catshill Area	**1.46%**	**0.00%**	**0.00%**	**0.00%**	**0.19%**
Hagley Area	**0.00%**	**0.00%**	**0.00%**	**0.00%**	**1.52%**
Rubery Area	**5.83%**	**10.37%**	**0.00%**	**0.00%**	**0.00%**
Wythall Area	**0.00%**	**0.48%**	**0.00%**	**0.00%**	**0.00%**
TOTAL	79.58%	17.57%	2.96%	7.61%	4.43%

Table A3 (contd)

Convenience Goods Allocation - Market Shares (%)

Location of stores	Zone				
	1	2	3	4	5
FOOD STORES OUTSIDE OF BROMSGROVE DISTRICT					
Northfield Area	**1.32%**	**25.20%**	**0.44%**	**0.76%**	**0.44%**
Redditch Area	**7.99%**	**6.37%**	**90.97%**	**1.85%**	**0.89%**
Droitwich Area	**5.76%**	**0.18%**	**0.97%**	**61.52%**	**0.00%**
Kidderminster Area	**0.90%**	**1.64%**	**0.78%**	**1.41%**	**69.11%**
TOTAL	15.97%	33.38%	93.16%	65.54%	70.44%

Table A3 (contd)

Convenience Goods Allocation - Market Shares (%)

Location of stores	Zone 1	2	3	4	5
FOOD STORES OUTSIDE OF STUDY AREA					
Birmingham	1.39%	40.78%	0.63%	0.33%	1.71%
Halesowen	1.67%	3.12%	0.49%	0.00%	1.52%
Worcester	0.21%	0.25%	1.60%	23.15%	1.33%
Stourbridge	0.69%	3.70%	0.00%	0.00%	18.61%
Other stores outside the study area	0.00%	0.25%	0.15%	0.33%	0.44%
TOTAL	3.96%	48.10%	2.86%	23.80%	23.61%
OVERALL TOTAL exc internet	99.51%	99.04%	98.98%	96.96%	98.48%

Table A3 (contd)

Convenience Goods Allocation - Market Shares (%)

Location of stores	Zone 1	2	3	4	5
Internet	0.49%	0.96%	1.02%	3.04%	1.52%
OVERALL TOTAL exc internet	100.00%	100.00%	100.00%	100.00%	100.00%

Sources/notes for Table A3
1. All market shares are sourced from household survey 2013

CONVENIENCE GOODS

Table A4

Convenience Goods Allocation - Spending Patterns (£m)

Location of stores	Zone 1	2	3	4	5
FOOD STORES IN BROMSGROVE DISTRICT					
Bromsgrove Town Centre	**42.31**	**8.08**	**2.03**	**2.20**	**0.88**
Asda, Market Street, Bromsgrove	34.15	6.31	1.50	2.20	0.00
Co-op, Birmingham Road, Bromsgrove	7.02	0.27	0.53	0.00	0.00
Iceland, Mill Lane, Bromsgrove	0.85	1.24	0.00	0.00	0.88
Poundland, High Street, Bromsgrove	0.28	0.27	0.00	0.00	0.00
Bromsgrove Area	**49.04**	**7.29**	**1.50**	**4.21**	**1.50**
Other Stores, Bromsgrove Area	**6.26**	**2.22**	**0.26**	**0.00**	**0.26**
Alvechurch Area	**0.28**	**0.27**	**1.58**	**0.00**	**1.14**
Barnt Green Area	**0.85**	**5.86**	**0.00**	**0.00**	**0.00**
Catshill Area	**1.99**	**0.00**	**0.00**	**0.00**	**0.26**
Hagley Area	**0.00**	**0.00**	**0.00**	**0.00**	**2.11**
Rubery Area	**7.97**	**36.60**	**0.00**	**0.00**	**0.00**
Wythall Area	**0.00**	**1.69**	**0.00**	**0.00**	**0.00**
TOTAL	108.71	62.01	5.37	6.41	6.16

Table A4 (contd)

Convenience Goods Allocation - Spending Patterns (£m)

Location of stores	Zone 1	2	3	4	5
FOOD STORES OUTSIDE OF BROMSGROVE DISTRICT					
Northfield	**1.80**	**88.93**	**0.79**	**0.64**	**0.62**
Redditch	**10.91**	**22.48**	**165.00**	**1.56**	**1.23**
Droitwich	**7.87**	**0.62**	**1.76**	**51.80**	**0.00**
Kidderminster	**1.23**	**5.77**	**1.41**	**1.19**	**96.11**
TOTAL	21.82	117.81	168.97	55.18	97.96

Table A4 (contd)

Convenience Goods Allocation - Spending Patterns (£m)

Location of stores	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5
FOOD STORES OUTSIDE OF STUDY AREA					
Birmingham	1.90	143.93	1.14	0.27	2.38
Halesowen	2.28	11.02	0.88	0.00	2.11
Worcester	0.28	0.89	2.91	19.49	1.85
Stourbridge	0.95	13.06	0.00	0.00	25.88
Other stores outside the study area	0.00	0.89	0.26	0.27	0.62
TOTAL	5.41	169.78	5.19	20.04	32.83
OVERALL TOTAL exc internet	135.93	349.60	179.53	81.63	136.95

Table A4 (contd)

Convenience Goods Allocation - Spending Patterns (£m)

Location of stores	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5
Internet	0.66	3.38	1.85	2.56	2.11
of which shelf-picked	0.60	3.04	1.66	2.31	1.90
from stores in Bromsgrove District	0.48	0.54	0.05	0.18	0.09
from stores outside Bromsgrove District	0.12	2.50	1.61	2.13	1.82
of which sourced directly from warehouses	0.07	0.34	0.18	0.26	0.21
OVERALL TOTAL inc internet	136.59	352.98	181.38	84.20	139.07

CONVENIENCE GOODS

Table A5

Commitments/losses

Application Ref	Extant retail commitments	Net A1 sales floorspace (sqm)	of which convenience floorspace (%)	Net convenience floorspace (sqm)	Estimated sales density (£/sqm)	Estimated turnover of convenience floorspace (£m)	of which comparison floorspace (%)	Net comparison floorspace (sqm)	Estimated sales density (£/sqm)	Estimated turnover of comparison floorspace (£m)
Commitments										
09/0365	Sainsbury's, Bromsgrove Retail Park, Birmingham Road, Bromsgrove, B61 0DD [1]	4,147	79%	3,263	11,779	38.4	21%	884	6,240	5.5
09/0365	Unit shops, Bromsgrove Retail Park, Road, Bromsgrove, B61 0DD [2]	860	0%	n/a	n/a	n/a	100%	860	3,500	3.0
12/0300	2 Sherwood Road, Bromsgrove [3]	5,057	0%	n/a	n/a	n/a	100%	5,057	1,500	7.6
Losses										
	Co-operative Food, Bromsgrove Retail Park, Birmingham Road, Bromsgrove, B61 0DD [4]	1,322	80%	1,058	7,389	7.8	20%	264	n/a	n/a
NET INCREASE				**2,205**		**30.6**		**7,065**		**16.1**

Sources/notes for Table A5:

1. Floorspace based on Table 5 of Planning and Retail Statement (May 2009) submitted in support of application. Sales density (excl petrol and cafe sales but incl VAT) based on data from Verdict Company Briefings (2012)
2. Floorspace based on Table 5 of Planning and Retail Statement (May 2009) submitted in support of application. Sales density estimated (based on Planning and Retail Statement)
3. Floorspace based on supporting information for planning application; sales density estimated using data from Retail Week Knowledge Bank, based on known operators
4. Total floorspace derived from IGD Stores Database 2010; convenience /comparison split estimated. Turnover sourced from household survey

CONVENIENCE GOODS

Table A6

District-wide wide capacity (£m)

	2013	2018	2023	2028	2030
Expenditure retention					
Total available convenience expenditure in study area (£m) (1)	894.2	932.2	976.8	1023.3	1042.5
Market share of convenience floorspace in Bromsgrove District (%) (2)	21.2%	21.2%	21.2%	21.2%	21.2%
Expenditure from study area retained by stores in Bromsgrove District (£m) (3)	190.0	198.1	207.5	217.4	221.5
Expenditure inflow					
Estimated proportion of in store convenience turnover from beyond study area (%) (4)	2.0%	2.0%	2.0%	2.0%	2.0%
Implied expenditure inflow to stores in Bromsgrove District (£m)	3.9	4.0	4.2	4.4	4.5
Total available expenditure					
Total available convenience expenditure in Bromsgrove Distict (£m) (5)	193.9	202.1	211.8	221.9	226.0
Claims on expenditure					
Turnover of existing stores (£m) (6)	193.9	193.9	193.9	193.9	193.9
Improvements in sales densities of existing stores (£m) (7)	0.0	2.9	5.9	8.9	10.1
Increase in SFT (non-shelf picking) (£m) (8)	0.0	0.1	0.1	0.1	0.1
Turnover of convenience floorspace commitments (£m) (9)	0.0	30.6	31.1	31.6	31.7
Residual expenditure					
Total residual expenditure available to support new convenience floorspace (£m) (10)	0.0	-25.4	-19.2	-12.6	-9.8
Estimated sales density of new convenience floorspace (£/sqm net) (11)	12,000	12,181	12,365	12,551	12,627
Capacity					
Capacity for new convenience floorspace (sqm net) (12)	-	-2,084	-1,549	-1,001	-778
Capacity for new convenience floorspace (sqm gross) (13)	-	-2,977	-2,213	-1,430	-1,111

Sources/notes for Table A6:

1. Sourced from Table A2
2. Proportion of expenditure available from residents of study area secured by stores in Bromsgrove District in 2013. Includes online spend where goods are sourced from stores in Bromsgrove District. Market share held constant for future years
3. Sourced from Table A4 for 2013. Calculated for future years by multiplying the total available expenditure from the study area by the market share
4. Estimated by CBRE
5. Total available expenditure is the sum of total available expenditure from the study area and inflow expenditure
6. Turnover of existing stores (including online spend where goods are sourced from stores in Bromsgrove District) is equivalent to total available expenditure in 2013 as the market is assumed to be in equilibrium
7. Stores are assumed to increase their sales density in future years, mainly through improved merchandising techniques. Improvements in floorspace efficiency are based on PBBI Retail Expenditure Guide 2012/2013 (August 2012)
8. We make an allowance for an increase in Special Forms of Trading (SFT), though only Internet-based shopping sourced from warehouses, as shelf-picking from stores will require additional retail floorspace. We use the 2013 household survey to identify the existing proportion of turnover spent via the Internet and sourced from warehouses, then grow it at the rate implied by PBBI Retail Expenditure Guide 2012/2013 (August 2012)
9. Turnover of commitments is sourced from Table A5. Commitments are assumed to increase their sales density in future years. Improvements in floorspace efficiency are based on PBBI Retail Expenditure Guide 2012/2013 (August 2012)
10. Total residual expenditure available to support new floorspace. This is the result of subtracting turnover of existing stores, improvements in sales densities, expenditure diverted through an increase in SFT and turnover of commitments from total available expenditure
11. Sales density of new floorspace is estimated by CBRE and assumed to increase its sales density in future years. Improvements in floorspace efficiency are based on PBBI Retail Expenditure Guide 2012/2013 (August 2012)
12. Capacity for new floorspace (net sales) is the result of dividing residual expenditure by estimated sales density
13. Capacity for new floorspace (gross) assumes that the net sales floorspace forms 70% of the gross floorspace

CONVENIENCE GOODS

Table A7

Trading performance of major stores in Bromsgrove District

Location of stores	Gross floorspace (sqm)	Net sales floorspace (sqm)	of which convenience floorspace (%)	Net convenience floorspace (sqm)	Estimated sales density (£/sqm)	Estimated company average turnover (£m)	Actual turnover (£m)	Overtrading (£m)	Overtrading (%)
Asda, Market Street, Bromsgrove		3,359	70%	2,351	11,674	27.4	44.1	16.7	37.8
Morrisons, Buntsford Park Road, Bromsgrove		2,600	75%	1,950	11,153	21.7	39.7	18.0	45.2
TOTAL								**34.7**	

Sources/notes for Table A7
1. Floorspace data derived from IGD Stores Database 2010
2. Convenience floorspace allocations estimated
3. Convenience sales densities calculated (excl petrol and cafe sales but incl VAT) based on data from Verdict Company Briefings (2012)

CONVENIENCE GOODS

Table A8

District-wide wide capacity (£m) accounting for overtrading

	2013	2018	2023	2028	2030
Expenditure retention					
Total available convenience expenditure in study area (£m) (1)	894.2	932.2	976.8	1023.3	1042.5
Market share of convenience floorspace in Bromsgrove District (%) (2)	21.2%	21.2%	21.2%	21.2%	21.2%
Expenditure from study area retained by stores in Bromsgrove District (£m) (3)	190.0	198.1	207.5	217.4	221.5
Expenditure inflow					
Estimated proportion of in store convenience turnover from beyond study area (%) (4)	2.0%	2.0%	2.0%	2.0%	2.0%
Implied expenditure inflow to stores in Bromsgrove District (£m)	3.9	4.0	4.2	4.4	4.5
Total available expenditure					
Total available convenience expenditure in Bromsgrove Distict (£m) (5)	193.9	202.1	211.8	221.9	226.0
Claims on expenditure					
Turnover of existing stores (£m) (6)	193.9	193.9	193.9	193.9	193.9
Improvements in sales densities of existing stores (£m) (7)	0.0	2.9	5.9	8.9	10.1
Increase in SFT (non-shelf picking) (£m) (8)	0.0	0.1	0.1	0.1	0.1
Turnover of convenience floorspace commitments (£m) (9)	0.0	30.6	31.1	31.6	31.7
Overtrading Scenario					
Overtrading of Bromsgrove's largest foodstores (10)	34.7	34.7	34.7	34.7	34.7
Residual expenditure					
Total residual expenditure available to support new convenience floorspace (£m) (11)	34.7	9.3	15.5	22.1	24.8
Estimated sales density of new convenience floorspace (£/sqm net) (12)	12,000	12,181	12,365	12,551	12,627
Capacity					
Capacity for new convenience floorspace (sqm net) (13)	-	762	1,255	1,761	1,968
Capacity for new convenience floorspace (sqm gross) (14)	-	1,089	1,792	2,516	2,811

