Retail and Commercial Leisure Needs Study

Wyre Forest District Council

Boyer

Prepared by Boyer Development Economics | May 2016

Report Control

Project:	Retail and Commercial Leisure Needs Study
Client:	Wyre Forest District Council
Reference:	15.713
File Origin:	http://lucas/sites/boyerplanning/developmenteco/15.713/4 Boyer Planning/4.02 Reports/WFDC Retail and Commercial Leisure Needs Study Final Version
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Issue	*Date*	*Status*	*Checked By*
1	19.05.2016	Final	AJ

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1. INTRODUCTION

Instruction

1.1 Wyre Forest District Council is preparing a new Local Plan which will guide development in the District over the period to 2032. As part of the plan preparation process they are refreshing the evidence base to inform their new Local Plan. The last Retail and Commercial Leisure Study was published in 2010 and requires updating in light of changes to shopping patterns; retail and general economy; new forecasts of housing and population change and the implementation of plans since 2010.

1.2 Boyer Planning Ltd (Boyer) have been instructed by Wyre Forest to prepare this new Retail and Commercial Leisure Study to consider the quantitative and qualitative retail and leisure needs of the District and its main town centres (Kidderminster, Stourport-on-Severn and Bewdley) up to 2032.

Report Purpose

1.3 The Council's study brief outlines the key outputs required from the Retail and Commercial Leisure Needs Assessment. These are:

- An audit and health check of the District's town centres to include assessment of existing role, hierarchy and function.
- Consideration of market signals, recent take up of land, supply of and demand for land and forecast of future needs.
- Through primary data collection establish existing shopping patterns and the influence of locations outside the District.
- A quantitative and qualitative assessment of the need for retail development taking into account population growth scenarios for the District.
- The provision of retail forecasts for comparison and convenience retail goods for the 2011-32 time-period.
- A qualitative and quantitative assessment of the need for commercial leisure use for the 2011-32 time-period.
- Consultation and engagement with relevant stakeholders.
- Consideration of the need for setting a local threshold for impact tests when considering applications for main town centre uses proposed outside of town centres.
- Recommendations on the location and extent of the primary shopping area based upon a clear definition of primary and secondary frontages.

Structure of Report

1.4 This study is split into two volumes. Volume 1 is the main report which sets out the main findings and recommendations of our assessment. Volume 2 comprises the appendices to Volume 1 and contains health check information for the towns assessed; the quantitative retail and commercial leisure capacity analysis tables; and the results of the specially commissioned household telephone survey.

1.5 The remainder of Volume 1 is set out as follows:

1.6 Section 2 reviews the retail geography of Wyre Forest District and briefly summarises the planning policy context for town centres and retail development;

1.7 Section 3 provides context to the study in respect of current and future trends for town centres, retailing and commercial leisure;

1.8 Section 4 set out a review of the vitality and viability of the District's three main town centres (Kidderminster, Stourport-on-Severn and Bewdley);

1.9 Section 5 summarises residents' current patterns of shopping, leisure usage and views on existing town centres;

1.10 Section 6 provides analysis of the capacity and need for additional food convenience goods and non-food comparison goods shopping provision;

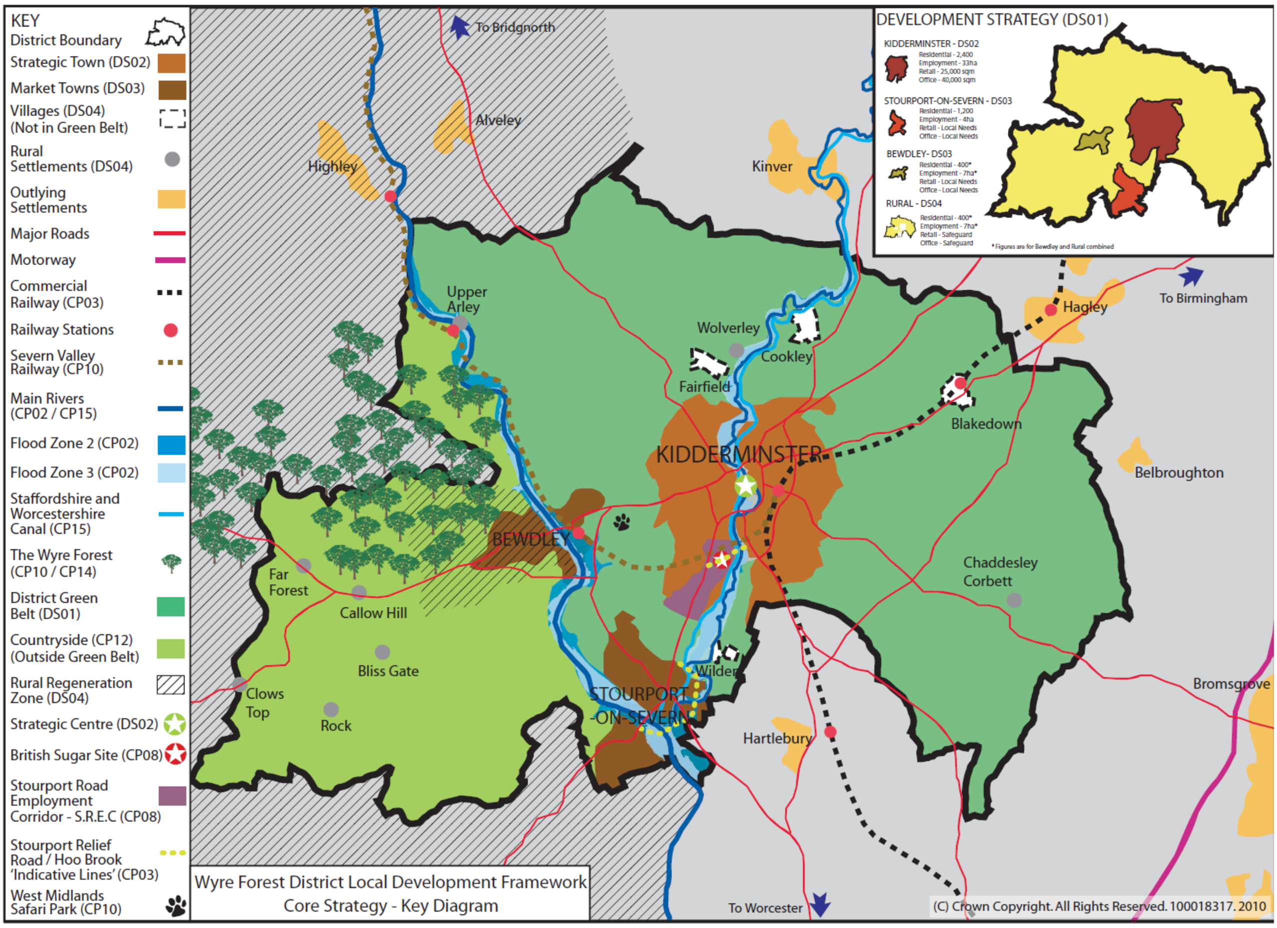
1.11 Section 7 reviews the potential need for additional commercial leisure facilities to serve the District's residents;

1.12 Section 8 sets out the conclusions and recommendations to our assessment.

2. REVIEW OF EXISTING TOWN CENTRE POLICY

Retail Geography

2.1 Wyre Forest is located within the West Midlands Region and is a District in Worcestershire. The main town centre for the District is Kidderminster, the other town centres are Stourport-on-Severn and Bewdley. The geography of the District area is shown on the extract plan below taken from the Council's Adopted Core Strategy.



2.2 The main competitor towns in the wider area include Worcester, Telford, Bromsgrove, Redditch, Droitwich, Stourbridge, Bridgnorth, Ludlow, the regional shopping centre Merry Hill and Birmingham City Centre.

Current Town Centre and Retail Planning Policy

2.3 Set out below is a brief review of the national and local planning policies relevant to retailing and town centres.

National Planning Policy Framework (NPPF)

2.4 On 27 March 2012, the Government published the National Planning Policy Framework (NPPF), which consolidated the guidance set out in preceding Planning Policy Statements (PPS), Planning Policy Guidance (PPG), and a number of related circulars, into a single document. Following its publication, this document now forms the statutory national planning policy guidance against which plans are made and applications for new development must be assessed.

2.5 Paragraph 6 of the NPPF confirms that 'the purpose of the planning system is to contribute to the achievement of sustainable development' and provides the economic, social and environmental implications of this for the planning system. Paragraph 9 adds that 'pursuing sustainable development involves seeking positive improvements in the quality of the built, natural and historic environment, as well as in people's quality of life' through a variety of means, including 'making it easier for jobs to be created in cities, towns and villages', and 'replacing poor design with better design'.

2.6 The NPPF makes it clear that there should be a presumption in favour of sustainable development. For plan making, this presumption in favour of sustainable development means that 'local planning authorities should positively seek opportunities to meet the development needs of their area' and that 'Local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change' (unless the adverse impacts of doing so would significantly outweigh the benefits, or specific policies contained within the NPPF indicate that development should be restricted).

2.7 Paragraph 17 of the NPPF sets out a series of 12 'Core Planning Principles' which should underpin both plan making and decision taking. These 12 principles include a requirement that planning should be 'genuinely plan led', with 'succinct plans' to shape development of an area. Local planning authorities should also support sustainable economic development, and plans should take account of market signals to set out a clear strategy for allocating sufficient land for development.

2.8 Paragraphs 23 to 27 of the NPPF ('ensuring the vitality of town centres') pay particular attention to retail matters. The NPPF retains the approach set out in PPS6, PPS4 and preceding national planning guidance by advocating a 'town centres first approach', stating that planning policies should positively promote competitive town centre environments (paragraph 23). In drawing up Local Plans, LPAs should:

- Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- Define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- Define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- Promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- Retain and enhance existing markets and, where appropriate, 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 development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;
- Allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
- Set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- Recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and
- Where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

2.9 Paragraphs 24 to 27 of the NPPF discuss the principal 'tests' which LPAs should apply to applications for retail development, which fall outside defined town centre locations. Firstly, applications for 'town centre uses' (such as retail) outside defined centres will need to demonstrate compliance with the sequential approach i.e. they must demonstrate the proposed scheme cannot be accommodated on an in-centre site (if the application site is in an edge-of-centre location), or either an in-centre or an edge-of-centre site location (if the application site is in an out-of-centre location). Both applicants and local planning authorities are expected to demonstrate flexibility on issues such as format and scale.

2.10 Applications for 'town centre uses' outside defined centres which are above 2,500m^2 (or a local set threshold) must also submit an impact assessment, to assess the impact of the proposal on existing, committed, and planned investment in defined centres in an appropriate catchment area, as well as the impact on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area. The NPPF is clear that in instances where a planning application cannot demonstrate compliance with either the sequential or impact 'tests', it should be refused planning permission.

2.11 With regard to plan making, paragraphs 150 to 185 of the NPPF is most relevant with paragraphs 150 to 157 focussing on the role of Local Plans.

2.12 Paragraph 150 of the NPPF states ‘Local Plans are the key to delivering sustainable development that reflects the vision and aspirations of local communities’ and that ‘planning decisions must be taken in accordance with the development plan, unless material considerations indicate otherwise’.

2.13 The NPPF advises that Local Plans should be aspirational but realistic, and should set out opportunities for development and clear policies on what will or will not be permitted and where; as well as detailing strategic priorities for the area, including for the provision of retail, leisure and other commercial development.

2.14 In preparing Local Plans, the NPPF at paragraph 158 identifies a requirement for local planning authorities to use a proportionate evidence base. Furthermore, Local Plans must be based on ‘adequate, up to date and relevant evidence about the economic, social and environmental characteristics and prospects of the area and be comprehensive in their assessments, ensuring that they are integrated and that they take full account of relevant market and economic signals’.

2.15 As such, and as advised in paragraph 161, in relation to retail matters, the evidence base should assess, amongst other things:

- The needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development;
- The role and function of town centres and the relationship between them, including any trends in the performance of centres; and
- The capacity of existing centres to accommodate new town centre development.

2.16 Examining Local Plans is dealt with at paragraph 182 of the NPPF which stipulates that Local Plans must undergo independent examination. In addition to showing a local plan has been prepared in accordance with the Duty to Co-operate and legal and procedural requirements; the local plan must also be found to be ‘sound’. A ‘sound’ plan is one that is found to be:

- **positively prepared** - based on a strategy which seeks to meet objectively assessed development and infrastructure requirements;

- **justified** - the plan should be the most appropriate strategy, when considered against reasonable alternatives, based on proportionate evidence base;
- **effective** - the plan should be deliverable over the plan period; and
- **consistent with national policy** - the plan should enable the delivery of sustainable development in accordance with policies in the framework.

National Planning Practice Guidance (2014)

2.17 In 2014 the Government published the National Planning Practice Guidance (NPPG) in order to provide further guidance on and support to the policies contained within the NPPF. The NPPG is a web based resource, which is actively managed by the Department of Communities and Local Government (DCLG) in order to allow for any necessary updates to be issued as soon as possible. The guidance will continue to be subject to a regular review process. One potential issue with this is that there is no formal consultation on any changes or alterations introduced through the NPPG.

2.18 The NPPG is set out thematically. Matters associated with town centre uses are contained in the section 'Ensuring the vitality of town centres'. This section states that a positive vision or strategy for town centres, articulated through the Local Plan is key to ensuring successful town centres that enable sustainable economic growth and provide a wider range of social and environmental benefits. It also states that any strategy should be based on evidence of the current state of town centres and opportunities to meet development needs and support their viability and vitality. Strategies should also identify changes in the hierarchy of town centres, including where a town centre is in decline. In these cases, strategies should seek to manage decline positively to encourage economic activity and achieve an appropriate mix of uses commensurate with a realistic future for that town centre.

2.19 The NPPG also provides further guidance in terms of the interpretation of the NPPF's sequential and impact tests (discussed above), including how they should be applied to both plan-making and decision-taking. A step by step guide to undertaking an impact test is also provided.

Wyre Forest Planning Policy Documents

2.20 Wyre Forest's Development Plan comprises the Adopted Core Strategy 2010 which provides the strategy and vision for future development in the District. The Core Strategy does not identify specific sites to accommodate development, this level of detail is provided within two specific allocation documents, the Site Allocations and Policies Local Plan and the Kidderminster Central Area Action Plan both documents were adopted in July 2013.

2.21 The Core Strategy sets out a vision for its main centres. For Kidderminster that vision includes serving the District's needs with quality leisure and shopping providing a choice of facilities. The vision for Stourport-on-Severn is to provide convenient leisure and shopping facilities for its residents. In Bewdley, the vision is that it should remain a thriving market town which meets the local community needs.

2.22 Objectives of the Core Strategy related to town centre retailing are to: 'Continue to develop Kidderminster as the strategic centre for the District and beyond and to maintain the important roles of Stourport-on-Severn and Bewdley as market towns.'

2.23 A centre hierarchy and guiding development strategies for the District's main town centres is provided in Chapter 5: A Sustainable Future – Development Strategy, specifically policies:

- DS01: DEVELOPMENT LOCATIONS
- DS02: KIDDERMINSTER REGENERATION AREA

- DS03: MARKET TOWNS

2.24 Chapter 8 of the Core Strategy provides guiding policies on retail and commercial development (CP09). This policy supports safeguarding, maintaining and enhancing the vitality and viability of the existing retail centres throughout the District and directs new development for retail and commercial uses to Kidderminster Town Centre, as the strategic centre in the District, in the first instance. For the market towns (Stourport-on-Severn and Bewdley) retail development within the centre is supported subject to it being in keeping with the settlement hierarchy.

2.25 Supporting text to the policy identifies that, based upon the findings of the 2010 Retail and Leisure Study, Kidderminster has the potential to accommodate 25,000 sqm of new comparison goods shopping floorspace up to 2026.

2.26 The Kidderminster Central Area Action Plan identifies an overarching strategy to focus new retail development into the primary retail centre to broaden the retail offer and improve the vitality and viability of the town centre. The strategy seeks to rebalance the centre of gravity of the town centre which has been heavily influenced by the success of the Weavers Wharf development on the western side of the town which has resulted in a perceived weakening of the eastern side of the town with growing vacancy rates and falling vitality and viability. Thus to address the imbalance, the strategy is to focus development in the eastern side of the town centre to create activity to draw footfall back through the town centre and create a ‘retail dumbell’.

2.27 The town centres of Stourport-on Severn and Bewdley are covered in the Site Allocations and Policies Local Plan. Policy SAL.GPB2 – Town Centre Retail sets out combined sequential approach and impact test requirements which have to be addressed for any new retail proposals over 280 sqm net. The Policy also has primary and secondary shopping frontage policies which direct retail and town centre uses into centres.

2.28 Small scale retail development primarily as a component of mixed use site allocations are made for a mix of central and non-central sites in Stourport-on-Severn and Bewdley.

Conclusions on Town Centre and Retail Planning Policy

2.29 National Planning Policy adopts a ‘town centres first’ approach to locating retail and other town centre use developments.

2.30 The local policy approach in the Wyre Forest’s DPDs are in line with this overriding objective and seek to promote, enhance and focus the majority of the new retail development in Kidderminster as the Districts main town centre. The market towns of Stourport-on-Severn and Bewdley are not the focus of retail development but are supported in terms of measures to maintain and enhance their vitality and viability.

2.31 We deal with the current vitality and viability of the main centres in Wyre Forest’s town centre hierarchy later in the assessment but it is worth highlighting that the nature and composition of town centres has been changing with a shift toward a more diverse range and mix of uses.

2.32 Whilst retail activity in centres remains important, the potential of other footfall generating uses and activities should be recognised as having a contribution to vitality and viability particularly where demand for retail premises may be in decline.

3. TOWN CENTRE AND ECONOMIC DEVELOPMENT TRENDS

Town Centres Market Overview

3.1 The retail sector and town centres are undergoing a period of significant structural change arising not just from the effects of the recent and sustained economic downturn but also the continuing popularity and convenience provided by out-of-town facilities and the increasing adoption of online shopping by both consumers and retailers.

3.2 The changing face of town centres and the issues facing ‘High Streets’ have been highlighted in a number of recent independent studies including The Portas Review, The Grimsey Review, The Fraser Review and Beyond Retail’s ‘Redefining the Shape and Purpose of Town Centres’.

3.3 As an introduction to the market analysis we highlight a number of the key findings of these independent studies and then provide our own sector-by-sector analysis and review trends which will have a bearing upon the need for and type of new floorspace being demanded over the time horizon of the study.

The Portas Review (2011)

3.4 Mary Portas was appointed by the Government to lead an independent review into the future of the high street, largely in response to the stagnation and decline of town centres nationally, seen as a consequence of reduced spending on the high street. The report, published in December 2011, suggests a number of measures which it was considered could tackle the further decline of the high street.

3.5 The Portas Review had 27 separate recommendations. Relevant to this assessment is the recommendation to strengthen planning policy in favour of ‘town centre first’ and encourage groups with interests and roles within centres to adopt a coordinated approach. The core Portas recommendations included:

- Run town centres like businesses: by strengthening the management of high streets through ‘Town Teams’, developing the ‘Business Improvements Districts’ (BID) model and encouraging new markets;
- Get the basics right: by looking at how the business rate system could better support small businesses and independent retailers, encouraging affordable town centre car parking and looking at further opportunities to ‘deregulate’ the high street and relax local authority restrictions that hold local businesses back.
- Level the playing field: by making explicit within the NPPF a presumption in favour to town centre development, introduce Secretary of State ‘exceptional sign off’; and encouraging large retailers to show their support for high streets by mentoring local businesses;
- Define landlords’ role and responsibilities: by encouraging a ‘contract of care’ between landlords and their commercial tenants, looking at disincentives for landlords leaving properties vacant, and empowering local authorities where landlords are negligent and making proactive use of Compulsory Purchase Order powers; and
- Give communities greater say: by including the high street in neighbourhood planning, directing more developer funding to supporting community groups, and, encouraging innovative community uses of empty high street spaces.

3.6 The Government response to the Portas Review (published in March 2012) accepted virtually all of the recommendations and set about providing some funding to take forward the Portas recommendations on ‘Portas Pilot Towns’, ‘High Street Innovation Fund’ and the ‘Future High Street Fund’.

3.7 The Government did not however go so far as to impose an embargo on all new out of town development - Portas had called for the introduction of a mechanism requiring the Secretary of State to 'sign off' all new out of town developments.

3.8 Recent experience and evidence confirms that the Government will continue to use its call-in powers sparingly when considering whether to intervene on proposals for town centre uses which are being promoted on out of centre sites. Indeed, since the *Rusden Lakes*[1] call-in in 2014, no other significant out of centre retail application has been subject to DCLG scrutiny.

The Grimsey Review: An Alternative Future for the High Street (2013)

3.9 This report was developed as an 'alternative response' to the recommendations of the Portas Review. It was authored by Bill Grimsey, the former boss of DIY chain Wickes and food retailer Iceland in collaboration with eight other industry experts.

3.10 The Grimsey Review was critical of the Portas Review for failing to highlight to the Government the dramatic structural changes that have impacted the retail industry and town centres due to the convergence of changing consumer behaviour by technology as well as changes brought about by the prevailing economic conditions.

3.11 The Review set out three specific conclusions which were:

- Town centre/high street plans must encompass a complete community hub solution incorporating; health, housing, education, arts, entertainment, business/office space, manufacturing and leisure, whilst developing day time, evening time and night time cultures where shops are just a part of the total plan.
- A number of radical government actions are required in order to create a level playing field which will provide conditions for town centres to facilitate change, encourage local investment, cutting through red tape and providing a common set of measures to track performance.
- A methodology and timetable is required to enable all local authorities to produce a town centre business plan complete with timelines, capital and revenue costs and benefits. The output for each town centre will be different identifying their own individual selling proposition and vision based on their unique heritage.

3.12 The Grimsey Review made 31 wide-ranging recommendations on how to save UK town centres the first of which was that it needs to be accepted that there is too much retail space in the UK and that bricks and mortar retailing can no longer be the anchor to creating thriving town centres. Other recommendations included encouraging more people to live in town centres, appointing a High Streets Minister, introducing free car parking (for two hours) and freezing car parking charges and creating technologically connected town centres which embrace the digital world.

3.13 There were a number of common themes between Portas and Grimsey. However, it could be argued that the Grimsey report was more commercially minded and highlighted the very significant issues around business rates and their rising cost relative to rent and other property overheads.

3.14 In this regard, the Review highlighted that there are discretionary powers available to local authorities to reduce the business rates of any local ratepayer. Wyre Forest were specifically mentioned in the Review as an example of a pro-active Council who:

[1] APPLICATION BY LXB RP (RUSHDEN) LIMITED LAND ADJACENT SKEW BRIDGE SKI SLOPE, NORTHAMPTON ROAD, RUSHDEN APPLICATION REF: EN/12/00010/FUL - for the erection of a home and garden centre, retail units, drive thru restaurant, gatehouse, lakeside visitor centre, restaurants, boathouse, together with proposals for access and an outline application for the erection of a hotel, crèche and leisure club

'….spent £12,000 out of its £100,000 High Street Innovation Grant bringing 10 empty shops back into use through business rate discounts. Their use of the grant was used exactly as it was intended and had the desired effect. It was extremely cost efficient and they should be commended. It also demonstrates the effectiveness of discounting business rates'

3.15 The quality of town centre environment and accessibility was highlighted by Grimsey as a key to successful town centres. Urban design, public realm and transport connectivity should be priorities as they are the building blocks making the connections between people and places, movement and urban form, nature and the built fabric.

Fraser Review: National Review of Town Centres (2013)

3.16 Malcolm Fraser led an external advisory group in preparing a review of community and enterprise in Scotland's town centres. Whilst prepared for the Scottish Government, the findings of the report are equally relevant to town centres in the rest of the UK (and beyond).

3.17 The report identifies three key reasons why town centres are important and deserve special consideration, namely:

- They are places of creativity and enterprise – bustling cities are a nation's economic powerhouse and these need a network of vigorous smaller centres around them.
- Town centres allow sharing of resources and services and their density means that shops, workplaces, leisure, culture and public services are near. Even if people do not live in-centre, they are the focus of public transport and accessible to the whole community.
- Town centres are our long-established and true eco-towns.

3.18 The report provides a series of recommendations and actions under six key themes which are:

- Vibrant Local Economies
- Enterprising Communities
- Digital Towns
- Proactive Planning

3.19 Measures identified include bringing empty town centre properties including those above shops back into use for housing which recognises the importance of residential footfall in creating vitality and viability; and using the town centre first presumption on all decisions about the location of public sector services and new community infrastructure to strengthen the economic, service and transport hub role of town centres.

Market Context

Town Centres

3.20 Town centres, and their retail content in particular, have undergone significant change over the last decade and continue to evolve.

3.21 The change has been primarily as a consequence of changing consumer shopping habits in responding to the growth and adoption of online retailing and the impact of the last sustained period of economic downturn on town centre businesses and consumer disposable incomes.

3.22 These factors combined led to a number of national multiple retailers entering administration and disappearing from high streets and those retailers that remain have made structural changes to their store networks and also how they now interact with customers.

3.23 Many national multiple retailers now have a store location strategy which is to have a strategic focus upon larger higher order centres in which they operate large stores offering the full range of their products. Where they have smaller stores in centres which do not conform to this requirement they will either close them or may, depending upon location, retain them if they provide good geographic coverage for click and collect services. The success of the online retailing channel for national retailers means that they simply do not need as many stores as they have historically held in their portfolios.

3.24 This trend is further fuelling the polarisation of shopping into an ever smaller number of major town and city centres. In the 1980s and 1990s the focus of retail activity was upon the top 150 or 200 towns in the UK. Retailers and shoppers are now gravitating toward the top 50 to 70 major shopping locations as these larger centres have a very extensive range and choice of non-food comparison goods shopping and strong diversity making them prime destinations for extended shopping and leisure trips.

3.25 For the town centres not within the top echelon there are both threats and opportunities from evolving retail formats and other town centre uses. Generally, the town centres that have weathered the economic downturn the best have a diverse range of uses and for small and medium sized centres the opportunity and potential competitive advantage lies in refocusing the role and function away from solely being shopping destinations to incorporate a much broader retail, leisure, culture and residential offer.

Out of Centre

3.26 Despite the affirmed 'town centre first' planning policies applied from the national level down, this has not resulted in an embargo on retail development outside town centres and research undertaken by Verdict[2] indicates that in the five years between 2007 and 2012, the amount of out of centre floorspace increased by 23%.

3.27 The edge and out of town retail market place has also been undergoing change brought about again by the economic downturn, internet based retailing and the drive from landlords to boost asset values.

3.28 As with the town centre, the demise of certain national multiple retailer occupiers from the retail warehouse marketplace and rationalisation by existing retailers coupled with the growth in online fulfilment, has reduced the level of demand from the traditional 'bulky-goods' sector for large retail warehouse premises. At the same time, the convenience of these locations in terms of car borne accessibility and parking coupled with large well configured units has spiked the interest of non-bulky retail occupiers.

3.29 In response retail warehouse and park owners have been securing planning permission to remove bulky goods type restrictions, subdivide too large units, introduce smaller 'kiosk' units to accommodate food and beverage occupiers and upgrade the quality of park environments.

3.30 This asset management of retail parks has been evident at the Crossley Retail Park in Kidderminster where for example a smaller unit has been added within the car park to accommodate a Costa Coffee shop.

Internet Retailing

3.31 A review of the marketplace would not be complete without comment upon online retailing which has from its infancy, around 10 years ago, now become a mainstream widely adopted trading 'location' in competition with traditional bricks and mortar locations.

[2] Verdict/Datamonitor, UK Out of Town Retailing.

3.32 The market share of online retailing is currently estimated to be around 5% for convenience/food retailing and averaging around 15% overall for non-food comparison goods retail. However, within the comparison goods sector there is a wide range of market share depending upon type of goods.

3.33 In the Wyre Forest area, the results from the household telephone survey (see Appendix 2) indicate that internet based food shopping accounts for around 3% of shopping. On non-food shopping the overall market share of the internet is around 17.5%.

3.34 For example statistics on penetration in terms of what shoppers are doing online[3] show that in the books and music categories the internet performs strongly with around 70% of consumers making such purchases online. In contrast the internet's sales penetration into the carpets and floorcoverings sector is much lower at around 20%. Generally the more homogenous a product is the more likely it is to be suited to internet selling. Where a product needs to be physically examined, tested or fitted it is less likely to be purchased online.

3.35 As part of this assessment we used the household telephone survey to interrogate residents living within the Wyre Forest towns' catchment areas and their use of the internet for shopping[4]. The results confirm that internet shopping is popular with residents: over 65% make purchases via their home internet and a further 22% also use portable/mobile internet for shopping. The goods most likely to be purchased online include books, clothes, music and computer games. Less likely to be purchased are DIY and garden items, jewellery and sports goods.

3.36 Forecasts of the future share of the internet suggest that it could peak around 2020 and plateau at around 20 to 25% of all retail transactions being carried out online.

3.37 However this does not necessarily mean a corresponding impact upon traditional retailing as click and collect and the fulfilment of online orders from physical retail stores will still generate footfall and commerce within town centres (and on retail parks). The option of using the internet to 'click and collect' in-store is also increasing in popularity, for example it has been reported that this service is accounting for a fifth of John Lewis internet order fulfilment. Online spending continues to be the key growth opportunity for national and independent retailers, accounting for increasing proportions of total sales. Such multi-channelling development strategies are actually driving demand for traditional outlets, whereby retailers are using bricks and mortar stores as showrooms for their products with service locations for collection and drop off points for their online orders. Similarly the network of Collect+ points within local independent stores and collection lockers provide the opportunity for smaller centres to benefit from the footfall and potential inked shopping and spending that can arise from the collection of internet based purchases in centres.

3.38 It is clear that e-tailing will not replace the 'shopping experience' as shopping is a social activity. In this regard, retailers are already adopting innovative approaches to encourage people to visit their store through 'try before you buy' and product testing concepts. For successful retailers, online selling provides an additional route to the market. Online retailers benefit from demand generated through physical channels whilst high-street outlets can benefit from reaching a wider customer base through the internet as well as through actual footfall.

3.39 Those retailers who are likely to have a healthy future are those who are able to combine a strong high street presence with an interesting and closely related e-tail offer. This can only be achieved through a well-considered multichannel or seamless omni-channel strategy.

[3] Data from Verdict
[4] Appendix 2 - Wyre Forest Household Survey - see questions 39 - 41.

Sector Review

Food and Convenience Shopping

3.40 The main food retailing market in the UK continues to be dominated by four main national grocery chains (Tesco, Sainsbury's, Asda, Morrisons) but that dominance is being impacted by the growth recently experienced by the limited assortment discounters (Aldi and Lidl) which were previously viewed as a supplement to the main grocery market given their more limited goods ranges but are now acknowledged by the public as having a range of goods which can fulfil main food shopping.

3.41 The growth of the discounter and their no-frills retail offer has taken market share at a time when the economic downturn and the internet, particularly its diversion of non-food shopping, has also had a negative effect on the established main grocery retailers' larger stores.

3.42 This is evidenced in Wyre Forest where the Aldi and Lidl stores in Kidderminster and Stourport-on- Severn are achieving strong levels of food shopping market share compared to the previous District wide shopping study.

3.43 In addition consumers are now more trusting and appreciate of the convenience provided by online grocery shopping and having goods delivered home. All of the main grocery retailers now offer online food shopping services.

3.44 Consumers' food shopping behaviour during the economic downturn changed from larger bulk food shopping to making more frequent trips but buying less in order to minimise food waste and avoid the cost of wasted food. Although the UK has now come out of the recession, the pattern of buying less food more often has continued.

3.45 The impact of these key changes (growth of discounters, the internet and changing consumer patterns) has led to a shift away from the largest format superstores and hypermarkets The race to add more large store floorspace to existing main grocery retailer portfolios has come to an end and more recently the retailers have been divesting space in their largest stores, seeking to introduce other retailers and services into the largest stores (for example Tesco's tie in with Giraffe family restaurants and Euphoria bakers to occupy surplus and underperforming in store space) and also closing underperforming stores and withdrawing from committed and planned developments.

3.46 The growth in the food retail sector in terms of physical floorspace and store requirements now is through expansion by the discounters (Aldi and Lidl) and the recent trial reintroduction of Netto into the UK through a tie up with Sainsbury's is an indication of the potential growth that is seen in that market. The main grocers have focused upon compact food supermarkets (very little non-food offer) and smaller convenience stores.

3.47 In Wyre Forest, this is evidenced by the recent permission for a second Aldi store at Silverwoods[5] outside Kidderminster Town Centre and the smaller format ASDA store (circa 900sqm sales) at New Road, Kidderminster.

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[5] Silverwoods is a major mixed use development on the former British Sugar site at Stourport Road, Kidderminster.

3.48 The push into convenience store retailing by all of the main grocery retailers is not simply a whim on their part. The success of food retailers, or retailers in any sector for that matter, is that they listen to and understand their customers. All of the food retailers carefully analyse customer shopping habits changing behaviour and emerging trends to shape their store development strategy and, with top-up shopping becoming the norm for the convenience sector, food retailers are adapting to new challenges.

3.49 Within the convenience store sector, there has been a noticeable increase in the proportion of fresh produce being offered and this is a clear response to shoppers now buying little and often at this format of store rather than at larger supermarkets. The choice being motivated by convenience and availability of fresh fruit, veg, meat and fish in their local store.

3.50 The main grocers have also heavily invested in their online retailing presence and this is becoming an increasingly popular way to bulk food shop for consumers. The challenge for the retailers is to wean their customers from home delivery which is a costly model to run over to a click and collect fulfilment model.

Non Food Comparison Goods Sector

3.51 Like the food sector, non-food retailing has been undergoing significant change as a result of the past economic downturn and the switching of consumer spending to online shopping.

3.52 There were a number of national multiple retailer casualties in the economic downturn. Some have returned from administration, other have been the subject of management buy-outs or been bought by others but the reality of the position is that there are now fewer national multiple retailer facias in the UK and in many instances their store closures have left some significant voids which often are not filled by retailers but taken up by food and beverage operators and commercial leisure uses.

3.53 Some examples of retailers that have been affected by administration over the last five years include:

- Electrical retailers: Comet, Best Buy, Phones 4 U,
- Clothing and fashion retailers: Jane Norman, Principles, Internationale, Adams Childrenswear, Officers Club, Ethel Austin, Alexon, Faith Shoes, Barrats, JJB Sports, USC
- Books/Media retailers; Borders, Virgin Megastore/Zavvi, Game, Clintons Cards
- Homeware retailers: Habitat, Focus DIY, Floors-2-Go, Sofa Workshop, MFI
- Variety retailers: Woolworths, TJ Hughes

3.54 The administrations have not been biased toward any particular location type: town centre and retail warehouse and retail park traders have all been casualties.

3.55 In response to the rise of the internet and online shopping, non-food comparison goods retailers have embraced multi-channel and omni-channel trading and the proportions of their trade derived from online sales has steadily grown to the point where they are now reducing their existing ‘bricks and mortar’ store portfolio. Physical stores are becoming ‘showrooms’ for merchandise which can then be purchased online or equally they are convenient locations for ‘click and collect’ or to return items. Therefore motivation in which stores to retain and close is becoming a decision about the convenience of a particular location and ensuring a spread which provides an appropriate level of geographic coverage.

3.56 In addition, retailers reducing store portfolio size has been driven by the higher relative cost of property-based sales compared to online/distribution services. A significant element of this has been the cost of business rates which have increased markedly whilst rent has risen more modestly.

3.57 Other sectors such as the DIY market whilst not losing any players have seen major rationalisation and a shift from very large format DIY Depot stores toward smaller stores and catalogue-based trade counter facilities (Screwfix and Toolstation).

3.58 However, in more recent years, the demand for out-of-centre representation from retailers has been reducing amongst the more traditional bulky goods traders that took retail warehouse and retail park space. The changing market place for DIY, furniture and electrical goods resulting from internet-based sales growth has meant that landlords and investors have been actively seeking to relax bulky goods type trading restrictions to allow a wider range of non-food retail goods and food and beverage uses.

3.59 Recently, out-of centre retail space has been attractive to clothing, leisure and mixed goods retailers, with some introducing new formats to trade from these locations. Examples include John Lewis at Home, Marks and Spencer, Next Home and Garden, Decathlon, Go Outdoors, Sports Direct and TK Maxx. Discounter and variety type stores such as B&M Bargains, Dunelm Mill, Poundstretcher and The Range have also increased their out-of-town presence.

3.60 We highlighted earlier in this section the issues within the grocery market and the problems the main food retailers face with their largest stores. It is anticipated that additional out of centre retail space will become available in the short and medium term as the food retailers seek to divest stores and sub-let floorspace.

Leisure and Other Town Centre Uses

3.61 Most market analysts predict that the commercial leisure sector comprising a mix of uses, such as cafes, bars, restaurants and cinemas, will comprise a growing proportion of town centre units and floorspace going forward. This growth in commercial leisure is partly a replacement for reduced demand for traditional retail space but also driven by demand for leisure activities in response to a greater proportion of households discretionary spend on leisure-based activities. In the UK leisure spending by households is primarily upon food and drink which accounts for over 50% of total leisure spending, in contrast around 15% of total leisure spend is spent on cultural activities (e.g. going to the cinema, theatre, art galleries or live music) and less than 10% is spent on hotels, ‘games of chance’ (such as bingo) and recreation/sporting services.