Sources/notes for Table A8:
1. Sourced from Table A2
2. Proportion of expenditure available from residents of study areas secured by stores in Bromsgrove District in 2013. Includes online spend where goods are sourced from stores in Bromsgrove District. Market share held constant for future years
3. Sourced from Table A4 for 2013. Calculated for future years by multiplying the total available expenditure from the study area by the market share
4. Estimated by CBRE
5. Total available expenditure is the sum of total available expenditure from the study area and inflow expenditure
6. Turnover of existing stores (including online spend where goods are sourced from stores in Bromsgrove District) is equivalent to total available expenditure in 2013 as the market is assumed to be in equilibrium
7. Stores are assumed to increase their sales density in future years, mainly through improved merchandising techniques. Improvements in floorspace efficiency are based on PBBI Retail Expenditure Guide 2012/2013 (August 2012)
8. We make an allowance for an increase in Special Forms of Trading (SFT), though only Internet-based shopping sourced from warehouses, as shelf-picking from stores will require additional retail floorspace. We use the 2013 household survey to identify the existing proportion of turnover spent via the Internet and sourced from warehouses, then grow it at the rate implied by PBBI Retail Expenditure Guide 2012/2013 (August 2012)
9. Turnover of commitments is sourced from Table A5. Commitments are assumed to increase their sales density in future years. Improvements in floorspace efficiency are based on PBBI Retail Expenditure Guide 2012/2013 (August 2012)
10. Overtrading scenario considers the over trading of largest stores (Table A7) by reducing the actual sales densities to company averages
11. Total residual expenditure available to support new floorspace. This is the result of subtracting turnover of existing stores, improvements in sales densities, expenditure diverted through an increase in SFT and turnover of commitments from total available expenditure
12. Sales density of new floorspace is estimated by CBRE and assumed to increase its sales density in future years. Improvements in floorspace efficiency are based on PBBI Retail Expenditure Guide 2012/2013 (August 2012)
13. Capacity for new floorspace (net sales) is the result of dividing residual expenditure by estimated sales density
14. Capacity for new floorspace (gross) assumes that the net sales floorspace forms 70% of the gross floorspace

B. Comparison Modelling

BROMSGROVE DISTRICT COUNCIL

Project: RETAIL STUDY 2013
Table: COMPARISON RETAIL CAPACITY TABLES
Version: Draft final 17/10/2013

Study area population by zone

Zone	Postcode Sector Groupings	2013	2018	2022	2023	2028	2030
1		67,053	69,482	71,437	71,926	74,370	75,347
2		185,920	190,667	193,664	194,413	198,160	199,658
3		94,685	95,237	95,661	95,767	96,297	96,509
4		43,160	44,053	44,696	44,857	45,661	45,982
5		73,287	73,801	74,153	74,241	74,681	74,857
TOTAL		**464,105**	**473,240**	**479,611**	**481,204**	**489,168**	**492,353**

Sources/notes for frontispiece
1. Population projections based on 2001 Census; 2013-2022 derived from Pitney Bowes Business Insight Area Profile Report (4 July 2013)
2. Population growth post 2022 assumed by CBRE, based on annual trend from 2018-2022

COMPARISON GOODS

Table B1

Comparison expenditure per capita (£)

Zone	2012	2013	2018	2023	2028	2030
1	3,091	3,224	4,166	5,049	6,084	6,555
2	2,732	2,849	3,682	4,462	5,377	5,793
3	2,848	2,970	3,838	4,652	5,605	6,039
4	2,948	3,075	3,973	4,815	5,802	6,252
5	2,787	2,907	3,756	4,552	5,485	5,910

Sources/notes for Table A1:
1. Expenditure data for 2012 from Pitney Bowes Business Insight Area Profile Report (4 July 2013)
2. Expenditure for 2013 is based on forecast growth in spend for 2012-2013 of 4.3% (Table 3.4 of Pitney Bowes Business Insight/Oxford Economics Retail Expenditure Guide, Spending Update 2012/2013, August 2012)
3. Expenditure for 2018 is based on forecast growth in spend of 5.4% for 2013-2014, 5.8% for 2014-2015, 5.5% for 2015-16, 5.0% for 2016-2017 and 4.6% for 2017-2018 (Table 3.4 of Pitney Bowes Business Insight/Oxford Economics Retail Expenditure Guide, Spending Update 2012/2013, August 2012)
3. Expenditure for 2023 is based on forecast growth in spend of 4.2% for 2018-2019, 4.0% for 2019-2020, 3.8% for 2020-2021, 3.8% for 2021-2022 and 3.8% for 2022-2023 (Table 3.4 of Pitney Bowes Business Insight/Oxford Economics Retail Expenditure Guide, Spending Update 2012/2013, August 2012)
5. Expenditure for 2028 and 2030 is based on growth of 3.8% per annum (CBRE assumption based on growth in previous year)
6. No allowance for Special Forms of Trading (SFT) is made at this stage. An allowance for SFT is made in Table B6

COMPARISON GOODS

Table B2

Total available expenditure (£m)

Zone	2013	2018	2023	2028	2030
1	216.17	289.44	363.13	452.44	493.88
2	529.77	702.01	867.53	1,065.51	1,156.71
3	281.26	365.54	445.48	539.78	582.86
4	132.71	175.02	215.99	264.93	287.46
5	213.03	277.19	337.95	409.65	442.41
TOTAL	**1,372.95**	**1,809.19**	**2,230.09**	**2,732.31**	**2,963.33**

Sources/notes for Table B2:
1. Total available expenditure is product of population (frontispiece to tables) multiplied by expenditure per capita (Table B2)

COMPARISON GOODS

Table B3

Comparison Goods Allocation - Market Shares (%)

Location of stores	Zone				
	1	2	3	4	5
COMPARISON STORES IN BROMSGROVE DISTRICT					
Bromsgrove Town Centre	**31.79%**	**1.80%**	**0.79%**	**2.84%**	**1.17%**
Bromsgrove Town Centre	29.97%	1.67%	0.75%	2.81%	1.17%
Morrisons, Buntsford Park Road, Bromsgrove	0.71%	0.00%	0.00%	0.00%	0.00%
Spains, New Road, Bromsgrove	0.34%	0.03%	0.00%	0.00%	0.00%
Broad Street DIY, Worcester Road, Bromsgrove	0.41%	0.00%	0.00%	0.00%	0.00%
Knights Pharmacy, Birmingham Road, Bromsgrove	0.20%	0.04%	0.00%	0.00%	0.00%
Little Heath Garden Centre, Lickey End, Bromsgrove	0.00%	0.02%	0.04%	0.00%	0.00%
Argos, High Street, Bromsgrove	0.04%	0.02%	0.00%	0.03%	0.00%
Asda, Market Street, Bromsgrove	0.08%	0.00%	0.00%	0.00%	0.00%
Lush Furniture, Warwick Road, Bromsgrove	0.02%	0.02%	0.00%	0.00%	0.00%
Aldi, Stokes Road, Bromsgrove	0.02%	0.00%	0.00%	0.00%	0.00%
Bromsgrove Area	**0.12%**	**0.09%**	**0.00%**	**0.00%**	**0.00%**
Alvechurch Area	**0.00%**	**0.00%**	**0.58%**	**0.00%**	**0.00%**
Barnt Green Area	**0.72%**	**0.42%**	**0.00%**	**0.00%**	**0.00%**
Catshill Area	**1.09%**	**0.00%**	**0.00%**	**0.00%**	**0.00%**
Rubery Area	**1.69%**	**2.18%**	**0.07%**	**0.00%**	**0.21%**
Wythall Area	**0.00%**	**0.33%**	**0.00%**	**0.00%**	**0.00%**
TOTAL	**35.41%**	**4.82%**	**1.44%**	**2.84%**	**1.38%**

Table B3

Comparison Goods Allocation - Market Shares (%)

Location of stores	Zone				
	1	2	3	4	5
COMPARISON STORES OUTSIDE OF BROMSGROVE DISTRICT					
Northfield	**0.65%**	**10.57%**	**0.04%**	**0.00%**	**0.05%**
Redditch	**18.05%**	**7.42%**	**69.85%**	**2.10%**	**0.46%**
Droitwich	**2.62%**	**0.34%**	**0.73%**	**33.24%**	**0.71%**
Kidderminster	**3.16%**	**1.40%**	**0.28%**	**3.21%**	**43.30%**
TOTAL	**24.49%**	**19.73%**	**70.89%**	**38.55%**	**44.52%**

COMPARISON GOODS

Table B3 (contd)

Comparison Goods Allocation - Market Shares (%)

Location of stores	Zone 1	2	3	4	5
COMPARISON STORES OUTSIDE OF STUDY AREA					
Birmingham	19.54%	57.71%	13.72%	2.65%	30.22%
Halesowen	0.26%	3.57%	0.19%	0.00%	0.52%
Worcester	8.01%	1.27%	3.03%	42.94%	5.62%
Stourbridge	0.35%	0.99%	0.16%	0.00%	8.01%
Other stores outside the study area	2.09%	3.98%	3.00%	4.35%	2.38%
TOTAL	30.26%	67.52%	20.09%	49.95%	46.75%
OVERALL TOTAL exc internet	90.16%	92.07%	92.43%	91.34%	92.65%

Table B3 (contd)

Comparison Goods Allocation - Market Shares (%)

Location of stores	Zone 1	2	3	4	5
Internet	9.84%	7.93%	7.57%	8.66%	7.35%

Sources/notes for Table B3:

1. All market shares are sourced from household survey 2013

COMPARISON GOODS

Table B4

Comparison Goods Allocation - Spending Patterns (£m)

Location of stores	Zone				
	1	2	3	4	5
COMPARISON STORES IN BROMSGROVE DISTRICT					
Bromsgrove Town Centre	68.73	9.53	2.23	3.76	2.50
Bromsgrove Area	0.25	0.46	0.00	0.00	0.00
Alvechurch Area	0.00	0.00	1.63	0.00	0.00
Barnt Green Area	1.56	2.22	0.00	0.00	0.00
Catshill Area	2.36	0.00	0.00	0.00	0.00
Rubery Area	3.65	11.57	0.20	0.00	0.45
Wythall Area	0.00	1.75	0.00	0.00	0.00
TOTAL	76.56	25.53	4.06	3.76	2.94

Table B4 (contd)

Comparison Goods Allocation - Spending Patterns (£m)

Location of stores	Zone				
	1	2	3	4	5
COMPARISON STORES OUTSIDE OF BROMSGROVE DISTRICT					
Northfield	1.40	55.99	0.11	0.00	0.11
Redditch	39.03	39.30	196.46	2.79	0.99
Droitwich	5.67	1.80	2.04	44.11	1.50
Kidderminster	6.84	7.43	0.78	4.26	92.24
TOTAL	52.93	104.52	199.39	51.16	94.84

COMPARISON GOODS

Table B4 (contd)

Comparison Goods Allocation - Spending Patterns (£m)

Location of stores	Zone 1	2	3	4	5
COMPARISON STORES OUTSIDE OF STUDY AREA					
Birmingham	42.24	305.71	38.59	3.52	64.39
Halesowen	0.56	18.90	0.52	0.00	1.10
Worcester	17.32	6.72	8.54	56.99	11.98
Stourbridge	0.77	5.25	0.44	0.00	17.06
Other stores outside the study area	4.52	21.11	8.43	5.77	5.08
TOTAL	65.41	357.70	56.52	66.28	99.60
OVERALL TOTAL exc INTERNET	194.90	487.75	259.96	121.21	197.38

Table B4 (contd)

Comparison Goods Allocation - Spending Patterns (£m)

Location of stores	Zone 1	2	3	4	5
Internet	21.28	42.03	21.29	11.50	15.65
of which shelf-picked	2.13	4.20	2.13	1.15	1.57
from stores in Bromsgrove District	0.33	0.26	1.24	0.02	0.01
from stores outside Bromsgrove District	1.80	3.94	0.89	1.13	1.56
of which sourced directly from warehouses	19.15	37.83	19.16	10.35	14.09
OVERALL TOTAL inc internet	216.17	529.77	281.26	132.71	213.03

COMPARISON GOODS

Table B5

Commitments/losses

Application Ref	Extant retail commitments	Net A1 sales floorspace (sqm)	of which convenience floorspace (%)	Net convenience floorspace (sqm)	Estimated sales density (£/sqm)	Estimated turnover of convenience floorspace (£m)	of which comparison floorspace (%)	Net comparison floorspace (sqm)	Estimated sales density (£/sqm)	Estimated turnover of comparison floorspace (£m)
Commitments										
09/0365	Sainsbury's, Bromsgrove Retail Park, Birmingham Road, Bromsgrove, B61 0DD	4,147	79%	3,263	11,779	38.4	21%	884	6,240	5.5
09/0365	Unit shops, Bromsgrove Retail Park, Road, Bromsgrove, B61 0DD	860	0%	n/a	n/a	n/a	100%	860	3,500	3.0
12/0300	2 Sherwood Road, Bromsgrove	5,057	0%	n/a	n/a	n/a	100%	5,057	1,500	7.6
Losses										
	Co-operative Food, Bromsgrove Retail Park, Birmingham Road, Bromsgrove, B61 0DD	1,322	80%	1,058	7,389	7.8	20%	264	n/a	n/a
NET INCREASE				**2,205**		**30.6**		**7,065**		**16.1**

Sources/notes for Table B5:

1. Floorspace based on Table 5 of Planning and Retail Statement (May 2009) submitted in support of application. Sales density (excl petrol and cafe sales but incl VAT) based on data from Verdict Company Briefings (2012)
2. Floorspace based on Table 5 of Planning and Retail Statement (May 2009) submitted in support of application. Sales density estimated (based on Planning and Retail Statement)
3. Floorspace based on supporting information for planning application; sales density estimated using data from Retail Week Knowledge Bank, based on known operators
4. Total floorspace derived from IGD Stores Database 2010; convenience/comparison split estimated. Turnover sourced from household survey

COMPARISON GOODS

Table B6

District-wide wide capacity (£m)