3.62 Broadly the commercial leisure sector comprises the following sectors:

- restaurant/food and beverage
- cinema
- health and fitness
- hotels

3.63 Across the leisure sector, the market has generally been more positive than for retail. Commercial leisure has not been impacted to any significant degree by internet growth although film streaming services do provide competition to cinemas but cannot match the overall cinema going experience.

3.64 The restaurant and food and beverage sector has seen a sustained level of growth, with new multiple operators and brands entering the casual and family dining market and continued expansion by the coffee shop chains.

3.65 It is also notable that local independent food and beverage operators are coming forward as part of an artisan and 'foodie' revival, although this is not as evident in every town centre compared to the national chains. Coffee shops, in particular, are also playing an important role in encouraging visits and extending dwell time in town centres as they perform a wider role as meeting places, providing wifi access for mobile working and becoming community hubs. They are also now operating extended opening hours and some of the smaller chains and independents are also applying for alcohol licenses to expand their offering further.

3.66 Casual dining brands such as Nandos, Wagamama, Pizza Express, Zizzi, Bill's, Jamie's Italian, Five Guys, Chimichanga, Carluccio's, Gourmet Burger Kitchen, Byron and Yo-Sushi are successful as they provide speed combined with good ambiance and generally also good value for money enabling families and younger people to dine out on a more regular basis or combine dining with other shopping and leisure activities.

3.67 As yet, none of these brands are represented within towns in Wyre Forest. It is however expected that these food and beverage operators or similar will be interested in space particularly within Kidderminster Town Centre.

3.68 For high streets, the casual dining model can provide footfall and activity throughout the day and into the evening. However take up of vacant retail space by branded operators has been limited in traditional town centres often to locations with the highest footfall due to their strict property requirements including size, location and configuration as well as exposure to both day and night time trading. Nationally, the most sought locations for A3 multiple operators tend to be retail/leisure parks and shopping centres since units can easily be configured to meet standard fit out requirements. These operators also value adjacencies to strong retail pitches and high street locations in larger town centres are also targeted.

3.69 Pubs and bars continue to be a central feature of the leisure industry, with three in five adults visiting them for a drink in 2013. However, the industry remains in transition and pubs are under pressure from a number of factors including an overall decline in beer sales and the growth in the off-licence trade, particularly in the sales of alcohol by supermarkets. The reasons behind this are a series of legislative changes (smoking ban and beer duty escalator), social and economic trends which have conspired to squeeze industry revenue and margins, and ultimately forcing many pubs out of business.

3.70 As a consequence a significant number of pubs (local pubs and within town centres) have been offered for sale. Some are being purchased and remain in pub/restaurant use but a number are being converted to housing or other commercial uses such as supermarket convenience stores. In Bewdley Town Centre for example, the Angel Public House on Load Street has been re-occupied by a Tesco Express format store.

3.71 Within pubs and bars a comprehensive food offering has become an important business driver in increasing revenue from customers and there is a blurring of function between the pub and restaurant sector particularly for casual dining.

3.72 Within new shopping centre developments the balance between retail and food and beverage is shifting whereas previously the focus was on retail tenants, the importance of food and beverage in attracting and retaining shoppers has been recognised and food courts are no longer tucked away separate from the retail they are integral to the overall offer and are often in gateway units.

3.73 In the cinema market growth has been split between two distinct offers, multiplex (large multi-screen complexes) and boutique cinemas (typically two or three screens). This is a shift from a market where growth had primarily been driven by multiplex developments on edge and out of centre sites at the expense of traditional in-centre cinemas which were declining. However the advent of digital technology has meant that the space requirements for cinemas have reduced and boutique cinemas can be accommodated more easily with town centre locations.

3.74 Comparing the numbers of screens, auditorium seats and cinema going the multiplex operators (including Vue, Cineworld, Odeon, Showcase) have the largest share of the market. The boutique and traditional cinema operators (Curzon, Everyman and independents) have a lower but slowly increasing share of the market as they become attractive anchor tenants for smaller development schemes in smaller towns serving more localised catchments and offering an alternative to the larger multiplex served catchment areas.

3.75 Another area of change and growth in the commercial leisure sector has been the emergence of budget gym operators offering consumers no-contract low cost gym membership which operates 24/7. The main budget gym operators include Pure Gym, Xrcise4Less, The Gym Group, Energie/Fit4less and Fitness4less. They are primarily ‘dry’ gyms in that they do not have swimming pools and unlike the mid and premium health and fitness operators (David Lloyd Leisure, Virgin Active etc) they do not have beauty spas and other facilities.

3.76 Typically the budget gym chains will consider town centre and urban locations, particularly where there is a large day time working population. Their space requirements range upwards from 1,000m^2 and they will consider upper floor or basement level space in existing buildings and in central locations; they do not require dedicated car parking.

3.77 The UK hotel market is very fragmented, with the 10 largest operating companies having approximately around 30% of all rooms.

3.78 The main growth in the hotel market is the budget sector which is currently dominated by two operators Premier Inn and Travelodge. Holiday Inn (Holiday Inn Express) using a franchising model has become the third largest in the sector and Accor (Ibis, Etap, Formule 1) is the other active budget brand in the UK. These chains initially developed their budget offer in strategic transportation locations as standalone facilities adjacent to motorway service areas and major junctions. More recently they have shifted focus to city and major town centre locations to service business-related trips and short-break leisure trips. They will now typically form part of mixed-use developments and gain benefit from adjacencies with a wide range of other uses. They have also increased the size of the hotels and number of rooms they seek to provide in these central locations relative to their transportation-led offer with requirements for in excess of 100 bedrooms in certain locations.

3.79 The Premier Inn at Weavers Wharf in Kidderminster is an example of this budget hotel operation and their seeking out good adjacencies to other footfall generators and food and beverage offer. The hotel is located within a Grade II listed former mill building which also houses a Debenhams store on ground and first floors.

Conclusions on Market Trends

3.80 The future for successful town centres is not all about retail provision, it will though remain a very important use and a major motivator to visit town centres.

3.81 However there is significant scope for town centres to capitalise on providing a more diverse and mixed range of use thus re-establishing their function as sustainable hubs for retail, commercial, civic, community and residential uses.

3.82 This joined-up strategy can, in turn, have wider positive implications on the performance of town centres with residents and visitors spending longer in-centre and undertaking 'linked trips' between retail, leisure and other uses. The development of a balanced commercial leisure offer can also help to increase footfall outside of normal shopping hours, for example in early evenings, particularly if the leisure offer also includes facilities such as cinemas.

3.83 In conclusion the retail market has undergone significant changes in recent years, which has been affected by the wider economic conditions facing the UK, which has led to a marked decline in established town centre as well as retailer formats such as large food superstores. The growth in online sales has also impacted on the need for new physical shopping floorspace in recent years.

3.84 However, with improving consumer spending levels and spending growth starting to return the retail industry is now embracing innovative multi-channelling strategies. There are good prospects for town centres to widen their audience in the future. To deliver this it will be critical that town centres are flexible enough to both embrace digital solutions whilst also providing appropriate and well managed retail floorspace that can showcase products and services. Adopting a well-considered holistic strategy will provide a strong platform to secure the future vitality and viability in town centres.

4. TOWN CENTRE ANALYSIS

Introduction

4.1 In this section we provide a review of the existing retail provision overall function and health of the District's main town centres.

4.2 The town centres reviewed are:

- Kidderminster
- Stourport-on-Severn
- Bewdley

Health Check Methodology

4.3 In compiling the health checks for each of the centres we have sought to comment upon a range of relevant vitality and viability indicators which, in combination and with the benefit of time series data (where available), can provide a reasonably balanced view of the overall health of a centre and its direction of travel. The indicators considered are:

- Environmental quality
- Main uses and composition of retailers by Goad classification
- Recent changes of uses
- Retailer representation and retailer absence
- Vacancy rates
- Retailer rents and yields
- Any notable clustering of types of shops
- Accessibility
- Car parking provision
- Perception of safety and occurrence of crime

4.4 Information has been compiled for each of these indicators by desk-based research and on the ground field survey work or a combination of both. In addition, although largely anecdotal, we have sought to discuss the health and performance of the main centres with a range of stakeholders including retailers, landlords, developers, commercial agents and other interested parties.

4.5 In addition the household telephone survey, which was commissioned specifically to support this assessment, asked a series of qualitative questions about how residents use the District's main towns and what measures they felt would improve them and encourage residents to use the centres more often. Analysis of these results is included within the health checks for each of the towns.

4.6 A summary of main findings from the health check analysis for each of the District's main centres is set out below. Our summaries draw upon the vitality and viability health check data for each of the study centres provided at Appendix 1.

Kidderminster Town Centre

4.7 Kidderminster is the main town centre within Wyre Forest District and the primary focus of retail activity. It performs the role of a major centre providing a range of retail, other town centre based services and civic and community uses.

4.8 The town centre shopping area is focused upon the pedestrianised High Street, Vicar Street, Market Street, Worcester Street and the Weavers Wharf area. Within this area there are two covered shopping centre developments the Swan Centre and the Rowland Hill Centre. Other shopping streets within the town centre include Bull Ring, Lower Mill Street, Coventry Street, Oxford Street and New Road.










4.9 Historically the primary shopping area and prime retail frontages would have been focused upon High Street, Worcester Street and Vicar Street, however with the introduction of Weavers Wharf into the town centre approximately 10 years ago with its large space units and predominance of national multiple retailers the gravity of the centre has shifted from this historic core toward the more modern development.

4.10 The retail mix within the town centre is good. At Weavers Wharf there is Marks and Spencer, Debenhams, Next, Sports Direct, Boots and TK Maxx occupying large units some of which provide two trading floors. Linking Weavers Wharf to the rest of the town centre there is a parade of unit shops including New Look, Savers, Greggs, Holland and Barrett, Starbucks and Café Nero.

4.11 The traditional town centre area has a more mixed retail representation with national multiple, local independents and quasi-retail service uses. National multiple retailers include:

- Wilkinsons
- Iceland
- Argos
- Poundand
- WH Smith
- Argos
- Bon Marche
- B&M Bargains
- WH Smith
- Superdrug
- Peacocks
- Claires Accessories
- Heron (Frozen Foods)
- Tresspass
- Specsavers
- H Samuel
- Game
- Vodaphone
- O2
- Carphone Warehouse

4.12 In terms of retailer representation, the focus in Kidderminster (excluding Weavers Wharf) is on the discount and value sector of the market. There are, we consider, gaps in provision for mainstream clothing and footwear.

4.13 Food retailing within the town centre is relatively limited and a factor in this is the amount of edge and out of centre food shopping provision around the town centre.

4.14 The retail offer in Kidderminster Town Centre is extended by the market which operates on Thursdays and Saturdays on Worcester Street, High Street and Vicar Street. This is a general market which has up to 100 stalls and offers a range of food and comparison goods. It is understood that the management of the Market has recently been awarded to E G Skett & Co who are responsible for the management and operation of a number of general and food markets within the Midlands.

4.15 Outside the town centre, there are a number of large foodstores both on the edge of the town centre (Tesco at Corportation Street/Exchange Street, Morrisons at Green Street, Aldi at Green Street) and out of centre (Asda at New Road, Sainsbury's at Crossley Retail Park).

4.16 Non food retail warehousing provision outside the town centre is concentrated within the Crossley Retail Park which is located north of the town centre. This comprises 12 units occupied by tenants including The Range, Smyths Toys, Pets at Home, Halfords, Maplin, Currys PC World, Furniture Barn, Oak Furniture Land and Costa. This is a popular retail park.

4.17 Other national operators include a range of banks and building societies (Barclays, Halifax, Nat West, RBS, Lloyds, Santander) food and beverage chains (Subway, Dominos, Wetherspoons) and bookmakers (Ladbrokes, William Hill, Coral).

4.18 Other uses demonstrating the diversity of Kidderminster Town Centre include the Town Hall, Council Offices, Colleges (Birmingham Metropolitan College and Kidderminster College), Library and health services. The town centre also has the Glades Leisure Centre although this is due to close in July 2016 and a new leisure centre facility for Kidderminster is being provided at Silverwoods.

4.19 The mix of convenience, comparison service and other town centre uses is detailed in the Goad Category Report for Kidderminster provided at Appendix 1. A summary table setting out the composition is provided below.

Table 1: Kidderminster Town Centre Composition

Sector	Outlet Count	Outlet Percent	National Average Percent
Convenience	25	6.85%	8.54%
Comparison	104	28.49%	32.08%
Retail Services	51	13.97%	14.37%
Leisure Services	71	19.45%	22.64%
Financial & Business Services	43	11.78%	10.67%
Vacant	71	19.45%	11.39%
Total	365		
Source: Kidderminster Goad Category Report, Survey Date: July 2015			

4.20 Overall, based upon the Goad survey data from July 2015, Kidderminster has below average numbers of convenience, comparison, retail service and leisure service outlets compared to the national average proportions.

4.21 The vacancy rate within the town centre in July 2015 was high relative to national average at approaching 20% of outlets. Based on footprint floorspace, the vacancy rate is 15.5% compared to a national average of 9%. According to the Goad analysis, the amount of vacant floorspace in the town centre is 16,100sqm (footprint area).

4.22 Our own survey of Kidderminster Town Centre in April 2016 identified a lower number of vacant premises - 51 compared to the Goad figure from July 2015 of 71, a reduction of 20 units. 51 vacant units equates to a vacancy rate of around 14% This fall in vacant units is attributable to a combination of the redevelopment of vacant premises on the edge of the town centre at Coventry Street and Blackwell Street to residential and recent lettings.

4.23 Vacant premises are spread throughout Kidderminster; however there is a particular concentration of units on Worcester Street and Blackwell Street. On Worcester Street there are a number of larger vacant units whereas at Blackwell Street, the vacant premises are generally smaller. The vacant premises (April 2016) within the core retail area of Kidderminster Town Centre are identified on the plan below. This shows the concentration of vacant premises on the western side of the main town centre around Worcester Street.

4.24 Whilst we would always expect a level of vacancy to exist in town centres, the vacancy rate in Kidderminster is high and the concentration of vacant premises in a particular location is a weakness which detracts from the overall shopping experience and environment of the town.

4.25 Shop rents in Kidderminster are, in our view, low relative to its primary competitors and analysis from EGi (the interactive database provided by Estates Gazzette) and anecdotal information from retail letting agents identifies peak zone A rentals are around £50/£65 per sqft, but have been static for a while and need to grow to recover to pre-recession levels.

4.26 Kidderminster has good levels of accessibility. Vehicle movement into the town centre area is provided from the Ringway. From our observations car access is reasonably good with directional sign posting for all of the main off-street town centre car parks. Car parking provision for shoppers is good although the most popular car park, which is at Weavers Wharf, is generally busy throughout the day and at capacity during peak shopping times. Other larger town centre car parks at Prospect Hill/Bromsgrove Street, Green Street and New Road are equally as convenient for shoppers visiting the town centre but not from our experience as busy.

4.27 In addition, the customer car parks serving the edge of centre Tesco, Morrisons and Aldi stores provide time limited parking which would allow linked trips with the town centre. Similarly the Crossley Retail Park provides short stay car parking which could facilitate some linked shopping.

4.28 The main bus stops within the town centre are located on Exchange Street close to the pedestrianised core of the town centre and at Blackwell Street near to the Swan Centre. The buses provide local access. Kidderminster bus station is located within the town centre, adjacent to Tesco's car park and accessed via Corporation Street. Kidderminster train station is to the south east of the town centre on Comberton Hill.

4.29 Information from the household telephone survey provides shopper feedback on Kidderminster (see Appendix 2). This identifies that the main method of travel to access the town centre was by car. The largest frequency of visits to the town centre by those residents in the immediate area (zone 1) was weekly (45%) and two or three times a week (26%).

4.30 The main reasons for visiting Kidderminster Town Centre were given as shopping for non-food items (68%), shopping for other food items (51%) and visiting financial services (25%). Browsing/window shopping was 7% and café/pub/restaurant visits was (8%).

4.31 The survey also asked respondents whether there were any measures that would encourage them to visit Kidderminster more often (Q31, Appendix 2). Overall across the study area 32% of respondents felt there was no change necessary, this response fell to 13% for zone 1 (Kidderminster's home zone). The changes identified (zone 1) included more clothing stores (24%), less empty/vacant shops (19%), a better range of non-food shopping (11%), more quality shops (9%) and less charity shops (9%). Parking issues (price, availability) did not feature as strongly as it usually does on shopper surveys suggesting it is not a major area of concern.

4.32 The shopping environment of the town centre has been the subject of recent public realm improvement works which have included relaying of paving to provide a more uniform and consistent hard landscaping. This has also allowed the introduction of some updated street furniture. The quality has therefore improved and this now ties in well with Weavers Wharf area of the town centre. However, the overall streetscape is impacted negatively by the number and prominence of vacant units around the town centre, particularly the eastern part.

4.33 Future proposals for Kidderminster Town Centre include the opening of Worcester Street to traffic and joint initiative, between the District Council and North Worcestershire Economic Development and Regeneration, to bring forward redevelopment plans for the eastern side of the town centre including Worcester Street, Bromsgrove Street, Coventry Street and Lion Street together with the Glades Leisure Centre and Medical Centre which are closing in Summer 2016. The regeneration plans, known as Kidderminster Eastern Gateway, which are at an options stage plans comprise three options which are retail led, residential led or a mixed use based option.

4.34 The Kidderminster Eastern Gateway proposals will, if realised, provide a significant contribution toward addressing the current imbalance within the town centre by removing the existing vacancy issues on Worcester Street whilst also potentially introducing more residential and mixed uses into the town centre thus contributing to vitality and viability.

4.35 Overall, we conclude that Kidderminster is in reasonable health, but the shift in gravity resulting from the establishment of Weavers Wharf as the prime retail pitch in the town centre has impacted upon the traditional core of the town centre. The public realm works should be a positive step to addressing the issue by providing a more attractive environment to stimulate change. However additional physical regeneration is also required to address the high proportion of voids and introduce more diversity into the town centre. This would strengthen the vitality and viability of the town centre. Measures by the Council to bring forward the Kidderminster Eastern Gateway will, if realised, provide a significant boost to the town centre and its overall vitality and viability.

Stourport-on-Severn Town Centre

4.36 Stourport-on-Severn is the second largest town centre within Wyre Forest District. Its shopping area is primarily linear based upon Bridge Street, High Street and Lombard Street with some retail and commercial frontage at the south of the town centre on New Street/York Street and on Tan Lane at the northern end of the town centre.

4.37 Stourport-on-Severn's function is primarily to provide for food shopping and everyday comparison and retail service offer to its immediate population. Its relative proximity to the more dominant non-food shopping provision at Kidderminster places a limit upon its comparison goods shopping potential.

4.38 The main convenience goods retailer anchoring the town centre is the Co-Op store at Lombard Street toward the northern end of the town centre. This store is supported by its own surface level car park. Other national multiple foodstore operators within the town centre are Heron Foods (frozen food centre) and Holland and Barrett. This provision is well supported by traditional convenience goods retailers including butchers (x2), greengrocers, bakers and confectioner/tobacconist/newsagents (CTNs).

4.39 Lidl and Tesco have stores which are located in edge of centre locations and which provide for main food shopping trips. Both stores have their own surface levels car parks which provide for time limited parking that should encourage linked shopping trips with the rest of the town centre and during our visits we did observe some linkage.

4.40 Other national retailer representation within the town is limited and includes Boots, WH Smith, Superdrug, M&Co, The Original Factory Shop and Specsavers.

4.41 This national representation is supported by a range of local independents which provides diversity and variety which includes some specialist and niche retail including a country pursuits store (Allcocks) and a craft and haberdashery store (Severn Stitches). The town centre does not however have any depth of clothing, fashion and footwear offer, particularly mainstream and young fashion. Although in terms of footwear, Blunts shoe shop does provide an extensive range and choice. The Goad composition data for Stourport-on-Severn Town Centre is set out in summary form in the table below. This identifies that non-food comparison goods shopping is below average composition.

Table 2: Stourport-on-Severn Town Centre Composition (08/2013 survey date)

Sector	Outlet Count	Outlet Percent	National Average Percent
Convenience	16	10.19%	8.54%
Comparison	47	29.94%	32.08%
Retail Services	30	19.11%	14.37%
Leisure Services	32	20.38%	22.64%
Financial & Business Services	20	12.74%	10.67%
Vacant	12	7.64%	11.39%
Total	157		
Source: Kidderminster Goad Category Report, Survey Date: August 2013			

4.42 The outlet count analysis confirms that convenience and retail service provision in the town is above average proportion, this is also the case for the financial and business service sector. As the data collected by Goad was for 2013, we conducted our own occupier survey to update the composition information for Stourport-on-Severn. Our survey in November 2015 revealed the following mix of town centre uses:

Table 3: Stourport-on-Severn Town Centre Composition Survey, November 2015 (Boyer)

Sector	Outlet Count	Outlet Percent
Convenience	12	8.2%
Comparison	50	34.2%
Services	58	39.7%
Vacant	15	10.3%
Other	11	7.5%
Total	146	100%

4.43 The updated composition analysis shows a small fall in the number of convenience outlets in the town centre and an increase in the number of comparison goods retail outlets.

4.44 Stourport-on-Severn has branches of the main high street banks including TSB, Barclays and HSBC but has recently lost its NatWest branch. The town also has professional services offices (solicitors, insurance brokers and financial advisers) and health providers.

4.45 Leisure services are below average in terms of overall composition and the only national chain food and beverage offer is the Wetherspoon public house (The Ye Old Crown Inn). This pub is one of a package of 34 Wetherspoon's pubs that the company is seeking to dispose of. It is still operating and it is not clear whether it will be purchased as a going concern or redeveloped for an alternative use. The other food and beverage/leisure offer that is present is operated by local independents with a range and choice across the quality spectrum. None of the existing food and beverage provision in Stourport-on-Severn particularly appears to cater for the family dining market.

4.46 Overall, for a centre of its size and function we consider that the town has a reasonable retail and service offer.

4.47 The vacancy rate recorded by the Goad survey in 2013 was below national average levels at 7.6% with 12 vacant units recorded. Our update survey in November 2015 recorded 15 vacant units, an increase of 3. This equates to a level closer to the national average. The vacant premises are generally spread throughout the town and there was evidence that some of the vacant units were being refitted ready for occupation. A subsequent visit in April 2016 confirms that two former vacant units are now trading (Dominos and The Swan), thus reducing the number of vacant units in the town centre down to 13. The plan below shows the distribution of vacant premises around the town centre and confirms there were no concentrations of or areas with high proportions of vacant premises in Stourport-on-Severn.

4.48 There is limited data available on retail rental levels in Stourport-on-Severn. Discussions with local commercial agents suggest that the best rental values achieved in the town centre are on High Street at around £25 per sqft (£280/sqm) zone A.

4.49 Stourport-on-Severn is an accessible town centre with a combination of time limited on street parking and off street pay and display parking. The off-street car parking is not particularly well sign-posted.

4.50 The main shopping area of the town centre is subject to relatively heavy flows of through traffic and this can at times lead to on-street congestion within the shopping area and some conflict between vehicles and pedestrians.

4.51 Responses to the household survey relating to usage of Stourport-on-Severn Town Centre shows the centre is used regularly (daily, two or three times a week and weekly) by its local population (zone 3) predominately for a food shopping (65%), everyday non-food shopping (34%) and for its sports, leisure and entertainment services (21%). Overall there was a good level of satisfaction (63% considered no improvements necessary) and improvements identified included measures to make the centres environment more attractive and more/cheaper parking provision.

4.52 Stourport-on-Severn's physical environment is reasonably good. The buildings comprising the town centre are a mix of ages and styles, some of the older buildings are particularly attractive but do not feature that strongly in the overall streetscape. The through traffic issue mentioned above is also compounded by the generally narrow pavement widths and a lack of any public open spaces within the town centre area. The wider setting to the town centre is very attractive with its river and canal providing interest, however this is not visible or signposted from the main shopping streets.

4.53 In conclusion, we consider that Stourport-on-Severn is a vital and viable town centre which serves and supports its local population's shopping and service needs satisfactorily.

Bewdley

4.54 Is the smallest of Wyre Forest's designated town centres. It is located toward the western side of the District and serves a predominately rural catchment. Given its historic and attractive setting the town also has a tourist and day visitor attraction and this reflected in the retail and service provision within the town.

4.55 The main shopping area in Bewdley is compact and focused primarily upon Load Street, with some additional shopping frontage on High Street, Welch Gate, Dog Lane and Severn Side.



4.56 The town centres retail provision is dominated by two convenience food stores - Co-Op and Tesco - the latter having recently opened an Express format store in a former public house. In addition to these two convenience stores the town has range traditional convenience traders which bolster this provision.

4.57 Comparison goods shopping provision is provided by local independent traders and there is a tourist, specialist and niche element provided by antique shops and gift shops. There is limited mainstream comparison goods shopping and clothing provision for example is boutique type.

4.58 Service provision within the town centre is good. The restaurant, café and pub offer is diverse in terms of quality and type. There are no branches of high street banks in Bewdley but the town does have an ATM's at the Tesco Express. There is a range of other professional services such as estate agents, solicitors and insurance brokers. Retail services include a number of hair and beauty salons. The overall composition of Bewdley drawn from Goad data is summarised in the table below:

Table 4: Bewdley Town Centre Composition (Goad survey 09/2013)

Sector	Outlet Count	Outlet Percent	National Average Percent
Convenience	13	13.68%	8.54%
Comparison	25	26.32%	32.08%
Retail Services	18	18.95%	14.37%
Leisure Services	25	26.32%	22.64%
Financial & Business Services	9	9.47%	10.67%
Vacant	5	5.26%	11.39%
Total	95		

4.59 In composition terms convenience, retail and leisure service provision was above average in 2013. Comparison shopping and financial/business services were below national average composition.

4.60 In preparing this health check and recognising that the Goad composition data was a not particularly up to date, we undertook our own composition survey in April 2016. The table below provides the up to date composition of the town centre:

Table 5: Bewdley Town Centre Composition Survey, November 2015 (Boyer)

Sector	Outlet Count	Outlet Percent
Convenience	14	15.2%
Comparison	24	26.1%
Services	40	43.4%
Vacant	5	5.4%
Other	9	9.8%
Total	92	100%

4.61 There is a very low level of vacant property within Bewdley Town Centre the Goad analysis in 2013 highlighted 5 vacant units which is well below the national average level and our more recent survey confirmed that the vacancy rate remains low and well below national rates. The plan below shows the distribution of the vacant units around the town centre.

4.62 There is limited data available on retail rental levels in Bewdley. Discussions with local commercial agents suggest that the strongest rental values achieved in the town centre are on Load Street at around £28 per sqft (£300/sqm) zone A. This is marginally above the rentals achieved in Stourport-on-Severn.

4.63 Access and movement around Bewdley is reasonably good. There is a mix of convenient short stay on street car parking and longer stay off-street parking is available at a surface level car park accessed via Severn Side North/Dog Lane and off Load Street and at Gardeners Meadows.

4.64 Customer views on Bewdley were collected by the household telephone survey. The results (Appendix 2) show that respondents living local to the town centre (zone 3) used the town regularly (daily, two or three times a week and weekly) and equally for food and non-food shopping (43%) predominately. Other popular usage included leisure and entertainment services (19%), visits to financial service such as bank, building society, post office (17%) and for health care services (13%). Overall there was a good level of satisfaction with Bewdley across the study area (70% considered no improvements necessary) however within its home zone i.e. those who use the centre most regularly, the satisfaction was lower at 43%. The main changes that survey respondents sought within Bewdley were more parking spaces (18%), a better range of non-food shopping (10%) better retail services (8%) and more national chain stores (7%).

4.65 Bewdley's physical town centre environment is very good, it is an attractive centre comprising some historic and interesting buildings. The towns setting on the River Severn adds to the overall character of the area and generally the town centre area is clean and well kept.

4.66 In conclusion, Bewdley Town Centre is vital and viable and performs its role supporting the local catchment population well and also benefits from tourist trade.

5. SHOPPING PATTERNS

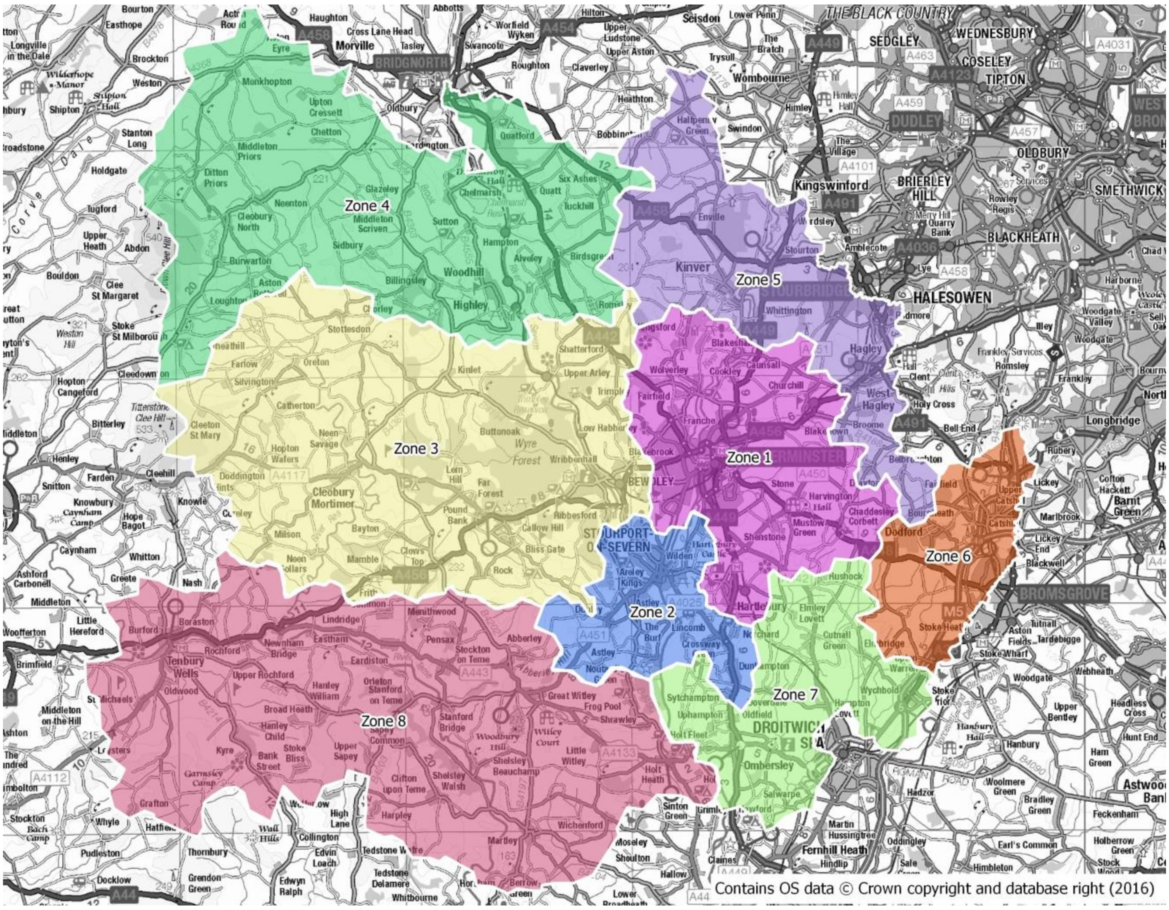
Introduction

5.1 In this section we review existing shopping patterns which have been examined by a household telephone survey that was undertaken specifically to inform this Retail and Commercial Leisure Needs Assessment.

5.2 The household telephone survey which was carried out by NEMS Market Research in November 2015 had a sample size of 800 completed interviews. The survey examined shopping and leisure patterns and usage of town centres in Wyre Forest District. The full results of the survey are provided as Appendix 2.

5.3 To allow time series comparison of how shopping patterns have changed the survey area and survey zones (which are based on postal sector geography), the core survey zones (zones 1 to 3) are the same as those adopted in the previous Wyre Forest Shopping Study.

5.4 The survey area and survey zones are shown below.



5.5 The survey area fully covers Wyre Forest District, but reflecting the fact that choice of where to shop does not respect local authority areas, the survey area extends into parts of Shropshire, Herefordshire, Staffordshire and the Midlands Unitary Authorities. Wyre Forest's main town centres and the survey zones they fall within are as follows:

- Kidderminster – zone 1
- Stourport-on-Severn – zone 2
- Bewdley – zone 3

5.6 The shopping influence of these town centres within their 'home zones' and across the whole of the study area is considered in the rest of this section, starting firstly with overall usage of Wyre Forest's town centres and then considering the food shopping and non-food shopping patterns in a wider context which also illustrates where shopping visits are 'leaking' to beyond the District and which of the larger town centres in the wider area exert influence upon the survey area. Leisure usage patterns are reviewed in Section 7- Commercial Leisure Need and qualitative survey feedback on the individual towns is included with the health check analysis.

Wyre Forest Town Centre Usage

5.7 The household survey included a series of questions asking respondents which of the District's town centres they visited and which they visited the most. The results provide a good approximation to the overall hierarchy of centres in the District and reflect the level of offer and attraction of its main towns.

5.8 The table below provides the total (all survey zones) results and demonstrates very clearly that Kidderminster is the District's most used town centre followed by Stourport-on-Severn and Bewdley. The smaller centres are all less used.

Table 6: Wyre Forests' Most Used Town Centre (across whole survey area)

Town Centre	Percentage Response
Kidderminster	82.1%
Stourport-on-Severn	9.7%
Bewdley	8.2%
Source: Appendix 2. Household Survey Question Q28 - Which centre do you visit the most?	

5.9 However, if the popularity of the District's centres is considered on a zone by zone basis then use of town centres, reflecting their convenient location and proximity to the local catchment, does indicate that the role and function of Stourport-on-Severn does, at a local level, compete with Kidderminster.

Table 7: Wyre Forests' Most Used Town Centre (by zone)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
1st	Kidderminster 97.7%	Stourport-on-Severn 50.4%	Kidderminster 56.4%	Kidderminster 86%	Kidderminster 88.7%	Kidderminster 89.1%	Kidderminster 78.9%	Kidderminster 88.5%
2nd	Stourport-on-Severn 1.8%	Kidderminster 44.1%	Bewdley 39.0%	Bewdley 14.0%	Bewdley 8.0%	Bewdley 7.3%	Stourport-on-Severn 14.5%	Stourport-on-Severn 11.5%
3rd	Bewdley 0.5%	Bewdley 5.5%	Stourport-on-Severn 4.6%	Stourport-on-Severn 0%	Stourport-on-Severn 3.3%	Stourport-on-Severn 3.6%	Bewdley 6.7%	Bewdley 0%

5.10 The zonal analysis confirms that the smaller centres are performing a secondary role in the study area but are important within their 'home zones'.

Food Shopping

5.11 The household survey questioned respondents about their main food (bulk food) and top-up or everyday food shopping habits and choice of store or centre. The tendency of households to undertake less bulk main food shopping came through in the results of the household survey i.e. respondents shopping more frequently and buying less and it is clear that residents within the survey area were comfortable undertaking their main food shopping online.

5.12 For main food shopping the results show that larger food stores remain the most popular option and the zone by zone analysis of the choice of where to undertake a main food shop clearly illustrates that the closest large superstore to home is generally the most popular. The table below provides a summary of the most popular main food shopping stores by zone with the three core zones.

Table 8: Food Shopping Patterns – most popular main food stores by core zone

	Zone 1	Zone 2	Zone 3
1st	Morrisons, Kidderminster	Tesco, Stourport-on-Severn	Sainsbury's, Kidderminster
2nd	Sainsbury's, Kidderminster	Lidl, Stourport-on-Severn	Lidl, Stourport-on-Severn
3rd	Tesco, Kidderminster	Morrisons, Kidderminster	Morrisons, Kidderminster
4th	Aldi, Kidderminster	Co-op, Lombard Street, Stourport-on-Severn	Aldi, Kidderminster
5th	Internet	Tesco, Kidderminster	Tesco, Kidderminster

Source: Appendix 2. Household Survey Question 1.

5.13 The results for the three core zones confirm that choice of main food shopping is primarily based upon location relative to home and also the size of store being able to provide the range and choice of goods that shoppers want. That said the discounters are popular notwithstanding their more limited choice.

5.14 Comparing 2015 with the earlier 2006, the overall share of the larger foodstores in the District is set out below.

Table 9: Main food shop 2006 and 2015

Centre / Facility	2006	2015
Sainsbury's, Kidderminster	19%	14%
Tesco, Kidderminster	17%	8%
Morrisons, Kiddermister	8%	13%
Aldi Kidderminster	1%	7%
Co-Op Stourport-on-Severn	10%	1%
Lidl, Stourport-on-Severn	10%	4%
Tesco Stourport-on-Severn	Not Trading	6%
Internet	1%	5%
Source: 2015 and 2006 household survey results		

5.15 Overall, there has been a reduction in the share of the larger stores around Kidderminster in the nine years since 2006.

5.16 The exceptions are Morrisons and Aldi Kidderminster which have both grown their market shares. In Stourport-on-Severn, the introduction of Tesco has contributed to the decline in market share of both the Co-Op and Lidl stores. The trend does confirm the shift away from larger main food shopping stores to a wider range of smaller stores. It must also be recognised that additional stores and extensions will have come forward increasing competition and that internet based main food grocery shopping has increased from a low base to 5% which is broadly in line with the national trend.

5.17 The use of the internet for main food shopping has become more popular. Overall across the study area internet based food shopping accounted for around 5% of shopping although this varied zone by zone from around 3% to over 12% (zone 7).

5.18 The household survey sought to establish which retailer or internet business households in the survey area were using. The results (Q.2) show across the study area that Tesco is the most popular internet food seller, followed by Ocado and Sainsbury's.

5.19 The household survey also questioned respondents about the reasons they shopped where they did for food shopping, how frequently they undertook a main food shop and their mode of travel on their food shopping trip. A summary of the results for these questions is set out below.

Table 10: Main Food Shopping – reason for choice of store/location

	Across Study Area
1st	Convenient to home
2nd	Low prices / value for money
3rd	Range of food goods available
4th	Habit, always used it
5th	Quality of food goods available
6th	Preference for retailer
Source: Appendix 2. Household Survey Question 5	

Table 11: Main Food Shopping – Frequency of visits

	Across Study Area	Percentage Response
1st	Once a week	67.77%
2nd	Once a fortnight	13.97%
3rd	Two or three times a week	10.98%
4th	Once a month	3.61%
5th	Daily	0.97%
	Other Responses	2.7%
Source: Appendix 2. Household Survey Question 6		

Table 12: Mode of travel to main food shop

	Across Study Area	Percentage Response
1st	Car (driver)	82.23%
2nd	Car (passenger)	7.43%
3rd	(Don't travel - goods delivered)	5.74%
4th	Walk	2.94%
5th	Bus	1.54%
Source: Appendix 2. Household Survey Question 8		

5.20 A further activity the household survey sought to investigate was the linkage between food shopping and other activities on the same trip. Overall, the survey results show that more than 60% of respondents do not link their main food shopping trip with any other activity. Of those that did perform a linked trip, the main linked activities were identified as non-food shopping, buying other food items, visiting a café, buying petrol and travelling to or from work. The table below shows the relative propensity of these linked trip activities.

Table 13: Main food shopping linked trip activities

	Across Study Area	Percentage Response
1st	No	62%
2nd	Yes - go shopping for non-food items	10%
3rd	Don't know / varies	4%
4th	Yes - go shopping for other food items	4%
5th	Yes - visit financial service such as bank, building society, post office	3%
5th	Yes - use sports / leisure or entertainment facilities	3%
6th	Yes - travel to / from work	3%
7th	Yes - visit family /friends	3%
8th	Yes - visit café / pub / restaurant	3%
Source: Appendix 2. Household Survey Question 10		

5.21 As a follow up to the linked trip question, respondents were asked where those linked trips were to. The result varied widely by study zone, but in the core zones, Kidderminster Town Centre was the main location benefitting from linked trips.

5.22 The survey also questioned where respondents did their top-up shopping which comprises general everyday food/convenience shopping which tends to supplement larger less frequent main food shopping.

5.23 The results for this show a more localised trend where smaller local shops are as popular as larger national multiple foodstores. Top-up shopping is more frequent than main food shopping and the amounts spent are generally lower. Given the fine grained level of responses we have not sought to describe them in this summary analysis of food shopping patterns. The detailed results are provided at Appendix 2 and the top-up food shopping questions are numbered 11 through to 16.

Non Food Shopping

5.24 The household survey had a series of non-food questions that sought to establish where households shopped for various categories of comparison goods.

5.25 The goods categories examined were grouped into broadly common themes/activities such as clothing and footwear shopping; DIY and gardening and; electrical goods shopping.

5.26 Generally, shopping on comparison goods is more discretionary and shoppers will tend to 'shop around' before making a decision to purchase goods. Larger town centres with a range and choice of shops will be more attractive for comparison goods shopping trips as they facilitate this shopping around in a single centre where a number of stores selling the same types of goods can be visited. However, shopping around and researching of purchases can also now be undertaken on the internet and then a particular store visited to fulfil a purchase.

5.27 This household survey results demonstrate the dominance of larger town centres for particular categories of comparison goods shopping and Kidderminster Town Centre along with Merry Hill and Worcester are the dominant centres particularly for non-bulky comparison goods categories.

5.28 We provide a summary of the results by comparison goods categories across the 8 survey zones in a series of tables below.

Table 14: Comparison Shopping – Clothing and Footwear

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
1st	Kidderminster Town Centre	Kidderminster Town Centre	Kidderminster Town Centre	Kidderminster Town Centre	Merry Hill Shopping Centre	Bromsgrove	Worcester	Worcester
2nd	Merry Hill Shopping Centre	Worcester	Worcester	Telford	Kidderminster Town Centre	Redditch	Droitwich	Kidderminster Town Centre
3rd	Merry Hill Retail Park	Internet / catalogue / mail order	Internet / catalogue / mail order	Internet / catalogue / mail order	Stourbridge	Merry Hill Shopping Centre	Internet / catalogue / mail order	Hereford
4th	Internet / catalogue / mail order	Stourport-on-Severn	Ludlow	Bridgnorth	Internet / catalogue / mail order	Merry Hill Retail Park	Merry Hill Shopping Centre	Internet / catalogue / mail order
5th	Worcester	Other	Merry Hill Shopping Centre	Crossley RPk, Kidderminster	Merry Hill Retail Park	Worcester	Birmingham City Centre	Merry Hill Shopping Centre
6th	Matalan, Park Lane, Kidderminster	Merry Hill Retail Park	Merry Hill Retail Park	Shrewsbury	Birmingham City Centre	Internet / catalogue / mail order	Ombersley Village Centre	Other

5.29 For clothing and footwear shopping Kidderminster Town Centre is the main choice for respondents across the majority of the survey zones. Merry Hill regional shopping centre and Worcester are also popular destinations and given that both of these centres are outside the survey area, they do exert some influence upon shopping patterns. Other town centres attracting shopping away from the survey area include Redditch, Bromsgrove, Hereford, Telford and Stourbridge.

5.30 For clothing and footwear, Stourport -on-Severn features only within its 'home zone' and Bewdley is not featured. The internet is a popular choice for clothing and footwear shopping.

5.31 Comparing the results for 2015 with those from 2006 shows that Kidderminster Town Centre has lost clothing and footwear market share, as has Merry Hill, and Worcester. The main gain in market share is for the internet which has grown its share of clothing and footwear shopping by 6%.

5.32 The table below provides the 2006 and 2015 percentages across the whole survey area. We would however caution against direct comparisons as the extent of the outer survey zones (zones 4 to 8) have changed.

Table 15: Non Food Clothing and Footwear Shopping 2006 and 2015

Centre / Facility	2006	2015
Kidderminster	37%	32%
Stourport-on-Severn	1%	1%
Bewdley	Less than 1%	Less than 1%
Merry Hill	22%	15%
Worcester	15 %	9%
Redditch	3%	2%
Bromsgrove	2%	2%
Birmingham City Centre	4%	3%
Stourbridge	2%	2%
Internet	4%	10%
Source: 2015 and 2006 household survey results		

Table 16: Comparison Shopping - Books, CD's, DVD's etc

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
1st	Internet / catalogue / mail order	Internet / catalogue / mail order	Internet / catalogue / mail order	Internet / catalogue / mail order	Internet / catalogue / mail order	Internet / catalogue / mail order	Internet / catalogue / mail order	Internet / catalogue / mail order
2nd	Kidderminster Town Centre	Stourport-on-Severn	Worcester	Telford	Merry Hill Shopping Centre	Bromsgrove	Droitwich	Kidderminster Town Centre
3rd	Worcester	Kidderminster Town Centre	Ludlow	Bridgnorth	Stourbridge	Redditch	Worcester	Worcester
4th	Merry Hill Shopping Centre	Worcester	Merry Hill Retail Park	Merry Hill Shopping Centre	Merry Hill Retail Park	Worcester	Kidderminster Town Centre	Merry Hill Shopping Centre
5th	Crossley RPk, Kidderminster	Merry Hill Shopping Centre	Kidderminster Town Centre	Kidderminster Town Centre	Birmingham City Centre	Merry Hill Shopping Centre	Bromsgrove	Leominster
6th	Blackheath Town Centre	Crossley RPk, Kidderminster	Bewdley	Other	Kidderminster Town Centre	Merry Hill Retail Park	Stourport-on-Severn	Droitwich

5.33 For books, CD's and other recorded media, the internet is the main shopping choice for respondents across all zones. Kidderminster, Merry Hill and Worcester are also consistently popular physical shopping locations.

Table 17: Comparison Shopping – small household goods including home furnishings, glass and china

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
1st	Kidderminster Town Centre	Kidderminster Town Centre	Kidderminster Town Centre	Internet / catalogue / mail order	Kidderminster Town Centre	Redditch	Droitwich	Internet / catalogue / mail order
2nd	Internet / catalogue / mail order	Internet / catalogue / mail order	Internet / catalogue / mail order	Telford	Merry Hill Shopping Centre	Bromsgrove	Blackpole Retail Park, Worcester	Ludlow
3rd	Crossley Retail Park, Kidderminster	Crossley Retail Park, Kidderminster	Worcester	Kidderminster Town Centre	Kidderminster Town Centre	Merry Hill Shopping Centre	Internet / catalogue / mail order	Kidderminster Town Centre
4th	Merry Hill Shopping Centre	Worcester	Sainsbury's, Kidderminster	Other	Stourbridge	Blackpole Retail Park, Worcester	Worcester	Crossley Retail Park, Kidderminster
5th	Worcester	Stourport-on-Severn	Merry Hill Shopping Centre	Crossley Retail Park, Kidderminster	Internet / catalogue / mail order	Birmingham City Centre	B&Q, Green Street, Kidderminster	Worcester
6th	Homebase, Kidderminster	Solihull	Crossley Retail Park, Kidderminster	Shrewsbury	Crossley Retail Park, Kidderminster	Ikea, Park Lane, Wednesbury	Kidderminster Town Centre	Hereford

5.34 For smaller household goods, Kidderminster is again a popular choice. Merry Hill does not feature as strongly and retail parks and free-standing retail warehouses also feature.

Table 18: Comparison Shopping – toys, games, bicycles and recreation goods etc

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
1st	Crossley Retail Park, Kidderminster	Internet / catalogue / mail order	Kidderminster Town Centre	Internet / catalogue / mail order	Merry Hill Shopping Centre	Internet / catalogue / mail order	Internet / catalogue / mail order	Internet / catalogue / mail order
2nd	Internet / catalogue / mail order	Kidderminster Town Centre	Internet / catalogue / mail order	Telford	Merry Hill Retail Park, Dudley	Bromsgrove	Droitwich	Kidderminster Town Centre
3rd	Kidderminster Town Centre	Crossley Retail Park, Kidderminster	Crossley Retail Park, Kidderminster	Kidderminster Town Centre	Internet / catalogue / mail order	Merry Hill Shopping Centre	Kidderminster Town Centre	Hereford
4th	Merry Hill Shopping Centre	Worcester	Telford	Merry Hill Shopping Centre	Stourbridge	Redditch	Worcester	Worcester
5th	Halesowen	Stourport-on-Severn	Other	Crossley Retail Park, Kidderminster	Kidderminster Town Centre	Merry Hill Retail Park	Redditch	Crossley Retail Park, Kidderminster
6th	Oldbury Town Centre	Blackpole Retail Park, Worcester	Redditch	Shrewsbury	Birmingham City Centre	Crossley Retail Park, Kidderminster	Crossley Retail Park, Kidderminster	Telford

5.35 The internet, Kidderminster and Merry Hill were amongst the more popular places to shop for toys and recreational goods and the Crossley Retail Park (Kidderminster) was also a popular choice. Stourport-on-Severn featured within its home zone.

Table 19: Comparison Shopping – chemist goods, including health and beauty products etc

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
1st	Kidderminster Town Centre	Stourport-on-Severn	Kidderminster Town Centre	Bridgnorth	Stourbridge	Bromsgrove	Droitwich	Tenbury Wells
2nd	Crossley Retail Park, Kidderminster	Kidderminster Town Centre	Bewdley	Highley Village Centre	Other	Catshill Village Centre	Internet / catalogue / mail order	Worcester
3rd	Internet / catalogue / mail order	Tesco, Severn Road, Stourport-on-Severn	Cleobury Mortimer	Kidderminster Town Centre	Kinver Village Centre	Merry Hill Shopping Centre	Birmingham City Centre	Kidderminster Town Centre
4th	Sainsbury's, Kidderminster	Droitwich	Stourport-on-Severn	Telford	Merry Hill Shopping Centre	Droitwich	Worcester	Ludlow
5th	Merry Hill Shopping	Internet / catalogue /	Ludlow	Sainsbury's, Kidderminster	Merry Hill Retail Park	Morrisons, Bromsgrove	Kidderminster Town Centre	Hereford

	Centre	mail order						
6th	Stourport-on-Severn	Worcester	Internet / catalogue / mail order	Crossley Retail Park, Kidderminster	Kidderminster Town Centre	Worcester	Bromsgrove	Leominster

5.36 Reflecting the more everyday nature of chemist and health and beauty categories, Wyre Forest centres and facilities feature more in attracting these shopping trips. The convenience of picking these goods up in a town centre also means that the internet does not feature particularly strongly in this comparison goods shopping category.

Table 20: Comparison Shopping – electrical items etc

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
1st	Crossley Retail Park, Kidderminster	Crossley Retail Park, Kidderminster	Internet / catalogue / mail order	Internet / catalogue / mail order	Internet / catalogue / mail order	Bromsgrove	Internet / catalogue / mail order	Internet / catalogue / mail order
2nd	Internet / catalogue / mail order	Internet / catalogue / mail order	Crossley Retail Park, Kidderminster	Crossley Retail Park, Kidderminster	Merry Hill Retail Park, Dudley	Internet / catalogue / mail order	Blackpole Retail Park, Worcester	Tenbury Wells
3rd	Kidderminster Town Centre	Kidderminster Town Centre	Kidderminster Town Centre	Telford	Stourbridge	Redditch	Droitwich	Hereford
4th	Stourport-on-Severn	Stourport-on-Severn	Sainsbury's, Kidderminster	Bridgnorth	Merry Hill Shopping Centre	Solihull	Worcester	Blackpole Retail Park, Worcester
5th	Homebase, Kidderminster	Solihull	Stourport-on-Severn	Kidderminster Town Centre	Crossley Retail Park, Kidderminster	Merry Hill Retail Park, Dudley	Roman Way Retail Park, Droitwich	Crossley Retail Park, Kidderminster
6th	Bewdley	Merry Hill Shopping Centre	Worcester	Sainsbury's, Kidderminster	Amblecote Village Centre	Birmingham City Centre	Crossley Retail Park, Kidderminster	Worcester

5.37 The use of the internet in researching and purchasing electrical items is illustrated by the shopping survey results set out in the table above. Similarly shoppers in the survey area are also using larger retail warehouse park locations (Crossley Retail Park, Merry Hill Retail Park, Blackpole Retail Park (Worcester) and Roman Way Retail Park (Droitwich)). Kidderminster Town Centre also features strongly and Stourport-on-Severn and Bewdley also play a role.

Table 21: Comparison Shopping – DIY, home improvement and garden goods

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
1st	B&Q, Kidderminster	B&Q, Kidderminster	B&Q, Kidderminster	B&Q, Kidderminster	B&Q, Kidderminster	Bromsgrove	Droitwich	B&Q, Kidderminster
2nd	Screwfix, Kidderminster	Stourport-on-Severn	Kidderminster Town Centre	Telford	Halesowen	Redditch	B&Q, Kidderminster	Leominster
3rd	Kidderminster Town Centre	Wigleys DIY, Stourport-on-Severn	Screwfix, Kidderminster	Bridgnorth	Stourbridge	B&Q, Smallwood, Redditch	Roman Way Retail Park, Droitwich	Tenbury Wells
4th	Homebase, Kidderminster	Homebase, Kidderminster	Stourport-on-Severn	Shrewsbury	Other	Homebase, Bromsgrove	Wigleys DIY, Stourport-on-Severn	Blackpole Retail Park, Worcester
5th	Internet / catalogue / mail order	Kidderminster Town Centre	Ludlow	Kidderminster Town Centre	Homebase, Kidderminster	B&Q, Kidderminster	Worcester	B&Q, Leominster
6th	Oldbury Town Centre	Droitwich	Wigleys DIY, Stourport-on-Severn	Internet / catalogue / mail order	Bromsgrove	Droitwich	Blackpole Retail Park, Worcester	Ludlow

5.38 For DIY, home improvement and garden goods, Kidderminster both in centre and out of centre is popular, with B&Q registering across all eight zones.

5.39 It is interesting to note, reflecting the shift away from large DIY superstores to internet-based shopping and omni-channel operators, such as Screwfix, that retail warehouses and parks are not as dominant in this category as they were say 5 years ago. Smaller in-centre DIY, hardware and decorator centres and mixed goods retailers such as Wilkinson's and Homebargains, and discount stores also provide goods to service this sector.

Table 22: Comparison Shopping – furniture, carpets and floor coverings

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
1st	Kidderminster Town Centre	Kidderminster Town Centre	Kidderminster Town Centre	Kidderminster Town Centre	Stourbridge	Bromsgrove	Droitwich	Kidderminster Town Centre
2nd	Crossley Retail Park, Kidderminster	Crossley Retail Park, Kidderminster	Internet / catalogue / mail order	Crossley Retail Park, Kidderminster	Merry Hill Retail Park, Dudley	Blackpole Retail Park, Worcester	Kidderminster Town Centre	Tenbury Wells
3rd	Internet / catalogue / mail order	Homebase, Chester Road South, Kidderminster	Crossley Retail Park, Kidderminster	Bridgnorth	Crossley Retail Park, Kidderminster	Crossley Retail Park, Kidderminster	Internet / catalogue / mail order	Internet / catalogue / mail order
4th	Droitwich	B&Q, Green Street, Kidderminster	Carters Furniture, Kidderminster	Shrewsbury	Kidderminster Town Centre	Birmingham City Centre	Worcester	Blackpole Retail Park, Worcester
5th	B&Q, Green Street, Kidderminster	Merry Hill Retail Park, Dudley	Droitwich	Internet / catalogue / mail order	Amblecote Village Centre	Internet / catalogue / mail order	Crossley Retail Park, Kidderminster	Worcester
6th	Oldbury Town Centre	Parkridge Retail Park, Droitwich	B&Q, Kidderminster	Telford	B&Q, Kidderminster	Droitwich	Redditch	Leominster

5.40 Kidderminster features strongly across all of the zones, both the town centre and out of centre facilities. Outside the District, the main outflows are to Stourbridge, Bromsgrove, Worcester and Droitwich.

Conclusions on Shopping Patterns

5.41 Within the survey area, the results of the household telephone survey confirm that Kidderminster sits at the top of the District's centre hierarchy with Stourport-on-Severn sitting below and Bewdley at a level below both of them.

5.42 For main food shopping, the larger grocery stores within the District dominate patterns and this is to the advantage of town centres which have main stores within them or close to their centre, particularly as these centres will generally benefit from linked-trip activities.

5.43 Kidderminster is a popular shopping destination across all of the comparison goods shopping categories. It does however face competition from larger centres such as Merry Hill and Worcester, which although are both outside the survey area do exert influence upon shopping patterns of residents and attract trips out of the area (leakage).

5.44 The internet has a strong role in both food and non-food shopping across the survey area and the internet's share has grown very significantly since the last shopper survey was undertaken back in 2006.

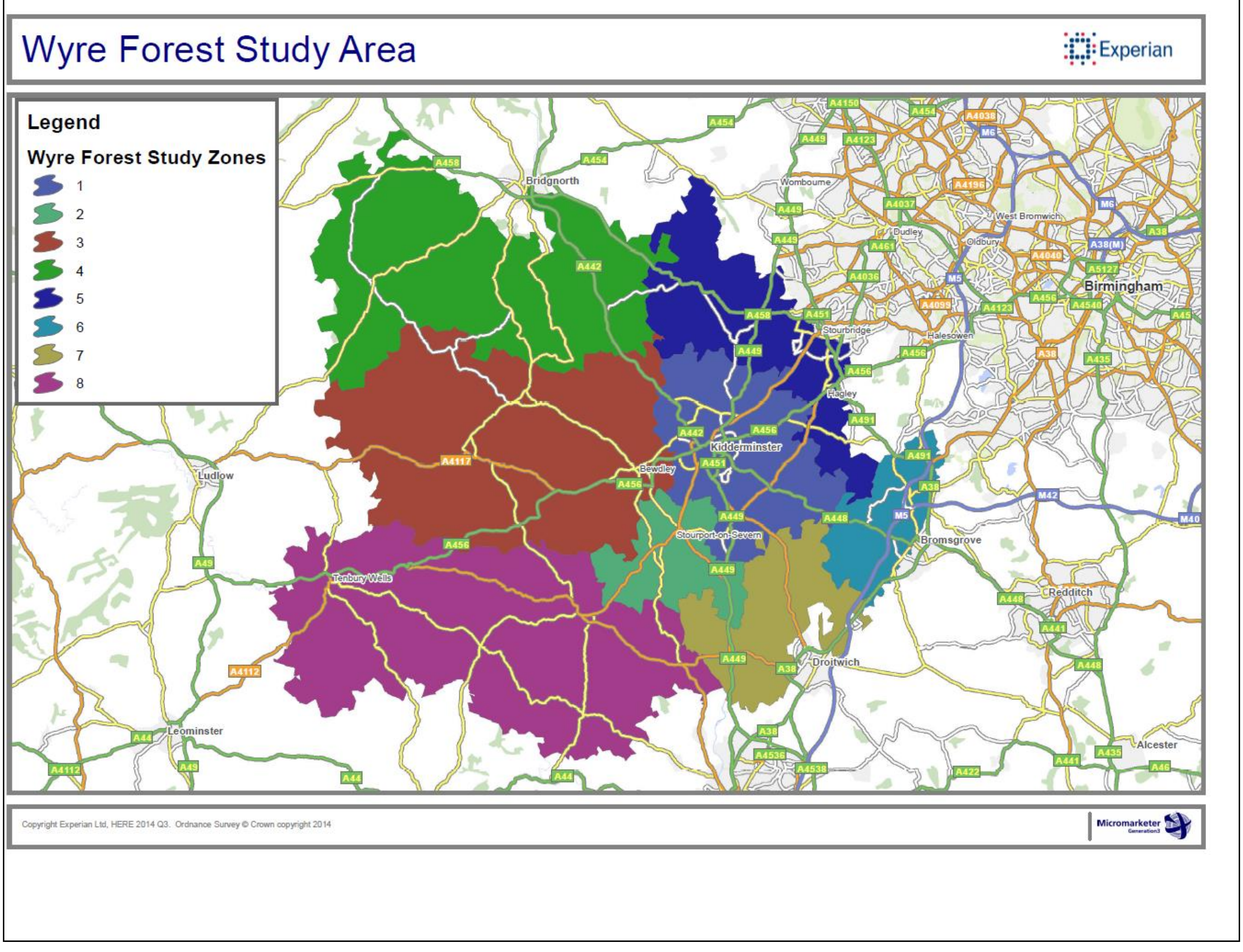
6. RETAIL CAPACITY AND SHOPPING FLOORSPACE NEED

Introduction

6.1 In this section, we provide details of the methodology and data inputs used to calculate the convenience and comparison goods retail capacity and then go on to provide the results of those retail capacity calculations. In particular the analysis provides estimates of potential turnover capacity and future floorspace need for the town centres of Kidderminster, Stourport-on-Severn and Bewdley up to 2031/2032.

Methodology

6.2 In preparing this assessment, we have adopted the same core study zones (zones 1 to 3 - see map below) as those used in the previous Wyre Forest Shopping Study. The outer zones (4 to 8) have been revised to focus the area that the District's centres, and Kidderminster Town Centre in particular, have the potential to draw shopping visits from.



6.3 As the plan above shows, the overall study area was divided into 8 smaller zones which allow a finer grained analysis of localised shopping patterns which have been researched through a bespoke household telephone survey. The household telephone survey results, which are provided in full at **Appendix 2**, provide details of where residents in the study area and individual study zones shop for food (convenience) and non-food (comparison) goods. We have provided a summary of these shopping patterns in the preceding section.

6.4 In undertaking the retail expenditure and turnover capacity analysis we have, however, made adjustments to the household survey results to take account of null responses such as 'don't buy these types of goods' and 'don't know/varies'. These adjustments allow the full extent of consumer expenditure on retail goods to be assigned to town centres and shopping facilities. Such adjustments are standard practice when preparing retail capacity and need modelling.

6.5 The retail capacity tables, provided at **Appendix 3,** set out our step-by-step approach to calculating quantitative retail capacity. Tables 1 to 14 provide the retail capacity and quantitative need analysis for convenience goods and Tables A to J set out the comparison based goods calculations.

6.6 In broad terms, the steps involved in calculating the quantitative retail capacity are:

Step	Description
1	Establish study area population.
2	Establish consumer spending potential on retail goods in study area over study years.
3	Establish 'market shares' of existing retail facilities (base line).
4	Apply 'market shares' to available spending to derive implied turnovers for existing facilities for the base line position and future study years.
5	Estimate floorspace and benchmark turnovers for existing shopping facilities.
6	Compare implied market share turnovers to benchmark turnovers to identify retail capacity (overtrading) or under trading (no capacity).
7	Make allowance for any commitments or plan proposals from the capacity established.

6.7 The quantitative capacity calculations require careful interpretation and should be supported by a qualitative review of existing centres and facilities to verify trading performance.

6.8 In addition, whilst forecasts are provided to 2031/2032, less weight should be placed on expenditure and capacity estimates over these longer time horizons particularly forecasts beyond 10 years. Given the dynamic nature of retailing and the interrelationship and competition between town centres, it is recommended that retail capacity should be monitored, reviewed and updated at regular intervals or when there have been significant changes which will impact the retail geography and hierarchy of an area. Previous national policy good practice guidance indicated a five year timespan for reviews and this is, in our view, still a sensible approach.

Study Data Inputs

6.9 In preparing the retail capacity analysis, we have sought to use the latest available data and information on population and forecast population change; consumer expenditure estimates and projected consumer spending growth; retailers' trading performance and their benchmark turnover levels; and the share of consumer spending transacted in non-store based businesses (also known as special forms of trading). These study inputs are explained in turn below.

Population

6.10 The population within the study area and its composite study zones has been obtained from Experian. The data which is based upon the latest 2011 census is projected forward by Experian based upon the most up to date sub-national ONS population projection data.

6.11 The Experian population projection data is trend based and takes account of migration, age profile and sub-national DCLG housing projections.

6.12 The assessment has considered population from 2014 (the latest and most up to date year available from Experian which coincides with the local area consumer expenditure estimates) and projects forward to 2016, 2021, 2026, 2031/32. The end date of 2032 reflects the future development plan timeframe.

6.13 Table 1 at Appendix 3 sets out the population and projected population for the eight study zones and the study area overall. This population analysis is repeated in Table A at Appendix 3 (as a context for the comparison goods analysis).

6.14 Across the study area the population in 2014 was 205,255 and this is projected to grow steadily over the period to 2032 when the population is projected to be 215,219 showing a growth in population of 9,964 persons.

Consumer Retail Expenditure

6.15 Local area consumer spending data has been obtained from Experian. The spend per head data is set out in Table 2 (convenience) and Table B (comparison) at **Appendix 3**. The expenditure has a 2014 base year and is in 2014 prices, again this is the most up to date information available from Experian.

6.16 The 2014 expenditure is grown year-on-year using trend data published by Experian in their Retail Planner Briefing Note 13 (October 2015). The growth rates applied have be derived from Appendix 3 of that briefing note and are forecasts of retail spending growth up to 2031/32 that are adjusted to take account of the increased proportion of spending taking place over the internet and through non-store selling platforms. The forecast used does also take account of internet sales that are fulfilled from retail floorspace via for example goods picking in larger food stores.

6.17 The expenditure growth rates adopted for both convenience and comparison goods are summarised in the table below.

Table 23: Expenditure Growth per Head (per annum)

Expenditure Growth per Head (pa)	2014-2015	2016 to 2022 (average pa)	2023 to 2035 (average pa)
Convenience	-0.4%	-0.2%	-0.1%
Comparison	4.7%	2.4%	3.3%
Source: Experian Retail Planner Briefing Note 12.1, Appendix 3 Note: 2016 to 2022 and 2023 to 2035 growth rates are per annum.			

6.18 The latest expenditure forecasts show growth returning to retail spending in comparison goods and a stabilising of convenience spending as the effects of the recession recede and very low interest rates and low inflation provide an increase in average household disposable income which in turn provides a stimulus to consumer spending.

6.19 However whilst positive, the predictions for retail spending growth going forward over the next twenty years are that consumer spend will not be as strong as it was in the period before the last recession (pre-2008).

6.20 Applying the spending per head figures to the population provides estimates of the spending generated within the study area and across the study zones. This analysis is provided in Appendix 3 at Table 3 for convenience spending and at Table C for comparison goods spending.

6.21 The spending potential on convenience goods generated by residents within the study area and the growth in that spending is summarised in the table below. The combination of a growing population and modest growth in spending provides the following expenditure potential:

Table 24: Convenience Goods Expenditure Potential and Growth

Year	Convenience Spend Potential in Study Area	Growth in Convenience Spend from 2016
2016	£454.02m	-
2021	£458.19m	£4.17m
2026	£461.95m	£7.93m
2031/32	£464.59m	£10.57m
Source: Appendix 3, Retail Capacity Analysis, Table 3.		

6.22 Across the whole study area convenience goods spending growth of around £10.5 million is available to support existing (and potentially new) food shopping floorspace over the 15 year period up to 2031/32.

6.23 For comparison goods spending, the expenditure generated by the resident population and the growth in spend per head is calculated in Table C, Appendix 3. The summary table below shows the overall amount of spending generated and the growth from 2016 to 2031.

Table 25: Comparison Goods Expenditure Potential and Growth

Year	Comparison Spend Potential in Study Area	Growth in Comparison Spend from 2016
2016	£734.64m	-
2021	£836.44m	£101.80m
2026	£993.05m	£258.41m
2031/32	£1,179.43m	£444.79m
Source: Appendix 3, Retail Capacity Analysis, Table 3.		

6.24 Over the 15 year period from 2016 to 2031/32 the growth in comparison goods expenditure across the whole study area is over £440 million.

Treatment of expenditure made through Special Forms of Trading (SFT)

6.25 Special form of trading (SFT) is the collective term for retail activity and spending that is transacted through non retail stores such as doorstep sales, markets, catalogue shopping, factory direct sales, TV shopping and now in growing measure the internet.

6.26 We have sought through the household telephone survey to establish the local level of SFT spending and this is primarily now through the internet. Having established the base line market share of SFT, we then allow for a future portion of the growth in expenditure to be directed to non-store retailing including the internet shopping and mail order. The share of spending being channelled into SFT in future years has been taken account of in the expenditure growth rates we have applied to consumer spending per head in future years as these are 'net' of SFT.

6.27 It is noteworthy that the use of internet and mail order by residents within the study area is relatively strong on comparison goods shopping particularly books, dvds, music and the consumer electronics sectors. For food shopping the study area exhibits broadly similar levels of adoption to national rates.

Convenience Goods Shopping Needs

6.28 Following our step-by-step methodology outlined above we have already identified the population and consumer expenditure stages of the assessment. The next step is to establish the base-line market shares of the existing retail facilities.

Establishing Convenience Goods Shopping Market Shares

6.29 Tables 4, 5 and 6 at Appendix 3 organise the market share shopping pattern information from the household telephone survey into trips to town centre and non-central locations. The analysis is by study zone which enables local shopping (and spending) patterns to be used to build up implied levels of turnover for all of the facilities from their respective 'home zones' and across the wider study area.

6.30 Table 4 compiles the main food shopping patterns for the study zones.

6.31 Table 5 compiles the top up food shopping patterns for the study zones.

6.32 Table 6 combines the main and top up food shopping patterns together to establish the overall composite food shopping pattern. The main food and top up shopping have been combined by applying a weighting of 70% to main and 30% to top up shopping to reflect the broad split between these two activities.

Calculating Implied Convenience Turnover of Existing Facilities based on Market Share

6.33 Applying the composite food shopping market share information in Table 6 to the available convenience goods expenditure generated within the study area (Table 3) provides implied turnovers for the existing food shopping facilities based upon the market share information. The results of this analysis are provided in Table 7 for 2016; Table 8 for 2021; Table 9 for 2026 and Table 10 for 2031.

6.34 Table 11 at Appendix 3 provides a summary of the implied convenience goods turnovers of the District's main town centres and free standing food stores. The summary table below shows the turnovers for 2016 through to 2031/32.

Table 26: Convenience Goods Turnover of Wyre Forest Centres/Locations

Location	Study Years			
	2016	2021	2026	2031/32
Wyre Forest Main Town Centres				
Kidderminster TC	£7.443m	£7.479m	£7.515m	£7.542m
Stourport-on-Severn TC	£5.729m	£5.772m	£5.805m	£5.815m
Bewdley TC	£7.198m	£7.290m	£7.321m	£7.309m
Wyre Forest Freestanding Stores/Locations				
Kidderminster (Non TC)	£135.823m	£160.713m	£161.536m	£162.061m
Stourport-on-Severn (Non TC)	£39.906m	£40.186m	£40.359m	£40.390m
Bewdley (Non TC)	£0.782m	£0.793m	£0.796m	£0.795m
Source: Table 11, Appendix 3				

6.35 The analysis shows that the District's town centres achieve relatively low levels of food shopping turnover compared to turnover of the edge and out of centre provision.

6.36 Of the non-town centre food shopping facilities, the highest implied market share based turnovers are achieved by the Morrisons, Sainsbury's and Tesco stores in Kidderminster and Tesco at Stourport-on-Severn. It is notable also that the Aldi store in Kidderminster and the Lidl in Stourport -on-Severn are performing very well.

Estimating the benchmark turnovers for existing shopping facilities

6.37 Deriving appropriate benchmarks or expected levels of turnover for retail floorspace is not a precise exercise.

6.38 For the main food grocers, it is possible to use company average data as a basis and this is available through company trading accounts and other published sources, such as Verdict on Grocery Retailing and Mintel's Retail Rankings report.

6.39 However, the main grocers trading densities have fallen recently and whereas average trading levels were around £12,000 to £13,500 per m^2 on convenience floorspace across the UK's main grocery retailers, the latest published data is suggesting a range around £10,000 per m^2. Discounters Aldi and Lidl which were typically achieving lower trading metrics have seen their densities improve and are now on average around £8,000 per m^2.

6.40 Whilst densities in the main grocers have fallen, it should be recognised that there is potential for higher levels of trading to be achieved again and to reflect this, rather than adopt the current lower average levels, we consider it appropriate to assess the need for additional floorspace adopting a higher level of benchmark turnover based on better trading performances.

6.41 These stronger levels of trading could be achieved without any undue levels of in-store stress or symptoms of overtrading[6] and to adopt lower levels of trading performance in assessing the need for additional floorspace would in our view create an artificial level of need.

6.42 It must also be recognised that company-based trading densities are averages across a retailers' overall store portfolio. There will be stores that trade above the average and equally stores that achieve turnovers below average. Local circumstances, such as catchment population profile and the nature and the level of competition in an area, will have an influence upon individual locations. Wyre Forest and the study area this assessment covers a relatively affluent population and consumer spending levels are at or above the national average levels and therefore the potential for stores to trade above average exists.

6.43 The trading densities applied in this assessment are as follows:

- Main Grocer Operated Stores — £12,500/m^2
- Discounters, Co-Op and Symbol Groups — £8,000/m^2
- Local stores — £5,000/m^2

6.44 The product of sales floorspace and convenience goods turnover provides the estimated benchmark turnover. This is set out in Table 12 at Appendix 3.

Compare implied market share turnovers to benchmark turnovers

6.45 Comparing the market share implied turnover of existing facilities with their benchmark turnovers provides an estimate of the theoretical turnover capacity available to support additional floorspace. A positive capacity is an indication of potential need for additional retail floorspace and may reflect overtrading in existing facilities. A negative capacity is an indication of an existing oversupply/underuse of existing floorspace which has the potential to be used more efficiently.

[6] Overtrading is a term used to describe a shop which is achieving high levels of turnover that are significantly above a notional benchmark level. In a foodstore, overtrading is manifest in a store that is so busy that it cannot maintain adequate stock levels on shelves, will run out of goods, will have long queues of shoppers at checkouts and car parks will be over capacity.

6.46 The analysis is provided in Table 13 (Appendix 3). In 2016 there is negative turnover capacity (no need) in Kidderminster and Stourport-on-Severn Town Centres and modest levels of turnover capacity in Bewdley Town Centre. Over the study period, the convenience goods capacity in Kidderminster and Stourport-on-Severn Town Centres remain negative; in Bewdley the modest level of capacity remains.

6.47 The out of centre convenience capacity position for Kidderminster shows a positive capacity of around £4.5m early in the study period and grows to over £6m by the end of the Plan period. Out of centre provision in Stourport-on- Severn (Tesco and Lidl) is trading well and this overtrading is manifest in a theoretical capacity of around £5m over the study period. Out of centre provision around Bewdley is broadly in balance over the study period.

6.48 Overall, across the whole of the District, due in large part to the overtrading capacity of Stourport-on-Severn and Kidderminster's out of town centre provision, there is a positive capacity of around £5.5m in 2016 growing to around £8.5m by the end of the study period.