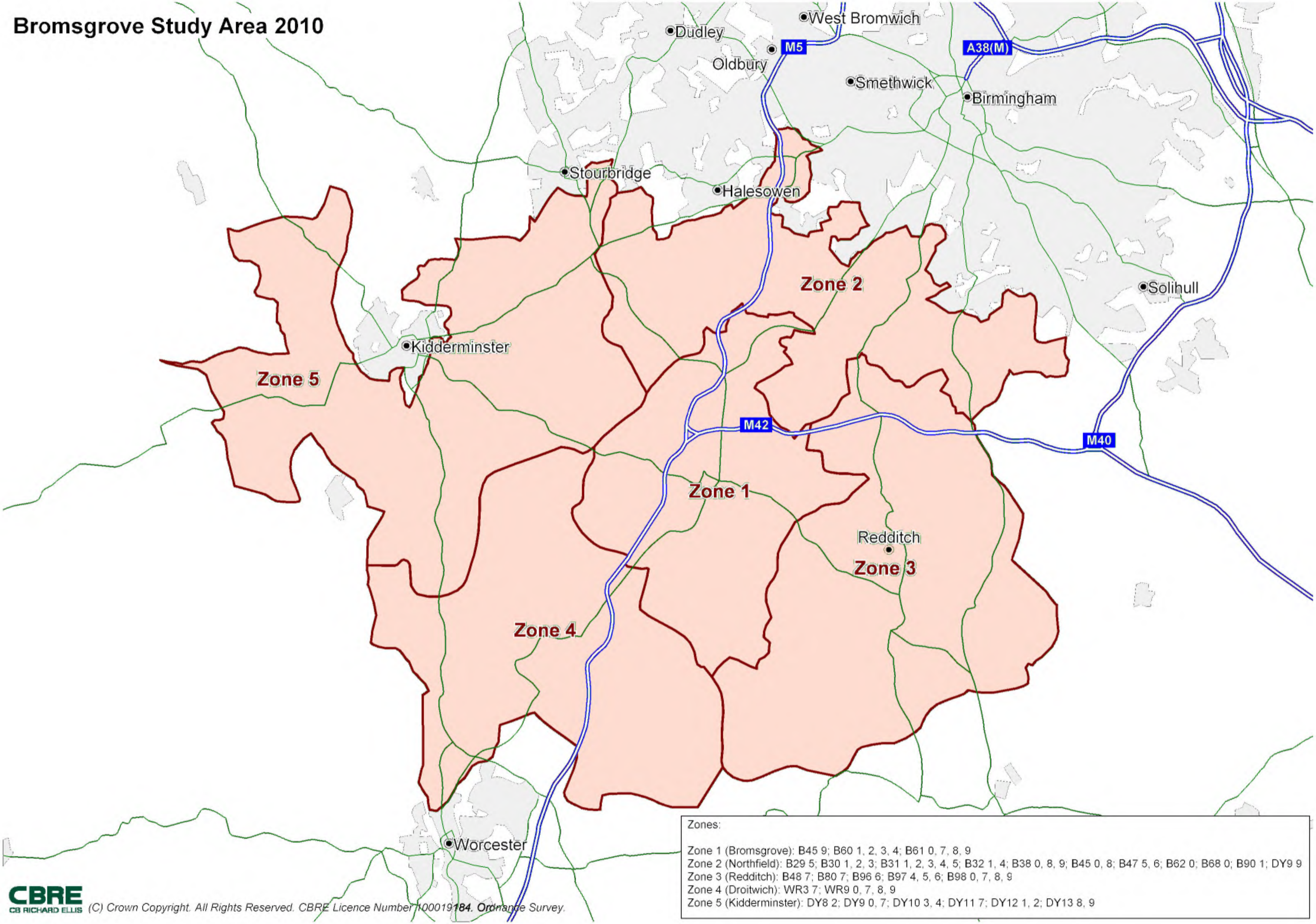
	2013	2018	2023	2028	2030
Expenditure retention					
Total available comparison expenditure in study area (£m) (1)	1372.9	1809.2	2230.1	2732.3	2963.3
Market share of comparison floorspace in Bromsgrove District (%) (2)	8.4%	8.4%	8.4%	8.4%	8.4%
Expenditure from study area retained by stores in Bromsgrove District (£m) (3)	114.7	151.1	186.3	228.3	247.6
Expenditure inflow					
Estimated proportion of in store comparison turnover from beyond study area (%) (4)	5.0%	5.0%	5.0%	5.0%	5.0%
Implied expenditure inflow to stores in Bromsgrove District (£m)	6.0	8.0	9.8	12.0	13.0
Total available expenditure					
Total available comparison expenditure in Bromsgrove Distict (£m) (5)	120.7	159.1	196.1	240.3	260.6
Claims on expenditure					
Turnover of existing stores (£m) (6)	120.7	120.7	120.7	120.7	120.7
Improvements in sales densities of existing stores (£m) (7)	0.0	11.3	23.6	37.0	42.8
Increase in SFT (non-shelf picking) (£m) (8)	0.0	5.8	6.6	6.6	6.6
Turnover of comparison floorspace commitments (£m) (9)	0.0	16.1	17.6	19.3	20.0
Residual expenditure					
Total residual expenditure available to support new comparison floorspace (£m) (10)	0.0	5.2	27.6	56.7	70.6
Estimated sales density of new comparison floorspace (£/sqm net) (11)	4,000	4,373	4,781	5,227	5,417
Capacity					
Capacity for new comparison floorspace (sqm net) (12)	-	1,179	5,778	10,843	13,027
Capacity for new comparison floorspace (sqm gross) (13)	-	1,474	7,222	13,554	16,283

Sources/notes for Table B6:

1. Sourced from Table B2
2. Proportion of expenditure available from residents of study area secured by stores in Bromsgrove District in 2013. Includes online spend where goods are sourced from stores in Bromsgrove District. Market share held constant for future years
3. Sourced from Table B4 for 2013. Calculated for future years by multiplying the total available expenditure from the study area by the market share
4. Estimated by CBRE
5. Total available expenditure is the sum of total available expenditure from the study area and inflow expenditure
6. Turnover of existing stores (including online spend where goods are sourced from stores in Bromsgrove District) is equivalent to total available expenditure in 2013 as the market is assumed to be in equilibrium
7. Stores are assumed to increase their sales density in future years, mainly through improved merchandising techniques. Improvements in floorspace efficiency are based on PBBI Retail Expenditure Guide 2012/2013 (August 2012)
8. We make an allowance for an increase in Special Forms of Trading (SFT), though only Internet-based shopping sourced from warehouses, as shelf-picking from stores will require additional retail floorspace. We use the 2013 household survey to identify the existing proportion of turnover spent via the Internet and sourced from warehouses, then grow it at the rate implied by PBBI Retail Expenditure Guide 2012/2013 (August 2012)
9. Turnover of commitments is sourced from Table B5. Commitments are assumed to increase their sales density in future years. Improvements in floorspace efficiency are based on PBBI Retail Expenditure Guide 2012/2013 (August 2012)
10. Total residual expenditure available to support new floorspace. This is the result of subtracting turnover of existing stores, improvements in sales densities, expenditure diverted through an increase in SFT and turnover of commitments from total available expenditure
11. Sales density of new floorspace is estimated by CBRE and assumed to increase its sales density in future years. Improvements in floorspace efficiency are based on PBBI Retail Expenditure Guide 2012/2013 (August 2012)
12. Capacity for new floorspace (net sales) is the result of dividing residual expenditure by estimated sales density
13. Capacity for new floorspace (gross) assumes that the net sales floorspace forms 80% of the gross floorspace

C. Study Area Map

Bromsgrove Study Area 2010



Zones:

Zone 1 (Bromsgrove): B45 9; B60 1, 2, 3, 4; B61 0, 7, 8, 9
Zone 2 (Northfield): B29 5; B30 1, 2, 3; B31 1, 2, 3, 4, 5; B32 1, 4; B38 0, 8, 9; B45 0, 8; B47 5, 6; B62 0; B68 0; B90 1; DY9 9
Zone 3 (Redditch): B48 7; B80 7; B96 6; B97 4, 5, 6; B98 0, 7, 8, 9
Zone 4 (Droitwich): WR3 7; WR9 0, 7, 8, 9
Zone 5 (Kidderminster): DY8 2; DY9 0, 7; DY10 3, 4; DY11 7; DY12 1, 2; DY13 8, 9

D. Household Survey Results

Food Shopping Weighted

	Base: All respondents (ex don't do/ varies etc)		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
	Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents (ex don't do/ varies etc)	997.30	100.000	144.00	100.000	397.30	100.000	206.00	100.000	92.00	100.000	158.00	100.000
Tesco Extra, Coldfield Drive, Redditch	69.40	6.959	3.80	2.639	5.50	1.384	59.40	28.835	.70	.761	.00	.000
Sainsburys, Abbey Trading Centre, Redditch	56.60	5.675	4.10	2.847	13.10	3.297	37.30	18.107	.70	.761	1.40	.886
Asda, Market Street, Bromsgrove	47.20	4.733	36.00	25.000	7.10	1.787	1.70	.825	2.40	2.609	.00	.000
Morrisons, Warwick Highway, Redditch	43.40	4.352	1.60	1.111	3.10	.780	38.70	18.786	.00	.000	.00	.000
Morrisons, Buntsford Park Road, Bromsgrove	42.30	4.241	33.80	23.472	3.50	.881	1.00	.485	4.00	4.348	.00	.000
Sainsburys, Frankley Beeches Road, Northfield	31.00	3.108	.70	.486	30.30	7.626	.00	.000	.00	.000	.00	.000
Morrisons, Covercroft Road, Droitwich	27.10	2.717	.70	.486	.00	.000	.70	.340	25.70	27.935	.00	.000
Sainsburys, Carpet Trades Way, Kidderminster	26.70	2.677	.30	.208	2.00	.503	1.00	.485	.00	.000	23.40	14.810
Morrisons, Green Street, Kidderminster	24.90	2.497	.00	.000	.30	.076	.00	.000	.70	.761	23.90	15.127
Sainsburys, Alcester Road, Northfield	22.40	2.246	.00	.000	20.70	5.210	.70	.340	.00	.000	1.00	.633
Aldi, Stokes Road, Bromsgrove	20.90	2.096	14.80	10.278	4.40	1.107	.70	.340	.30	.326	.70	.443
Waitrose, Saltway, Droitwich	20.60	2.066	6.90	4.792	.70	.176	.30	.146	12.70	13.804	.00	.000
Aldi, Kidderminster Road, Droitwich	12.60	1.263	.70	.486	.00	.000	.70	.340	11.20	12.174	.00	.000
Tesco Superstore, Castle Road, Kidderminster	12.10	1.213	.00	.000	.00	.000	.00	.000	.00	.000	12.10	7.658
Internet	11.80	1.183	.70	.486	3.80	.956	2.10	1.019	2.80	3.043	2.40	1.519
Aldi, Trescott Road, Redditch	9.80	.983	.00	.000	1.00	.252	8.80	4.272	.00	.000	.00	.000
Co-operative Food, Birmingham Road, Bromsgrove	8.30	.832	7.40	5.139	.30	.076	.60	.291	.00	.000	.00	.000
Co-operative Food, Hazelwood Street, Stirchley	6.70	.672	.00	.000	6.70	1.686	.00	.000	.00	.000	.00	.000
Aldi, Bristol Road, Northfield	6.10	.612	.00	.000	6.10	1.535	.00	.000	.00	.000	.00	.000
Aldi, Bristol Road South, Northfield	5.90	.592	.00	.000	5.90	1.485	.00	.000	.00	.000	.00	.000
Co-operative Food, Pershore Road, Northfield	4.90	.491	.00	.000	4.90	1.233	.00	.000	.00	.000	.00	.000
Asda, Queensway Mall, Bromsgrove	4.80	.481	1.70	1.181	2.10	.529	1.00	.485	.00	.000	.00	.000
Aldi, Green Street, Kidderminster	4.80	.481	.00	.000	.00	.000	.00	.000	.30	.326	4.50	2.848
Iceland, Trafford Park Estate, Trescott Rd, Redditch	4.70	.471	.00	.000	.00	.000	4.70	2.282	.00	.000	.00	.000
Aldi, Birmingham Road, Redditch	4.40	.441	.00	.000	.70	.176	3.70	1.796	.00	.000	.00	.000
Marks and Spencer, Walford Walk, Redditch	4.30	.431	.30	.208	.30	.076	3.40	1.650	.30	.326	.00	.000
Tesco Express, Frankley Beeches Road, Northfield	4.10	.411	.60	.417	3.50	.881	.00	.000	.00	.000	.00	.000
Tesco Express, Alcester Road, Redditch	3.70	.371	.00	.000	.00	.000	3.70	1.796	.00	.000	.00	.000
Lidl, 3a, The Quadrant, Redditch	3.70	.371	.70	.486	.00	.000	3.00	1.456	.00	.000	.00	.000
Co-operative Food, Franche Road, Kidderminster	3.70	.371	.00	.000	.30	.076	.00	.000	.00	.000	3.40	2.152
Co-operative Food, West Heath Road, Northfield	3.60	.361	.00	.000	3.60	.906	.00	.000	.00	.000	.00	.000
Tesco Express, Hewell Road, Bromsgrove	3.50	.351	.30	.208	3.20	.805	.00	.000	.00	.000	.00	.000
Tesco Superstore, Ridgacre Road, Northfield	3.40	.341	.00	.000	3.40	.856	.00	.000	.00	.000	.00	.000
Iceland, 12 Mill Lane, Bromsgrove	3.30	.331	.90	.625	1.40	.352	.00	.000	.00	.000	1.00	.633
Tesco Express, Shakespeare Avenue, Redditch	3.20	.321	.00	.000	.30	.076	2.90	1.408	.00	.000	.00	.000
Tesco Express, Willow Way, Redditch	3.10	.311	.00	.000	.00	.000	3.10	1.505	.00	.000	.00	.000
Co-operative Food, Stoke Road, Bromsgrove	2.90	.291	1.90	1.319	.00	.000	.00	.000	.00	.000	1.00	.633