6.49 The summary capacity table below sets out the position with regard to potential within the District's town centres.

Table 27: Convenience Goods Turnover Capacity By Main Town Centre

Wyre Forest Town Centres	2016 £m	2021 £m	2026 £m	2031 £m
Kidderminster Town Centre	-£1.752	-£1.716	-£1.680	-£1.653
Stourport-on-Severn Town Centre	-£4.646	-£4.603	-£4.570	-£4.560
Bewdley Town Centre	£2.090	£2.182	£2.213	£2.201
Source: Appendix 3, Retail Capacity Analysis, Table 13				

6.50 To establish what these levels of turnover capacity would translate to in physical sales floorspace, it is necessary to divide the turnover by an appropriate sales density.

6.51 We have already set out above the sales densities we have adopted for this assessment and these have been applied to the turnover capacity figures to arrive at theoretical retail floorspace need estimates. Table 14 at Appendix 3 provides the full details and a summary table for 2016, 2021 and 2031 is set out below.

Table 28: Convenience Goods Capacity Converted to Sales Floorspace

Wyre Forest Town Centres	2016 m^2	2021 m^2	2026 m^2	2031 m^2
Kidderminster Town Centre	-269 (Nil)	-261 (Nil)	-252 (Nil)	-245 (Nil)
Stourport-on-Severn Town Centre	-715 (Nil)	-699 (Nil)	-686 (Nil)	-676 (Nil)
Bewdley Town Centre	322	332	332	326
Source: Appendix 3, Retail Capacity Analysis, Table 14				

6.52 Only Bewdley shows a theoretical requirement for additional convenience goods shopping floorspace. Converting sales area to gross area suggests that the theoretical need for Bewdley is approximately 470sqm gross.

Make allowance for any commitments or plan proposals

6.53 The table above provides a theoretical estimate for the floorspace needs of each of the District's main town centres. It is however necessary to factor in the existing pipeline of consented convenience retail floorspace and information on retail planning permissions that have been provided to us by Wyre Forest DC.

6.54 There are two significant foodstore permissions that need to be accounted for. These are:

- Extension to existing Aldi Store at Green Street, Kidderminster. 205sqm sales area extension. (15/0468/FULL)
- New Aldi Store at Stourport Road, Kidderminster 1,254 sqm net (1,000sqm convenience goods sales)

6.55 Neither of these commitments are within town centre locations, the extension is to the edge of centre Aldi at Kidderminster which trades well and will act to reduce an element of overtrading in that store.

6.56 The new Aldi Store is out of centre and its catchment area will overlap both Kidderminster and Stourport-on-Severn. We have found no capacity arising in either Kidderminster or Stourport-on-Severn Town Centres over the study period but there is some limited overtrading in the out of centre store in Kidderminster and Stourport-on-Severn which generates some potential capacity (£5.5m rising to circa £8.5m) the new Aldi store and the Aldi extension will act to reduce the overtrading.

Conclusions on Convenience Goods Shopping Needs

6.57 Based on the limited amount of convenience goods shopping need identified and having taken into account the two committed foodstore proposals we do not consider it necessary or appropriate for any site to be allocated to meet future (short/medium term) food shopping needs of the District. There is a small positive quantitative need identified in Bewdley which is equivalent to around 490 sqm gross. This level of floorspace is equivalent to providing a further convenience store of a size similar to the existing Co-Op or Tesco Express, qualitatively this would not add particularly to consumer choice.

6.58 We would, however, anticipate with the structural changes that are taking place within the food retail sector including the growth of discounters and the main grocers looking for convenience and small supermarket formats that proposals may come forward. Where such stores are located within established centres or are well related to them sequentially, and it is demonstrated that they will provide linked footfall and spending benefits to the relevant town centres, then, subject to impact testing and other relevant policy considerations including achieving sustainable patterns of shopping, they should in our view be supported.

Comparison Goods Shopping Needs

6.59 As with the convenience goods capacity and need analysis, we set out below the details and findings of our step by step assessment for comparison goods shopping need within the District, focusing upon the main town centres. The detailed capacity calculations are provided in Appendix 3 at Tables A to K.

6.60 Tables A, B and C provide the population; comparison spend per head; and total comparison goods spend potential for the study area and zones. These have been reviewed earlier in this section under the data inputs heading.

Establishing Comparison Goods Shopping Market Shares

6.61 Table D at Appendix 3 provides the combined comparison goods market share by study zones based upon the responses to the household telephone survey. The responses for each of the comparison goods shopping categories have been weighted in accordance with the proportion of spending devoted to each category of goods.

6.62 The spend-based weighting applied is set out below.

Table 29: Comparison Good Market Share (weighted)

Across Study Area	Percentage Response
clothing or footwear goods	31%
books, CDs or DVDs	6%
small household goods, such as home furnishings, glass and china items	13%
toys, games, bicycles and recreation goods	14%
chemist goods, including health and beauty products	15%
electrical items, such as televisions, washing machines and computers	10%
DIY and garden goods	3%
furniture, carpets and floor coverings	8%
Source: Experian Spending Analysis	

Calculating Implied Comparison Turnover of Existing Facilities based on Market Share

6.63 Applying the combined market share information in Table D to the available comparison goods expenditure generated within the study area (Table C) provides implied turnovers for the existing town centres and other shopping facilities.

6.64 The results of this analysis are provided in Table E for 2016; Table F for 2021; Table G for 2026 and Table H for 2031.

6.65 Table J at Appendix 3 provides a summary of the implied/market share based comparison goods turnovers of the District's main town centres and free standing food stores. The summary table below shows the turnovers of the study towns for 2016 through to 2031/2032.

Table 30: Implied Comparison Goods Turnovers of Wyre Forests Main Town Centres

Wyre Forest Town Centres	2016 £m	2021 £m	2026 £m	2031/2032 £m
Kidderminster	£182.848	£207.711	£245.971	£291.411
Stourport-on-Severn	£14.818	£16.817	£19.877	£23.494
Bewdley	£3.935	£4.494	£5.315	£6.268
Source: Appendix 3, Retail Capacity Analysis, Table J				

6.66 The implied turnover analysis shows that Kidderminster commands by far the largest comparison goods turnover of the town centres in the District. This reflects the range and choice of comparison goods shopping available in the town centre and its role atop the hierarchy of centres in the District.

6.67 Stourport-on-Severn and Bewdley achieve more modest levels of non-food turnover, this is commensurate with the level of comparison goods shopping provision in each of the towns.

Estimating the benchmark turnovers for existing shopping facilities.

6.68 As with the convenience goods sector, deriving appropriate benchmark or expected levels of turnover for retail floorspace is not a precise exercise. For national multiple retailers, it is possible to consider their company accounts and review average turnover data across their store portfolio as a basis and this is available through reports published by analyst companies such as Verdict and Mintel. These reports show a diverse range of trading densities with electrical and clothing and footwear retailers achieving average sales densities of over £7,000/sqm and discount household goods retailers achieving lower rates at around £2,500/sqm.

6.69 However town centre comparison goods retailing is made up of a range of national multiple, regional and independent traders so the company average approach is at best an informative in the process of estimating appropriate trading densities and we have adopted a centre by centre approach based upon the type and mix of comparison goods retail provision.

6.70 It should also be noted that the threshold for overtrading in comparison goods shops tends to be much higher than for food retailing and generally trading at a level above a notional benchmark average would be very positively considered by non-food retailers as being more profitable and achieving a higher margin trading.

6.71 Having taken into account the mix of retail within each of the study centres and having regard also to the general level of affluence within the District we have adopted the following trading densities to assess comparison goods capacity:

- Kidderminster Town Centre £6,500/sqm
- Stourport-on-Severn and Bewdley Town Centres £4,000/sqm

6.72 The product of sales floorspace and convenience goods turnover provides the estimated benchmark turnover. This is set out in Table J at Appendix 3. Table J also provides a calculation that shows the implied trading density (implied market share turnover divided by floorspace) of the existing comparison goods shopping floorspace in the main study towns. These are also set out in the table below:

Table 31: Implied Trading Density for Town Centres 2016

Wyre Forest Town Centre	Implied Trading Density £/m^2
Kidderminster Town Centre	£6,371
Stourport-on-Severn Town Centre	£2,934
Bewdley Town Centre	£2,623
Source: Table J, Appendix 3	

6.73 The implied trading density analysis suggests broadly as anticipated trading performance of the floorspace in Kidderminster. Stourport-on-Severn and Bewdley Town Centres are not achieving the benchmark trading levels we would expect, however it is anticipated that both town centres benefit from an element of tourist and day trip spending from outside the study area.

Comparing implied market share turnovers to benchmark turnovers

6.74 Comparing the market share implied turnover of existing facilities with their benchmark turnovers provides an estimate of the theoretical turnover capacity available to support additional floorspace. A positive capacity is an indication of potential need for additional retail floorspace and may reflect overtrading in existing facilities. A negative capacity is an indication of an existing oversupply/underuse of existing floorspace which has the potential to be used more efficiently.

6.75 This analysis is provided in Table J (Appendix 3). In 2016, none of the District's town centres show positive turnover capacity.

6.76 Rolling the expenditure analysis forward, the theoretical capacity in Kidderminster becomes positive whilst Stourport-on-Severn and Bewdley continue to show negative capacity over the Plan period.

Table 32: Comparison Goods Turnover Capacity by Main Town Centre

Wyre Forest Town Centres	2016 £m	2021 £m	2026 £m	2031 £m
Kidderminster Town Centre	-£3.702	£6.744	£29.472	£58.180
Stourport-on-Severn Town Centre	-£5.382	-£4.945	-£3.566	-£1.760
Bewdley Town Centre	-£2.065	-£1.970	-£1.649	-£1.233
Source: Appendix 3, Retail Capacity Analysis, Table J				

6.77 To establish what these levels of turnover capacity would translate to in physical sales floorspace, it is necessary to divide the turnover by an appropriate sales density. We have already set out above the sales densities we have adopted for this assessment and these have been applied to the capacity figures to arrive at theoretical retail floorspace need figures. Table K at Appendix 3 provides the full details and a summary table for 2016, 2021 and 2031 is set out below.

Table 33: Comparison Goods Capacity Converted to Sales Floorspace

Wyre Forest Town Centres	2016 m^2	2021 m^2	2026 m^2	2031 m^2
Kidderminster Town Centre	-570	963	3,907	7,159
Stourport-on-Severn Town Centre	-1,345 (nil)	-1,147 (nil)	-768 (nil)	-352 (nil)
Bewdley Town Centre	-516 (nil)	-457 (nil)	-355 (nil)	-247 (nil)
Source: Appendix 3, Retail Capacity Analysis, Table K				

6.78 For planning policy purposes, the sales area floorspace in the table above has been converted to an equivalent gross floorspace based upon 70% sales to gross ratio. The table below provides the gross comparison goods shopping floorspace requirement.

Table 34: Comparison Goods Capacity Converted to Gross Floorspace

Wyre Forest Town Centres	2016 m^2	2021 m^2	2026 m^2	2031 m^2
Kidderminster Town Centre	Nil	1,375	5,582	10,227
Stourport-on-Severn Town Centre	Nil	Nil	Nil	Nil
Bewdley Town Centre	Nil	Nil	Nil	Nil
Source: Appendix 3, Retail Capacity Analysis, Sales assumed to be 70% of gross floorspace				

Allowance for Commitments and Plan Proposals

6.79 The table above provides a theoretical estimate for the floorspace needs of each of the District's main town centres. It is however necessary to factor in the existing pipeline of comparison retail floorspace consented. Information on retail planning permissions has been provided to us by Wyre Forest DC.

6.80 Planning permissions which need to be accounted for in the capacity analysis are in Kidderminster Town Centre. These are:

- Weavers Wharf/Bull Ring permission which included a large floorplate unit, smaller retail units and A3 units. Overall, the retail floorspace element of this permission is 3,518sqm net.
- Riverside Walk which comprises the redevelopment of the former Brinton Carpets building to provide a mixed use of retail, leisure and residential scheme. The retail floorspace element of this permission has been assumed to be 1,200sqm net.

6.81 Table K at Appendix 3 provides the revised floorspace need figures for Kidderminster which have taken account of the committed comparison goods floorspace coming forward. In the early part of the plan period, once committed floorspace is factored in, there is no quantitative need for additional floorspace in Kidderminster. By the end of the study period there is a need for around 2,500 sqm net sales of comparison goods shopping floorspace. The details are set out below.

Table 35: Kidderminster Comparison Goods Floorspace Need (Net Commitments)

Wyre Forest Town Centres	2016 m^2	2021 m^2	2026 m^2	2031 m^2
Kidderminster Town Centre Net Floorspace	-5188	-3,655	-711	2,541
Kidderminster Town Centre Gross Floorspace	Nil	Nil	Nil	3,630
Source: Appendix 3, Retail Capacity Analysis, Sales assumed to be 70% of gross floorspace				

Conclusions on Comparison Goods Shopping Needs

6.82 The need analysis indicates that quantitatively there is scope for Kidderminster Town Centre to expand its comparison goods shopping floorspace over the study period. However the need is not pressing assuming the committed development in the town centre comes forward. In addition, we would also highlight the substantial amount of vacant floorspace within the town centre which if re-occupied would meet any short/medium term needs. We would however anticipate that this vacant space would be subject to some remodelling or redevelopment.

6.83 In Stourport-on-Severn Town Centre over the study period there is no capacity or need for additional comparison goods shopping floorspace and the town centre trades broadly in equilibrium across the plan period. We do not consider that there is a requirement to make any site specific allocations.

6.84 Similarly, the comparison shopping floorspace need analysis for Bewdley does not present a requirement to allocate sites.

Conclusions on Shopping Floorspace Need

6.85 The retail capacity and floorspace need analysis set out in Appendix 3 and explained above leads to the following conclusions on the need for additional floorspace to serve the District's population over the period to 2031.

6.86 Whilst theoretical need is identified for additional convenience floorspace, once existing foodstore permissions have been factored in there is no additional capacity for further convenience floorspace in the District and there is no pressing need for the Council to allocate any sites for additional larger food stores. A small level of need exists in Bewdley Town Centre but this of itself would support a further small convenience store, we would anticipate that the level of turnover capacity can be absorbed by existing floorspace in the town trading more intensively.

6.87 However, the dynamic of food shopping is changing and there is an increasing focus on convenience and smaller food only supermarkets which can be accommodated on central sites. The Council should be aware of this potential and may choose to provide for this through more sustainably provision in their network of local/village centres or by providing such facilities in any larger residential developments for example.

6.88 Whilst Kidderminster Town Centre does have a theoretical need for additional comparison goods shopping, due to commitments this need only arises toward the end of the plan period. We do not therefore consider any specific site allocations are required now and would suggest instead that there is encouragement given to the reuse of vacant floorspace and regeneration of the eastern part of the town centre to provide a counterbalance to Weavers Wharf.

6.89 Neither Stourport-on-Severn or Bewdley Town Centres are forecast to have needs for significant levels of comparison shopping floorspace for them to continue to fulfil their existing roles.

7. COMMERCIAL LEISURE NEED

Introduction

7.1 This section of the assessment provides a review of the potential needs of and demand from the commercial leisure sector. We highlighted earlier in the assessment the importance of the commercial leisure provision in the District's town centres and how enhancing the offer of centres will promote the vitality and viability of centres and diversify them to become more than destinations for shopping.

7.2 Our commercial leisure assessment firstly identifies the current levels of expenditure available in the study area in the broad leisure sectors and expected growth over the study period to 2031. We then review the findings of the household survey to identify the destinations where commercial leisure visits are made (and money spent) and then provide a review of the capacity for the District to support additional floorspace.

7.3 It is important to note however that the capacity assessment for commercial leisure uses should be relied on only as a broad guideline. The techniques used to determine leisure needs and information on leisure operator turnovers are not as comprehensive as those available for assessing retail needs.

7.4 In the leisure sector, operator demand tends to drive the market rather than estimates of capacity or need. Generally operators look for opportunities whether they be premises driven, a requirement for a particular town or a location that matches their particular trading model and key demographics.

7.5 The spending analysis supporting this section is provided at Appendix 4.

Commercial Leisure Expenditure Growth

7.6 Analyses of the baseline level of leisure spend available in the study area and the growth in expenditure over the study period is calculated by multiplying population by leisure spend per head. Tables CL1, CL2 and CL3 at Appendix 4 provide population (same as used in retail analysis), spend per head for leisure services (by broad categories) and total spending potential over the study period.

7.7 The leisure spending information is provided by Experian and has been analysed for the following broad service categories:

- Accommodation services (both UK and abroad);
- Cultural services (trips to cinemas, theatres, concerts, etc and also TV subscriptions);
- Games of chance (bingo, lottery, bookmakers);
- Hairdressing salons and personal grooming;
- Recreation and sporting services (spectating, participating, club subs and fees);
- Restaurants and cafes (meals, drinks and takeaway)

7.8 In proportionate terms spending in restaurants and cafes is the largest element of commercial leisure spend comprising approximately half the total leisure spend.

7.9 Table CL3 identifies shows the current total spending on each of the above-listed categories, and the extent to which this will increase in the study area over the period from 2016 to 2031. It shows that:

- Spending on accommodation services will increase from £59m to £85m (growth of £27m);
- Spending on cultural services will increase from £89m to £128m (growth of £39m);
- Spending on games of chance will increase from £46m to £67m (growth of £21m);
- Spending on hairdressing and grooming will increase from £35m to £51m (growth of £16m);

- Spending on recreation and sport will increase from £36m to £52m (growth of £16m);
- Spending on restaurants and cafes will increase from £333m to £482m (an increase of £149m).

7.10 Overall, expenditure on leisure goods and services within the study area will increase by £268m between 2016 and 2031 and this is a substantial uplift in expenditure. As highlighted above, the growth is particularly strong in the restaurant, café and takeaway sector, which has performed well over the period of the economic downturn and is expected to continue to provide strong levels of growth over the course of the study period.

Commercial Leisure Patterns

7.11 Utilising the results of the household survey, we can identify the levels of participation and patterns of usage of leisure facilities within and beyond the District. This analysis provides us with an overall District-wide share and also highlights the more popular destinations/town centres where leisure-based activities are undertaken.

7.12 However, in some instances, the categories of commercial leisure questioned have low sample sizes as often households do not take part in the questioned activity. The table below highlights the differing levels of leisure participation in the study area.

Table 36: Commercial Leisure Participation Rates in Study Area

Commercial Leisure Activity	Percentage Participation
Health & fitness / leisure centre activities	28.22%
Cinema	54.88%
Restaurants, bars, pubs etc (Food and Beverage)	82.72%
Ten-pin bowling	17.82%
Bingo	2.75%
Theatre / concert halls / museums / art galleries	50.58%
(None of these)	8.74%
Source: Question 42, Household Telephone Survey, Appendix 2	

7.13 For the most popular types of commercial leisure activity and those that will typically be located within and support town centres, we have provided analysis of market shares for Wyre Forest and the main competitors. This is provided in Tables CL4 for food and beverage (Restaurants, Bars and Cafes) and Tables CL5 and CL6 review the patterns of cinema visits and cultural visits (theatre, concert, museum and galleries).

Food and Beverage

7.14 Analysis of food and beverage patterns is provided at Table CL4 (Appendix 4), the patterns of visits to facilities and town centres are shown on a zone by zone basis.

7.15 Kidderminster Town Centre is shown to attract food and beverage visits from respondents across all eight of the study zones, although it has a low penetration in zones 4, 6 and 7. From our analysis of provision we anticipate that the majority of this spending is directed towards the town centre, although there will be some facilities across the urban area that attract visits away from the town centre. As would be expected, the market shares are strongest from those zones in proximity to Kidderminster, with a 47% market share from zone 1 (Kidderminster's home zone). Overall the results of the household telephone survey indicate Kidderminster commands around 20% of food and beverage visits across the whole study area.

7.16 In the wider area beyond the District, Bromsgrove and Birmingham City Centre are the main attractors of food and beverage visits. Worcester and Stourbridge attract at lower levels.

7.17 Stourport-on-Severn and Bewdley have a more varied attraction level and generally they pull in the majority of their food and beverage visits from their ‘home’ zones.

Cinemas

7.18 The only cinema with Wyre Forest District is the Reel Cinema on the edge of Kidderminster Town Centre. Although this cinema is centrally located within the study area, it is not the most popular cinema going destination for residents living in the study area. The survey results (Table LC5 at Appendix 4) show that the Empire Cinema at Rubery and the Odeon at Merry Hill are the most popular cinema going destination across the study area (both achieving around 23% market share). The Reel Cinema, Kidderminster attracts trade primarily from zones 1 to 3 and achieves an overall market share of around 12%.

7.19 The Vue Cinema at Worcester and the smaller cinema facilities at Worcester, Tenbury Wells, Bridgnorth and Quinton also draw visits away from the study area.

Arts and Culture

7.20 There is a good level of participation within this leisure sector in the study area, although the market share analysis in Table LCC6 at Appendix 4 does high light that the facilities within the District are limited in their overall attraction. Theatre and cultural entertainment vistis made by residents within the study area are primarily made to Birmingham City Centre (43%) and as far afield as Central London/West End (14%). Overall venues within Wyre Forest have a market share of around 8% with the majority of visits being drawn from the core zones 1 to 3.

7.21 Analysis of the arts and culture patterns from the household survey are set out in LC6 at Appendix 4.

Other Commercial Leisure Categories

7.22 The household survey results (Appendix 2) provide details of the usage patterns for the other commercial leisure categories. The question numbers are:

Q43 - Which centre / facility did you last visit for indoor sports or health and fitness activity?

Q46 - Which centre / facility did you last visit to go ten-pin bowling?

Q47 - Which centre / facility did you last visit to play bingo?

7.23 However because many of the respondents do not participate in these leisure-based activities we have not analysed the patterns or provided any quantitative analysis upon them for the purposes of considering future need.

7.24 Section 3 reviewed town centre and occupier trends and highlighted the current market positioning for a range of commercial leisure uses. Over the next plan period, the Council should expect to see increasing interest from health and fitness operators, particularly at the budget end of the market.

7.25 The bowling and bingo market nationally is not at present particularly buoyant and bingo in particular has been impacted by the rise in on line gambling options. That said, the recent reduction in taxation on bingo operators from 20% to 10% has stimulated some change including upgrading and investment in existing facilities to embrace new technology alongside traditional social bingo playing. The future for physical bricks and mortar bingo is likely to be a multi-channel offering of new technology and traditional games alongside food and beverage and live entertainment. These should be viewed as town centre uses and the Council should be receptive to these new formats coming forward in town centre locations.

Hotels

7.26 Hotel usage was not covered by the household survey as it would not be expected that residents within the local study area would be using local hotel accommodation. We do provide some commentary upon the hotel market in Section 3 of this report and building upon that we have sought to review existing local provision and demand from hotel operators for representation in Wyre Forest District's main town centres. There two national hotel chain operators with premises in central Kidderminster, these are the Premier Inn at Weavers Wharf, Travelodge at Park Lane. In addition, on the western edge of Kidderminster there is a Mercure Hotel at Habberley Road. Stourport–on-Severn has no national hotel chain premises. Within Bewdley, the George Hotel is operated by Weatherspoons. Both Travelodge and Premier Inn publish lists of towns/locations they have current hotel requirements, having reviewed those lists neither have identified unfulfilled requirements in the District.

Qualitative Review of Existing Commercial Leisure Facilities

7.27 Data from Experian Goad and our own occupier survey provides a review of the composition of town centres and compares the proportion of provision within a centre to national average levels on the basis of both outlet numbers and floorspace. The Experian Goad data also provides an index marker and the indexing system illustrates the difference between the percentage figure for the centre and the UK average. The index provides a gap analysis tool and can be used to identify under (below 100) and over representation (above 100) within a centre. The Experian data for 'leisure services' is provided below along with a descriptive review of current provision based upon our own town centre analysis and visits.

Kidderminster Town Centre

7.28 The composition data in the table below shows that Kidderminster Town Centre has above below average provision of cafes, restaurants and pub, bar and wine bar provision. In terms food and beverage occupiers, the following national business are currently represented in the town centre:

Frankie & Benny's	Pizza Hut	Wetherspoons
Café Nero	McDonalds	Starbucks
Subway	Dominos	

7.29 In addition there are independent cafés, restaurant and takeaway operators of varying quality around the town centre.

7.30 Overall, for a centre of its size and status Kidderminster's food and beverage provision is in our view below average in terms of quality and there is scope for improvement in the standard and range of offer.

Table 37: Kidderminster Town Centre Commercial Leisure Outlets (Experian Goad Category Report 2015)

Leisure Service	Outlets	Area %	Base %	Index
Bars & Wine Bars	3	0.82	1.57	52
Bingo & Amusements	3	0.82	0.39	208
Cafes	11	3.01	4.27	71
Casinos & Betting Offices	6	1.64	1.45	113
Cinemas, Theatres & Concert Halls	0	0	0.26	0
Clubs	0	0	0.64	0
Disco, Dance & Nighclubs	1	0.27	0.24	116
Fast Food & Take Away	23	6.30	5.67	111
Hotels & Guest Houses	2	0.55	0.68	81
Public Houses	8	2.19	2.71	81
Restaurants	13	3.56	4.48	79
Sports and Leisure Facilities	1	0.27	0.28	99
TOTALS	**71**	**19.45**	**22.64**	**86**

7.31 The Goad outlet information identifies that bingo and amusement provision is well above average and betting office provision is similarly above average (8 outlets). There is no cinema within the town centre (although there is a cinema close to the south side of the town centre).

Stourport-on-Severn

7.32 Experian Goad's survey of Stourport-on-Severn Town Centre was undertaken in Autumn 2013. The leisure composition analysis based on outlets is set out below:

Table38: Stourport-on-Severn Town Centre Commercial Leisure Outlets (Experian Goad Category Report 2013)

Leisure Service	Outlets	Area %	Base %	Index
Bars & Wine Bars	1	0.64	1.57	41
Bingo & Amusements	2	1.27	0.39	323
Cafes	6	3.82	4.27	89
Casinos & Betting Offices	3	1.91	1.45	132
Cinemas, Theatres & Concert Halls	0	0	0.26	0
Clubs	0	0	0.64	0
Disco, Dance & Nighclubs	0	0	0.24	0
Fast Food & Take Away	11	7.01	5.67	124
Hotels & Guest Houses	0	0	0.68	0
Public Houses	6	3.82	2.71	141
Restaurants	3	1.91	4.48	43
Sports and Leisure Facilities	0	0	0.28	0
TOTALS	**32**	**20.38**	**22.64**	**90**

7.33 Stourport-on-Severn in 2013 had below average provision of bars & wine bars, cafes and restaurants. Our own occupier review in November 2015 and revisit in April 2016 identified that Wetherspoons was the only national food and beverage operator. The rest of the food and beverage provision comprises of local independent restaurants, takeaways and traditional public houses. In terms of numbers of outlets, our updating work showed that there had been little change to the numbers of leisure service outlets. Overall, for a centre of its size and function, we consider that there is a slight under provision in terms of both quality and number of outlets and a need for more family orientated provision.

Bewdley

7.34 Experian Goad's survey of Bewdley Town Centre was undertaken in Autumn 2013. The leisure services provision within the centre is set out in the table below.

Table39: BewdleyTown Centre Commercial Leisure Outlets (Experian Goad Category Report 2013)

Leisure Service	Outlets	Area %	Base %	Index
Bars & Wine Bars	1	1.05	1.57	67
Bingo & Amusements	0	0	0.39	0
Cafes	4	4.21	4.27	99
Casinos & Betting Offices	1	1.05	1.45	73
Cinemas, Theatres & Concert Halls	0	0	0.26	0
Clubs	1	1.05	0.64	164
Disco, Dance & Nighclubs	0	0	0.24	0
Fast Food & Take Away	5	5.26	5.67	93
Hotels & Guest Houses	1	1.05	0.68	155
Public Houses	7	7.37	2.71	272
Restaurants	5	4.26	4.48	117
Sports and Leisure Facilities	0	0	0.28	0
TOTALS	**25**	**26.32**	**22.64**	**116**

7.35 Food and beverage provision in Bewdley is good and at a level above national averages. This is, we consider, a reflection of the town's tourist attraction and pleasant historical market town setting.

7.36 Our occupier survey April 2016 identified that with the exception of Wetherspoons who run the George Hotel on Load Street the remainder of the food and beverage offer is provided by independent operators. They provide a good range, choice and quality of food and beverage facilities which range from family eating through to fine dining.

7.37 Overall, the total leisure service in Bewdley is above the national average suggesting the town is well provided for in leisure terms.

Commercial Leisure Need Conclusions

7.38 Having reviewed the existing patterns of commercial leisure use within the District and assessed by way of quantitative and qualitative analysis the current levels of provision within the main town centres, we set out below our broad-based conclusions on the potential for additional commercial leisure uses to be provided.

7.39 It should be emphasised that assessing leisure-based need is less evolved than for retail and these conclusions should not be treated as prescriptive. Commercial leisure operators will take an opportunity-led approach and adjacencies with other leisure operators and key retailers are important motivators for these businesses. In addition, where a centre is felt to be improving or is benefiting from investment and new retail development, these factors can stimulate demand from the commercial leisure sector particularly food and beverage operators who are reliant heavily upon the strength of town centre anchors and footfall levels.

7.40 As such commercial leisure need is in part driven by wider retail needs and the fulfilment of town centre strategies such as co-ordinated promotion, environmental improvements and upgrading works that make centres more attractive places to shop, live and generally spend time.

7.41 For the food and beverage sector, we have modelled existing patterns of usage across the District's town centres and considered the potential growth in food and beverage spend (which is the largest leisure spend category). The forecast food and beverage need across the all of the District's town centres based on continuing market share is set out below.

Table 40: Food and Beverage Floorspace Need

Year	District Share of Food & Beverage Spend Growth (£m)	Food & Beverage Floorspace Need *(m^2 gross)
2016	-	-
2021	£15.13m	2,161
2026	£31.18m	4,133
2031	£47.87m	5,891
Source: Appendix 4, Leisure Capacity Analysis, Table LC7		

7.42 Apportioning this to the District's main town centres based upon existing usage would focus the majority of this floorspace into Kidderminster with lesser proportions directed to the other centres (see Table LC7, Appendix 4)

7.43 However, if the distribution reflects the existing food and beverage shares, then Bewdley would continue to 'punch above its weight'. It may be more appropriate to plan to address the quantitative and qualitative deficiencies identified in Stourport-on-Severn and Kidderminster, although, we would expect a change in composition would come about naturally over time, as the role of retailing in these centres is likely to reduce and service- and leisure-based uses increase.

7.44 For cinema provision, the market overall is diverging and there is a trend now toward smaller facilities serving smaller more localised catchments. Currently the only cinema in the District is the four screen Reel Cinema on the edge of Kidderminster Town Centre. The survey results confirm that although it is popular and well used, it is not the dominant choice within the study area. In the wider area there are cinemas nearby (easily within 30 minutes off peak drive) which include a 13 screen multiplex Emprie Cinema at Rubery, Odeon Merry Hill (10 screens), Showcase Dudley (14 screens). Worcester, which is more distant, has 2 cinema venues with 13 screens in total.

7.45 We estimate that there are 41 cinema screens easily accessible to residents within the study area. This equates to approximately one screen per 7,400 people. The average screen density in the Midlands is 5.7 screens per 100,000 population[7]. Therefore the level of cinema provision across the study area could not be considered deficient. However we would suggest that the Council view positively any smaller format and boutique type cinema proposals that come forward within town centre locations as such uses can add diversity and extend activity within centres into the evening.

7.46 The private gym sector is another commercial leisure opportunity which can reinforce vitality and viability if located within town centres. There is growth in the budget end of the market and currently there is limited provision of these types of facilities in the District. There is therefore a potential gap in provision which the town centres could fulfil. Budget gyms do not have swimming pool facilities or sports courts so the potential overlap or impact upon existing council-owned and run leisure centres should not be a significant issue.

[7] BFI Statistical Year Book 2015 edition – Screen Density and Admissions Per Person

8. CONCLUSIONS AND RECOMMENDATIONS

8.1 In this section of the report we draw upon the analysis provided in the previous sections of the assessment and set out below our conclusions and make strategic recommendations for the Council to take forward into their new Local Plan.

Summary of Findings

8.2 In Section 2, we summarised the current national and local planning policy context under which this study has been prepared. Current national planning policy, as set out in the NPPF, promotes the vitality and viability of town centres, and identifies them as the most suitable location for retail, leisure, cultural and other 'town centre' uses. This supports the wider government objectives for sustainable economic growth. The NPPF also identifies the need for local planning authorities to have a robust and up-to-date evidence base to inform local planning policy documents. This study contributes to this required evidence base in respect of retail and broader economic development matters.

8.3 Section 3 of the assessment reviewed the current market context and the issues and opportunities that town centres have to address. We have highlighted significant structural changes in the retail market leading retailers to focus their activities into a smaller number of stores in higher order town centres; and constant advances in online shopping which is evolving the way in which consumers undertake their shopping. Coupled with potential shrinkage in retail provision there is the growth in leisure and, in particular, the food and beverage market which has grown steadily despite the past economic downturn. The implications of these market place changes are, we feel, most apparent in the network of smaller town and District centres. However even larger centres are not immune to these changes and, more than ever, there is a need for town centres to assert their positions as centres of retail, leisure, culture and civic/administration. The potential for mixed use and more intensive in-centre living must be explored.

8.4 The health checks of the District's main town centres are provided in Section 4 of this report and are supplemented by the information in Appendix 1 which provides quantitative town centre data. These health checks and the data show that the Districts main town centres are all vital and viable but in the case of Kidderminster there is a need to regenerate the eastern part of the town centre to address the imbalance created through the Weavers Wharf development which has become a dominant element within the town centre. This has in part begun with the significant environment and townscape works which have created an attractive place where shoppers and visitors will be more inclined to spend time (and money) to the benefit of existing occupiers and potentially also attracting new investment and improved occupier profile.

8.5 Drawing upon the findings of the household telephone survey (Appendix 2) Section 5 of the assessment provides a review of current shopping patterns and the influence of the District's main town centres. The shopping pattern review confirms that Kidderminster Town Centre is the main shopping destination within the District and that its attraction is relatively wide and extends beyond the District area. Both Stourport-on-Severn and Bewdley are smaller but still important town centres especially for their support populations, that said, they do not tend to dominate local resident shopping choices but do have a significant local role. Competition with Kidderminster Town Centre is strongest with Merry Hill, Bromsgrove, Redditch, Droitwich, Stourbridge and Birmingham City Centre. The out of centre retail park (Crossley Retail Park) is also a competitor with the town centre. Overall the market shares achieved by Wyre Forest's town centres are viable and this is borne out in the retail capacity and need modelling.

8.6 The need for additional convenience and comparison goods floorspace is examined in Appendix 3 and explained in Section 6.

8.7 For convenience goods shopping, the potential growth in consumer spending on food shopping having taken account of the growing share of online trading is limited. That said, we identify some theoretical potential for additional food shopping floorspace across the District. However that theoretical capacity is absorbed by new foodstore floorspace which is committed outside Kidderminster Town Centre.

8.8 Whilst there is a small residual convenience floorspace need over and above the committed requirements, our recommendation is that given this need arises later in the plan period, it is not necessary to specifically allocate any sites to accommodate this need. Instead a criteria-based policy which promotes in-centre food shopping provision within the main town centres would respond to the need and have flexibility to reflect the emerging smaller supermarket trend. The Council should also regularly review the food shopping capacity position and have regard within that review process to potential for more sustainable patterns of shopping to be established through local food shopping facilities related to any larger scale residential development coming forward.

8.9 For comparison goods shopping capacity and need, the analysis shows that having taken account of existing commitments in Kidderminster there is a limited need for additional comparison goods floorspace in Kidderminster. This need only arises toward the end of the plan period. We do not therefore consider any specific site allocations are required now and would suggest instead that there is encouragement given to the reuse or redevelopment of the substantial amount of vacant floorspace and regeneration of the eastern part of the town centre to provide a counterbalance to Weavers Wharf.

8.10 In Stourport-on-Severn Town Centre over the study period there is no capacity or need for additional comparison goods shopping floorspace and the town centre trades broadly in equilibrium across the plan period. We do not consider that there is a requirement to make any site specific allocations

8.11 Similarly, the comparison shopping floorspace need analysis for Bewdley does not present a requirement to allocate sites.

8.12 In Section 7 of the Study we considered commercial leisure needs. The growth in consumer spending on leisure goods and services within the study area will increase by £268m between 2016 and 2031. A substantial component of this growth is attributed to the food and beverage sector with spend growth of over £149m in the restaurant, café and takeaway sector. This sector has performed well over the period of the economic downturn and is expected to continue to provide strong levels of growth over the course of the study period.

8.13 The analysis of commercial leisure needs is less refined than for retail. The market is more elastic and operator demand is a key driver to the market. The recent trend has been for shopping developments to have an increasing proportion of food and beverage and other commercial leisure uses often in equal proportions to the retail floorspace.

8.14 The market shares for food and beverage use in Wyre Forest's town centres is reasonable with all of the centres attracting a relatively good proportion of visits. Overall based on the growth in spending generated in the study area and applying the existing market share of Wyre Forest, the District can support around 8,100m^2 gross of floorspace in 2031. Applying market shares for the District's town centres individually, Kidderminster has the largest requirement of around 1,150m^2 by 2031 and the other towns have a smaller shares (Table LC7 at Appendix 4). Qualitatively, we consider that Kidderminster in particular would benefit from improved food and beverage offer particularly family dining facilities.