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Food Shopping Weighted

	Base: All respondents (ex don't do/ varies etc)		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
	Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Co-operative Food, Alcester Road, Redditch	2.30	.231	.70	.486	1.00	.252	.60	.291	.00	.000	.00	.000
Tesco Metro, Bristol Road South, Northfield	2.00	.201	.00	.000	2.00	.503	.00	.000	.00	.000	.00	.000
Lidl, Vale Road, Kidderminster	2.00	.201	.00	.000	.00	.000	.00	.000	.00	.000	2.00	1.266
Iceland, Grosvenor Centre, Northfield	2.00	.201	.00	.000	2.00	.503	.00	.000	.00	.000	.00	.000
Co-operative Food, Castle Square, Northfield	2.00	.201	.00	.000	1.30	.327	.00	.000	.00	.000	.70	.443
Marks and Spencer, Weavers Wharf, Kidderminster	1.90	.191	.00	.000	.00	.000	.00	.000	.00	.000	1.90	1.203
Tesco Express, Warbler Place, Kidderminster	1.80	.180	.00	.000	.00	.000	.00	.000	.00	.000	1.80	1.139
Co-operative Food, Gilbert Road, Bromsgrove	1.80	.180	1.20	.833	.30	.076	.00	.000	.30	.326	.00	.000
Tesco Express, Primsland Way Retail, Droitwich	1.60	.160	.00	.000	.00	.000	.00	.000	1.60	1.739	.00	.000
Tesco Express, Bristol Road South, Northfield	1.60	.160	.30	.208	1.30	.327	.00	.000	.00	.000	.00	.000
Tesco Express, Stourport Road, Kidderminster	1.50	.150	.30	.208	.00	.000	.00	.000	.00	.000	1.20	.759
Asda, New Road, Kidderminster	1.40	.140	.00	.000	.70	.176	.00	.000	.00	.000	.70	.443
Aldi, New Road, Kidderminster	1.40	.140	.70	.486	.00	.000	.00	.000	.00	.000	.70	.443
Waitrose, Junction 2 M42, Redditch	1.30	.130	.00	.000	.00	.000	.00	.000	.00	.000	1.30	.823
Tesco Express, Redhill Road, Northfield	1.30	.130	.00	.000	1.30	.327	.00	.000	.00	.000	.00	.000
Asda, Hagley Road West, Northfield	1.30	.130	.00	.000	1.30	.327	.00	.000	.00	.000	.00	.000
Aldi, Bridgnorth Road, Kidderminster	1.30	.130	.00	.000	.30	.076	.00	.000	.00	.000	1.00	.633
Tesco Express, Alcester Road, Northfield	1.20	.120	.00	.000	.90	.227	.30	.146	.00	.000	.00	.000
Co-operative Food, Ombersley Road, Droitwich	1.20	.120	.00	.000	.00	.000	.00	.000	1.20	1.304	.00	.000
Co-operative Food, 430 Evesham Road, Redditch	1.20	.120	.00	.000	.00	.000	1.20	.583	.00	.000	.00	.000
Tesco Metro, Lombard Street, Kidderminster	1.00	.100	.00	.000	.00	.000	.00	.000	.00	.000	1.00	.633
Tesco Express, Hagley Road, Kidderminster	1.00	.100	.00	.000	.70	.176	.00	.000	.00	.000	.30	.190
Co-operative Food, Load Street, Kidderminster	1.00	.100	.00	.000	.00	.000	.00	.000	.00	.000	1.00	.633
Tesco Express, Old Birmingham Road, Bromsgrove	.90	.090	.90	.625	.00	.000	.00	.000	.00	.000	.00	.000
Farmfoods, Kingfisher Shopping Centre, Redditch	.90	.090	.00	.000	.00	.000	.90	.437	.00	.000	.00	.000
Co-operative Food, 127 Evesham Road, Redditch	.90	.090	.00	.000	.00	.000	.90	.437	.00	.000	.00	.000
Lidl, Blackpole Road, Droitwich	.70	.070	.00	.000	.00	.000	.00	.000	.00	.000	.70	.443
Tesco Express, Bridge Road, Kidderminster	.60	.060	.00	.000	.00	.000	.00	.000	.00	.000	.60	.380
Co-operative Food, Stourport Road, Kidderminster	.60	.060	.00	.000	.00	.000	.00	.000	.00	.000	.60	.380
Aldi, Stratford Road, Northfield	.60	.060	.00	.000	.60	.151	.00	.000	.00	.000	.00	.000
Tesco Express, Comberton Hill, Kidderminster	.30	.030	.00	.000	.00	.000	.00	.000	.00	.000	.30	.190
Tesco Express, Bewdley Hill, Kidderminster	.30	.030	.00	.000	.00	.000	.00	.000	.00	.000	.30	.190
Tesco Express, Barnes Hill, Northfield	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
Farmfoods, New Road, Northfield	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
Farmfoods, Hazelwell Street, Northfield	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
Co-operative Food, Turves Green, Northfield	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
Co-operative Food, The Square, Redditch	.30	.030	.00	.000	.00	.000	.30	.146	.00	.000	.00	.000

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Food Shopping Weighted

		Base: All respondents (ex don't do/ varies etc)		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
		Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
	Co-operative Food, New Road, Redditch	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Co-operative Food, Manor Lane, Northfield	.30	.030	.00	.000	.00	.000	.30	.146	.00	.000	.00	.000
	Co-operative Food, Lombard Street/Tan Lane, Kidderminster	.30	.030	.00	.000	.00	.000	.00	.000	.00	.000	.30	.190
	Co-operative Food, Alcester Road, Northfield	.30	.030	.30	.208	.00	.000	.00	.000	.00	.000	.00	.000
	Morrisons, Bristol Road South, Rubery	32.80	3.289	4.80	3.333	28.00	7.048	.00	.000	.00	.000	.00	.000
	Sainsbury's, Alcester Road South, Maypole	25.00	2.507	.00	.000	25.00	6.292	.00	.000	.00	.000	.00	.000
	Sainsbury's, Stratford Road, Shirley	12.40	1.243	.00	.000	12.40	3.121	.00	.000	.00	.000	.00	.000
	Sainsbury's, Chapel Lane, Selly Oak	12.20	1.223	.00	.000	12.20	3.071	.00	.000	.00	.000	.00	.000
	Morrisons, Great Park, Ashbrook Drive, Rubery	11.20	1.123	3.00	2.083	8.20	2.064	.00	.000	.00	.000	.00	.000
	Asda, Wolverhampton Road, Oldbury	9.30	.933	1.00	.694	8.30	2.089	.00	.000	.00	.000	.00	.000
	Waitrose, Ryemarket, Stourbridge	8.20	.822	.00	.000	1.30	.327	.00	.000	.00	.000	6.90	4.367
	Tesco, Ridgacre Road, Quinton	7.50	.752	.00	.000	7.50	1.888	.00	.000	.00	.000	.00	.000
	Sainsbury's, Sandringham Way, Brierley Hill	7.30	.732	.00	.000	1.40	.352	.00	.000	.00	.000	5.90	3.734
	Sainsbury's, Windermere Drive, Blackpole, Worcester	7.20	.722	.00	.000	.30	.076	.00	.000	5.50	5.978	1.40	.886
	Aldi, New Road, Stourbridge	6.50	.652	.00	.000	3.10	.780	.00	.000	.00	.000	3.40	2.152
	Local stores, Redditch	6.40	.642	.30	.208	.00	.000	6.10	2.961	.00	.000	.00	.000
	Local stores, Birmingham	6.30	.632	.00	.000	6.30	1.586	.00	.000	.00	.000	.00	.000
	Aldi, Alcester Road South, Birmingham	6.00	.602	.00	.000	6.00	1.510	.00	.000	.00	.000	.00	.000
	Asda, Merryhill Centre, Brierley Hill, Dudley	5.90	.592	.70	.486	2.10	.529	.00	.000	.00	.000	3.10	1.962
	Tesco, Lombard Street, Stourport-on-Severn	5.60	.562	.00	.000	.00	.000	.00	.000	.00	.000	5.60	3.544
	Sainsbury's, Merry Hill Shopping Centre, Brierley Hill	5.20	.521	.00	.000	2.40	.604	.00	.000	.00	.000	2.80	1.772
Other	Morrisons, Stratford Road, Shirley	5.20	.521	.00	.000	5.20	1.309	.00	.000	.00	.000	.00	.000
	Local stores, Bromsgrove	5.10	.511	3.60	2.500	1.50	.378	.00	.000	.00	.000	.00	.000
	Asda, Queensway, Halesowen	4.80	.481	.00	.000	3.10	.780	.00	.000	.00	.000	1.70	1.076
	Asda, Coventry Road, Small Heath, Birmingham	4.10	.411	.00	.000	4.10	1.032	.00	.000	.00	.000	.00	.000
	Local stores, Northfield	3.60	.361	.00	.000	3.60	.906	.00	.000	.00	.000	.00	.000
	Co-op, Load Street, Bewdley	3.60	.361	.00	.000	.00	.000	.00	.000	.00	.000	3.60	2.278
	Sainsbury's, Howard Road, Kings Heath	3.50	.351	.00	.000	3.50	.881	.00	.000	.00	.000	.00	.000
	Asda, Cornbow Centre, Halesowen	3.50	.351	.00	.000	3.50	.881	.00	.000	.00	.000	.00	.000
	Tesco, Mill Wood Drive, Worcester	3.40	.341	.00	.000	.00	.000	.00	.000	3.40	3.696	.00	.000
	Tesco, Stratford Road, Shirley, Solihull	3.10	.311	.00	.000	3.10	.780	.00	.000	.00	.000	.00	.000
	Sainsbury's, Halesowen Street, Rowley Regis	3.10	.311	.70	.486	2.40	.604	.00	.000	.00	.000	.00	.000
	Local stores, Shirley	2.80	.281	.00	.000	2.50	.629	.30	.146	.00	.000	.00	.000
	Local stores, Barnt Green	2.80	.281	.60	.417	2.20	.554	.00	.000	.00	.000	.00	.000
	Tesco, Dickens Heath, Shirley	2.70	.271	.00	.000	2.70	.680	.00	.000	.00	.000	.00	.000
	Spar, Worcester Road, West Hagley	2.70	.271	.00	.000	.30	.076	.00	.000	.00	.000	2.40	1.519
	Local stores, Stourbridge	2.70	.271	.00	.000	.60	.151	.00	.000	.00	.000	2.10	1.329
	Local stores, Rubery	2.70	.271	.60	.417	2.10	.529	.00	.000	.00	.000	.00	.000
	Local stores, Bewdley	2.70	.271	.00	.000	.00	.000	.60	.291	.00	.000	2.10	1.329
	Tesco, Brindley Road, Worcester	2.70	.271	.00	.000	.00	.000	.00	.000	2.70	2.935	.00	.000
	Sainsbury's, Freeth Street, Oldbury	2.40	.241	.00	.000	2.40	.604	.00	.000	.00	.000	.00	.000
	Local stores, Hagley	2.40	.241	.00	.000	.00	.000	.00	.000	.00	.000	2.40	1.519
	Local stores, Droitwich	2.40	.241	.00	.000	.00	.000	.30	.146	2.10	2.283	.00	.000

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Food Shopping Weighted

		Base: All respondents (ex don't do/ varies etc)		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
		Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
	Marks & Spencer, High Street, Birmingham	2.40	.241	.00	.000	2.40	.604	.00	.000	.00	.000	.00	.000
	Iceland, Bridge Street, Kidderminster	2.30	.231	.00	.000	.00	.000	.00	.000	.00	.000	2.30	1.456
	Co-op, Lombard Street, Stourport	2.30	.231	.00	.000	.00	.000	.00	.000	.00	.000	2.30	1.456
	Aldi, Pheasant Street, Worcester	2.30	.231	.00	.000	.00	.000	.00	.000	2.30	2.500	.00	.000
	Local stores, Kings Norton	2.10	.211	.00	.000	2.10	.529	.00	.000	.00	.000	.00	.000
	Tesco, Ladywood Middleway, Birmingham	2.10	.211	.00	.000	2.10	.529	.00	.000	.00	.000	.00	.000
	Tesco, Foxoak Street, Cradley Heath	2.10	.211	.00	.000	.70	.176	.00	.000	.00	.000	1.40	.886
	Tesco, Fordrough Road, Birmingham	2.10	.211	.00	.000	1.40	.352	.00	.000	.70	.761	.00	.000
	Co-op, Weoley Castle, Birmingham	2.00	.201	.00	.000	2.00	.503	.00	.000	.00	.000	.00	.000
	Aldi, Stratford Road, Shirley	2.00	.201	.00	.000	2.00	.503	.00	.000	.00	.000	.00	.000
	Sainsbury's, Brindley Place, Birmingham	1.90	.191	.00	.000	1.90	.478	.00	.000	.00	.000	.00	.000
	Local stores, Weoley Castle	1.90	.191	.00	.000	1.90	.478	.00	.000	.00	.000	.00	.000
	Co-op, Alvechurch Road, Birmingham	1.90	.191	.00	.000	1.90	.478	.00	.000	.00	.000	.00	.000
	Biddle's, Birchfield Road, Redditch	1.90	.191	.00	.000	.00	.000	1.90	.922	.00	.000	.00	.000
	Spar, Oakland Avenue, Droitwich Spa	1.80	.180	.00	.000	.00	.000	.00	.000	1.80	1.957	.00	.000
	Tesco, St Peters Drive, Worcester	1.70	.170	.30	.208	.70	.176	.00	.000	.70	.761	.00	.000
	Iceland, Alcester Road South, Maypole	1.70	.170	.00	.000	1.70	.428	.00	.000	.00	.000	.00	.000
	Asda, Silver Street, Worcester	1.70	.170	.00	.000	.00	.000	.00	.000	1.70	1.848	.00	.000
	Asda, Pearson Street, Brierley Hill	1.70	.170	.00	.000	1.00	.252	.00	.000	.00	.000	.70	.443
	Aldi, Edgbaston Road, Edgbaston	1.70	.170	.00	.000	1.70	.428	.00	.000	.00	.000	.00	.000
	Local stores, Chaddesley Corbett	1.60	.160	.00	.000	.00	.000	.00	.000	.00	.000	1.60	1.013
Other	Local stores, Bournville	1.50	.150	.00	.000	1.50	.378	.00	.000	.00	.000	.00	.000
	Co-op, The Square, Alvechurch	1.50	.150	.30	.208	.30	.076	.90	.437	.00	.000	.00	.000
	Tesco, New Birmingham Road, Birmingham	1.40	.140	.00	.000	.70	.176	.00	.000	.00	.000	.70	.443
	Tesco, Aston Lane, Aston on Carrant, Birmingham	1.40	.140	.00	.000	1.40	.352	.00	.000	.00	.000	.00	.000
	Iceland, Bristol Road South, Birmingham	1.40	.140	.00	.000	1.40	.352	.00	.000	.00	.000	.00	.000
	Waitrose, Stratford Road, Birmingham	1.30	.130	.00	.000	1.00	.252	.00	.000	.30	.326	.00	.000
	Oakhouse Food, Buntsford Park Road, Bromsgrove	1.30	.130	.00	.000	1.00	.252	.00	.000	.00	.000	.30	.190
	Local stores, Wythall	1.30	.130	.00	.000	1.30	.327	.00	.000	.00	.000	.00	.000
	Co-op, Alcester Road, Studley	1.30	.130	.00	.000	.00	.000	1.30	.631	.00	.000	.00	.000
	Tesco, Hewell Road, Barnt Green	1.20	.120	.00	.000	1.20	.302	.00	.000	.00	.000	.00	.000
	Spar, Drakes Cross Parade, Hollywood, Birmingham	1.20	.120	.00	.000	1.20	.302	.00	.000	.00	.000	.00	.000
	Merry Hill Retail Park, Merry Hill, Brierly Hill	1.20	.120	.30	.208	.60	.151	.00	.000	.00	.000	.30	.190
	Local stores, Hollywood	1.20	.120	.00	.000	1.20	.302	.00	.000	.00	.000	.00	.000
	Local stores, Cotteridge	1.20	.120	.00	.000	1.20	.302	.00	.000	.00	.000	.00	.000
	Lidl, Vale Road, Stourport-on-Severn	1.20	.120	.00	.000	.00	.000	.00	.000	.00	.000	1.20	.759
	Aldi, Birmingham Road, Studley	1.20	.120	.00	.000	.00	.000	1.20	.583	.00	.000	.00	.000
	Waitrose, Moorfield Road, Alcester	1.00	.100	.00	.000	.00	.000	1.00	.485	.00	.000	.00	.000
	Spar, Batchley Road, Redditch	1.00	.100	.00	.000	.00	.000	1.00	.485	.00	.000	.00	.000
	Simply Fresh, Bartley Green	1.00	.100	.00	.000	1.00	.252	.00	.000	.00	.000	.00	.000
	Morrisons, Pottery Road, Oldbury	1.00	.100	.00	.000	1.00	.252	.00	.000	.00	.000	.00	.000
	Local stores, West Bromwich	1.00	.100	.00	.000	1.00	.252	.00	.000	.00	.000	.00	.000
	Local stores, Longbridge	1.00	.100	.00	.000	1.00	.252	.00	.000	.00	.000	.00	.000
	Lidl, Hagley Street, Halesowen	1.00	.100	.00	.000	1.00	.252	.00	.000	.00	.000	.00	.000

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Food Shopping Weighted

		Base: All respondents (ex don't do/ varies etc)		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
		Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Other	Tesco, Warbler Place, Kidderminster	.90	.090	.00	.000	.00	.000	.00	.000	.00	.000	.90	.570
	Tesco, Hagley Road, Stourbridge	.90	.090	.00	.000	.00	.000	.00	.000	.00	.000	.90	.570
	Spar, St Kenelms Road, Romsley	.90	.090	.00	.000	.90	.227	.00	.000	.00	.000	.00	.000
	Spar, Broad Street, Bromsgrove	.90	.090	.90	.625	.00	.000	.00	.000	.00	.000	.00	.000
	Spar, Blake Avenue, Droitwich Spa	.90	.090	.00	.000	.00	.000	.00	.000	.90	.978	.00	.000
	Local stores, Stourport-on-Severn	.90	.090	.00	.000	.00	.000	.00	.000	.00	.000	.90	.570
	Local stores, Stirchley	.90	.090	.00	.000	.90	.227	.00	.000	.00	.000	.00	.000
	Local stores, Quinton	.90	.090	.00	.000	.90	.227	.00	.000	.00	.000	.00	.000
	Local stores, Oldbury	.90	.090	.00	.000	.90	.227	.00	.000	.00	.000	.00	.000
	Local stores, Maypole	.90	.090	.00	.000	.90	.227	.00	.000	.00	.000	.00	.000
	Local stores, Catshill	.90	.090	.60	.417	.00	.000	.00	.000	.00	.000	.30	.190
	Local stores, Bartley Green	.90	.090	.00	.000	.90	.227	.00	.000	.00	.000	.00	.000
	Local stores, Astwood Bank	.90	.090	.00	.000	.00	.000	.90	.437	.00	.000	.00	.000
	Co-op, Ombersley Road, Worcester	.90	.090	.00	.000	.00	.000	.00	.000	.90	.978	.00	.000
	Asda, Windmill Lane, Birmingham	.90	.090	.00	.000	.90	.227	.00	.000	.00	.000	.00	.000
	Waitrose, High Street, Harborne, Birmingham	.70	.070	.00	.000	.70	.176	.00	.000	.00	.000	.00	.000
	Tesco, Worcester Road, Evesham	.70	.070	.00	.000	.00	.000	.70	.340	.00	.000	.00	.000
	Tesco, Town Gate Retail Park, Birmingham Road, Dudley	.70	.070	.00	.000	.70	.176	.00	.000	.00	.000	.00	.000
	Tesco, Coventry Road, Sheldon	.70	.070	.70	.486	.00	.000	.00	.000	.00	.000	.00	.000
	Sainsbury's, York Street, Stourport	.70	.070	.00	.000	.00	.000	.00	.000	.00	.000	.70	.443
	Morrisons, Lichfield Street, Walsall	.70	.070	.00	.000	.70	.176	.00	.000	.00	.000	.00	.000
	Morrisons, Four Pools Industrial Estate, Evesham	.70	.070	.00	.000	.00	.000	.70	.340	.00	.000	.00	.000
	Morrisons, Chester Road, Birmingham	.70	.070	.00	.000	.70	.176	.00	.000	.00	.000	.00	.000
	Morrisons, Charterfield Shopping Centre, Kingswinford	.70	.070	.00	.000	.70	.176	.00	.000	.00	.000	.00	.000
	Marks & Spencer, St John Street, Bridgnorth	.70	.070	.00	.000	.00	.000	.00	.000	.00	.000	.70	.443
	Marks & Spencer, Merryhill Shopping Centre, Brierley Hill	.70	.070	.00	.000	.70	.176	.00	.000	.00	.000	.00	.000
	Local stores, Bournville and Stirchley	.70	.070	.00	.000	.70	.176	.00	.000	.00	.000	.00	.000
	Iceland, Warwick Road, Acocks Green	.70	.070	.00	.000	.70	.176	.00	.000	.00	.000	.00	.000
	Iceland, Stratford Road, Solihull	.70	.070	.00	.000	.70	.176	.00	.000	.00	.000	.00	.000
	Iceland, Institute Road, King's Heath	.70	.070	.00	.000	.70	.176	.00	.000	.00	.000	.00	.000
	Iceland, High Street, Harbourne, Birmingham	.70	.070	.00	.000	.70	.176	.00	.000	.00	.000	.00	.000
	Iceland, Friary Walk, Worcester	.70	.070	.00	.000	.00	.000	.00	.000	.70	.761	.00	.000
	Farmfoods, Warwick Road, Birmingham	.70	.070	.00	.000	.70	.176	.00	.000	.00	.000	.00	.000
	Errands, Lombard Street, Kidderminster	.70	.070	.00	.000	.00	.000	.00	.000	.00	.000	.70	.443
	Costco, Watson Road, Birmingham	.70	.070	.00	.000	.70	.176	.00	.000	.00	.000	.00	.000
	Co-op, Lymington Road, Highcliffe	.70	.070	.00	.000	.00	.000	.00	.000	.00	.000	.70	.443
	Co-op, High Street, Kinver, Stourbridge	.70	.070	.00	.000	.00	.000	.00	.000	.00	.000	.70	.443
	Asda, King George's Way, Pershore	.70	.070	.00	.000	.00	.000	.00	.000	.70	.761	.00	.000
	Asda, Bosworth Drive, Solihull	.70	.070	.00	.000	.70	.176	.00	.000	.00	.000	.00	.000
	Aldi, Earl Way, Halesowen	.70	.070	.00	.000	.00	.000	.00	.000	.00	.000	.70	.443
	Tesco, Alcester Road, Hollywood, Birmingham	.60	.060	.00	.000	.30	.076	.30	.146	.00	.000	.00	.000
	Spar, The Green, Kings Norton, Birmingham	.60	.060	.00	.000	.60	.151	.00	.000	.00	.000	.00	.000
	Spar, Lower Lickhill Road, Stourport-on-Severn	.60	.060	.00	.000	.00	.000	.00	.000	.00	.000	.60	.380

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Food Shopping Weighted

		Base: All respondents (ex don't do/ varies etc)		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
		Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Other	Queensway Shopping Centre, Stourbridge	.60	.060	.00	.000	.30	.076	.00	.000	.00	.000	.30	.190
	Poundland, High Street, Bromsgrove	.60	.060	.30	.208	.30	.076	.00	.000	.00	.000	.00	.000
	One Stop, Worcester Road, Bromsgrove	.60	.060	.60	.417	.00	.000	.00	.000	.00	.000	.00	.000
	Matchborough Post Office, Matchborough Way, Redditch	.60	.060	.00	.000	.00	.000	.60	.291	.00	.000	.00	.000
	Local stores, Worcester	.60	.060	.00	.000	.00	.000	.00	.000	.60	.652	.00	.000
	Local stores, Solihull	.60	.060	.00	.000	.60	.151	.00	.000	.00	.000	.00	.000
	Local stores, Selly Oak	.60	.060	.00	.000	.60	.151	.00	.000	.00	.000	.00	.000
	Local stores, Kidderminster	.60	.060	.00	.000	.00	.000	.00	.000	.00	.000	.60	.380
	Local stores, Hartlebury	.60	.060	.00	.000	.00	.000	.00	.000	.30	.326	.30	.190
	Local stores, Chelmsley Wood	.60	.060	.00	.000	.30	.076	.00	.000	.00	.000	.30	.190
	Local stores, Belbroughton	.60	.060	.00	.000	.60	.151	.00	.000	.00	.000	.00	.000
	Local stores, Aston Field	.60	.060	.60	.417	.00	.000	.00	.000	.00	.000	.00	.000
	Local stores, Alvechurch	.60	.060	.00	.000	.00	.000	.60	.291	.00	.000	.00	.000
	Fairfield Post Office, Stourbridge Road, Fairfield	.60	.060	.30	.208	.00	.000	.30	.146	.00	.000	.00	.000
	Co-op, Hagley Road, Birmingham	.60	.060	.00	.000	.60	.151	.00	.000	.00	.000	.00	.000
	Co-op, Dad's Lane, Birmingham	.60	.060	.00	.000	.60	.151	.00	.000	.00	.000	.00	.000
	Co-op, Colin Road, Worcester	.60	.060	.00	.000	.00	.000	.00	.000	.60	.652	.00	.000
	Aldi, Bristol Road, Selly Oak	.60	.060	.00	.000	.60	.151	.00	.000	.00	.000	.00	.000
	Tesco, Platts Crescent, Stourbridge	.30	.030	.00	.000	.00	.000	.00	.000	.00	.000	.30	.190
	Tesco, High Street, Northfield	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Tesco, Alvechurch Road, West Heath	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Tesco Garage, Oaktree Lane, Birmingham	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Stanleys Farm Shop, Blakedown	.30	.030	.00	.000	.00	.000	.00	.000	.00	.000	.30	.190
	Spar, Watford Road, Cotteridge	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Spar, The Crest Road, Birmingham	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Spar, Ryde Park Road, Rednal	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Spar, Queensway, Stourbridge	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Spar, Lindsworth Approach, Birmingham	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Spar, Golden Cross Lane, Catshill	.30	.030	.30	.208	.00	.000	.00	.000	.00	.000	.00	.000
	Select and Save, Taysfield Road, Birmingham	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Select and Save, Hollywood Lane, Birmingham	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Sainsbury's, Poplar Way, Solihull	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Rowberry's, Lower Chaddelsely Corbett, Kidderminster	.30	.030	.00	.000	.00	.000	.00	.000	.00	.000	.30	.190
	One Stop, Worcester Street, Stourbridge	.30	.030	.00	.000	.00	.000	.00	.000	.00	.000	.30	.190
	One Stop, Woodrow Lane, Catshill	.30	.030	.30	.208	.00	.000	.00	.000	.00	.000	.00	.000
	One Stop, Stratford Road, Shirley	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	One Stop, Drakes Cross Parade, Birmingham	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Michael's, Hobbs Moat Road, Shirley	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Martins, Sycamore Road, Birmingham	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Marks & Spencer, Stratford Road, Shirley	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Marks & Spencer, High Street, Worcester	.30	.030	.00	.000	.00	.000	.00	.000	.30	.326	.00	.000
	Marks & Spencer, High Street, Harborne	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Marks & Spencer, Dudley Street, Wolverhampton	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000

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Food Shopping Weighted

		Base: All respondents (ex don't do/ varies etc)		Zone 1		2		3		4		5	
		Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Other	Londis Silver Shopper, Furze Lane, Redditch	.30	.030	.00	.000	.00	.000	.30	.146	.00	.000	.00	.000
	Local stores, Woolaston	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Local stores, Wolverley	.30	.030	.00	.000	.00	.000	.00	.000	.00	.000	.30	.190
	Local stores, Sambourne	.30	.030	.00	.000	.00	.000	.30	.146	.00	.000	.00	.000
	Local stores, Poole	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Local stores, Pedmore	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Local stores, Ombersley	.30	.030	.00	.000	.00	.000	.00	.000	.30	.326	.00	.000
	Local stores, Old Swinford	.30	.030	.00	.000	.00	.000	.00	.000	.00	.000	.30	.190
	Local stores, Mount Pleasant	.30	.030	.00	.000	.00	.000	.30	.146	.00	.000	.00	.000
	Local stores, Kings Heath	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Local stores, Gloucester	.30	.030	.00	.000	.00	.000	.00	.000	.30	.326	.00	.000
	Local stores, Feckenham	.30	.030	.00	.000	.00	.000	.30	.146	.00	.000	.00	.000
	Local stores, Dunnington	.30	.030	.00	.000	.00	.000	.30	.146	.00	.000	.00	.000
	Local stores, Drakes Cross	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Local stores, Crabbs Cross	.30	.030	.00	.000	.00	.000	.30	.146	.00	.000	.00	.000
	Local stores, Blakedown	.30	.030	.00	.000	.00	.000	.00	.000	.00	.000	.30	.190
	Local stores, Blackwell	.30	.030	.30	.208	.00	.000	.00	.000	.00	.000	.00	.000
	Local stores, Alcester	.30	.030	.00	.000	.00	.000	.30	.146	.00	.000	.00	.000
	Lidl, Moseley Road, Birmingham	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Iceland, Coventry Road, Birmingham	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Home Bargains, Trafford Retail Park, Redditch	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Home Bargains, Ryemarket Shopping Park, Stourbridge	.30	.030	.00	.000	.00	.000	.00	.000	.00	.000	.30	.190
	Hillers Garden & Plant Centre, Dunnington Heath Farm, Dunnington, Alcester	.30	.030	.00	.000	.00	.000	.30	.146	.00	.000	.00	.000
	Heron Foods, Weoley Castle Square, Weoley Castle	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Dave Withers, St Kenelms Road, Romsley	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Costcutter, Wynall Lane, Stourbridge	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Costcutter, Merritts Brook Lane, Birmingham	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Costcutter, May Lane, Wythall	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Costcutter, Matchborough Way, Redditch	.30	.030	.00	.000	.00	.000	.30	.146	.00	.000	.00	.000
	Costcutter, Gauden Road, Pedmore	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Costcutter, Farmers Way, Droitwich	.30	.030	.00	.000	.00	.000	.00	.000	.30	.326	.00	.000
	Co-op, Worcester Road, Hagley	.30	.030	.00	.000	.00	.000	.00	.000	.00	.000	.30	.190
	Co-op, Stratford Road, Birmingham	.30	.030	.00	.000	.00	.000	.30	.146	.00	.000	.00	.000
	Co-op, Ridgacre Road, Quinton	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Co-op, Quinton Road West, Quinton	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Co-op, Longmore Street, Shirley	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Co-op, High Street, Evesham	.30	.030	.00	.000	.00	.000	.30	.146	.00	.000	.00	.000
	Co-op, Hagley Lane, Stourbridge	.30	.030	.00	.000	.00	.000	.00	.000	.00	.000	.30	.190
	Co-op, Coventry Road, Sheldon	.30	.030	.30	.208	.00	.000	.00	.000	.00	.000	.00	.000
	Co-op, Amber Way, Halesowen	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Co-op, Alcester Road South, Maypole	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000