8.15 Within the study area the Reel Cinema in Kidderminster commands a good share of the market but it is not the dominant facility, the multi-screen facilities at Rubery and Merry Hill are more popular. Overall, we do not consider there is need for an additional cinema over the study period but, with the changing cinema market and small and boutique operators looking for opportunities, we would suggest that the Council view positively any smaller format cinema proposals that come forward within town centre locations as such uses can add diversity and extend activity within centres into the evening.

8.16 Health and fitness is another growth sector and the budget 'dry' gym operators are acquisitive and opportunity/site led. All of the District's main town centres have the potential to accommodate such a facility as all command good footfall and are accessible locations.

8.17 We also reviewed the arts and culture sector and it is clear that whilst the District's existing facilities have local attraction, the pull of Birmingham and Central London does limit any potential in this sector.

8.18 Drawing the need analysis together we set out in the table below the gross retail and commercial leisure floorspace requirements on a town centre by town centre basis.

Table 41: Summary of Floorspace Need for Kidderminster Town Centre

Kidderminster Town Centre Retail and Commercial Leisure Floorspace Need				
	2016	2021	2026	3031/32
Convenience Goods Gross (sqm)	Nil	Nil	Nil	Nil
Comparison Goods Gross (sqm)	Nil	1,375	5,582	10,277
Food and Beverage Gross (sqm)	Nil	424	812	1,157

Table 42: Summary of Floorspace Need for Stourport-on-Severn Town Centre

Stourport-on-Severn Town Centre Retail and Commercial Leisure Floorspace Need				
	2016	2021	2026	3031/32
Convenience Goods Gross (sqm)	Nil	Nil	Nil	Nil
Comparison Goods Gross (sqm)	Nil	Nil	Nil	Nil
Food and Beverage Gross (sqm)	Nil	102	195	278

Table 43: Summary of Floorspace Need for Bewdley Town Centre

Bewdley Town Centre Retail and Commercial Leisure Floorspace Need				
	2016	2021	2026	3031/32
Convenience Goods Gross (sqm)	457	471	471	462
Comparison Goods Gross (sqm)	Nil	Nil	Nil	Nil
Food and Beverage Gross (sqm)	Nil	166	317	452

Recommendations

8.19 The matters identified in the study brief have been considered in the assessment and details of retail and leisure floorspace needs have been provided above. The brief also included specific requirements and we provide our recommendations in respect of each of these below.

Recommendations on the location and extent of the primary shopping are based upon a clear definition of primary and secondary shopping frontages

8.20 We have reviewed the designated primary and secondary frontages and primary shopping area boundaries[8] for each of the District's main centres. Set out below on a centre by centre basis are comments and some minor changes that we feel appropriate:

- Kidderminster – the primary shopping area is, in our view extensively drawn. To the east, whilst we recognise that The Ringway is a strongly defined boundary, the area between the shopping frontages and the ring road comprises a number of non-retail uses and activities including the Health Centre and Glades Leisure Centre which are both being relocated. We would suggest that the primary shopping area boundary is redrawn along Waterloo Street/Bromsgrove Street but continues to include the area currently occupied by the Health Centre and Glades Leisure Centre to reflect the preferred option for the Kidderminster Eastern Gateway which is to provide retail and leisure based mixed use redevelopment. The plan provided at **Appendix 5** shows the suggested primary shopping area for Kidderminster.
- Kidderminster – Primary shopping frontages are, we consider, well defined and do not require any adjustment. The secondary shopping frontages will require some deletion to those currently drawn where they extend beyond the revised primary shopping area boundary. The secondary frontages that will be removed are generally mixed and with very low levels of A1 retail use and have seen the introduction of residential development.
- Stourport-on-Severn - the primary shopping area boundary is appropriately drawn, we do not have any amendments to suggest.

[8] *Kidderminster Central Area Action Plan Proposals Map – July 2013*
Stourport-on-Severn and Bewdley – Site Allocations & Policies Local Plan Proposals Map Town and Village Insets – July 2013

- Stourport-on-Severn – both the primary and secondary shopping frontages are a good reflection of the concentration of prime and secondary retail frontages within the town centre. We do not have any amendments to suggest.
- Bewdley – the primary shopping area is extensive and encompasses the majority of the retail and commercial activity in the town centre. We have no suggested changes.
- Bewdley – no primary and secondary frontages are defined. We would suggest that the primary frontage should comprise the northern side of Load Street between No.s 47 and 73 inclusive. The secondary frontage should comprise the remaining frontages in the primary shopping area.

8.21 We have provided plans which show these suggested boundaries and frontages, these are at Appendix 5.

Consideration of the need for setting a local threshold for impact tests when considering applications for main town centre uses proposed outside of town centres

8.22 The default NPPF floorspace threshold requiring consideration of retail impact is 2,500sqm gross and the Framework allows local authorities to set their own local threshold.

8.23 The NPPG states that if setting a locally appropriate threshold, it is important to consider:

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

8.24 If the NPPF threshold (2,500 sqm gross) was to be adopted, then a single development proposal could exceed the entire development plan floorspace need projection in the District's town centres in the short and medium term and this would come forward without the need for a retail impact assessment.

8.25 Where the projected need for additional floorspace is low (ie limited expenditure capacity) proposals that significantly exceed the up to date floorspace need projections are likely to reduce the turnover of existing floorspace, and this impact on turnover and potential future investment in town centres should be carefully tested on a case by case basis.

8.26 The local circumstances in Wyre Forest, demonstrated by our need assessment indicate that the NPPF threshold of 2,500 sqm gross is inappropriate as a blanket threshold for the District. This default NPPF scale of development would represent a significant proportion of the overall retail floorspace need projections in the District in the short to medium term. Indeed, development smaller than 2,500 sqm gross could have a significant adverse impact on the District's town and local centres.

8.27 Furthermore, whilst we do consider that the town centres in the District are vital and viable, in the case of Stourport-on-Severn and Bewdley they serve relatively local roles and do not have a critical mass of retailing and the capacity modelling shows that they do not achieve strong levels of trading. In these circumstances it is very likely that margins for existing retailers are lean and their ability to withstand even modest levels of trade diversion are poor, meaning they are very susceptible to impact.

8.28 In Kidderminster Town Centre there are some structural issues within the town centre that the Kidderminster Eastern Gateway Development Framework is seeking to address. Without these proposals we consider that the town centre retailers, particularly those in the eastern part of the town, have a degree of fragility and even modest out of centre retail proposals could have significant adverse impacts.

8.29 We would therefore advise that the Council do set a lower local threshold requiring impact testing.

8.30 Having regard to the composition and unit sizes within the District's town centres, the existing health of the centres and the amount of out of centre retail provision which already exists, we consider that a threshold lower than 2,500 sqm would be appropriate.

8.31 Evolving retail formats, particularly smaller foodstores which can be around 500 sqm gross, will still achieve relatively good levels of turnover which could potentially have significantly adverse impacts. We would therefore recommend that the Council adopts a threshold requiring retail proposals (food and non-food) of 500 sqm gross and over, to be supported by a retail impact assessment which assess the effect the proposed development would have upon trading/turnover and planned investment within the relevant town centres.

8.32 Wyre Forest within their Site Allocations and Policies Local Plan (July 2013) have a locally set impact test threshold of 280 sqm net (Policy SAL.GPB2). Our suggestion for a threshold of 500 sqm gross floorspace is similar in effect to the previous threshold when typical retail gross to net conversion ratios are applied. However the adoption of a gross floorspace based figure is consistent with the approach in the NPPF.

8.33 We would suggest that the level of detail required and scope of the impact assessment is agreed as part of the pre-application process.

APPENDIX ONE – HEALTH CHECK DATA

Goad Category Report

Kidderminster

Survey Date: **07/07/2015**

GETTING THE MOST FROM YOUR GOAD CATEGORY REPORT

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

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

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

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

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

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

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

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

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

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

Also available from Experian:

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

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

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

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

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

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

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

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

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A world of insight

Nearest Location	Distance KM
Bewdley	4.85
Stourport-on-Severn	5.63
Hagley	7.90
Stourbridge	10.29
Lye	11.89

Major Retailers Present

Department Stores

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

Mixed Goods Retailers

Argos	1
Boots the Chemist	2
T K Maxx	1
W H Smith	1
Wilkinson	2

Supermarkets

Sainsburys	0
Tesco	3
Waitrose	0

Clothing

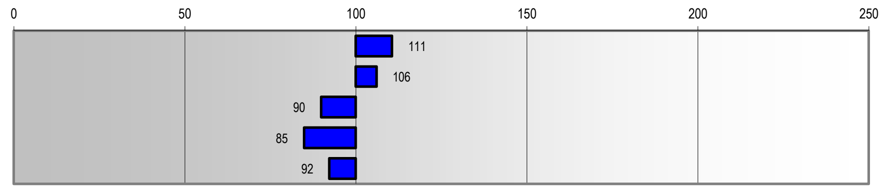
Burton	0
Dorothy Perkins	0
H & M	0
New Look	1
Next	1
Primark	0
River Island	0
Topman	0
Topshop	0

Other Retailers

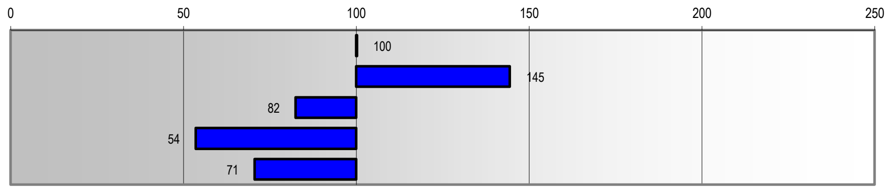
Carphone Warehouse	1
Clarks	1
Clintons	1
H M V	0
O2	1
Superdrug	1
Phones 4 U	0
Vodafone	1
Waterstones	0

Multiple Counts & Floorspace by Sector

Counts	Outlets	Area %	Base %	Index
Comparison	55	47.41	42.85	111
Convenience	14	12.07	11.38	106
Retail Service	10	8.62	9.59	90
Leisure Services	20	17.24	20.31	85
Financial & Business Services	17	14.66	15.87	92
Total Multiple Outlets	116			



Floorspace Sq Ft	Outlets	Area %	Base %	Index
Comparison	295,200	47.91	47.79	100
Convenience	208,700	33.87	23.44	145
Retail Service	23,100	3.75	4.55	82
Leisure Services	51,400	8.34	15.56	54
Financial & Business Services	37,700	6.12	8.67	71
Total Multiple Floorspace	616,100			



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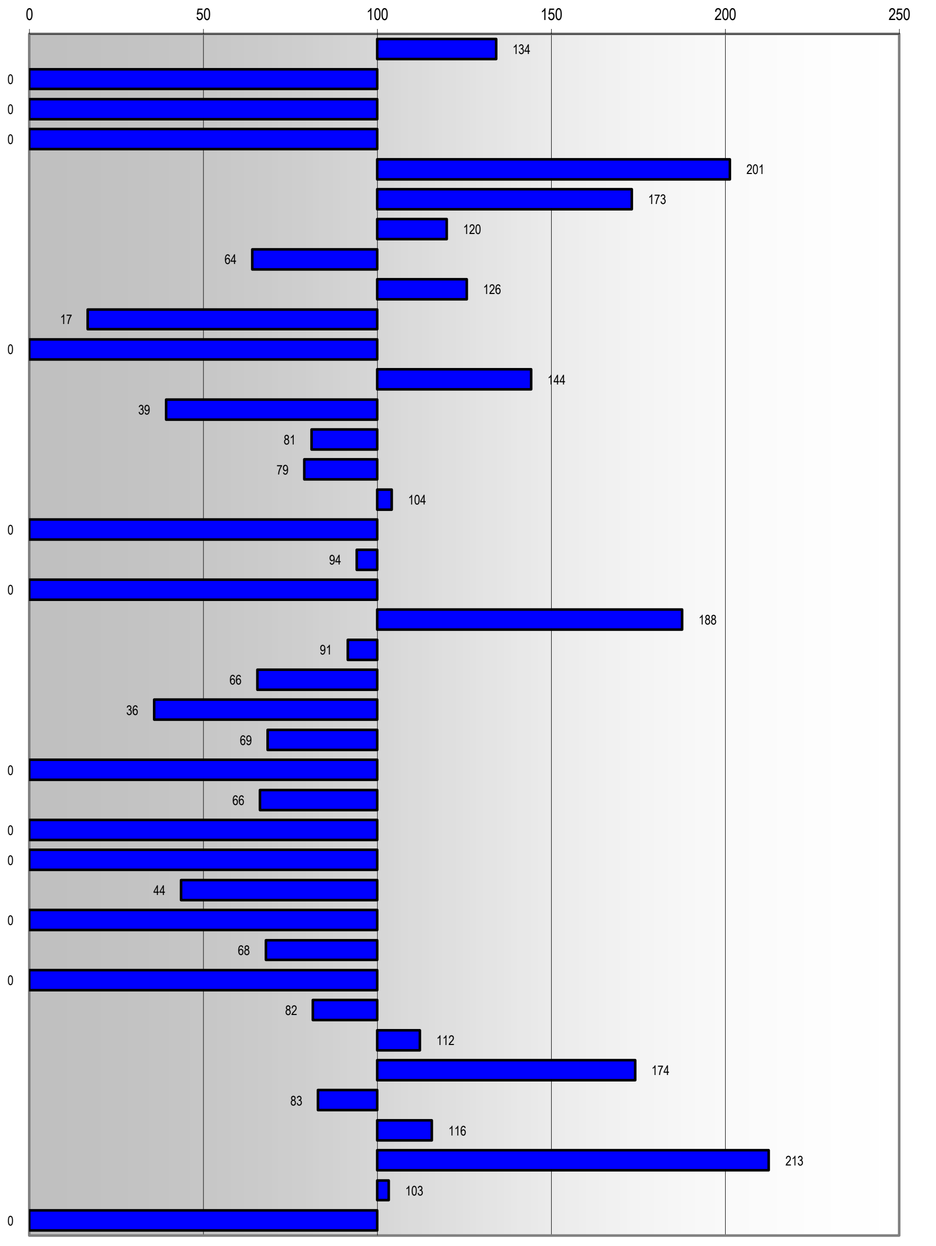
Base: All UK Centres

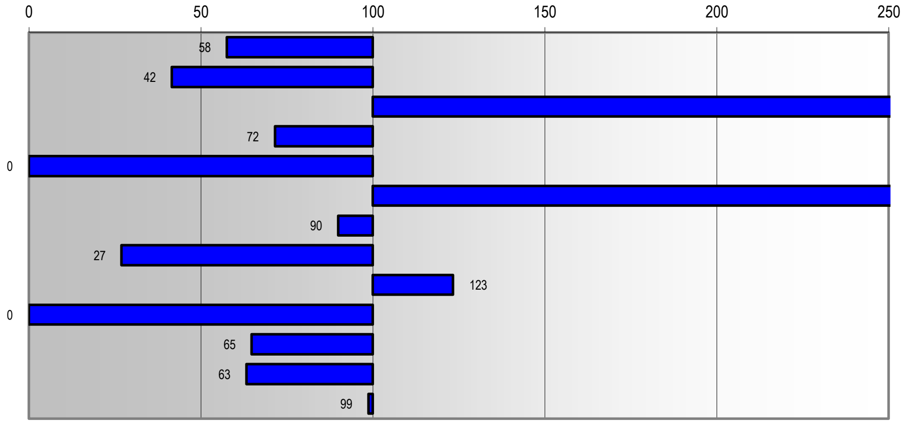
Sector	Classification	Outlets	Area %	Base %	Index
Comparison					
	Antique Shops	2	0.55	0.41	134
	Art & Art Dealers	0	0.00	0.63	0
	Booksellers	0	0.00	0.49	0
	Carpets & Flooring	0	0.00	0.55	0
	Catalogue Showrooms	1	0.27	0.14	201
	Charity Shops	17	4.66	2.69	173
	Chemist & Drugstores	5	1.37	1.14	120
	Childrens & Infants Wear	1	0.27	0.43	64
	Clothing General	8	2.19	1.74	126
	Crafts, Gifts, China & Glass	1	0.27	1.63	17
	Cycles & Accessories	0	0.00	0.25	0
	Department & Variety Stores	2	0.55	0.38	144
	DIY & Home Improvement	1	0.27	0.70	39
	Electrical & Other Durable Goods	4	1.10	1.35	81
	Florists	2	0.55	0.69	79
	Footwear	4	1.10	1.05	104
	Furniture Fitted	0	0.00	0.39	0
	Furniture General	3	0.82	0.87	94
	Gardens & Equipment	0	0.00	0.05	0
	Greeting Cards	5	1.37	0.73	188
	Hardware & Household Goods	5	1.37	1.50	91
	Jewellery, Watches & Silver	4	1.10	1.67	66
	Ladies & Mens Wear & Acc.	2	0.55	1.53	36
	Ladies Wear & Accessories	6	1.64	2.40	69
	Leather & Travel Goods	0	0.00	0.16	0
	Mens Wear & Accessories	2	0.55	0.83	66
	Music & Musical Instruments	0	0.00	0.15	0
	Music & Video Recordings	0	0.00	0.18	0
	Newsagents & Stationers	2	0.55	1.25	44
	Office Supplies	0	0.00	0.03	0
	Other Comparison Goods	2	0.55	0.81	68
	Photographic & Optical	0	0.00	0.12	0
	Secondhand Goods, Books, etc.	1	0.27	0.34	82
	Sports, Camping & Leisure Goods	3	0.82	0.73	112
	Telephones & Accessories	8	2.19	1.26	174
	Textiles & Soft Furnishings	2	0.55	0.66	83
	Toiletries, Cosmetics & Beauty Products	4	1.10	0.95	116
	Toys, Games & Hobbies	6	1.64	0.77	213
	Vehicle & Motorcycle Sales	1	0.27	0.27	103
	Vehicle Accessories	0	0.00	0.18	0
	Totals	**104**	**28.49**	**32.08**	**89**



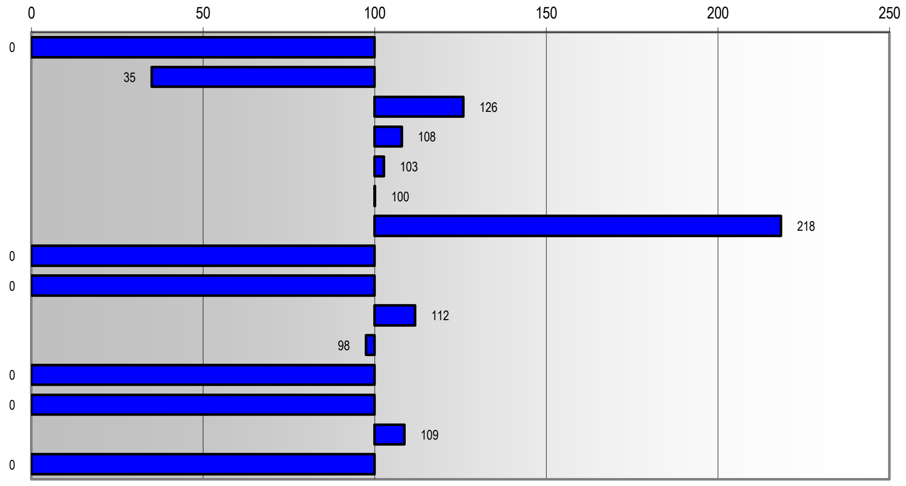
Outlet Counts

Centre: Kidderminster **Survey Date:** 07/07/2015

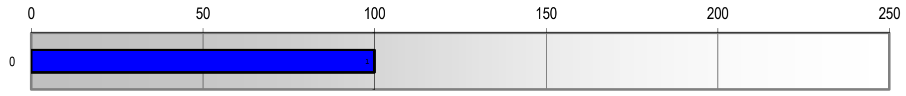
Convenience	Outlets	Area %	Base %	Index
Bakers & Confectioners	4	1.10	1.90	58
Butchers	1	0.27	0.66	42
CTN	4	1.10	0.43	254
Convenience Stores	4	1.10	1.53	72
Fishmongers	0	0.00	0.11	0
Frozen Foods	3	0.82	0.31	265
Greengrocers	1	0.27	0.30	90
Grocers & Delicatessens	1	0.27	1.02	27
Health Foods	2	0.55	0.44	123
Markets	0	0.00	0.14	0
Off Licences	1	0.27	0.42	65
Shoe Repairs Etc	1	0.27	0.43	63
Supermarkets	3	0.82	0.83	99
Total Convenience	**25**	**6.85**	**8.54**	80



Retail Service	Outlets	Area %	Base %	Index
Clothing & Fancy Dress Hire	0	0.00	0.08	0
Dry Cleaners & Launderettes	1	0.27	0.78	35
Filling Stations	1	0.27	0.22	126
Health & Beauty	35	9.59	8.88	108
Opticians	5	1.37	1.33	103
Other Retail Services	2	0.55	0.55	100
Photo Processing	1	0.27	0.13	218
Photo Studio	0	0.00	0.16	0
Post Offices	0	0.00	0.50	0
Repairs, Alterations & Restoration	1	0.27	0.25	112
Travel Agents	3	0.82	0.84	98
TV, Cable & Video Rental	0	0.00	0.04	0
Vehicle Rental	0	0.00	0.06	0
Vehicle Repairs & Services	2	0.55	0.50	109
Video Tape Rental	0	0.00	0.04	0
Totals	**51**	**13.97**	**14.37**	**97**



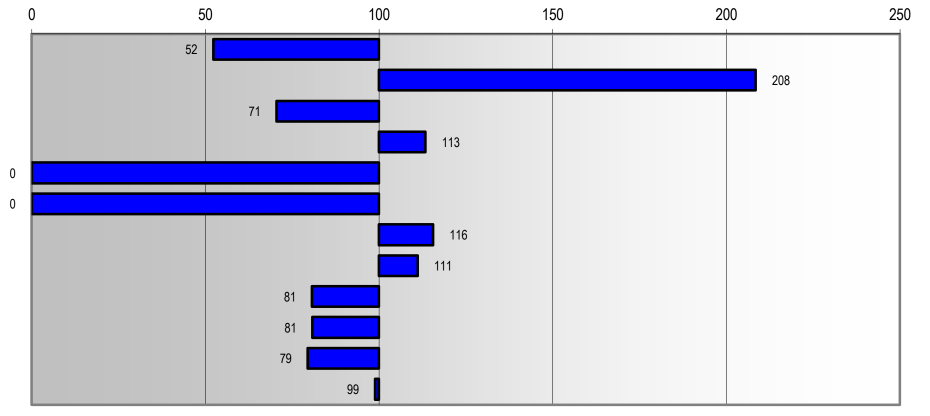
Other Retail	Outlets	Area %	Base %	Index
Other Retail Outlets	**0**	**0.00**	**0.13**	**0**



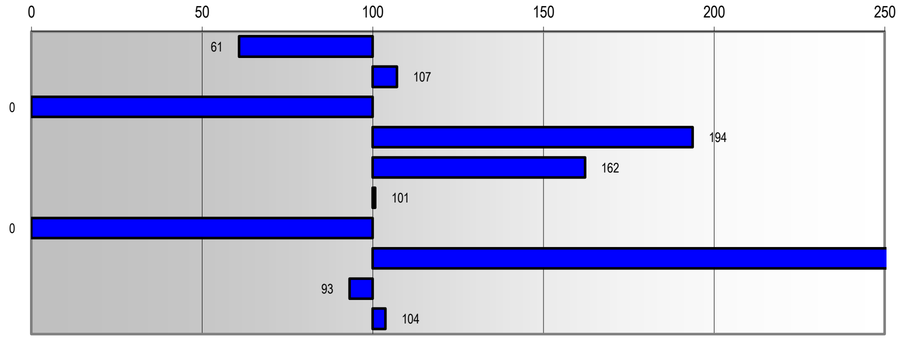
Outlet Counts

Centre: **Kidderminster** **Survey Date:** **07/07/2015**

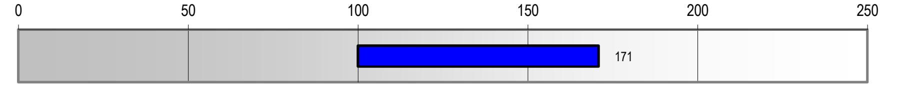
Leisure Services	Outlets	Area %	Base %	Index
Bars & Wine Bars	3	0.82	1.57	52
Bingo & Amusements	3	0.82	0.39	208
Cafes	11	3.01	4.27	71
Casinos & Betting Offices	6	1.64	1.45	113
Cinemas, Theatres & Concert Halls	0	0.00	0.26	0
Clubs	0	0.00	0.64	0
Disco, Dance & Nightclubs	1	0.27	0.24	116
Fast Food & Take Away	23	6.30	5.67	111
Hotels & Guest Houses	2	0.55	0.68	81
Public Houses	8	2.19	2.71	81
Restaurants	13	3.56	4.48	79
Sports & Leisure Facilities	1	0.27	0.28	99
Totals	**71**	**19.45**	**22.64**	**86**



Financial & Business Services				
Building Societies	1	0.27	0.45	61
Building Supplies & Services	2	0.55	0.51	107
Business Goods & Services	0	0.00	0.02	0
Employment & Careers	3	0.82	0.42	194
Financial Services	8	2.19	1.35	162
Legal Services	4	1.10	1.09	101
Other Business Services	0	0.00	0.36	0
Printing & Copying	3	0.82	0.30	274
Property Services	12	3.29	3.53	93
Retail Banks	10	2.74	2.64	104
Totals	**43**	**11.78**	**10.67**	**110**



Vacant Outlets				
Vacant Retail & Service Outlets	**71**	**19.45**	**11.39**	**171**

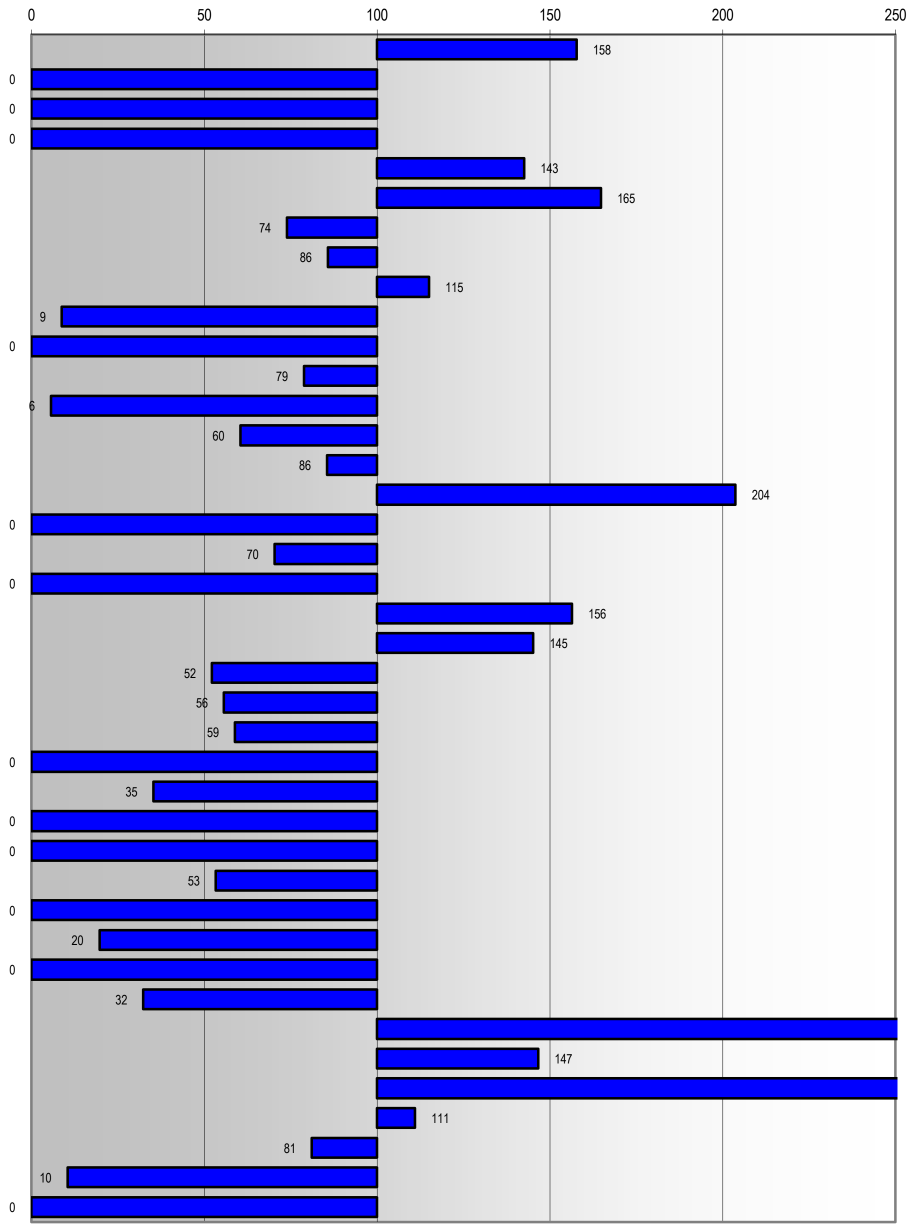


Total Number of Outlets **365**

Floorspace Sq Ft

Centre: Kidderminster **Survey Date:** 07/07/2015

Sector	Classification	Floorspace	Area %	Base %	Index
Comparison					
	Antique Shops	3,900	0.35	0.22	158
	Art & Art Dealers	0	0.00	0.37	0
	Booksellers	0	0.00	0.41	0
	Carpets & Flooring	0	0.00	0.53	0
	Catalogue Showrooms	8,200	0.74	0.52	143
	Charity Shops	32,500	2.92	1.77	165
	Chemist & Drugstores	12,800	1.15	1.55	74
	Childrens & Infants Wear	3,100	0.28	0.32	86
	Clothing General	41,900	3.76	3.27	115
	Crafts, Gifts, China & Glass	800	0.07	0.82	9
	Cycles & Accessories	0	0.00	0.19	0
	Department & Variety Stores	40,200	3.61	4.58	79
	DIY & Home Improvement	700	0.06	1.11	6
	Electrical & Other Durable Goods	7,300	0.66	1.08	60
	Florists	2,400	0.22	0.25	86
	Footwear	20,200	1.81	0.89	204
	Furniture Fitted	0	0.00	0.35	0
	Furniture General	10,900	0.98	1.39	70
	Gardens & Equipment	0	0.00	0.07	0
	Greeting Cards	8,700	0.78	0.50	156
	Hardware & Household Goods	60,400	5.42	3.73	145
	Jewellery, Watches & Silver	4,300	0.39	0.74	52
	Ladies & Mens Wear & Acc.	11,400	1.02	1.84	56
	Ladies Wear & Accessories	14,600	1.31	2.22	59
	Leather & Travel Goods	0	0.00	0.09	0
	Mens Wear & Accessories	2,700	0.24	0.69	35
	Music & Musical Instruments	0	0.00	0.10	0
	Music & Video Recordings	0	0.00	0.17	0
	Newsagents & Stationers	5,400	0.48	0.91	53
	Office Supplies	0	0.00	0.06	0
	Other Comparison Goods	1,200	0.11	0.55	20
	Photographic & Optical	0	0.00	0.05	0
	Secondhand Goods, Books, etc.	600	0.05	0.17	32
	Sports, Camping & Leisure Goods	30,800	2.76	1.01	275
	Telephones & Accessories	10,500	0.94	0.64	147
	Textiles & Soft Furnishings	32,900	2.95	0.48	617
	Toiletries, Cosmetics & Beauty Products	11,000	0.99	0.89	111
	Toys, Games & Hobbies	6,000	0.54	0.66	81
	Vehicle & Motorcycle Sales	600	0.05	0.52	10
	Vehicle Accessories	0	0.00	0.22	0
	Totals	**386,000**	**34.65**	**35.91**	**96**



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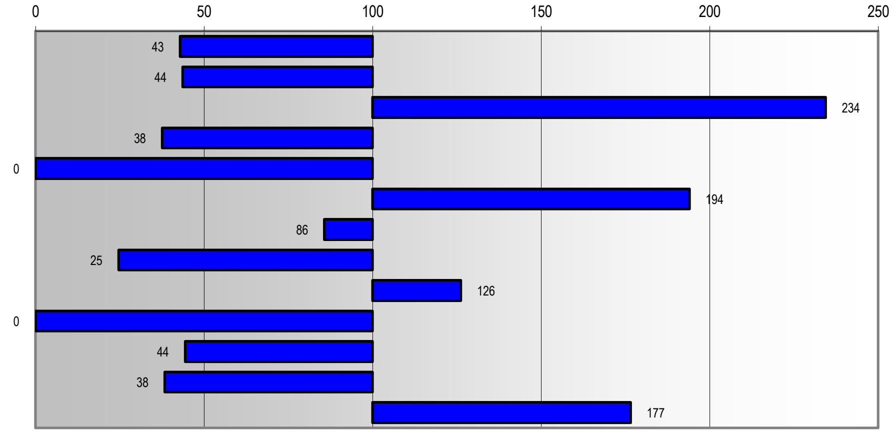
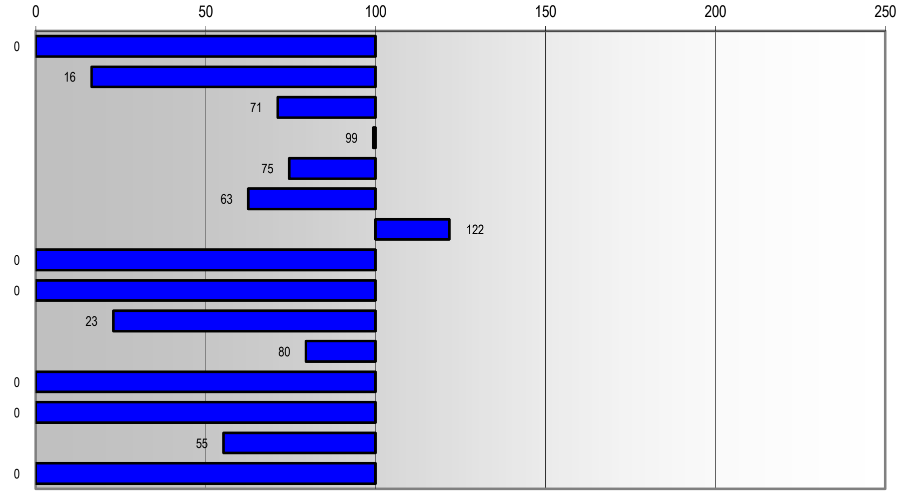
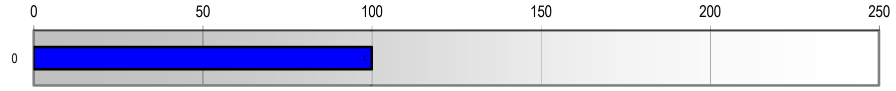
Convenience	Floorspace	Area %	Base %	Index
Bakers & Confectioners	4,300	0.39	0.90	43
Butchers	1,600	0.14	0.33	44
CTN	4,500	0.40	0.17	234
Convenience Stores	7,000	0.63	1.67	38
Fishmongers	0	0.00	0.05	0
Frozen Foods	18,400	1.65	0.85	194
Greengrocers	1,400	0.13	0.15	86
Grocers & Delicatessens	1,500	0.13	0.55	25
Health Foods	3,700	0.33	0.26	126
Markets	0	0.00	0.93	0
Off Licences	1,200	0.11	0.24	44
Shoe Repairs Etc	500	0.04	0.12	38
Supermarkets	175,900	15.79	8.94	177
Total Convenience	**220,000**	**19.75**	**15.16**	**130**



Retail Service	Floorspace	Area %	Base %	Index
Clothing & Fancy Dress Hire	0	0.00	0.04	0
Dry Cleaners & Launderettes	600	0.05	0.33	16
Filling Stations	900	0.08	0.11	71
Health & Beauty	44,300	3.98	4.00	99
Opticians	6,400	0.57	0.77	75
Other Retail Services	2,600	0.23	0.37	63
Photo Processing	600	0.05	0.04	122
Photo Studio	0	0.00	0.07	0
Post Offices	0	0.00	0.48	0
Repairs, Alterations & Restoration	200	0.02	0.08	23
Travel Agents	4,000	0.36	0.45	80
TV, Cable & Video Rental	0	0.00	0.01	0
Vehicle Rental	0	0.00	0.05	0
Vehicle Repairs & Services	4,100	0.37	0.67	55
Video Tape Rental	0	0.00	0.02	0
Totals	**63,700**	**5.72**	**7.50**	**76**



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



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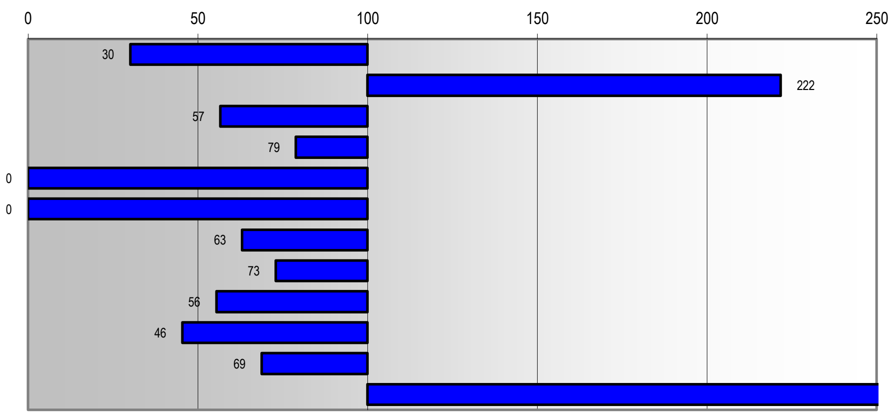
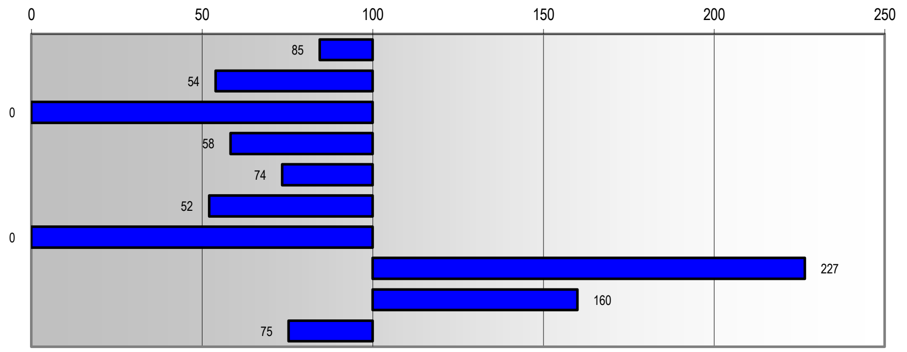
Floorspace Sq Ft