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Food Shopping Weighted

		Base: All respondents (ex don't do/ varies etc)		Zone 1		2		3		4		5	
		Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Other	Blackwell Village Stores, Bromsgrove	.30	.030	.30	.208	.00	.000	.00	.000	.00	.000	.00	.000
	Bells Garage, Blackwell Street, Kidderminster	.30	.030	.00	.000	.00	.000	.00	.000	.00	.000	.30	.190
	Beckett's, Wythall Island	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Asda, Kelymead Road, Birmingham	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Asda, High Street, Shirley, Kings Heath	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Aldi, College Road, Birmingham	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	Aldi, Bearwood Road, Smethwick	.30	.030	.00	.000	.30	.076	.00	.000	.00	.000	.00	.000
	A-Z, Ipsley Street, Redditch	.30	.030	.00	.000	.00	.000	.30	.146	.00	.000	.00	.000

Comparison Goods Shopping Weighted

	Base: All respondents (ex don't do/ varies etc)		Zone 1		2		3		4		5	
	Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents (ex don't do/ varies etc)	844.794	100.000	123.426	100.000	323.268	100.000	179.263	100.000	79.041	100.000	139.795	100.000

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Comparison Goods Shopping Weighted

	Base: All respondents (ex don't do/ varies etc)		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
	Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Redditch Town Centre	134.009	15.863	17.259	13.983	18.353	5.677	96.820	54.010	1.015	1.285	.562	.402
Birmingham City Centre	84.503	10.003	7.731	6.264	63.941	19.780	8.199	4.574	1.213	1.535	3.418	2.445
Internet	68.487	8.107	12.149	9.843	25.646	7.933	13.572	7.571	6.848	8.664	10.272	7.348
Merry Hill Retail Park, Merry Hill, Dudley, Birmingham (Next Home, Staples, Currys / PC World, Lee Longlands etc.)	63.050	7.463	8.818	7.144	24.096	7.454	2.387	1.332	.590	.747	27.158	19.427
Kidderminster Town Centre	56.934	6.739	3.067	2.484	3.676	1.137	.365	.203	1.905	2.410	47.923	34.280
Bromsgrove Town Centre	47.582	5.632	36.988	29.968	5.389	1.667	1.350	.753	2.217	2.805	1.638	1.172
Worcester City Centre	46.351	5.487	7.800	6.320	1.991	.616	3.536	1.972	26.388	33.385	6.636	4.747
Droitwitch Spa Town Centre	27.343	3.237	2.393	1.939	.218	.067	.576	.322	23.563	29.810	.593	.424
Northfield Town Centre	25.477	3.016	.675	.547	24.658	7.628	.072	.040	.000	.000	.072	.052
Catalogue / Mail Order	17.203	2.036	1.908	1.546	7.789	2.409	3.191	1.780	1.569	1.985	2.746	1.964
Stourbridge Town Centre	10.871	1.287	.365	.296	2.031	.628	.281	.157	.000	.000	8.194	5.861
Battery Retail Park, Selly Oak, Birmingham (Next, Homebase, PC World, Currys, Halfords, Frankie & Benny's)	10.446	1.237	.434	.351	9.837	3.043	.104	.058	.000	.000	.072	.052
Rubery Local Centre	7.671	.908	1.659	1.344	5.594	1.731	.125	.069	.000	.000	.292	.209
Blackpole Retail Park, Blackpole Road, Worcester (Currys, Harveys, Paul Simon, Carpetright, Pets at Home, Lidl etc.)	7.005	.829	1.087	.881	.130	.040	.350	.195	5.020	6.351	.419	.300
Halesowen Town Centre	6.930	.820	.102	.082	6.278	1.942	.334	.186	.000	.000	.217	.155
Stourport on Severn Town Centre	5.416	.641	.000	.000	.292	.090	.281	.157	.000	.000	4.843	3.464
Crossley Retail Park, Carpet Trades Way, Kidderminster, Worcestershire (Smyths Toys, Currys, Pets at Home etc.)	4.866	.576	.361	.292	.394	.122	.130	.073	.104	.132	3.878	2.774
Westfield, Merry Hill, Brierley Hill, West Midlands (M&S, Debenhams, Next, BHS, Asda, Sainsburys, H&M, Primark)	4.604	.545	.602	.488	1.120	.346	.029	.016	.000	.000	2.854	2.041
Abbey Retail Park, Redditch, Alvechurch Highway (Homebase, Argos Extra, Sainsburys)	3.484	.412	.518	.419	.682	.211	2.285	1.274	.000	.000	.000	.000
Bewdley Town Centre	3.292	.390	.125	.101	.000	.000	.000	.000	.000	.000	3.168	2.266
Hagley Local Centre	2.555	.302	.072	.058	.770	.238	.000	.000	.000	.000	1.713	1.226
Elgar Retail Park, Blackpole Road, Worcester (Homebase, Argos, Dunelm, Maplin, Next Home, HomeSense, Halfords, KFC)	1.967	.233	.082	.066	.000	.000	.155	.086	1.207	1.527	.523	.374
Brierley Hill Town Centre	1.829	.216	.025	.020	.860	.266	.000	.000	.000	.000	.944	.675
Alcester Town Centre	1.371	.162	.073	.059	.073	.023	1.225	.684	.000	.000	.000	.000
Barnt Green Local Centre	1.304	.154	.518	.419	.786	.243	.000	.000	.000	.000	.000	.000
Catshill Local Centre	1.277	.151	1.277	1.034	.000	.000	.000	.000	.000	.000	.000	.000
Weavers Wharf Retail Park, Kidderminster, Worcestershire (Marks & Spencers, Debenhams, Next, TK Maxx, Boots etc.)	1.109	.131	.000	.000	.000	.000	.000	.000	.000	.000	1.109	.793
Wythall Local Centre	1.068	.126	.000	.000	1.068	.330	.000	.000	.000	.000	.000	.000
Alvechurch Local Centre	1.039	.123	.000	.000	.000	.000	1.039	.580	.000	.000	.000	.000
Parkridge Retail Park, Kidderminster Rd, Droitwich (Carpet Right, Horseatack, Sofa Specialist)	.895	.106	.198	.160	.302	.093	.000	.000	.292	.369	.104	.074
Evesham Shopping Park, Evesham (Next, Boots, Argos, Poundstretcher, Tesco)	.867	.103	.000	.000	.586	.181	.281	.157	.000	.000	.000	.000
Trafford Retail Park, Trescott Road, Redditch (Pets at Home, Aldi, Iceland, Poundstretcher, Home Bargains, KFC)	.690	.082	.000	.000	.145	.045	.545	.304	.000	.000	.000	.000
Four Pools Retail Park, The Link, Evesham, Worcestershire (Homebase, Halfords, Pets at Home, Countrywide Farmers etc.)	.606	.072	.000	.000	.509	.158	.097	.054	.000	.000	.000	.000

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Comparison Goods Shopping Weighted

	Base: All respondents (ex don't do/ varies etc)		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
	Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Hylton Road Retail Park, Hylton Road, Worcester (PC World, Homebase, Hammonds Furniture, Avis Rent A Car, Sharps etc.)	.436	.052	.000	.000	.436	.135	.000	.000	.000	.000	.000	.000
Aston Fields Local Centre	.281	.033	.000	.000	.281	.087	.000	.000	.000	.000	.000	.000
Shrub Hill Retail Park, Tallow Hill, Worcester (Wickes, Staples, Wilson Pets at Home, Dreams, Carphone Warehouse etc.)	.201	.024	.025	.020	.104	.032	.000	.000	.072	.091	.000	.000
Leamington Spa Shopping Park, Leamington Spa (Debenhams, New Look, Argos, Outfit, Boots, Next, Carpet Right etc.)	.145	.017	.000	.000	.000	.000	.073	.041	.000	.000	.072	.052
Apex Retail Park, Upper Conybere Street, Highgate, Birmignham (PC World, Currys)	.104	.012	.104	.084	.000	.000	.000	.000	.000	.000	.000	.000
Maybrook Industrial Estate, Birmingham Road, Stratford Upon Avon, Warwickshire (Staples, Carpet Right, Currys etc.)	.086	.010	.000	.000	.086	.027	.000	.000	.000	.000	.000	.000
Stourport on Severn Town Centre	.073	.009	.000	.000	.073	.023	.000	.000	.000	.000	.000	.000

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Comparison Goods Shopping Weighted

		Base: All respondents (ex don't do/ varies etc)		Zone									
				1		2		3		4		5	
		Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Other	Solihull	40.653	4.812	3.493	2.830	29.520	9.132	6.828	3.809	.000	.000	.812	.581
	Kingfisher Shopping Centre, Redditch	8.775	1.039	1.569	1.271	1.461	.452	5.464	3.048	.281	.355	.000	.000
	B&Q, Jinnah Road, Redditch	6.659	.788	1.257	1.019	1.225	.379	4.105	2.290	.072	.091	.000	.000
	Touchwood Shopping Centre, Solihull	6.260	.741	.562	.455	2.895	.896	1.891	1.055	.000	.000	.911	.652
	Solihull Retail Park, Marshall Lake Road, Solihull	6.177	.731	.129	.104	5.669	1.754	.379	.211	.000	.000	.000	.000
	Kings Heath	6.159	.729	.000	.000	6.159	1.905	.000	.000	.000	.000	.000	.000
	John Lewis, Touchwood Shopping Centre, Solihull	5.154	.610	.817	.662	2.868	.887	1.033	.576	.025	.031	.411	.294
	Tesco Extra, Coldfield Drive, Redditch	5.027	.595	.538	.436	1.007	.311	3.483	1.943	.000	.000	.000	.000
	Shirley	4.449	.527	.281	.228	4.168	1.289	.000	.000	.000	.000	.000	.000
	Sears Retail Park, Oakenshaw Road, Shirley	4.132	.489	.029	.023	4.007	1.239	.097	.054	.000	.000	.000	.000
	B&Q, Mucklow Hill, Halesowen	3.776	.447	.216	.175	3.056	.945	.000	.000	.000	.000	.504	.361
	Selly Oak	3.458	.409	.074	.060	3.384	1.047	.000	.000	.000	.000	.000	.000
	Stratford upon Avon	3.257	.386	.073	.059	.978	.303	2.206	1.230	.000	.000	.000	.000
	B&Q, Green Street, Kidderminster	2.857	.338	.072	.058	.169	.052	.000	.000	.529	.669	2.088	1.494
	Cotteridge	2.665	.315	.000	.000	2.665	.824	.000	.000	.000	.000	.000	.000
	Currys, Redditch Ringway, Redditch	2.442	.289	.436	.353	.129	.040	1.877	1.047	.000	.000	.000	.000
	Oldbury	2.035	.241	.029	.023	1.978	.612	.000	.000	.000	.000	.029	.020
	Kings Norton	2.026	.240	.000	.000	2.026	.627	.000	.000	.000	.000	.000	.000
	Quinton	1.828	.216	.000	.000	1.828	.566	.000	.000	.000	.000	.000	.000
	Hollywood Local Centre	1.765	.209	.125	.101	1.640	.507	.000	.000	.000	.000	.000	.000
	Boots, Kingfisher Shopping Centre, Redditch	1.743	.206	.125	.101	.125	.039	1.494	.833	.000	.000	.000	.000
	Bournville	1.677	.199	.000	.000	1.677	.519	.000	.000	.000	.000	.000	.000
	Abroad	1.660	.196	.000	.000	.365	.113	.709	.396	.585	.740	.000	.000
	Homebase, Roman Way Retail Park, Kidderminster Road, Droitwich	1.609	.190	.216	.175	.000	.000	.000	.000	1.393	1.762	.000	.000
	Apollo 2000, Redditch Ringway, Redditch	1.584	.188	.258	.209	.233	.072	1.094	.610	.000	.000	.000	.000
	Harborne	1.419	.168	.000	.000	1.419	.439	.000	.000	.000	.000	.000	.000
	Webbs, Worcester Road, Droitwich	1.296	.153	.432	.350	.360	.111	.216	.120	.072	.091	.216	.155
	Malvern	1.248	.148	.029	.023	.292	.090	.365	.204	.281	.355	.281	.201
	Currys, St Marys Ringway, Kidderminster	1.184	.140	.208	.169	.025	.008	.000	.000	.000	.000	.951	.680
	Evesham	1.170	.138	.585	.474	.000	.000	.585	.326	.000	.000	.000	.000
	Matalan, Jinnah Road, Redditch	1.163	.138	.000	.000	.029	.009	.842	.470	.292	.370	.000	.000
	Morrisons, Bristol Road South, Rubery	1.143	.135	.104	.084	1.039	.321	.000	.000	.000	.000	.000	.000
	Knights Pharmacy, Evesham Road, Redditch	1.121	.133	.125	.101	.000	.000	.996	.556	.000	.000	.000	.000
	Stirchley	1.105	.131	.000	.000	1.105	.342	.000	.000	.000	.000	.000	.000
	Ikea, Park Lane, Wednesbury	1.030	.122	.053	.043	.657	.203	.175	.097	.145	.183	.000	.000
	Dunelm Mill, Birchley Industrial Estate, Oldbury	1.023	.121	.000	.000	.937	.290	.029	.016	.000	.000	.057	.041
	Boots, High Street, Kings Heath	.996	.118	.000	.000	.872	.270	.125	.069	.000	.000	.000	.000
	Currys, Solihull Gate Retail Park, Shirley	.926	.110	.104	.084	.565	.175	.258	.144	.000	.000	.000	.000
	Sainsbury's, Alcester Road South, Maypole	.887	.105	.000	.000	.887	.274	.000	.000	.000	.000	.000	.000
	Studley	.872	.103	.000	.000	.000	.000	.872	.486	.000	.000	.000	.000
	Morrisons, Buntsford Park Road, Bromsgrove	.872	.103	.872	.706	.000	.000	.000	.000	.000	.000	.000	.000
	Barnt Green	.872	.103	.374	.303	.498	.154	.000	.000	.000	.000	.000	.000
	Dudley	.861	.102	.175	.141	.540	.167	.000	.000	.000	.000	.146	.104
	Argos, Kingfisher Shopping Centre, Redditch	.723	.086	.025	.020	.129	.040	.570	.318	.000	.000	.000	.000

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Comparison Goods Shopping Weighted

		Base: All respondents (ex don't do/ varies etc)		Zone 1		2		3		4		5	
		Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Other	Roman Way Retail Park, Kidderminster Road, Droitwich	.709	.084	.000	.000	.146	.045	.146	.081	.417	.527	.000	.000
	Argos, Bristol Road South, Northfield	.663	.079	.000	.000	.663	.205	.000	.000	.000	.000	.000	.000
	Sainsbury's, Carpet Trades Way, Kidderminster	.623	.074	.000	.000	.000	.000	.000	.000	.000	.000	.623	.445
	Local Chemist, Worcester	.623	.074	.000	.000	.000	.000	.000	.000	.623	.788	.000	.000
	Maybird Shopping Centre, Stratford upon Avon	.590	.070	.000	.000	.281	.087	.309	.173	.000	.000	.000	.000
	WH Smith, Harbourne, Birmingham	.585	.069	.000	.000	.585	.181	.000	.000	.000	.000	.000	.000
	Warwick	.585	.069	.000	.000	.292	.090	.292	.163	.000	.000	.000	.000
	TV shopping channel	.585	.069	.292	.237	.292	.090	.000	.000	.000	.000	.000	.000
	Black Heath	.583	.069	.000	.000	.583	.180	.000	.000	.000	.000	.000	.000
	Cheltenham	.562	.066	.000	.000	.000	.000	.000	.000	.562	.711	.000	.000
	Sutton Coldfield	.551	.065	.000	.000	.551	.171	.000	.000	.000	.000	.000	.000
	Spains, New Road, Bromsgrove	.521	.062	.416	.337	.104	.032	.000	.000	.000	.000	.000	.000
	Currys, Upper Conybere Street, Birmingham	.515	.061	.129	.104	.386	.120	.000	.000	.000	.000	.000	.000
	Bearwood Local Centre	.514	.061	.000	.000	.514	.159	.000	.000	.000	.000	.000	.000
	Homebase, Findlay Road, Kings Heath	.504	.060	.000	.000	.504	.156	.000	.000	.000	.000	.000	.000
	Broad Street DIY, Worcester Road, Bromsgrove	.504	.060	.504	.408	.000	.000	.000	.000	.000	.000	.000	.000
	Lloyds Pharmacy, Pershore Road, Cotteridge	.498	.059	.000	.000	.498	.154	.000	.000	.000	.000	.000	.000
	Boots, Stratford Road, Solihull	.498	.059	.000	.000	.498	.154	.000	.000	.000	.000	.000	.000
	Wilkinsons, Salter Shopping Centre, Droitwich	.465	.055	.000	.000	.000	.000	.000	.000	.465	.588	.000	.000
	DFS, Kidderminster Road, Droitwich	.438	.052	.000	.000	.073	.023	.292	.163	.000	.000	.073	.052
	B&Q, Marshall Lake Road, Shirley, Solihull	.432	.051	.000	.000	.432	.134	.000	.000	.000	.000	.000	.000
	Argos, Warwick Road, Birmingham	.425	.050	.000	.000	.425	.132	.000	.000	.000	.000	.000	.000
	Tesco, Foxoak Street, Cradley Heath	.417	.049	.000	.000	.417	.129	.000	.000	.000	.000	.000	.000
	Debenhams, Kingfisher Shopping Centre, Redditch	.407	.048	.000	.000	.000	.000	.407	.227	.000	.000	.000	.000
	Coventry	.382	.045	.000	.000	.000	.000	.102	.057	.281	.355	.000	.000
	West Heath	.374	.044	.000	.000	.374	.116	.000	.000	.000	.000	.000	.000
	Lloyds Pharmacy, Oakfield Road, Wollescote, Stourbridge	.374	.044	.000	.000	.249	.077	.000	.000	.000	.000	.125	.089
	Knights Pharmacy, Birmingham Road, Bromsgrove	.374	.044	.249	.202	.125	.039	.000	.000	.000	.000	.000	.000
	Boots, Weoley Castle Square, Birmingham	.374	.044	.000	.000	.374	.116	.000	.000	.000	.000	.000	.000
	Boots, Warwick Road, Birmingham	.374	.044	.000	.000	.374	.116	.000	.000	.000	.000	.000	.000
	Boots, Touchwood Shopping Centre, Solihull	.374	.044	.000	.000	.249	.077	.125	.069	.000	.000	.000	.000
	Boots, Harborne, Birmingham	.374	.044	.000	.000	.374	.116	.000	.000	.000	.000	.000	.000
	Bartley Green	.374	.044	.000	.000	.374	.116	.000	.000	.000	.000	.000	.000
	Cousins Furniture, Hall Street, Dudley	.365	.043	.000	.000	.146	.045	.000	.000	.000	.000	.219	.157
	Homebase, Chapel Lane, Selly Oak	.360	.043	.000	.000	.360	.111	.000	.000	.000	.000	.000	.000
	Castle Nurseries, Birmingham Road, Studley	.360	.043	.000	.000	.216	.067	.144	.080	.000	.000	.000	.000
	B&Q, Harborne Lane, Selly Oak, Birmingham	.360	.043	.000	.000	.360	.111	.000	.000	.000	.000	.000	.000
	Bridgnorth	.353	.042	.000	.000	.000	.000	.000	.000	.000	.000	.353	.252
	Astwood Bank, Redditch	.341	.040	.000	.000	.000	.000	.341	.190	.000	.000	.000	.000
	Dunelm Mill, New Bond Street, Birmingham	.330	.039	.029	.023	.302	.093	.000	.000	.000	.000	.000	.000
	Aldi, Alcester Road South, Birmingham	.321	.038	.000	.000	.321	.099	.000	.000	.000	.000	.000	.000
	Comet, Marshall Lake Road, Solihull	.312	.037	.000	.000	.208	.064	.104	.058	.000	.000	.000	.000

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Comparison Goods Shopping Weighted

		Base: All respondents (ex don't do/ varies etc)		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
		Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Other	Apollo 2000, Middlemore Road, Birmingham	.307	.036	.000	.000	.178	.055	.129	.072	.000	.000	.000	.000
	Villlage Outlets	.292	.035	.000	.000	.292	.090	.000	.000	.000	.000	.000	.000
	Toys 'R Us, Wolverhampton Road, Oldbury	.292	.035	.000	.000	.292	.090	.000	.000	.000	.000	.000	.000
	Romsley	.292	.035	.000	.000	.292	.090	.000	.000	.000	.000	.000	.000
	London	.292	.035	.000	.000	.292	.090	.000	.000	.000	.000	.000	.000
	Jewellery Quarter, Birmingham	.292	.035	.000	.000	.292	.090	.000	.000	.000	.000	.000	.000
	Gemini, Bristiol Road South, Birmingham	.292	.035	.000	.000	.292	.090	.000	.000	.000	.000	.000	.000
	Gem Box, Hall Green, Birmingham	.292	.035	.000	.000	.292	.090	.000	.000	.000	.000	.000	.000
	Costcutter, High Street, Studley	.292	.035	.000	.000	.000	.000	.292	.163	.000	.000	.000	.000
	Bournemouth	.292	.035	.000	.000	.292	.090	.000	.000	.000	.000	.000	.000
	Asda, Wolverhampton Road, Oldbury	.292	.035	.000	.000	.292	.090	.000	.000	.000	.000	.000	.000
	Windsor Carpets, Brookhill Works, Redditch	.292	.035	.000	.000	.000	.000	.292	.163	.000	.000	.000	.000
	Wickes, Redditch Ringway, Redditch	.288	.034	.000	.000	.000	.000	.288	.161	.000	.000	.000	.000
	Wickes, Ashtree Road, Stirchley	.288	.034	.000	.000	.288	.089	.000	.000	.000	.000	.000	.000
	Bournville Garden Centre, Maple Road, Birmingham	.288	.034	.000	.000	.288	.089	.000	.000	.000	.000	.000	.000
	TV Shopping Channel	.281	.033	.281	.228	.000	.000	.000	.000	.000	.000	.000	.000
	South Wales	.281	.033	.000	.000	.000	.000	.281	.157	.000	.000	.000	.000
	Cotton Traders, Evesham	.281	.033	.281	.228	.000	.000	.000	.000	.000	.000	.000	.000
	Clarks Village, Farm Road, Somerset	.281	.033	.000	.000	.000	.000	.000	.000	.281	.355	.000	.000
	Chelmsley Wood Local Centre	.281	.033	.000	.000	.281	.087	.000	.000	.000	.000	.000	.000
	Bideford, Devon	.281	.033	.000	.000	.000	.000	.000	.000	.000	.000	.281	.201
	Bescot Retail Park, Bescot Crescent, Walsall	.281	.033	.000	.000	.281	.087	.000	.000	.000	.000	.000	.000
	Batchley, Redditch	.281	.033	.000	.000	.000	.000	.281	.157	.000	.000	.000	.000
	Marshall Lake Retail Park, Shirley, Solihull	.279	.033	.000	.000	.206	.064	.073	.041	.000	.000	.000	.000
	Wilkinsons, Chelmsley Wood Shopping Centre, Birmingham	.269	.032	.000	.000	.197	.061	.000	.000	.000	.000	.072	.052
	Chaddesley Corbett	.269	.032	.000	.000	.072	.022	.000	.000	.000	.000	.197	.141
	Geoff Hill, High Street, Amblecote	.258	.030	.000	.000	.154	.047	.000	.000	.000	.000	.104	.074
	Winyates Centre, Redditch	.249	.029	.000	.000	.000	.000	.249	.139	.000	.000	.000	.000
	Old Swinford	.249	.029	.000	.000	.000	.000	.000	.000	.000	.000	.249	.178
	Morrisons, Green Street, Kidderminster	.249	.029	.000	.000	.125	.039	.000	.000	.000	.000	.125	.089
	Morrisons, Frankley Beeches Road, Rubery	.249	.029	.249	.202	.000	.000	.000	.000	.000	.000	.000	.000
	Matchborough, Redditch	.249	.029	.000	.000	.000	.000	.249	.139	.000	.000	.000	.000
	Lloyds Pharmacy, Quinton Road West, Quinton	.249	.029	.000	.000	.249	.077	.000	.000	.000	.000	.000	.000
	Lloyds Pharmacy, Alcester Road South, King's Heath, Birmingham	.249	.029	.000	.000	.249	.077	.000	.000	.000	.000	.000	.000
	Knights Pharmacy, Alvechurch Road, West Heath	.249	.029	.000	.000	.249	.077	.000	.000	.000	.000	.000	.000
	Boots, Monyhull Hall Road, Kings Norton	.249	.029	.000	.000	.249	.077	.000	.000	.000	.000	.000	.000
	Weoley Castle	.225	.027	.000	.000	.225	.070	.000	.000	.000	.000	.000	.000
	Perry Barr, Birmingham	.221	.026	.000	.000	.221	.068	.000	.000	.000	.000	.000	.000
	Levines, Warwick Road, Birmingham	.219	.026	.000	.000	.146	.045	.073	.041	.000	.000	.000	.000
	Kidderminster Carpets, Bristol Road, Rubery	.219	.026	.073	.059	.146	.045	.000	.000	.000	.000	.000	.000
	Cousins Furniture, Warwick Road, Tyseley, Birmingham	.219	.026	.000	.000	.146	.045	.073	.041	.000	.000	.000	.000
	Outskirts of Redditch	.217	.026	.000	.000	.072	.022	.145	.081	.000	.000	.000	.000
	Webbs, Kidderminster Road South, Stourbridge	.216	.026	.000	.000	.000	.000	.000	.000	.000	.000	.216	.155

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Comparison Goods Shopping Weighted

		Base: All respondents (ex don't do/ varies etc)		Zone 1		2		3		4		5	
		Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Other	Homebase, Sears Retail Park, Oakenshaw Road, Solihull	.216	.026	.000	.000	.216	.067	.000	.000	.000	.000	.000	.000
	Richer Sounds, Queensway, Birmingham	.208	.025	.000	.000	.208	.064	.000	.000	.000	.000	.000	.000
	Gallagher Retail Park, Axletree Way, Wednesbury	.208	.025	.104	.084	.104	.032	.000	.000	.000	.000	.000	.000
	Comet, Bristol Road South, Rubery	.208	.025	.000	.000	.208	.064	.000	.000	.000	.000	.000	.000
	Argos, High Street, Kings Heath, Birmingham	.208	.025	.000	.000	.104	.032	.000	.000	.000	.000	.104	.074
	Hall Green, Birmingham	.198	.023	.000	.000	.198	.061	.000	.000	.000	.000	.000	.000
	Marks & Spencer, Mill Lane, Solihull	.190	.022	.029	.023	.161	.050	.000	.000	.000	.000	.000	.000
	Kingswinford	.177	.021	.000	.000	.177	.055	.000	.000	.000	.000	.000	.000
	Lee Longlands, Broad Street, Birmingham	.175	.021	.000	.000	.175	.054	.000	.000	.000	.000	.000	.000
	Tesco, Ladywood Middleway, Birmingham	.153	.018	.000	.000	.153	.047	.000	.000	.000	.000	.000	.000
	Longbridge	.153	.018	.000	.000	.153	.047	.000	.000	.000	.000	.000	.000
	Smallwood, Redditch	.146	.017	.000	.000	.000	.000	.146	.081	.000	.000	.000	.000
	Furniture Village, Marshall Lake Road, Solihull	.146	.017	.000	.000	.073	.023	.073	.041	.000	.000	.000	.000
	Erdington	.146	.017	.000	.000	.146	.045	.000	.000	.000	.000	.000	.000
	Camp Hill Industrial Estate, John Kempe Way, Birmingham	.146	.017	.073	.059	.073	.023	.000	.000	.000	.000	.000	.000
	Sheldon Local Centre	.144	.017	.072	.058	.072	.022	.000	.000	.000	.000	.000	.000
	Morris Mica, Evesham Road, Redditch	.144	.017	.000	.000	.000	.000	.144	.080	.000	.000	.000	.000
	Little Heath Garden Centre, Lickey End, Bromsgrove	.144	.017	.000	.000	.072	.022	.072	.040	.000	.000	.000	.000
	Homebase, Spennells Valley Road, Kidderminster	.144	.017	.072	.058	.000	.000	.000	.000	.000	.000	.072	.052
	Barnet Hill Garden & Leisure, Worcester Road, Stourbridge	.144	.017	.000	.000	.000	.000	.000	.000	.000	.000	.144	.103
	Ashwood Nurseries, Ashwood Lower Lane, Kingswinford	.144	.017	.000	.000	.144	.045	.000	.000	.000	.000	.000	.000
	Ambleside Garden Centre, Norton Lane, Earlswood	.144	.017	.000	.000	.144	.045	.000	.000	.000	.000	.000	.000
	Wolverhampton	.130	.015	.000	.000	.029	.009	.102	.057	.000	.000	.000	.000
	Dreams, Washford Drive, Redditch	.130	.015	.102	.082	.000	.000	.029	.016	.000	.000	.000	.000
	Chapmans, Reddal Hill Road, Cradley Heath	.129	.015	.000	.000	.000	.000	.000	.000	.000	.000	.129	.092
	Wollaston	.125	.015	.000	.000	.125	.039	.000	.000	.000	.000	.000	.000
	Wilkinsons, Warwick Road, Birmingham	.125	.015	.000	.000	.125	.039	.000	.000	.000	.000	.000	.000
	Warley Local Centre	.125	.015	.000	.000	.125	.039	.000	.000	.000	.000	.000	.000
	Spar, Lindsworth Approach, Birmingham	.125	.015	.000	.000	.125	.039	.000	.000	.000	.000	.000	.000
	Shedley Green	.125	.015	.000	.000	.125	.039	.000	.000	.000	.000	.000	.000
	Savers, Watford Road, Birmingham	.125	.015	.000	.000	.125	.039	.000	.000	.000	.000	.000	.000
	Sainsbury's, Halesowen Street, Blackheath	.125	.015	.000	.000	.125	.039	.000	.000	.000	.000	.000	.000
	Ombersley	.125	.015	.000	.000	.000	.000	.000	.000	.125	.158	.000	.000
	Moseley	.125	.015	.000	.000	.125	.039	.000	.000	.000	.000	.000	.000
	Lloyds Pharmacy, Wychall Lane, Birmingham	.125	.015	.000	.000	.125	.039	.000	.000	.000	.000	.000	.000
	Lloyds Pharmacy, Weoley Castle	.125	.015	.000	.000	.125	.039	.000	.000	.000	.000	.000	.000
	Lloyds Pharmacy, Coventry Road, Sheldon	.125	.015	.125	.101	.000	.000	.000	.000	.000	.000	.000	.000
	Lloyds Pharmacy, Castle Road, Birmingham	.125	.015	.000	.000	.125	.039	.000	.000	.000	.000	.000	.000
	Howley Grange, Halesowen	.125	.015	.000	.000	.125	.039	.000	.000	.000	.000	.000	.000
	Hawksley	.125	.015	.000	.000	.125	.039	.000	.000	.000	.000	.000	.000
	Bournville Pharmacy, Sycamore Road, Birmingham	.125	.015	.000	.000	.125	.039	.000	.000	.000	.000	.000	.000