Centre: **Kidderminster** **Survey Date:** **07/07/2015**

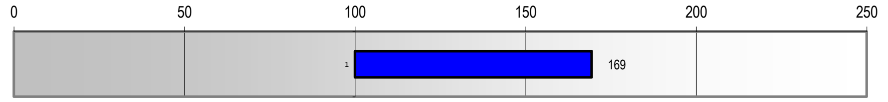
Leisure Services	Floorspace	Area %	Base %	Index
Bars & Wine Bars	6,400	0.57	1.91	30
Bingo & Amusements	20,900	1.88	0.85	222
Cafes	14,500	1.30	2.30	57
Casinos & Betting Offices	9,800	0.88	1.11	79
Cinemas, Theatres & Concert Halls	0	0.00	1.70	0
Clubs	0	0.00	1.12	0
Disco, Dance & Nightclubs	3,400	0.31	0.48	63
Fast Food & Take Away	22,300	2.00	2.74	73
Hotels & Guest Houses	12,700	1.14	2.05	56
Public Houses	18,300	1.64	3.61	46
Restaurants	30,300	2.72	3.95	69
Sports & Leisure Facilities	51,400	4.61	1.62	285
Totals	**190,000**	**17.05**	**23.43**	**73**



Financial & Business Services	Floorspace	Area %	Base %	Index
Building Societies	3,200	0.29	0.34	85
Building Supplies & Services	2,700	0.24	0.45	54
Business Goods & Services	0	0.00	0.01	0
Employment & Careers	1,800	0.16	0.28	58
Financial Services	6,200	0.56	0.76	74
Legal Services	4,500	0.40	0.78	52
Other Business Services	0	0.00	0.41	0
Printing & Copying	4,300	0.39	0.17	227
Property Services	32,800	2.94	1.84	160
Retail Banks	25,500	2.29	3.04	75
Totals	**81,000**	**7.27**	**8.07**	**90**



Vacant Outlets	Floorspace	Area %	Base %	Index
Vacant Retail & Service Outlets	**173,400**	**15.56**	**9.19**	**169**
Total Floorspace	**1,114,100**			



TERMS AND CONDITIONS

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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Goad Category Report

Stourport-on-Severn

Survey Date: **21/08/2013**

GETTING THE MOST FROM YOUR GOAD CATEGORY REPORT

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

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

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

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

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

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

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

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

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

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

Also available from Experian:

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

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

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

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

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

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

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

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

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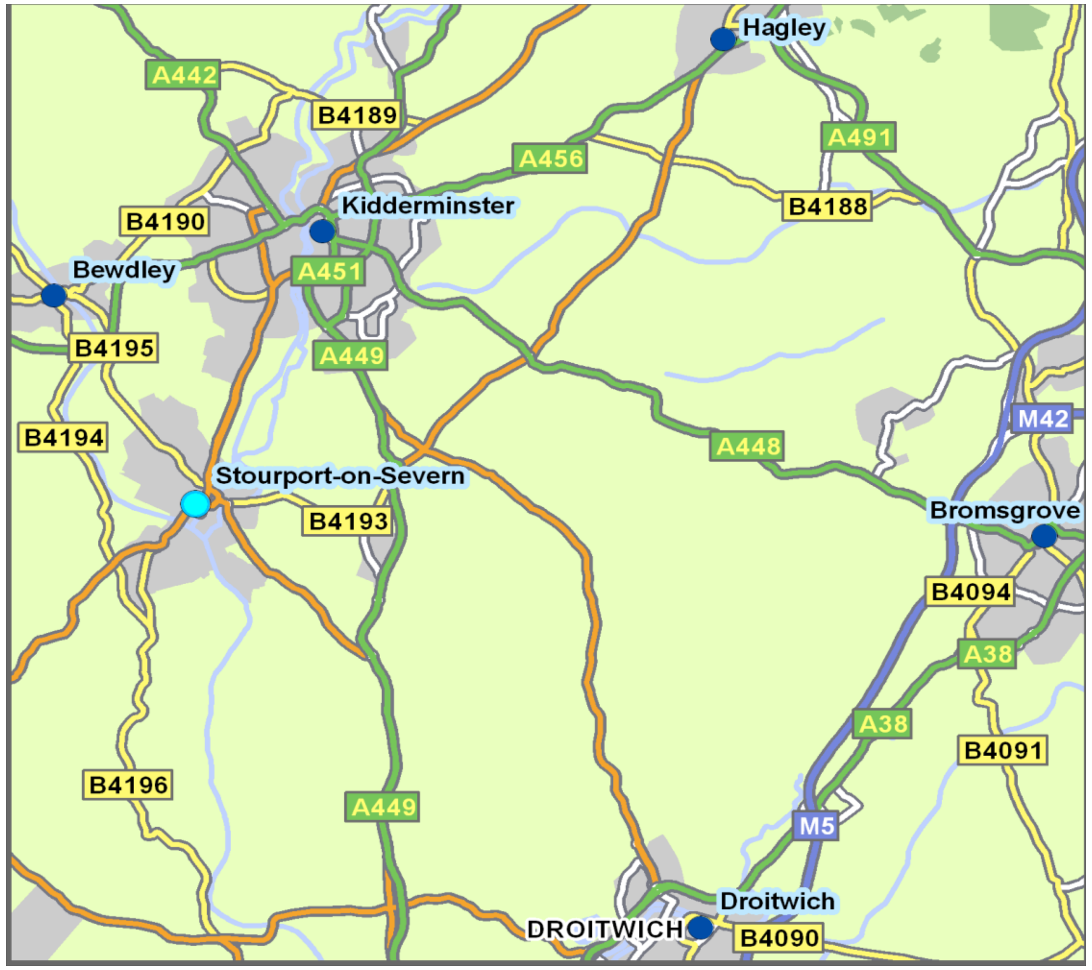


Nearest Location	Distance KM
Bewdley	4.66
Kidderminster	5.63
Droitwich	11.96
Hagley	12.78
Bromsgrove	14.85

Major Retailers Present

Department Stores

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

Mixed Goods Retailers

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

Supermarkets

Sainsburys	0
Tesco	1
Waitrose	0

Clothing

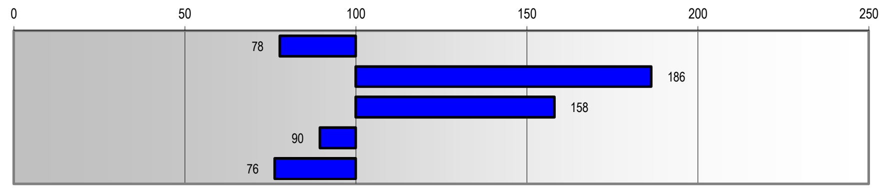
Burton	0
Dorothy Perkins	0
H & M	0
New Look	0
Next	0
Primark	0
River Island	0
Topman	0
Topshop	0

Other Retailers

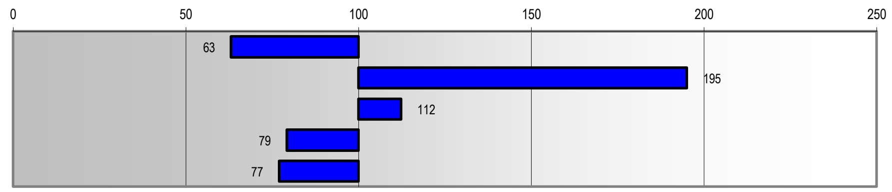
Carphone Warehouse	0
Clarks	0
Clintons	0
H M V	0
O2	0
Superdrug	1
Phones 4 U	0
Vodafone	0
Waterstones	0

Multiple Counts & Floorspace by Sector

Counts	Outlets	Area %	Base %	Index
Comparison	11	33.33	42.85	78
Convenience	7	21.21	11.38	186
Retail Service	5	15.15	9.59	158
Leisure Services	6	18.18	20.31	90
Financial & Business Services	4	12.12	15.87	76
Total Multiple Outlets	33			



Floorspace Sq Ft	Outlets	Area %	Base %	Index
Comparison	38,400	30.16	47.79	63
Convenience	58,200	45.72	23.44	195
Retail Service	6,500	5.11	4.55	112
Leisure Services	15,700	12.33	15.56	79
Financial & Business Services	8,500	6.68	8.67	77
Total Multiple Floorspace	127,300			



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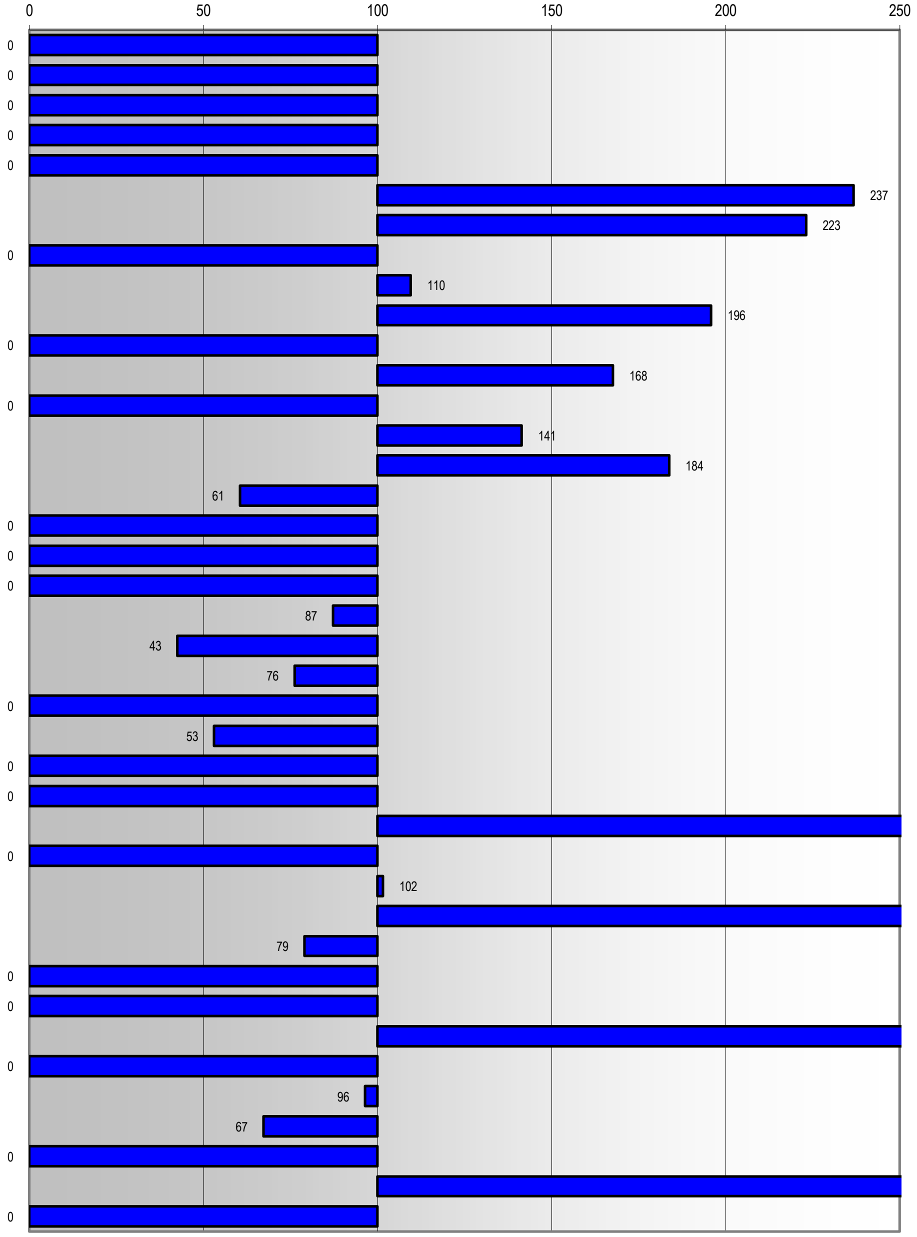
Base: All UK Centres

Sector	Classification	Outlets	Area %	Base %	Index
Comparison					
	Antique Shops	0	0.00	0.41	0
	Art & Art Dealers	0	0.00	0.63	0
	Booksellers	0	0.00	0.49	0
	Carpets & Flooring	0	0.00	0.55	0
	Catalogue Showrooms	0	0.00	0.14	0
	Charity Shops	10	6.37	2.69	237
	Chemist & Drugstores	4	2.55	1.14	223
	Childrens & Infants Wear	0	0.00	0.43	0
	Clothing General	3	1.91	1.74	110
	Crafts, Gifts, China & Glass	5	3.18	1.63	196
	Cycles & Accessories	0	0.00	0.25	0
	Department & Variety Stores	1	0.64	0.38	168
	DIY & Home Improvement	0	0.00	0.70	0
	Electrical & Other Durable Goods	3	1.91	1.35	141
	Florists	2	1.27	0.69	184
	Footwear	1	0.64	1.05	61
	Furniture Fitted	0	0.00	0.39	0
	Furniture General	0	0.00	0.87	0
	Gardens & Equipment	0	0.00	0.05	0
	Greeting Cards	1	0.64	0.73	87
	Hardware & Household Goods	1	0.64	1.50	43
	Jewellery, Watches & Silver	2	1.27	1.67	76
	Ladies & Mens Wear & Acc.	0	0.00	1.53	0
	Ladies Wear & Accessories	2	1.27	2.40	53
	Leather & Travel Goods	0	0.00	0.16	0
	Mens Wear & Accessories	0	0.00	0.83	0
	Music & Musical Instruments	1	0.64	0.15	438
	Music & Video Recordings	0	0.00	0.18	0
	Newsagents & Stationers	2	1.27	1.25	102
	Office Supplies	1	0.64	0.03	2,192
	Other Comparison Goods	1	0.64	0.81	79
	Photographic & Optical	0	0.00	0.12	0
	Secondhand Goods, Books, etc.	0	0.00	0.34	0
	Sports, Camping & Leisure Goods	3	1.91	0.73	261
	Telephones & Accessories	0	0.00	1.26	0
	Textiles & Soft Furnishings	1	0.64	0.66	96
	Toiletries, Cosmetics & Beauty Products	1	0.64	0.95	67
	Toys, Games & Hobbies	0	0.00	0.77	0
	Vehicle & Motorcycle Sales	2	1.27	0.27	480
	Vehicle Accessories	0	0.00	0.18	0
	Totals	**47**	**29.94**	**32.08**	**93**

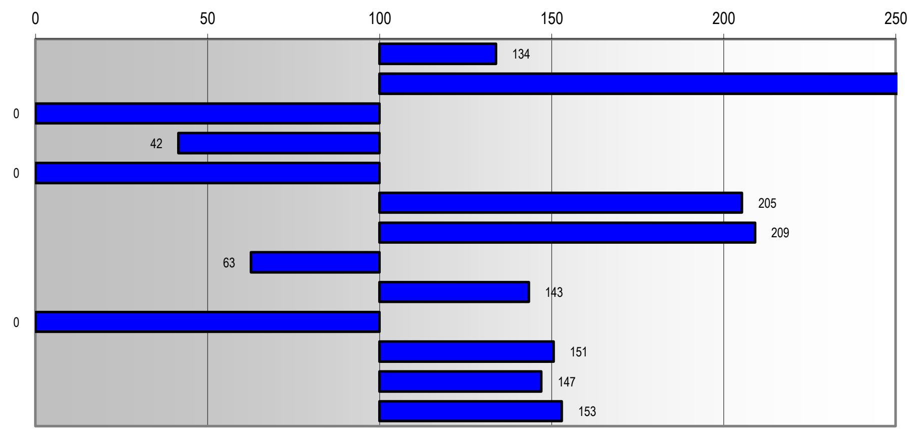


Outlet Counts

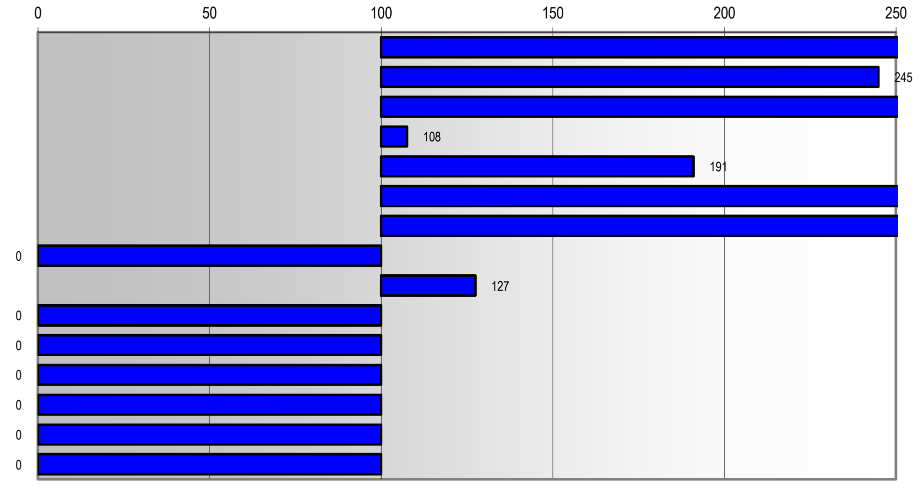
Centre: Stourport-on-Severn

Survey Date: 21/08/2013

Convenience	Outlets	Area %	Base %	Index
Bakers & Confectioners	4	2.55	1.90	134
Butchers	3	1.91	0.66	290
CTN	0	0.00	0.43	0
Convenience Stores	1	0.64	1.53	42
Fishmongers	0	0.00	0.11	0
Frozen Foods	1	0.64	0.31	205
Greengrocers	1	0.64	0.30	209
Grocers & Delicatessens	1	0.64	1.02	63
Health Foods	1	0.64	0.44	143
Markets	0	0.00	0.14	0
Off Licences	1	0.64	0.42	151
Shoe Repairs Etc	1	0.64	0.43	147
Supermarkets	2	1.27	0.83	153
Total Convenience	**16**	**10.19**	**8.54**	119



Retail Service	Outlets	Area %	Base %	Index
Clothing & Fancy Dress Hire	1	0.64	0.08	792
Dry Cleaners & Launderettes	3	1.91	0.78	245
Filling Stations	1	0.64	0.22	293
Health & Beauty	15	9.55	8.88	108
Opticians	4	2.55	1.33	191
Other Retail Services	4	2.55	0.55	466
Photo Processing	1	0.64	0.13	508
Photo Studio	0	0.00	0.16	0
Post Offices	1	0.64	0.50	127
Repairs, Alterations & Restoration	0	0.00	0.25	0
Travel Agents	0	0.00	0.84	0
TV, Cable & Video Rental	0	0.00	0.04	0
Vehicle Rental	0	0.00	0.06	0
Vehicle Repairs & Services	0	0.00	0.50	0
Video Tape Rental	0	0.00	0.04	0
Totals	**30**	**19.11**	**14.37**	**133**



Other Retail	Outlets	Area %	Base %	Index
Other Retail Outlets	**0**	**0.00**	**0.13**	**0**

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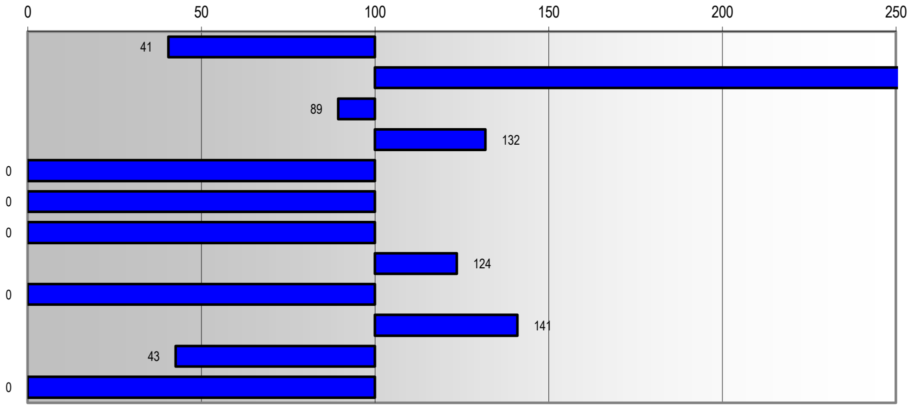
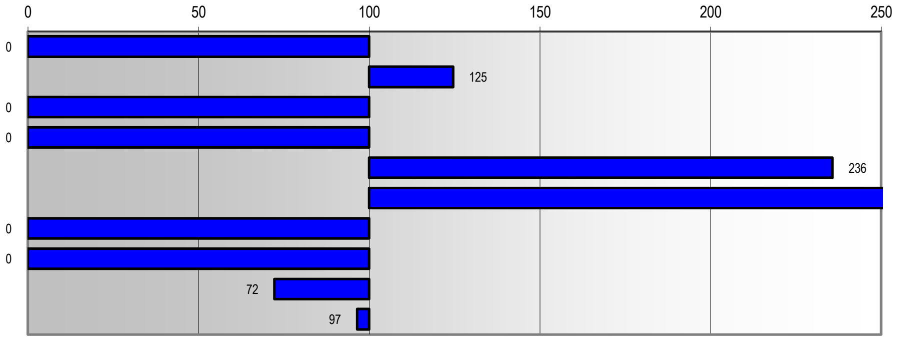
Outlet Counts

Centre: Stourport-on-Severn **Survey Date:** 21/08/2013

Leisure Services	Outlets	Area %	Base %	Index
Bars & Wine Bars	1	0.64	1.57	41
Bingo & Amusements	2	1.27	0.39	323
Cafes	6	3.82	4.27	89
Casinos & Betting Offices	3	1.91	1.45	132
Cinemas, Theatres & Concert Halls	0	0.00	0.26	0
Clubs	0	0.00	0.64	0
Disco, Dance & Nightclubs	0	0.00	0.24	0
Fast Food & Take Away	11	7.01	5.67	124
Hotels & Guest Houses	0	0.00	0.68	0
Public Houses	6	3.82	2.71	141
Restaurants	3	1.91	4.48	43
Sports & Leisure Facilities	0	0.00	0.28	0
Totals	**32**	**20.38**	**22.64**	**90**

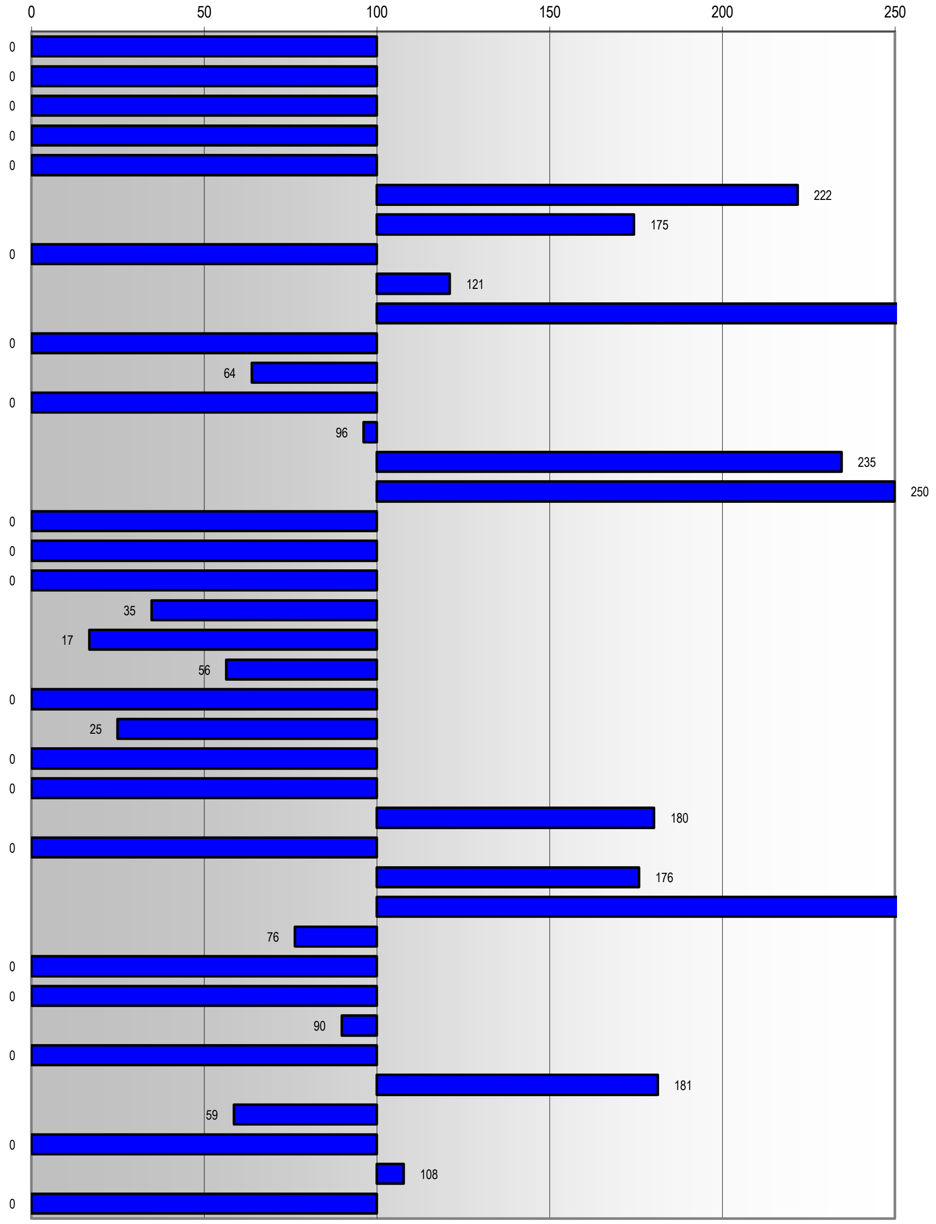


Financial & Business Services				
Building Societies	0	0.00	0.45	0
Building Supplies & Services	1	0.64	0.51	125
Business Goods & Services	0	0.00	0.02	0
Employment & Careers	0	0.00	0.42	0
Financial Services	5	3.18	1.35	236
Legal Services	6	3.82	1.09	352
Other Business Services	0	0.00	0.36	0
Printing & Copying	0	0.00	0.30	0
Property Services	4	2.55	3.53	72
Retail Banks	4	2.55	2.64	97
Totals	**20**	**12.74**	**10.67**	**119**

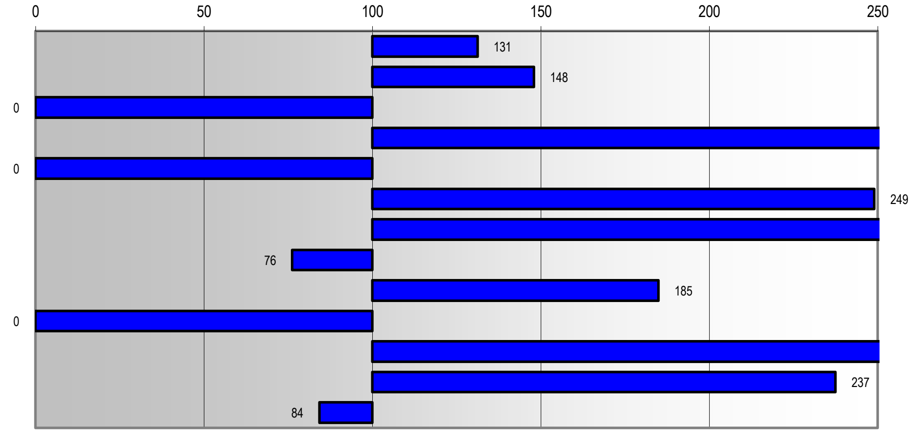


Vacant Outlets				
Vacant Retail & Service Outlets	**12**	**7.64**	**11.39**	**67**
Total Number of Outlets	**157**			

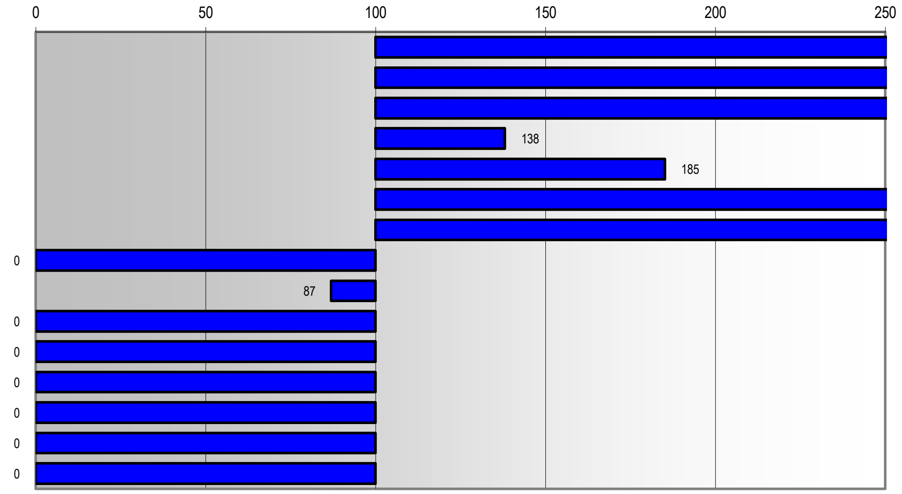
Sector	Classification	Floorspace	Area %	Base %	Index
Comparison					
	Antique Shops	0	0.00	0.22	0
	Art & Art Dealers	0	0.00	0.37	0
	Booksellers	0	0.00	0.41	0
	Carpets & Flooring	0	0.00	0.53	0
	Catalogue Showrooms	0	0.00	0.52	0
	Charity Shops	11,300	3.93	1.77	222
	Chemist & Drugstores	7,800	2.71	1.55	175
	Childrens & Infants Wear	0	0.00	0.32	0
	Clothing General	11,400	3.96	3.27	121
	Crafts, Gifts, China & Glass	6,800	2.36	0.82	289
	Cycles & Accessories	0	0.00	0.19	0
	Department & Variety Stores	8,400	2.92	4.58	64
	DIY & Home Improvement	0	0.00	1.11	0
	Electrical & Other Durable Goods	3,000	1.04	1.08	96
	Florists	1,700	0.59	0.25	235
	Footwear	6,400	2.22	0.89	250
	Furniture Fitted	0	0.00	0.35	0
	Furniture General	0	0.00	1.39	0
	Gardens & Equipment	0	0.00	0.07	0
	Greeting Cards	500	0.17	0.50	35
	Hardware & Household Goods	1,800	0.63	3.73	17
	Jewellery, Watches & Silver	1,200	0.42	0.74	56
	Ladies & Mens Wear & Acc.	0	0.00	1.84	0
	Ladies Wear & Accessories	1,600	0.56	2.22	25
	Leather & Travel Goods	0	0.00	0.09	0
	Mens Wear & Accessories	0	0.00	0.69	0
	Music & Musical Instruments	500	0.17	0.10	180
	Music & Video Recordings	0	0.00	0.17	0
	Newsagents & Stationers	4,600	1.60	0.91	176
	Office Supplies	1,300	0.45	0.06	700
	Other Comparison Goods	1,200	0.42	0.55	76
	Photographic & Optical	0	0.00	0.05	0
	Secondhand Goods, Books, etc.	0	0.00	0.17	0
	Sports, Camping & Leisure Goods	2,600	0.90	1.01	90
	Telephones & Accessories	0	0.00	0.64	0
	Textiles & Soft Furnishings	2,500	0.87	0.48	181
	Toiletries, Cosmetics & Beauty Products	1,500	0.52	0.89	59
	Toys, Games & Hobbies	0	0.00	0.66	0
	Vehicle & Motorcycle Sales	1,600	0.56	0.52	108
	Vehicle Accessories	0	0.00	0.22	0
	Totals	77,700	27.00	35.91	75



Convenience	Floorspace	Area %	Base %	Index
Bakers & Confectioners	3,400	1.18	0.90	131
Butchers	1,400	0.49	0.33	148
CTN	0	0.00	0.17	0
Convenience Stores	26,500	9.21	1.67	551
Fishmongers	0	0.00	0.05	0
Frozen Foods	6,100	2.12	0.85	249
Greengrocers	2,400	0.83	0.15	569
Grocers & Delicatessens	1,200	0.42	0.55	76
Health Foods	1,400	0.49	0.26	185
Markets	0	0.00	0.93	0
Off Licences	2,100	0.73	0.24	301
Shoe Repairs Etc	800	0.28	0.12	237
Supermarkets	21,700	7.54	8.94	84
Total Convenience	**67,000**	**23.28**	**15.16**	**154**



Retail Service	Floorspace	Area %	Base %	Index
Clothing & Fancy Dress Hire	900	0.31	0.04	777
Dry Cleaners & Launderettes	2,500	0.87	0.33	265
Filling Stations	900	0.31	0.11	276
Health & Beauty	15,900	5.52	4.00	138
Opticians	4,100	1.42	0.77	185
Other Retail Services	5,600	1.95	0.37	522
Photo Processing	1,000	0.35	0.04	786
Photo Studio	0	0.00	0.07	0
Post Offices	1,200	0.42	0.48	87
Repairs, Alterations & Restoration	0	0.00	0.08	0
Travel Agents	0	0.00	0.45	0
TV, Cable & Video Rental	0	0.00	0.01	0
Vehicle Rental	0	0.00	0.05	0
Vehicle Repairs & Services	0	0.00	0.67	0
Video Tape Rental	0	0.00	0.02	0
Totals	**32,100**	**11.15**	**7.50**	**149**



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

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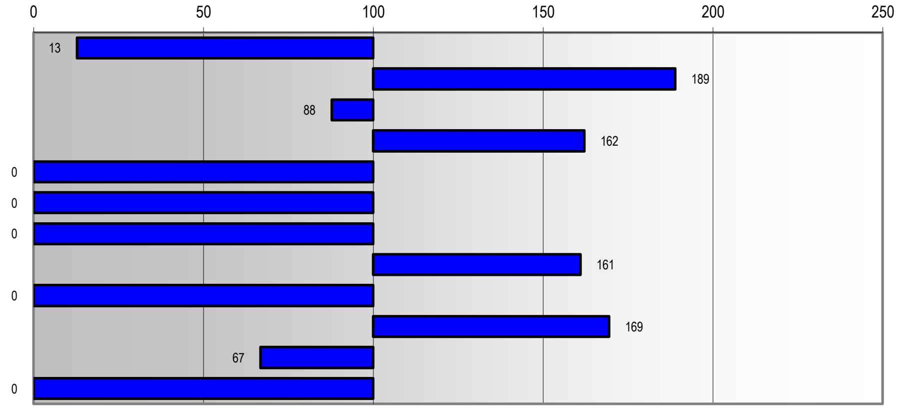
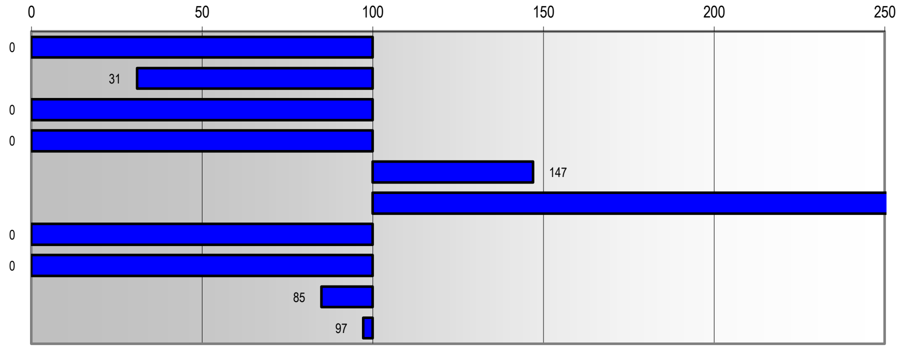
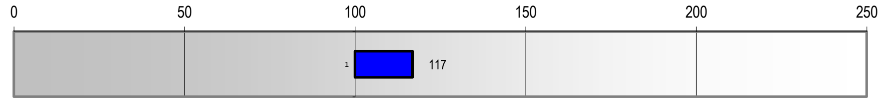
Leisure Services	Floorspace	Area %	Base %	Index
Bars & Wine Bars	700	0.24	1.91	13
Bingo & Amusements	4,600	1.60	0.85	189
Cafes	5,800	2.02	2.30	88
Casinos & Betting Offices	5,200	1.81	1.11	162
Cinemas, Theatres & Concert Halls	0	0.00	1.70	0
Clubs	0	0.00	1.12	0
Disco, Dance & Nightclubs	0	0.00	0.48	0
Fast Food & Take Away	12,700	4.41	2.74	161
Hotels & Guest Houses	0	0.00	2.05	0
Public Houses	17,600	6.12	3.61	169
Restaurants	7,600	2.64	3.95	67
Sports & Leisure Facilities	0	0.00	1.62	0
Totals	**54,200**	**18.83**	**23.43**	**80**