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Comparison Goods Shopping Weighted

		Base: All respondents (ex don't do/ varies etc)		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
		Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Other	Boots, Three Shires Oak Road, Birmingham	.125	.015	.000	.000	.125	.039	.000	.000	.000	.000	.000	.000
	Boots, Alcester Road South, Maypole, Birmingham	.125	.015	.000	.000	.125	.039	.000	.000	.000	.000	.000	.000
	Bidford-on-Avon	.125	.015	.000	.000	.000	.000	.125	.069	.000	.000	.000	.000
	Ashtree Pharmacy, Pershore Road, Birmingham	.125	.015	.000	.000	.125	.039	.000	.000	.000	.000	.000	.000
	Argos, High Street, Bromsgrove	.124	.015	.049	.040	.049	.015	.000	.000	.025	.031	.000	.000
	Dunelm Mill, Worcester Street, Kidderminster	.114	.014	.000	.000	.029	.009	.000	.000	.000	.000	.086	.061
	Boundary Mills, Retail Centre, Walsall	.114	.014	.000	.000	.029	.009	.029	.016	.029	.036	.029	.020
	Walsall Town Centre	.104	.012	.000	.000	.104	.032	.000	.000	.000	.000	.000	.000
	Telford Bridge Retail Park, Telford	.104	.012	.000	.000	.104	.032	.000	.000	.000	.000	.000	.000
	Spar, St Kenelms Road, Romsley	.104	.012	.000	.000	.104	.032	.000	.000	.000	.000	.000	.000
	John Lewis, Cribbs Causeway, Bristol	.104	.012	.000	.000	.000	.000	.000	.000	.104	.132	.000	.000
	Chorley Retail Park, Chorley	.104	.012	.000	.000	.000	.000	.000	.000	.104	.132	.000	.000
	Cavendish House, The Promenade, Cheltenham	.104	.012	.000	.000	.000	.000	.000	.000	.000	.000	.104	.074
	Carpet Trades Way, Kidderminster	.104	.012	.000	.000	.000	.000	.000	.000	.000	.000	.104	.074
	Asda, Market Street, Bromsgrove	.104	.012	.104	.084	.000	.000	.000	.000	.000	.000	.000	.000
	Asda, Belmont Road, Hereford	.104	.012	.000	.000	.000	.000	.000	.000	.104	.132	.000	.000
	Argos, Sears Retail Park, Shirley, Solihull	.104	.012	.000	.000	.104	.032	.000	.000	.000	.000	.000	.000
	Argos, Chelmsley Wood Shopping Centre, Birmingham	.104	.012	.000	.000	.104	.032	.000	.000	.000	.000	.000	.000
	Aldi, Stratford Road, Shirley	.104	.012	.000	.000	.104	.032	.000	.000	.000	.000	.000	.000
	Adsa, Great Barr, Birmingham	.104	.012	.000	.000	.104	.032	.000	.000	.000	.000	.000	.000
	Lush Furniture, Warwick Road, Bromsgrove	.102	.012	.029	.023	.073	.023	.000	.000	.000	.000	.000	.000
	Sparkhill	.097	.011	.000	.000	.097	.030	.000	.000	.000	.000	.000	.000
	Matalan, Maybird Centre, Stratford-upon-Avon	.086	.010	.000	.000	.057	.018	.029	.016	.000	.000	.000	.000
	Debenhams, Bull Ring, Birmingham	.086	.010	.000	.000	.086	.027	.000	.000	.000	.000	.000	.000
	The Wash House, Wilden Lane, Stourport-on-Severn	.074	.009	.000	.000	.000	.000	.000	.000	.000	.000	.074	.053
	The Wash House, Blackwell Street, Kidderminster	.074	.009	.000	.000	.000	.000	.000	.000	.000	.000	.074	.053
	Reddispares, Mount Pleasant, Redditch	.074	.009	.000	.000	.000	.000	.074	.041	.000	.000	.000	.000
	Currys, Gallagher Retail Park, Axletree Way, Wednesbury	.074	.009	.000	.000	.074	.023	.000	.000	.000	.000	.000	.000
	William & Sons, Level Street, Brierley Hill	.073	.009	.000	.000	.000	.000	.000	.000	.000	.000	.073	.052
	Walter Wall, High Street, Quarry Bank, Brierley Hill	.073	.009	.000	.000	.073	.023	.000	.000	.000	.000	.000	.000
	Wales	.073	.009	.000	.000	.000	.000	.000	.000	.000	.000	.073	.052
	The Mall, Cribbs Causeway, Bristol	.073	.009	.000	.000	.000	.000	.000	.000	.073	.092	.000	.000
	Stechford, Birmingham	.073	.009	.000	.000	.073	.023	.000	.000	.000	.000	.000	.000
	Simply Furniture, St Andrews Centre, Droitwich	.073	.009	.000	.000	.000	.000	.000	.000	.073	.092	.000	.000
	Shrewsbury	.073	.009	.073	.059	.000	.000	.000	.000	.000	.000	.000	.000
	Paradise Carpets, Studley Road, Redditch	.073	.009	.000	.000	.000	.000	.073	.041	.000	.000	.000	.000
	Outskirts of Solihull	.073	.009	.000	.000	.073	.023	.000	.000	.000	.000	.000	.000
	Northfield	.073	.009	.000	.000	.073	.023	.000	.000	.000	.000	.000	.000
	Lodge Park, Dagnell End Road, Redditch	.073	.009	.000	.000	.000	.000	.073	.041	.000	.000	.000	.000
	Langfords, Hewell Road, Barnt Green	.073	.009	.000	.000	.073	.023	.000	.000	.000	.000	.000	.000
	Hoods Carpets & Flooring, Alcester Road South, Birmingham	.073	.009	.000	.000	.073	.023	.000	.000	.000	.000	.000	.000
	Highgate Retail Park, Highgate Middleway, Birmingham	.073	.009	.000	.000	.073	.023	.000	.000	.000	.000	.000	.000

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Comparison Goods Shopping Weighted

		Base: All respondents (ex don't do/ varies etc)		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
		Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
	Harvey's, John Kempe Way, Birmingham	.073	.009	.000	.000	.073	.023	.000	.000	.000	.000	.000	.000
	Fort Retail Park, Fort Parkway, Birmingham	.073	.009	.000	.000	.073	.023	.000	.000	.000	.000	.000	.000
	Cheshire	.073	.009	.000	.000	.073	.023	.000	.000	.000	.000	.000	.000
	Bourne Carpets, Bearwood Road, Smethwick	.073	.009	.000	.000	.073	.023	.000	.000	.000	.000	.000	.000
	B&Q, Bordesley Green	.073	.009	.000	.000	.073	.023	.000	.000	.000	.000	.000	.000
	Aston Fields, Bromsgrove	.073	.009	.073	.059	.000	.000	.000	.000	.000	.000	.000	.000
	Amblecote, Stourbridge	.073	.009	.000	.000	.000	.000	.000	.000	.000	.000	.073	.052
	Acocks Green	.073	.009	.000	.000	.073	.023	.000	.000	.000	.000	.000	.000
	Wyevale Garden Centre, Maple Road, Bournville	.072	.009	.000	.000	.072	.022	.000	.000	.000	.000	.000	.000
	Willowbrook Garden Centre, Catshill, Bromsgrove	.072	.009	.072	.058	.000	.000	.000	.000	.000	.000	.000	.000
	Wilkinsons, Maypole Retail Park, Birmingham	.072	.009	.000	.000	.072	.022	.000	.000	.000	.000	.000	.000
	Wilkinsons, Kingfisher Centre, Redditch	.072	.009	.000	.000	.000	.000	.072	.040	.000	.000	.000	.000
	Wigley DIY, Sandy Lane, Stourport-on-Severn	.072	.009	.000	.000	.000	.000	.000	.000	.000	.000	.072	.052
	Toolstation, Great Western Business Park, Worcester	.072	.009	.000	.000	.000	.000	.000	.000	.072	.091	.000	.000
	Rednal	.072	.009	.000	.000	.072	.022	.000	.000	.000	.000	.000	.000
	Moredale Electrical, Enfield Industrial Park, Redditch	.072	.009	.000	.000	.000	.000	.072	.040	.000	.000	.000	.000
	Martin Hussingtree	.072	.009	.000	.000	.000	.000	.072	.040	.000	.000	.000	.000
	Kennedys Mica Hardware, New Road, Birmingham	.072	.009	.000	.000	.072	.022	.000	.000	.000	.000	.000	.000
	Hurst Green Stores, Hurst Green	.072	.009	.000	.000	.072	.022	.000	.000	.000	.000	.000	.000
	Homebase, Oldbury Ringway, Oldbury	.072	.009	.000	.000	.072	.022	.000	.000	.000	.000	.000	.000
Other	Home Zone, Freer Street, Walsall	.072	.009	.000	.000	.072	.022	.000	.000	.000	.000	.000	.000
	Hiller Garden & Farm Centre, Dunnington Heath Farm, Dunnington, Alcester	.072	.009	.000	.000	.000	.000	.072	.040	.000	.000	.000	.000
	Haleswood	.072	.009	.000	.000	.072	.022	.000	.000	.000	.000	.000	.000
	EH Smiths, Haslucks Green Road, Shirley	.072	.009	.000	.000	.072	.022	.000	.000	.000	.000	.000	.000
	Cooks Garden Centre, Worcester Road, Stourport	.072	.009	.000	.000	.000	.000	.000	.000	.000	.000	.072	.052
	Blackwell	.072	.009	.072	.058	.000	.000	.000	.000	.000	.000	.000	.000
	Birkwood	.072	.009	.000	.000	.000	.000	.072	.040	.000	.000	.000	.000
	Barn Green, Wolverhampton	.072	.009	.000	.000	.072	.022	.000	.000	.000	.000	.000	.000
	Badger Nurseries, Birmingham Road, Studley	.072	.009	.000	.000	.000	.000	.072	.040	.000	.000	.000	.000
	The Range, Ravenside Retail Park, Erdington	.057	.007	.000	.000	.057	.018	.000	.000	.000	.000	.000	.000
	Textile Express, Milk Street, Shrewsbury	.057	.007	.000	.000	.029	.009	.000	.000	.000	.000	.029	.020
	Dunelm Mill, Ravenside Retail Park, Kingsbury Road, Erdington	.057	.007	.000	.000	.057	.018	.000	.000	.000	.000	.000	.000
	Costco, Watson Road, Birmingham	.053	.006	.000	.000	.053	.016	.000	.000	.000	.000	.000	.000
	TC Hayes, Bearwood Road, Smethwick	.049	.006	.000	.000	.049	.015	.000	.000	.000	.000	.000	.000
	Yorkshire	.029	.003	.029	.023	.000	.000	.000	.000	.000	.000	.000	.000
	Wednesbury	.029	.003	.029	.023	.000	.000	.000	.000	.000	.000	.000	.000
	Ulster	.029	.003	.000	.000	.000	.000	.029	.016	.000	.000	.000	.000
	Tesco, St Peters Drive, Worcester	.029	.003	.000	.000	.029	.009	.000	.000	.000	.000	.000	.000
	Tesco, Hopkins Precinct, Alcester	.029	.003	.000	.000	.000	.000	.029	.016	.000	.000	.000	.000
	Store 21, High Street, Moseley	.029	.003	.000	.000	.029	.009	.000	.000	.000	.000	.000	.000
	Small Heath	.029	.003	.000	.000	.029	.009	.000	.000	.000	.000	.000	.000
	Sainsbury's, Stratford Road, Shirley	.029	.003	.000	.000	.029	.009	.000	.000	.000	.000	.000	.000

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Comparison Goods Shopping Weighted

		Base: All respondents (ex don't do/ varies etc)		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
		Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Other	Sainsbury's, Poplar Way, Solihull	.029	.003	.000	.000	.029	.009	.000	.000	.000	.000	.000	.000
	Morrisons, Stratford Road, Shirley	.029	.003	.000	.000	.029	.009	.000	.000	.000	.000	.000	.000
	Monmouth	.029	.003	.000	.000	.000	.000	.029	.016	.000	.000	.000	.000
	Labels, Ledbury Road, Ross-on-Wye	.029	.003	.000	.000	.000	.000	.000	.000	.029	.036	.000	.000
	Dunelm Mill, Green Retail Park, Rowley Regis	.029	.003	.000	.000	.029	.009	.000	.000	.000	.000	.000	.000
	Aldi, Stokes Road, Bromsgrove	.029	.003	.029	.023	.000	.000	.000	.000	.000	.000	.000	.000
	Wordsley	.025	.003	.000	.000	.000	.000	.000	.000	.000	.000	.025	.018
	Sainsbury's, Chapel Lane, Selly Oak	.025	.003	.000	.000	.025	.008	.000	.000	.000	.000	.000	.000
	Richards, Alcester Road South, Birmingham	.025	.003	.000	.000	.025	.008	.000	.000	.000	.000	.000	.000
	Co-op, Pershore Road, Birmingham	.025	.003	.000	.000	.025	.008	.000	.000	.000	.000	.000	.000
	Cannock Town Centre	.025	.003	.000	.000	.025	.008	.000	.000	.000	.000	.000	.000
	Brantwood	.025	.003	.000	.000	.025	.008	.000	.000	.000	.000	.000	.000