Financial & Business Services	Floorspace	Area %	Base %	Index
Building Societies	0	0.00	0.34	0
Building Supplies & Services	400	0.14	0.45	31
Business Goods & Services	0	0.00	0.01	0
Employment & Careers	0	0.00	0.28	0
Financial Services	3,200	1.11	0.76	147
Legal Services	9,300	3.23	0.78	417
Other Business Services	0	0.00	0.41	0
Printing & Copying	0	0.00	0.17	0
Property Services	4,500	1.56	1.84	85
Retail Banks	8,500	2.95	3.04	97
Totals	**25,900**	**9.00**	**8.07**	**112**



Vacant Outlets				
Vacant Retail & Service Outlets	**30,900**	**10.74**	**9.19**	**117**
Total Floorspace	**287,800**			



TERMS AND CONDITIONS

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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Goad Category Report

Bewdley

Survey Date: **10/09/2013**

GETTING THE MOST FROM YOUR GOAD CATEGORY REPORT

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

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

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

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

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

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

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

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

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

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

Also available from Experian:

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

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

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

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

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

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

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

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

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Nearest Location	Distance KM
Stourport-on-Severn	4.66
Kidderminster	4.85
Hagley	12.68
Stourbridge	14.58
Lye	16.36

Major Retailers Present

Department Stores

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

Mixed Goods Retailers

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

Supermarkets

Sainsburys	0
Tesco	0
Waitrose	0

Clothing

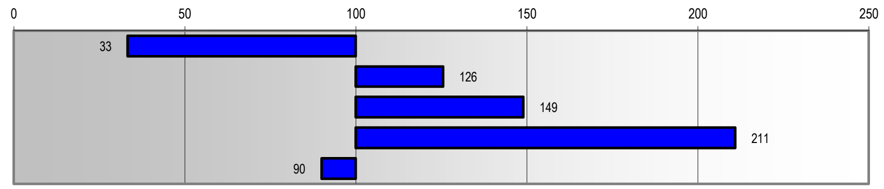
Burton	0
Dorothy Perkins	0
H & M	0
New Look	0
Next	0
Primark	0
River Island	0
Topman	0
Topshop	0

Other Retailers

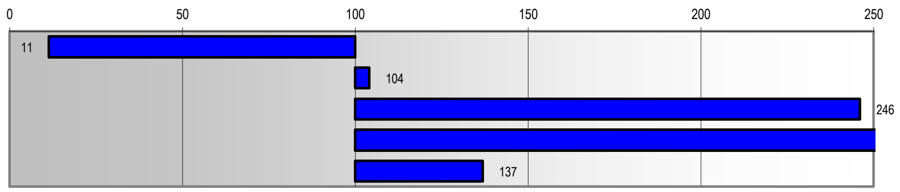
Carphone Warehouse	0
Clarks	0
Clintons	0
H M V	0
O2	0
Superdrug	0
Phones 4 U	0
Vodafone	0
Waterstones	0

Multiple Counts & Floorspace by Sector

Counts	Outlets	Area %	Base %	Index
Comparison	2	14.29	42.85	33
Convenience	2	14.29	11.38	126
Retail Service	2	14.29	9.59	149
Leisure Services	6	42.86	20.31	211
Financial & Business Services	2	14.29	15.87	90
Total Multiple Outlets	14			



Floorspace Sq Ft	Outlets	Area %	Base %	Index
Comparison	1,600	5.42	47.79	11
Convenience	7,200	24.41	23.44	104
Retail Service	3,300	11.19	4.55	246
Leisure Services	13,900	47.12	15.56	303
Financial & Business Services	3,500	11.86	8.67	137
Total Multiple Floorspace	29,500			



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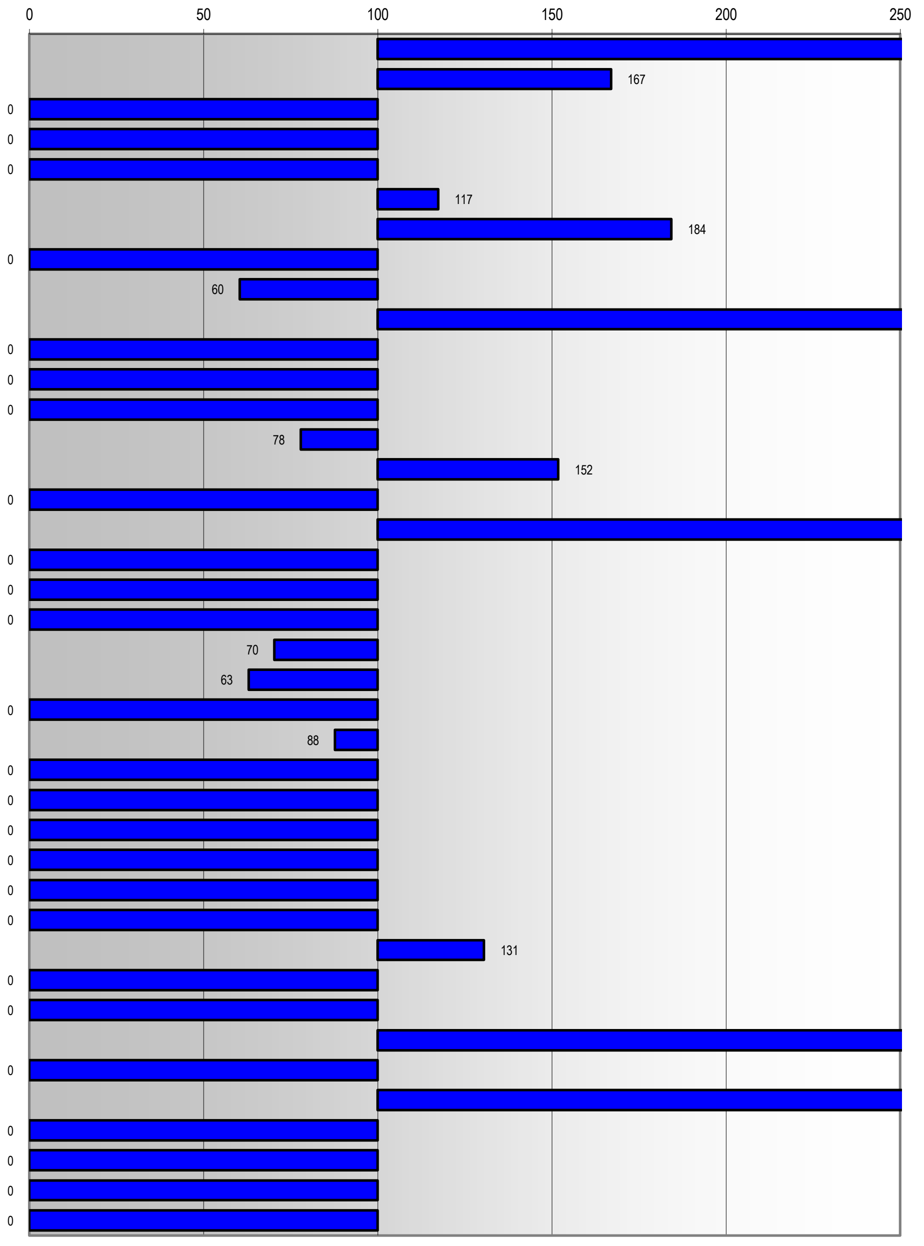
Outlet Counts

Centre: Bewdley **Survey Date:** 10/09/2013

Base: All UK Centres

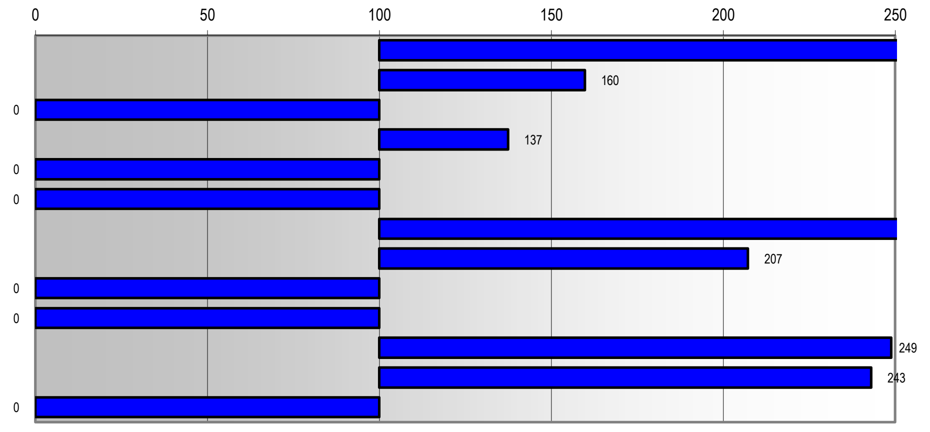
Sector	Classification	Outlets	Area %	Base %	Index
Comparison					
	Antique Shops	1	1.05	0.41	258
	Art & Art Dealers	1	1.05	0.63	167
	Booksellers	0	0.00	0.49	0
	Carpets & Flooring	0	0.00	0.55	0
	Catalogue Showrooms	0	0.00	0.14	0
	Charity Shops	3	3.16	2.69	117
	Chemist & Drugstores	2	2.11	1.14	184
	Childrens & Infants Wear	0	0.00	0.43	0
	Clothing General	1	1.05	1.74	60
	Crafts, Gifts, China & Glass	4	4.21	1.63	259
	Cycles & Accessories	0	0.00	0.25	0
	Department & Variety Stores	0	0.00	0.38	0
	DIY & Home Improvement	0	0.00	0.70	0
	Electrical & Other Durable Goods	1	1.05	1.35	78
	Florists	1	1.05	0.69	152
	Footwear	0	0.00	1.05	0
	Furniture Fitted	1	1.05	0.39	273
	Furniture General	0	0.00	0.87	0
	Gardens & Equipment	0	0.00	0.05	0
	Greeting Cards	0	0.00	0.73	0
	Hardware & Household Goods	1	1.05	1.50	70
	Jewellery, Watches & Silver	1	1.05	1.67	63
	Ladies & Mens Wear & Acc.	0	0.00	1.53	0
	Ladies Wear & Accessories	2	2.11	2.40	88
	Leather & Travel Goods	0	0.00	0.16	0
	Mens Wear & Accessories	0	0.00	0.83	0
	Music & Musical Instruments	0	0.00	0.15	0
	Music & Video Recordings	0	0.00	0.18	0
	Newsagents & Stationers	0	0.00	1.25	0
	Office Supplies	0	0.00	0.03	0
	Other Comparison Goods	1	1.05	0.81	131
	Photographic & Optical	0	0.00	0.12	0
	Secondhand Goods, Books, etc.	0	0.00	0.34	0
	Sports, Camping & Leisure Goods	3	3.16	0.73	431
	Telephones & Accessories	0	0.00	1.26	0
	Textiles & Soft Furnishings	2	2.11	0.66	319
	Toiletries, Cosmetics & Beauty Products	0	0.00	0.95	0
	Toys, Games & Hobbies	0	0.00	0.77	0
	Vehicle & Motorcycle Sales	0	0.00	0.27	0
	Vehicle Accessories	0	0.00	0.18	0
	Totals	**25**	**26.32**	**32.08**	**82**



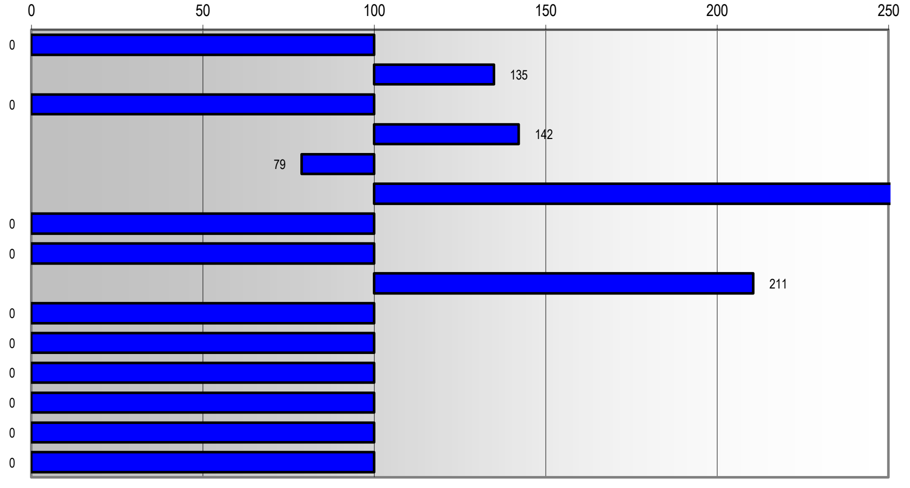
Outlet Counts

Centre: **Bewdley** **Survey Date:** **10/09/2013**

Convenience	Outlets	Area %	Base %	Index
Bakers & Confectioners	5	5.26	1.90	276
Butchers	1	1.05	0.66	160
CTN	0	0.00	0.43	0
Convenience Stores	2	2.11	1.53	137
Fishmongers	0	0.00	0.11	0
Frozen Foods	0	0.00	0.31	0
Greengrocers	1	1.05	0.30	346
Grocers & Delicatessens	2	2.11	1.02	207
Health Foods	0	0.00	0.44	0
Markets	0	0.00	0.14	0
Off Licences	1	1.05	0.42	249
Shoe Repairs Etc	1	1.05	0.43	243
Supermarkets	0	0.00	0.83	0
Total Convenience	**13**	**13.68**	**8.54**	160



Retail Service	Outlets	Area %	Base %	Index
Clothing & Fancy Dress Hire	0	0.00	0.08	0
Dry Cleaners & Launderettes	1	1.05	0.78	135
Filling Stations	0	0.00	0.22	0
Health & Beauty	12	12.63	8.88	142
Opticians	1	1.05	1.33	79
Other Retail Services	3	3.16	0.55	577
Photo Processing	0	0.00	0.13	0
Photo Studio	0	0.00	0.16	0
Post Offices	1	1.05	0.50	211
Repairs, Alterations & Restoration	0	0.00	0.25	0
Travel Agents	0	0.00	0.84	0
TV, Cable & Video Rental	0	0.00	0.04	0
Vehicle Rental	0	0.00	0.06	0
Vehicle Repairs & Services	0	0.00	0.50	0
Video Tape Rental	0	0.00	0.04	0
Totals	**18**	**18.95**	**14.37**	**132**



Other Retail	Outlets	Area %	Base %	Index
Other Retail Outlets	**0**	**0.00**	**0.13**	**0**

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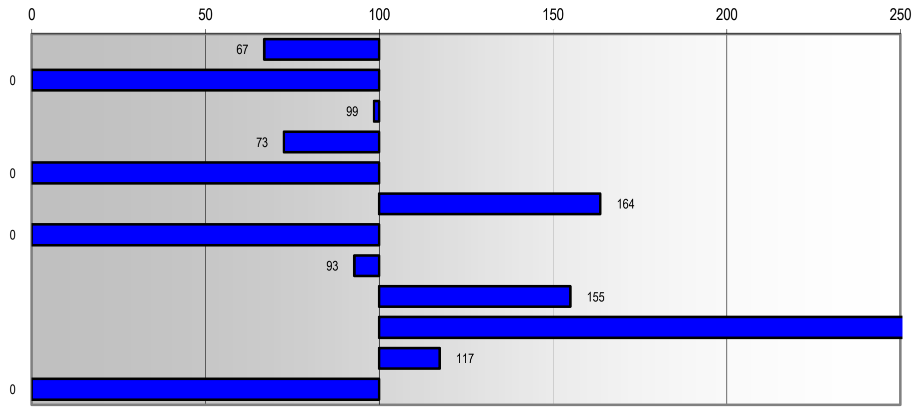
Outlet Counts

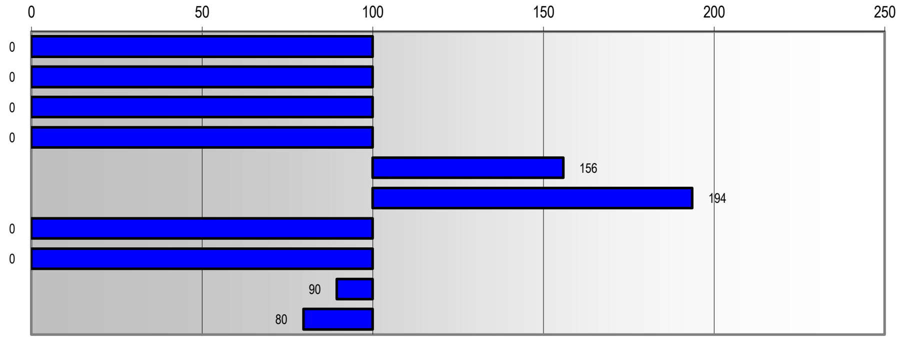
Centre: Bewdley

Survey Date: 10/09/2013

Leisure Services	Outlets	Area %	Base %	Index
Bars & Wine Bars	1	1.05	1.57	67
Bingo & Amusements	0	0.00	0.39	0
Cafes	4	4.21	4.27	99
Casinos & Betting Offices	1	1.05	1.45	73
Cinemas, Theatres & Concert Halls	0	0.00	0.26	0
Clubs	1	1.05	0.64	164
Disco, Dance & Nightclubs	0	0.00	0.24	0
Fast Food & Take Away	5	5.26	5.67	93
Hotels & Guest Houses	1	1.05	0.68	155
Public Houses	7	7.37	2.71	272
Restaurants	5	5.26	4.48	117
Sports & Leisure Facilities	0	0.00	0.28	0
Totals	**25**	**26.32**	**22.64**	**116**



Financial & Business Services	Outlets	Area %	Base %	Index
Building Societies	0	0.00	0.45	0
Building Supplies & Services	0	0.00	0.51	0
Business Goods & Services	0	0.00	0.02	0
Employment & Careers	0	0.00	0.42	0
Financial Services	2	2.11	1.35	156
Legal Services	2	2.11	1.09	194
Other Business Services	0	0.00	0.36	0
Printing & Copying	0	0.00	0.30	0
Property Services	3	3.16	3.53	90
Retail Banks	2	2.11	2.64	80
Totals	**9**	**9.47**	**10.67**	**89**



Vacant Outlets	Outlets	Area %	Base %	Index
Vacant Retail & Service Outlets	**5**	**5.26**	**11.39**	**46**
Total Number of Outlets	**95**			

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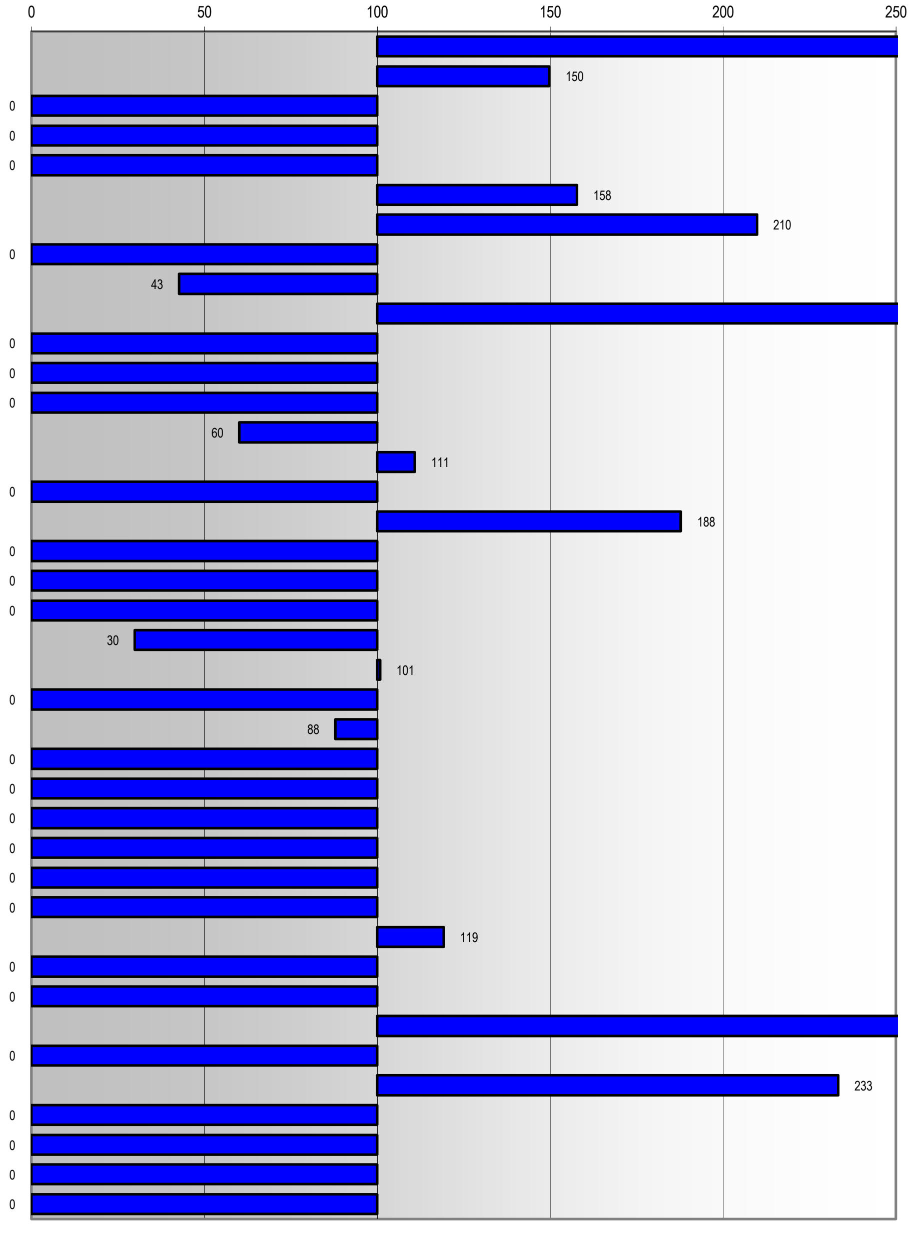
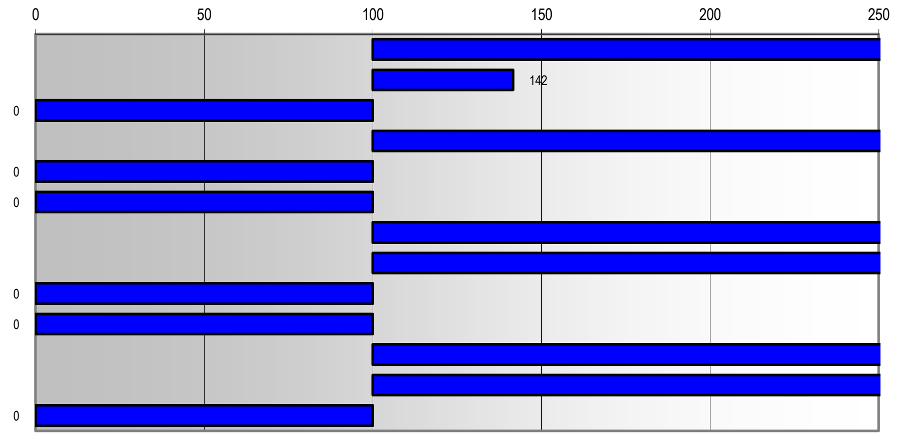
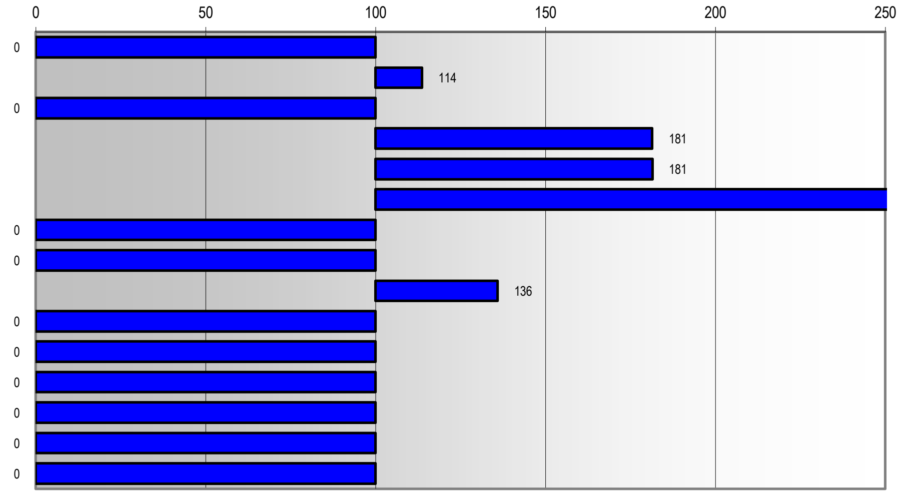
Sector	Classification	Floorspace	Area %	Base %	Index
Comparison					
	Antique Shops	900	0.84	0.22	378
	Art & Art Dealers	600	0.56	0.37	150
	Booksellers	0	0.00	0.41	0
	Carpets & Flooring	0	0.00	0.53	0
	Catalogue Showrooms	0	0.00	0.52	0
	Charity Shops	3,000	2.79	1.77	158
	Chemist & Drugstores	3,500	3.26	1.55	210
	Childrens & Infants Wear	0	0.00	0.32	0
	Clothing General	1,500	1.40	3.27	43
	Crafts, Gifts, China & Glass	3,000	2.79	0.82	342
	Cycles & Accessories	0	0.00	0.19	0
	Department & Variety Stores	0	0.00	4.58	0
	DIY & Home Improvement	0	0.00	1.11	0
	Electrical & Other Durable Goods	700	0.65	1.08	60
	Florists	300	0.28	0.25	111
	Footwear	0	0.00	0.89	0
	Furniture Fitted	700	0.65	0.35	188
	Furniture General	0	0.00	1.39	0
	Gardens & Equipment	0	0.00	0.07	0
	Greeting Cards	0	0.00	0.50	0
	Hardware & Household Goods	1,200	1.12	3.73	30
	Jewellery, Watches & Silver	800	0.74	0.74	101
	Ladies & Mens Wear & Acc.	0	0.00	1.84	0
	Ladies Wear & Accessories	2,100	1.96	2.22	88
	Leather & Travel Goods	0	0.00	0.09	0
	Mens Wear & Accessories	0	0.00	0.69	0
	Music & Musical Instruments	0	0.00	0.10	0
	Music & Video Recordings	0	0.00	0.17	0
	Newsagents & Stationers	0	0.00	0.91	0
	Office Supplies	0	0.00	0.06	0
	Other Comparison Goods	700	0.65	0.55	119
	Photographic & Optical	0	0.00	0.05	0
	Secondhand Goods, Books, etc.	0	0.00	0.17	0
	Sports, Camping & Leisure Goods	2,900	2.70	1.01	268
	Telephones & Accessories	0	0.00	0.64	0
	Textiles & Soft Furnishings	1,200	1.12	0.48	233
	Toiletries, Cosmetics & Beauty Products	0	0.00	0.89	0
	Toys, Games & Hobbies	0	0.00	0.66	0
	Vehicle & Motorcycle Sales	0	0.00	0.52	0
	Vehicle Accessories	0	0.00	0.22	0
	Totals	**23,100**	**21.51**	**35.91**	**60**



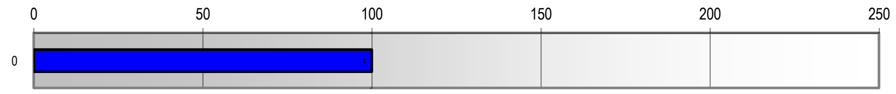
Convenience	Floorspace	Area %	Base %	Index
Bakers & Confectioners	2,800	2.61	0.90	290
Butchers	500	0.47	0.33	142
CTN	0	0.00	0.17	0
Convenience Stores	7,200	6.70	1.67	401
Fishmongers	0	0.00	0.05	0
Frozen Foods	0	0.00	0.85	0
Greengrocers	600	0.56	0.15	381
Grocers & Delicatessens	1,500	1.40	0.55	255
Health Foods	0	0.00	0.26	0
Markets	0	0.00	0.93	0
Off Licences	800	0.74	0.24	307
Shoe Repairs Etc	500	0.47	0.12	398
Supermarkets	0	0.00	8.94	0
Total Convenience	**13,900**	**12.94**	**15.16**	**85**



Retail Service	Floorspace	Area %	Base %	Index
Clothing & Fancy Dress Hire	0	0.00	0.04	0
Dry Cleaners & Launderettes	400	0.37	0.33	114
Filling Stations	0	0.00	0.11	0
Health & Beauty	7,800	7.26	4.00	181
Opticians	1,500	1.40	0.77	181
Other Retail Services	5,700	5.31	0.37	1,424
Photo Processing	0	0.00	0.04	0
Photo Studio	0	0.00	0.07	0
Post Offices	700	0.65	0.48	136
Repairs, Alterations & Restoration	0	0.00	0.08	0
Travel Agents	0	0.00	0.45	0
TV, Cable & Video Rental	0	0.00	0.01	0
Vehicle Rental	0	0.00	0.05	0
Vehicle Repairs & Services	0	0.00	0.67	0
Video Tape Rental	0	0.00	0.02	0
Totals	**16,100**	**14.99**	**7.50**	**200**



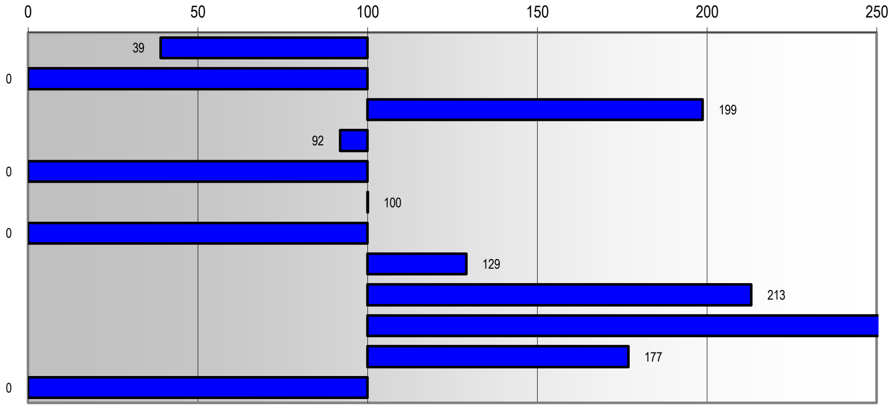
Other Retail	Floorspace	Area %	Base %	Index
Other Retail Outlets	**0**	**0.00**	**0.12**	**0**



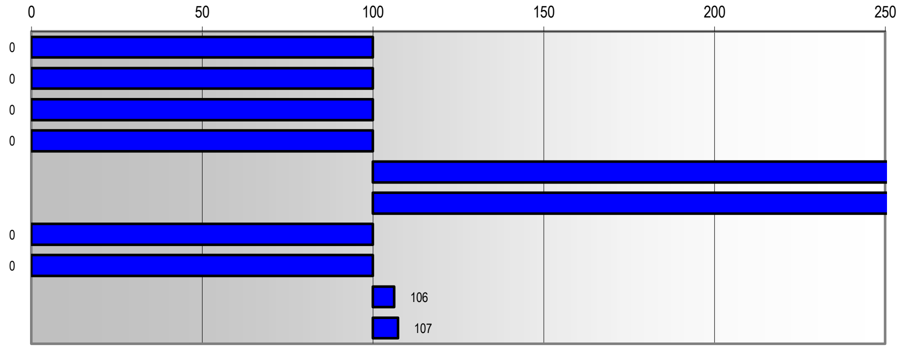
Floorspace Sq Ft

Centre: Bewdley **Survey Date:** 10/09/2013

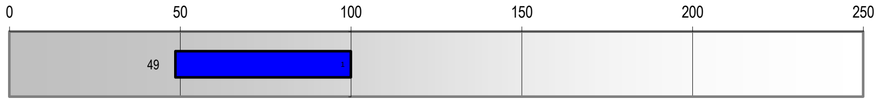
Leisure Services	Floorspace	Area %	Base %	Index
Bars & Wine Bars	800	0.74	1.91	39
Bingo & Amusements	0	0.00	0.85	0
Cafes	4,900	4.56	2.30	199
Casinos & Betting Offices	1,100	1.02	1.11	92
Cinemas, Theatres & Concert Halls	0	0.00	1.70	0
Clubs	1,200	1.12	1.12	100
Disco, Dance & Nightclubs	0	0.00	0.48	0
Fast Food & Take Away	3,800	3.54	2.74	129
Hotels & Guest Houses	4,700	4.38	2.05	213
Public Houses	13,200	12.29	3.61	341
Restaurants	7,500	6.98	3.95	177
Sports & Leisure Facilities	0	0.00	1.62	0
Totals	**37,200**	**34.64**	**23.43**	**148**



Financial & Business Services	Floorspace	Area %	Base %	Index
Building Societies	0	0.00	0.34	0
Building Supplies & Services	0	0.00	0.45	0
Business Goods & Services	0	0.00	0.01	0
Employment & Careers	0	0.00	0.28	0
Financial Services	4,300	4.00	0.76	529
Legal Services	2,400	2.23	0.78	288
Other Business Services	0	0.00	0.41	0
Printing & Copying	0	0.00	0.17	0
Property Services	2,100	1.96	1.84	106
Retail Banks	3,500	3.26	3.04	107
Totals	**12,300**	**11.45**	**8.07**	**142**



Vacant Outlets				
Vacant Retail & Service Outlets	**4,800**	**4.47**	**9.19**	**49**



Total Floorspace	**107,400**

TERMS AND CONDITIONS

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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APPENDIX TWO – HOUSEHOLD SURVEY RESULTS

Q01 Where did you LAST undertake your main food and grocery shopping?
Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Aldi, Bridgnorth	1.5%	12	0.0%	0	0.0%	0	1.6%	1	24.8%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Bromsgrove	2.9%	23	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	22.7%	21	0.0%	0	0.0%	0
Aldi, Droitwich	0.7%	5	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	18.8%	4	0.0%	0
Aldi, Kidderminster	7.0%	56	15.1%	40	3.8%	3	10.5%	9	0.6%	0	2.4%	4	0.0%	0	0.0%	0	0.8%	0
Aldi, Leominster	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	2
Aldi, Ludlow	1.6%	13	0.0%	0	0.0%	0	3.5%	3	1.8%	1	0.0%	0	0.0%	0	0.0%	0	16.7%	9
Aldi, Stourbridge	1.6%	13	0.8%	2	0.0%	0	0.0%	0	0.0%	0	7.3%	11	0.0%	0	0.0%	0	0.0%	0
Aldi, Wollaston	1.2%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	9	0.0%	0	0.0%	0	0.0%	0
Aldi, Worcester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Asda, Brierley Hill	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	3	0.0%	0	0.0%	0	2.2%	1
Asda, Bromsgrove	4.2%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	35.4%	33	0.0%	0	0.0%	0
Asda, Halesowen	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0
Asda, Kidderminster	0.2%	2	0.6%	2	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Merry Hill	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0
Co-op, Birmingham Road, Bromsgrove	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.0%	0	0.0%	0
Co-op, Franche Road, Kidderminster	0.7%	5	1.4%	4	0.0%	0	1.4%	1	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, High Street, Kinver	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0
Co-op, High Street, Stourbridge	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Co-op, Highley, Bridgnorth	0.2%	1	0.0%	0	0.0%	0	0.9%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Load Street, Bewdley	0.2%	1	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Lombard Street / Tan Lane, Stourport	0.8%	6	0.0%	0	6.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.7%	0
Co-op, Tenbury Wells	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Iceland, Kidderminster	1.0%	8	2.7%	7	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Newtown Road, Worcester	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	0	0.0%	0
Lidl, Stourbridge	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.7%	0
Lidl, Stourport	4.1%	32	1.7%	4	16.1%	14	13.5%	11	0.7%	0	1.4%	2	0.0%	0	0.0%	0	1.2%	1
M&S Simply Food, Bridgnorth	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
M&S Worcester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
M&S, Merryhill	0.4%	3	0.0%	0	0.9%	1	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0
Morrisons, Bromsgrove	2.1%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.3%	16	3.4%	1	0.0%	0
Morrisons, Droitwich	0.8%	6	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	23.3%	5	1.5%	1
Morrisons, Kidderminster	12.8%	102	27.0%	71	12.3%	10	12.9%	11	8.7%	4	2.4%	4	0.0%	0	2.8%	1	2.6%	1
Morrisons, Kingswinford	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	4	0.0%	0	0.0%	0	0.0%	0
Morrisons, Leominster	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.8%	5
Morrisons, Rubery	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Sainsbury's Local, Woollaston	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Ambelcote, Brierley Hill	1.1%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.6%	8	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Blackpole, Worcester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.7%	0
Sainsbury's, Bridgnorth	1.5%	12	0.0%	0	0.0%	0	0.0%	0	27.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Bromsgrove	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Sainsbury's, Kidderminster	14.3%	114	23.4%	62	5.4%	5	23.9%	20	14.9%	6	11.7%	18	0.0%	0	0.6%	0	6.5%	4
Sainsbury's, St Johns, Worcester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Sainsbury's, Wombourne	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	4	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Bewdley	0.2%	1	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Cookley, Kiderminster	1.2%	9	3.5%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Warndon	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Tesco Extra, Stourbridge	3.2%	25	0.0%	0	2.1%	2	0.0%	0	0.0%	0	15.6%	23	0.0%	0	0.0%	0	0.0%	0
Tesco, Kidderminster	8.2%	65	17.9%	47	6.3%	5	8.1%	7	2.1%	1	0.8%	1	0.0%	0	1.9%	0	6.4%	4
Tesco, Ludlow	1.1%	9	0.0%	0	0.0%	0	6.2%	5	1.9%	1	0.0%	0	0.0%	0	0.0%	0	5.4%	3
Tesco, Stourport	5.7%	45	0.9%	2	41.7%	35	2.9%	2	0.0%	0	0.0%	0	0.0%	0	7.4%	2	6.0%	3
Tesco, Warndon, Worcester	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	1	0.7%	0
Waitrose, Droitwich	1.4%	11	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	5.9%	6	19.4%	4	1.9%	1
Waitrose, Stourbridge	3.4%	27	0.6%	2	0.0%	0	0.0%	0	0.0%	0	16.8%	25	0.0%	0	0.0%	0	0.0%	0
Kidderminster Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kidderminster (outside town centre)	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Tenbury Road, Bromyard	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1
Local stores, Cleobury Mortimer Town Centre	0.3%	2	0.0%	0	0.0%	0	2.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Local stores, Craven Arms Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Local stores, Ludlow Town Centre	0.2%	1	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Malvern	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1
Redditch	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	2	0.6%	0	0.0%	0
Telford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	3.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tenbury Wells	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.8%	8
Tesco, St Peters Drive, Worcester	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0
Internet	4.9%	39	4.2%	11	3.1%	3	3.2%	3	6.0%	3	4.4%	7	6.6%	6	12.6%	3	7.4%	4
Other	2.6%	21	0.0%	0	0.0%	0	0.9%	1	1.7%	1	9.2%	14	5.3%	5	0.6%	0	0.7%	0
Weighted base:		796		263		85		83		44		149		94		22		56
Sample:		797		100		99		100		99		99		100		101		99

Q02 Which retailer did you purchase your main food internet / home delivery shopping from on that occasion?
'Those who LAST did their main food and grocery shopping via the Internet at Q01:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Asda	9.1%	4	0.0%	0	0.0%	0	0.0%	0	12.2%	0	0.0%	0	51.6%	3	0.0%	0	0.0%	0
Iceland	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons	5.5%	2	0.0%	0	0.0%	0	20.6%	1	0.0%	0	21.8%	1	0.0%	0	5.1%	0	0.0%	0
Ocado	19.2%	7	0.0%	0	58.5%	2	0.0%	0	0.0%	0	56.5%	4	34.9%	2	0.0%	0	0.0%	0
Sainsbury’s	13.4%	5	0.0%	0	22.5%	1	20.6%	1	0.0%	0	21.8%	1	13.5%	1	48.7%	1	9.5%	0
Tesco	24.3%	9	0.0%	0	19.0%	0	58.7%	2	87.8%	2	0.0%	0	0.0%	0	46.2%	1	90.5%	4
Waitrose	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	28.5%	11	100.0%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		39		11		3		3		3		7		6		3		4
Sample:		34		3		3		5		5		3		5		5		5

Q03 Is this where you normally undertake your main food and grocery shopping?
Those who mentioned a specific location to do their main food shopping at Q01:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Yes	77.9%	620	73.6%	193	75.6%	64	88.2%	73	81.5%	36	73.8%	110	86.3%	81	83.0%	18	78.7%	44
No	22.1%	176	26.4%	69	24.4%	21	11.8%	10	18.5%	8	26.2%	39	13.7%	13	17.0%	4	21.3%	12
Weighted base:		796		263		85		83		44		149		94		22		56
Sample:		797		100		99		100		99		99		100		101		99

Q04 Where do you normally undertake your main food and grocery shopping?
Those who normally undertake their main food and grocery shopping at a different location to Q01: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Aldi, Bridgnorth	0.8%	1	0.0%	0	0.0%	0	0.0%	0	18.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Bromsgrove	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	1	0.0%	0	0.0%	0
Aldi, Droitwich	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	39.8%	1	0.0%	0
Aldi, Kidderminster	7.4%	11	14.4%	9	3.7%	1	0.0%	0	14.3%	1	0.0%	0	0.0%	0	4.0%	0	6.2%	1
Aldi, Leominster	0.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	0
Aldi, Ludlow	1.2%	2	0.0%	0	0.0%	0	16.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	0
Aldi, Stourbridge	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	1	0.0%	0	0.0%	0	0.0%	0
Aldi, Wollaston	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Brierley Hill	3.3%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.4%	5	0.0%	0	0.0%	0	0.0%	0
Asda, Bromsgrove	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.2%	2	4.0%	0	0.0%	0
Asda, Halesowen	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Kidderminster	2.8%	4	6.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Merry Hill	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Birmingham Road, Bromsgrove	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	1	0.0%	0	0.0%	0
Co-op, Kidderminster Road, Bewdley	0.3%	0	0.0%	0	0.0%	0	5.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Lombard Street / Tan Lane, Stourport	1.5%	2	2.2%	1	3.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	0
Co-op, Norton, Stourbridge	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Tenbury Wells	0.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	0
Co-op, The Broadway, Stourbridge	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1	0.0%	0	0.0%	0	0.0%	0
Iceland, Kidderminster	1.0%	2	0.0%	0	9.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Stourbridge	0.3%	0	0.0%	0	3.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Stourport	3.4%	5	2.6%	2	22.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
M&S Simply Food, Bridgnorth	0.2%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
M&S, Weavers Wharf, Kidderminster	0.3%	1	0.0%	0	0.0%	0	6.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Bromsgrove	3.2%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	42.4%	5	0.0%	0	0.0%	0
Morrisons, Droitwich	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.5%	1	0.0%	0
Morrisons, Kidderminster	14.6%	23	34.1%	21	3.7%	1	5.3%	0	0.0%	0	0.0%	0	0.0%	0	6.8%	0	0.0%	0
Morrisons, Leominster	1.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.3%	2
Morrisons, Rubery	1.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	1	7.1%	1	0.0%	0	0.0%	0
Sainsbury's Local, Woollaston	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Ambelcote, Brierley Hill	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.9%	2	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Blackpole, Worcester	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	0	0.0%	0
Sainsbury's, Bridgnorth	1.4%	2	0.0%	0	0.0%	0	0.0%	0	30.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Bromsgrove	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.1%	1	0.0%	0	0.0%	0
Sainsbury's, Kidderminster	12.0%	19	17.0%	11	5.3%	1	24.9%	2	3.9%	0	11.0%	4	0.0%	0	0.0%	0	7.4%	1
Tesco Express, Bewdley	0.9%	1	0.0%	0	0.0%	0	16.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Comberton Hill, Kidderminster	1.1%	2	2.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Cookley, Kiderminster	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	1	0.0%	0	0.0%	0
Tesco Extra, Stourbridge	5.4%	8	0.0%	0	5.3%	1	0.0%	0	0.0%	0	21.5%	8	0.0%	0	0.0%	0	0.0%	0
Tesco, Kidderminster	9.6%	15	17.5%	11	3.7%	1	8.9%	1	6.5%	0	4.1%	1	0.0%	0	6.8%	0	3.7%	0
Tesco, Ludlow	0.6%	1	0.0%	0	0.0%	0	0.0%	0	6.5%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	0
Tesco, Stourport	3.8%	6	0.0%	0	28.6%	5	16.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, Droitwich	1.9%	3	2.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	1	17.1%	1	0.0%	0
Waitrose, Stourbridge	2.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.7%	4	0.0%	0	0.0%	0	0.0%	0
Local stores, Areley Kings Village Centre	0.4%	1	0.0%	0	3.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Telford	0.7%	1	0.0%	0	0.0%	0	0.0%	0	15.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tenbury Wells	2.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	41.6%	4
Internet	0.8%	1	0.0%	0	7.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		155		63		16		9		7		35		12		4		11
Sample:		146		25		22		11		20		26		13		14		15

Q04A Which retailer do you normally purchase your main food internet / home delivery shopping from?
Those who normally do their main food shopping via the Internet at Q04:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Asda	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ocado	50.0%	1	0.0%	0	50.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco	50.0%	1	0.0%	0	50.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		1		0		1		0		0		0		0		0		0
Sample:		2		0		2		0		0		0		0		0		0

Q05 What is the MAIN reason you normally choose this location to do your main food and grocery shopping?
Those who normally do their main food shopping at a specific location at Q04:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Clean store	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Close to family / friends	0.5%	4	0.0%	0	0.0%	0	0.9%	1	5.0%	2	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Convenient to home	28.4%	221	21.8%	56	32.6%	26	25.7%	21	19.4%	8	35.5%	52	36.2%	33	22.1%	5	34.5%	19
Convenient to work	0.4%	3	0.0%	0	0.6%	0	0.7%	1	2.0%	1	0.0%	0	0.9%	1	0.0%	0	1.2%	1
Delivery service	2.1%	16	0.0%	0	3.3%	3	2.0%	2	6.2%	3	1.0%	1	4.1%	4	5.1%	1	5.3%	3
Easy to get to by car	3.4%	26	5.5%	14	0.0%	0	1.1%	1	1.9%	1	3.5%	5	4.6%	4	2.1%	0	1.4%	1
Easy to get to by foot	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Easy to get to by public transport	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Friendly / helpful staff	0.7%	5	1.7%	4	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	1.3%	0	0.7%	0
Good layout / easy to get around	0.7%	5	1.3%	3	1.0%	1	0.6%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0
Good offers	1.0%	8	2.2%	6	1.4%	1	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Habit / always used it	7.0%	55	5.7%	15	5.1%	4	6.6%	5	7.6%	3	11.4%	17	5.6%	5	8.4%	2	6.5%	4
Has a café	0.8%	6	1.7%	4	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Has a petrol station	0.7%	6	0.0%	0	0.0%	0	4.4%	4	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0
Large store	0.6%	5	0.6%	2	0.0%	0	0.7%	1	3.7%	2	0.0%	0	0.0%	0	0.0%	0	1.6%	1
Long opening hours	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Low prices / value for money	19.3%	150	18.4%	47	31.9%	25	20.8%	17	19.2%	8	14.6%	21	20.4%	19	18.1%	4	13.9%	8
Loyalty scheme / reward points	3.5%	27	8.3%	21	1.0%	1	2.9%	2	0.0%	0	0.0%	0	2.2%	2	1.7%	0	0.0%	0
Online shopping is convenient	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Parking - easy to find a space	1.4%	11	0.0%	0	0.6%	0	2.7%	2	6.7%	3	3.3%	5	0.0%	0	1.1%	0	0.7%	0
Parking - is free / cheap	1.0%	8	0.0%	0	0.0%	0	2.3%	2	1.1%	0	0.8%	1	4.3%	4	1.1%	0	0.0%	0
Pleasant shopping environment	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	6.6%	1	0.0%	0
Preference for retailer	6.4%	50	13.5%	35	1.7%	1	0.7%	1	7.2%	3	3.1%	5	3.0%	3	3.0%	1	3.9%	2
Quality of food goods available	6.8%	53	2.2%	6	5.6%	4	8.1%	7	5.7%	2	13.2%	19	6.3%	6	10.5%	2	11.2%	6
Quality of non-food goods available	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Range of food goods available	7.5%	58	7.3%	19	7.6%	6	7.3%	6	9.1%	4	7.1%	10	5.0%	5	9.2%	2	11.3%	6
Range of non-food goods available	0.8%	7	1.7%	4	1.0%	1	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Safe shopping environment	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Self-service checkouts	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Small / quiet store	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.7%	0
Staff discount / work there	1.9%	15	3.0%	8	1.0%	1	0.0%	0	2.5%	1	1.7%	2	2.2%	2	1.0%	0	1.4%	1
Supporting local business	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Other	2.1%	16	4.3%	11	1.4%	1	0.0%	0	0.6%	0	0.8%	1	2.0%	2	2.4%	1	0.0%	0
Has everything I need	0.3%	2	0.0%	0	1.0%	1	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
(Don't know / no particular reason)	2.0%	16	0.6%	2	1.4%	1	9.0%	7	1.5%	1	1.0%	1	1.5%	1	2.5%	1	2.9%	2
Weighted base:		777		256		80		82		43		147		92		22		55
Sample:		778		96		92		98		98		99		99		100		96

MeanScore: visits per week

Q06 How often do you normally do your main food and grocery shopping at your usual store?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Daily	1.0%	8	1.4%	4	2.0%	2	0.9%	1	1.4%	1	0.0%	0	0.8%	1	0.8%	0	0.0%	0
Two or three times a week	11.0%	88	8.7%	23	12.7%	11	9.1%	8	16.1%	7	12.7%	19	10.7%	10	8.8%	2	14.4%	8
Once a week	67.8%	543	71.7%	188	66.9%	59	66.6%	55	60.1%	26	62.4%	94	76.4%	72	63.6%	14	60.3%	34
Once a fortnight	14.0%	112	15.7%	41	13.1%	12	18.3%	15	13.6%	6	11.5%	17	6.9%	6	21.6%	5	16.7%	9
Once every three weeks	0.8%	6	0.0%	0	0.0%	0	0.9%	1	0.0%	0	3.0%	4	0.0%	0	1.3%	0	1.2%	1
Once a month	3.6%	29	1.3%	3	3.4%	3	3.6%	3	6.2%	3	6.1%	9	3.8%	4	2.9%	1	6.3%	4
Less often	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / no particular pattern)	1.9%	16	1.3%	3	2.1%	2	0.7%	1	2.7%	1	4.3%	6	1.5%	1	1.0%	0	1.2%	1
Mean:		*1.13*		*1.13*		*1.22*		*1.07*		*1.22*		*1.07*		*1.15*		*1.04*		*1.08*
Weighted base:		801		263		89		83		44		151		94		22		56
Sample:		801		100		100		100		100		100		100		101		100

MeanScore: (£)

Q07 How much does your household normally spend on main food and grocery shopping per trip?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
£1 - £5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£6 - £10	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.8%	1	1.8%	0	1.2%	1
£11 - £15	0.5%	4	0.0%	0	1.2%	1	2.6%	2	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£16 - £20	2.5%	20	2.5%	7	3.4%	3	0.9%	1	1.2%	1	3.2%	5	3.5%	3	1.9%	0	1.5%	1
£21 - £25	2.8%	23	1.2%	3	2.3%	2	0.6%	0	4.9%	2	6.6%	10	3.7%	4	1.9%	0	2.1%	1
£26 - £30	3.7%	30	2.2%	6	6.0%	5	8.4%	7	2.5%	1	3.2%	5	2.0%	2	2.3%	1	6.1%	3
£31 - £35	1.5%	12	0.9%	2	1.7%	1	2.8%	2	0.0%	0	1.6%	2	3.0%	3	2.0%	0	0.0%	0
£36 - £40	5.5%	44	9.3%	24	2.9%	3	2.6%	2	3.0%	1	3.8%	6	6.6%	6	4.6%	1	0.7%	0
£41 - £45	3.1%	25	3.1%	8	7.0%	6	1.7%	1	0.6%	0	2.6%	4	3.6%	3	7.1%	2	0.0%	0
£46 - £50	7.3%	59	6.1%	16	6.2%	5	6.9%	6	12.6%	6	8.8%	13	7.5%	7	6.4%	1	7.6%	4
£51 - £55	1.9%	16	0.9%	2	1.8%	2	1.1%	1	2.6%	1	3.2%	5	3.4%	3	1.7%	0	2.0%	1
£56 - £60	6.0%	48	9.5%	25	3.1%	3	3.0%	2	4.8%	2	3.2%	5	4.8%	5	11.1%	2	7.5%	4
£61 - £65	2.0%	16	0.0%	0	4.0%	4	2.6%	2	0.0%	0	4.2%	6	0.0%	0	7.4%	2	4.1%	2
£66 - £70	5.3%	42	8.3%	22	4.2%	4	1.8%	1	8.3%	4	2.9%	4	4.5%	4	1.3%	0	4.7%	3
£71 - £75	4.2%	34	3.4%	9	5.9%	5	2.6%	2	2.1%	1	8.2%	12	0.8%	1	7.5%	2	3.5%	2
£76 - £80	9.5%	76	9.4%	25	8.8%	8	10.4%	9	12.0%	5	7.3%	11	17.1%	16	5.7%	1	2.4%	1
£81 - £85	1.6%	13	0.6%	2	0.7%	1	0.9%	1	1.4%	1	3.5%	5	2.9%	3	1.7%	0	1.4%	1
£86 - £90	4.5%	36	6.4%	17	1.2%	1	6.6%	5	1.8%	1	4.8%	7	4.2%	4	0.0%	0	1.9%	1
£91 - £95	0.1%	1	0.0%	0	0.0%	0	0.6%	0	1.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0
£96 - £100	12.1%	97	17.5%	46	4.9%	4	12.9%	11	6.1%	3	6.0%	9	11.1%	10	9.9%	2	21.3%	12
£101 - £120	6.0%	48	7.8%	21	4.4%	4	2.5%	2	6.4%	3	7.9%	12	2.5%	2	2.6%	1	7.6%	4
£121 - £140	1.5%	12	0.0%	0	5.0%	4	3.2%	3	1.7%	1	0.8%	1	0.9%	1	5.7%	1	2.1%	1
£141 - £160	2.4%	19	3.8%	10	0.7%	1	1.6%	1	0.0%	0	1.4%	2	1.8%	2	3.4%	1	4.7%	3
£161 - £180	1.4%	11	2.3%	6	0.0%	0	1.7%	1	5.9%	3	0.0%	0	0.8%	1	1.1%	0	0.0%	0
£181 - £200	1.6%	13	0.6%	2	2.9%	3	1.2%	1	4.4%	2	1.4%	2	1.6%	2	6.4%	1	1.5%	1
£201 - £250	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
£250+	0.7%	6	1.3%	3	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	9.3%	75	2.3%	6	17.6%	16	13.2%	11	14.7%	6	9.9%	15	12.8%	12	4.9%	1	14.0%	8
(Refused)	2.2%	17	0.5%	1	4.4%	4	7.8%	6	0.0%	0	2.9%	4	0.0%	0	0.6%	0	2.1%	1
Mean:		*79.43*		*81.91*		*71.98*		*75.81*		*82.87*		*83.16*		*71.41*		*80.90*		*82.04*
Weighted base:		801		263		89		83		44		151		94		22		56
Sample:		801		100		100		100		100		100		100		101		100

Q08 How do you normally travel to do your main food and grocery shopping?
Excluding those who normally do their main food and grocery shopping via the Internet at Q04:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Car (driver)	82.2%	658	85.6%	225	77.4%	68	87.5%	73	83.7%	37	79.8%	120	78.5%	74	74.9%	17	80.7%	46
Car (passenger)	7.4%	59	4.9%	13	8.4%	7	5.1%	4	9.0%	4	13.4%	20	6.5%	6	8.7%	2	5.3%	3
Bicycle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0
Bus	1.5%	12	0.5%	1	7.3%	6	0.0%	0	0.6%	0	0.8%	1	2.0%	2	2.3%	1	1.2%	1
Mobility scooter / disability vehicle	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Motorbike	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0
Taxi	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Train	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walk	2.9%	23	3.2%	8	4.6%	4	3.5%	3	0.6%	0	0.8%	1	4.8%	4	0.0%	0	4.0%	2
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't travel - goods delivered)	5.7%	46	5.9%	15	2.3%	2	3.8%	3	6.0%	3	5.2%	8	7.5%	7	12.6%	3	8.9%	5
Weighted base:		800		263		87		83		44		151		94		22		56
Sample:		799		100		98		100		100		100		100		101		100

Q09 When you go main food shopping, is your trip normally linked with another activity?
Excluding those who normally do their main food and grocery shopping via the Internet at Q04:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Yes - go shopping for non food items	9.8%	78	9.3%	24	4.1%	4	8.1%	7	8.8%	4	13.3%	20	9.7%	9	14.4%	3	12.7%	7
Yes - go shopping for other food items	3.6%	29	5.3%	14	6.2%	5	2.9%	2	2.6%	1	2.4%	4	0.0%	0	2.9%	1	2.7%	2
Yes - get fuel	1.1%	9	1.2%	3	0.7%	1	4.4%	4	0.0%	0	0.0%	0	0.8%	1	2.4%	1	0.7%	0
Yes - travel to / from school / college / university	1.1%	9	2.3%	6	2.4%	2	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - travel to / from work	2.9%	23	2.8%	7	8.1%	7	1.6%	1	2.2%	1	1.4%	2	1.8%	2	0.0%	0	4.5%	3
Yes - use sports / leisure or entertainments facilities	3.3%	27	0.9%	2	0.0%	0	5.6%	5	3.3%	1	6.5%	10	2.8%	3	1.9%	0	9.4%	5
Yes - visit café / pub / restaurant	2.7%	21	1.8%	5	2.7%	2	3.8%	3	0.7%	0	3.9%	6	0.8%	1	1.9%	0	6.7%	4
Yes - visit family /friends	2.8%	22	2.3%	6	3.3%	3	3.3%	3	5.1%	2	2.2%	3	4.8%	4	1.7%	0	0.7%	0
Yes - visit financial service such as bank, building society, post office	3.3%	27	1.2%	3	4.7%	4	2.6%	2	2.8%	1	5.0%	8	3.6%	3	6.5%	1	6.5%	4
Yes - visit health service such as doctor, dentist, hospital, opticians	0.5%	4	0.0%	0	0.6%	0	2.0%	2	0.6%	0	0.0%	0	1.3%	1	0.6%	0	0.7%	0
Yes - visit other service such as laundrette, hairdresser, recycling	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.8%	1	1.3%	0	1.4%	1
Yes - Other	0.8%	6	1.6%	4	0.6%	0	0.0%	0	2.5%	1	0.0%	0	0.0%	0	0.6%	0	0.0%	0
No	62.5%	500	68.7%	181	63.0%	55	61.1%	51	45.5%	20	59.0%	89	69.1%	65	53.8%	12	49.6%	28
Yes - go window shopping / browsing	1.3%	10	2.2%	6	0.0%	0	0.0%	0	4.9%	2	1.6%	2	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	4.2%	33	0.5%	1	3.8%	3	4.6%	4	18.7%	8	4.7%	7	4.8%	5	12.0%	3	4.4%	2
Weighted base:		800		263		87		83		44		151		94		22		56
Sample:		799		100		98		100		100		100		100		101		100

Q10 Where do you normally do this linked trip?
Those who normally link their main food shopping with another activity at Q09: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
B&Q, Green Street, Kidderminster	0.2%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bewdley	1.4%	4	0.0%	0	0.0%	0	11.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	0
Birmingham City Centre	1.5%	4	0.0%	0	13.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	0	0.0%	0
Bridgnorth	2.6%	7	0.0%	0	0.0%	0	2.7%	1	38.9%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brierley Hill (EXCLUDING Intu Merry Hill Shopping Centre)	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0
Bromsgrove	5.5%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	61.6%	14	2.0%	0	0.0%	0
Droitwich	4.8%	13	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	20.7%	5	82.0%	6	6.0%	2
Halesowen	0.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	2	0.0%	0	0.0%	0	0.0%	0
Hereford	0.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	0
Kidderminster Town Centre (NOT Weavers Wharf)	25.4%	67	51.0%	40	25.5%	7	17.3%	5	33.3%	5	12.6%	7	0.0%	0	8.0%	1	6.0%	2
Kidderminster Town Centre (ONLY Weavers Wharf)	15.6%	41	27.4%	22	14.2%	4	27.8%	8	2.1%	0	3.7%	2	3.0%	1	0.0%	0	16.5%	4
Leominster	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.2%	1
Ludlow	5.3%	14	0.0%	0	0.0%	0	21.9%	6	5.5%	1	0.0%	0	0.0%	0	0.0%	0	26.9%	7
Malvern	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	1
Merry Hill Shopping Centre (Intu), Brierley Hill	0.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	2	0.0%	0	0.0%	0	0.0%	0
Redditch	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	1	2.0%	0	0.0%	0
Stourbridge	11.2%	29	0.0%	0	0.0%	0	0.0%	0	0.0%	0	53.5%	29	0.0%	0	0.0%	0	0.0%	0
Stourport-on-Severn	6.7%	18	1.8%	1	44.9%	13	1.6%	0	2.1%	0	2.2%	1	0.0%	0	0.0%	0	4.7%	1
Telford	0.5%	1	0.0%	0	0.0%	0	0.0%	0	7.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tenbury Wells	1.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.9%	3
Wolverhampton	1.0%	3	2.1%	2	0.0%	0	2.7%	1	2.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Worcester	1.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	0	9.9%	3
Blackpole Retail Park, Worcester	0.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	0
Crossley Retail Park, Kidderminster	2.8%	7	7.2%	6	0.0%	0	3.2%	1	1.8%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	0
Weavers Wharf, Kidderminster	0.2%	1	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	9.5%	25	10.5%	8	0.0%	0	9.7%	3	3.6%	1	17.5%	10	11.6%	3	0.0%	0	4.2%	1
Weighted base:		262		79		29		29		15		55		23		7		25
Sample:		271		29		30		33		37		38		27		36		41

Q11 Do you do ‘top up’ shopping for staple goods, such as bread and milk, in between your main food shopping?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Yes	75.5%	605	77.7%	204	67.9%	60	67.4%	56	76.1%	33	79.9%	120	72.7%	68	66.7%	15	84.4%	48
No	24.5%	197	22.3%	59	32.1%	28	32.6%	27	23.9%	11	20.1%	30	27.3%	26	33.3%	7	15.6%	9
Weighted base:		801		263		89		83		44		151		94		22		56
Sample:		801		100		100		100		100		100		100		101		100

Q12 Where do you LAST undertake this ‘top-up’ shopping?

Those who do top-up shopping at Q11: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Aldi, Bridgnorth	0.9%	5	0.8%	2	0.0%	0	0.0%	0	11.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Bromsgrove	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.9%	4	0.0%	0	0.0%	0
Aldi, Droitwich	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.0%	3	0.0%	0
Aldi, Kidderminster	1.7%	10	3.8%	8	0.0%	0	2.5%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Aldi, Ludlow	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Stourbridge	2.1%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.7%	13	0.0%	0	0.0%	0	0.0%	0
Aldi, Wollaston	3.2%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.0%	19	0.0%	0	0.0%	0	0.0%	0
Aldi, Worcester	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0
Asda, Bromsgrove	3.7%	22	2.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	25.8%	18	1.0%	0	0.0%	0
Asda, Kidderminster	0.7%	4	2.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&M, Kidderminster	0.3%	2	0.0%	0	2.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Aston Fields, Bromsgrove	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0
Co-op, Birmingham Road, Bromsgrove	1.7%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.1%	10	0.0%	0	0.0%	0
Co-op, Franche Road, Kidderminster	2.7%	16	7.1%	14	0.0%	0	2.4%	1	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, High Street, Kinver	2.7%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.3%	16	0.0%	0	0.0%	0	0.0%	0
Co-op, Highley, Bridgnorth	1.1%	6	0.0%	0	0.0%	0	0.0%	0	19.1%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Kidderminster Road, Bewdley	0.4%	2	0.0%	0	0.0%	0	4.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Load Street, Bewdley	0.5%	3	0.0%	0	0.0%	0	4.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Lombard Street / Tan Lane, Stourport	1.2%	7	0.0%	0	10.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1
Co-op, Ludlow	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0
Co-op, Norton, Stourbridge	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0
Co-op, Ombersley Road, Worcester	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	0	0.0%	0
Co-op, Tenbury Wells	0.9%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.2%	6
Co-op, The Broadway, Stourbridge	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	5	0.0%	0	0.0%	0	0.0%	0
Iceland, Bromsgrove	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	3	0.0%	0	0.0%	0
Iceland, Kidderminster	0.6%	3	1.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Worcester	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0
Lidl, Stourport	0.9%	5	0.0%	0	6.8%	4	2.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
M&S Simply Food, Bridgnorth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
M&S Worcester	0.2%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
M&S, Merryhill	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0
M&S, Weavers Wharf, Kidderminster	0.4%	2	0.7%	1	1.1%	1	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Bromsgrove	0.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.1%	5	0.0%	0	0.0%	0
Morrisons, Droitwich	2.7%	16	5.5%	11	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	24.5%	4	1.5%	1
Morrisons, Kidderminster	1.9%	11	3.6%	7	1.1%	1	1.0%	1	0.0%	0	2.1%	2	0.0%	0	1.0%	0	0.0%	0
Morrisons, Leominster	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0
Morrisons, Rubery	0.4%	2	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Local, Woollaston	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	4	1.0%	1	0.0%	0	0.0%	0
Sainsbury's, Blackpole, Worcester	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0
Sainsbury's, Bridgnorth	1.1%	6	0.0%	0	0.0%	0	1.0%	1	17.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Bromsgrove	1.4%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.3%	8	0.0%	0	0.0%	0
Sainsbury's, Kidderminster	3.0%	18	5.1%	10	3.3%	2	9.2%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0
Spar, Lickhill Road, Morrell, Stourport	0.1%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Marlpool Lane, Kidderminster	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Spar, Queensway, Stourbridge	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Spar, Tenbury Wells	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	2
Spar, Worcester Lane, Hagley, Stourbridge	2.1%	12	0.8%	2	0.0%	0	0.0%	0	0.0%	0	9.1%	11	0.0%	0	0.0%	0	0.0%	0
Tesco Express (Esso), Bewdley Hill, Kidderminster	0.7%	4	2.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express Foley Park, Kidderminster	2.7%	16	7.9%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Bewdley	1.9%	11	0.0%	0	0.0%	0	20.7%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Comberton Hill, Kidderminster	0.7%	4	2.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Cookley,	1.0%	6	3.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Kiderminster																		
Tesco Express, Spennells, Kidderminster	5.6%	33	16.3%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Stourbridge Road, Kidderminster	1.0%	6	2.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Stourbridge	1.9%	11	0.0%	0	3.1%	2	0.0%	0	0.0%	0	8.2%	10	0.0%	0	0.0%	0	0.0%	0
Tesco, Kidderminster	1.4%	8	3.3%	7	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	1
Tesco, Ludlow	0.5%	3	0.0%	0	0.0%	0	2.2%	1	2.5%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1
Tesco, Stourport	4.2%	25	0.0%	0	39.2%	21	4.5%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	0	1.7%	1
Waitrose, Droitwich	0.8%	5	0.0%	0	2.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.1%	3	0.9%	0
Waitrose, Stourbridge	1.6%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.2%	10	0.0%	0	0.0%	0	0.0%	0
Areley Common	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bewdley (outside town centre)	0.1%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bewdley Town Centre	1.4%	8	0.8%	2	0.0%	0	12.1%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chaddesley Corbett Village Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.9%	0	0.0%	0
Kidderminster Town Centre	2.2%	13	6.0%	12	0.9%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kidderminster (outside town centre)	6.3%	37	17.6%	36	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0
Stourport Town Centre	0.9%	6	0.0%	0	6.3%	3	0.0%	0	6.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stourport (outside town centre)	0.4%	2	0.0%	0	4.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgnorth	0.6%	3	0.0%	0	0.0%	0	0.0%	0	9.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bromsgrove	0.6%	4	0.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	2	0.0%	0	0.0%	0
Catshill	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	3	0.0%	0	0.0%	0
Droitwich Spa	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	6.7%	1	0.0%	0
Local stores, Abberley Village Centre	0.4%	2	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1
Local stores, Alcester Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Local stores, Alveley Village Centre	0.7%	4	0.0%	0	0.0%	0	0.0%	0	11.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Areley Kings Village Centre	0.5%	3	0.0%	0	5.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Belbroughton Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Local stores, Bromyard Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1
Local stores, Catshill Village Centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	2	0.0%	0	0.0%	0
Local stores, Cleobury Mortimer Town Centre	2.3%	13	0.0%	0	0.0%	0	17.8%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.8%	4
Local stores, Clows Top Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1
Local stores, Cutnall Green Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	0	0.0%	0
Local stores, Ditton Priors Village Centre	0.7%	4	0.0%	0	0.0%	0	0.0%	0	12.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Dunhampton Village Centre	0.1%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Far Forest Village Centre	0.2%	1	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Hartlebury Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	0	0.0%	0
Local stores, Holt Fleet Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0
Local stores, Hopton Wafers Village Centre	0.6%	4	0.0%	0	0.0%	0	6.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Kingswinford Local Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Local stores, Kinver Village Centre	1.5%	9	1.2%	2	0.0%	0	0.0%	0	0.0%	0	5.5%	7	0.0%	0	0.0%	0	0.0%	0
Local stores, Martley Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0
Local stores, Much Wenlock Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Ombersley Village Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.3%	2	0.9%	0
Local stores, Sidemoor Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Local stores, Stottesdon Village Centre	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Sytchampton	0.1%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Village Centre																		
Local stores, Wychbold Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	0	0.0%	0
Malvern	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0
Redditch	1.1%	7	0.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.2%	5	0.0%	0	0.0%	0
Stourbridge	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	3	0.0%	0	0.0%	0	0.0%	0
Telford	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tenbury Wells	3.3%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	43.7%	20
Tesco, St Peters Drive, Worcester	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0
Internet	0.7%	4	0.0%	0	7.2%	4	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	2.0%	12	0.0%	0	0.0%	0	1.4%	1	1.4%	0	5.2%	6	1.7%	1	0.0%	0	7.9%	4
Weighted base:		591		203		54		56		33		118		68		15		45
Sample:		571		75		67		70		73		77		69		62		78

Q13 Is this where you normally undertake your top-up food grocery shopping?
Those who do top-up shopping at Q11:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Yes	85.4%	517	75.7%	155	88.1%	53	92.2%	52	91.8%	31	87.6%	105	94.8%	65	82.2%	12	93.6%	45
No	14.6%	88	24.3%	50	11.9%	7	7.8%	4	8.2%	3	12.4%	15	5.2%	4	17.8%	3	6.4%	3
Weighted base:		605		204		60		56		33		120		68		15		48
Sample:		587		76		73		71		74		79		69		63		82

Q14 Where do you normally undertake your top-up food and grocery shopping?
Those who normally undertake their top-up food and grocery shopping at a different location to the one mentioned at Q13: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Aldi, Bridgnorth	1.3%	1	0.0%	0	0.0%	0	0.0%	0	33.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Bromsgrove	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	50.0%	1	0.0%	0	0.0%	0
Aldi, Stourbridge	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.4%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Kidderminster	5.1%	3	5.7%	2	16.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.7%	0	0.0%	0
Co-op, Franche Road, Kidderminster	2.5%	2	4.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, High Street, Kinver	3.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.9%	2	0.0%	0	0.0%	0	0.0%	0
Co-op, High Street, Stourbridge	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.4%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Load Street, Bewdley	2.5%	2	0.0%	0	0.0%	0	44.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Lombard Street / Tan Lane, Stourport	0.9%	1	0.0%	0	12.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Norton, Stourbridge	6.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	41.8%	4	0.0%	0	0.0%	0	0.0%	0
Iceland, Kidderminster	18.8%	13	30.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
M&S Simply Food, Bridgnorth	1.6%	1	0.0%	0	0.0%	0	0.0%	0	42.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
M&S, Weavers Wharf, Kidderminster	1.4%	1	0.0%	0	0.0%	0	23.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Droitwich	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	79.8%	2	0.0%	0
Morrisons, Kidderminster	2.5%	2	4.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Kidderminster	5.6%	4	9.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, St Johns, Worcester	0.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.6%	0	0.0%	0
Spar, Lickhill Road, Morrell, Stourport	1.2%	1	0.0%	0	17.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express (Esso), Bewdley Hill, Kidderminster	2.5%	2	4.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Comberton Hill, Kidderminster	12.9%	9	20.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Stourbridge Road, Kidderminster	1.2%	1	0.0%	0	0.0%	0	20.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Stourbridge	1.2%	1	0.0%	0	17.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Kidderminster	4.6%	3	7.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Stourport	0.7%	0	0.0%	0	10.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, Stourbridge	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.4%	1	0.0%	0	0.0%	0	0.0%	0
Kidderminster (outside town centre)	6.5%	4	10.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stourport (outside town centre)	0.7%	0	0.0%	0	0.0%	0	12.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Catshill	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	50.0%	1	0.0%	0	0.0%	0
Dudley	0.9%	1	0.0%	0	12.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local stores, Highley Village Centre	0.5%	0	0.0%	0	0.0%	0	0.0%	0	13.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Telford	0.4%	0	0.0%	0	0.0%	0	0.0%	0	11.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tenbury Wells	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	0
Other	3.4%	2	4.0%	2	12.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		67		41		5		4		2		10		2		2		0
Sample:		48		14		7		7		6		6		2		5		1

MeanScore: visits per week

Q15 How often do you undertake top-up food shopping trips?
Those who do top-up shopping at Q11:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Daily	7.4%	45	13.2%	27	4.9%	3	9.4%	5	4.8%	2	1.7%	2	2.1%	1	1.6%	0	9.6%	5
Two or three times a week	42.6%	258	44.2%	90	54.9%	33	31.2%	17	46.2%	15	44.4%	53	40.2%	27	36.4%	5	32.1%	15
Once a week	35.8%	217	32.0%	65	21.4%	13	45.0%	25	33.5%	11	40.9%	49	39.7%	27	41.0%	6	41.5%	20
Once a fortnight	4.5%	27	4.6%	9	5.1%	3	0.0%	0	4.9%	2	2.0%	2	11.4%	8	3.2%	0	5.0%	2
Once every three weeks	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	2	8.8%	1	0.0%	0
Once a month	1.4%	8	0.7%	1	1.6%	1	7.8%	4	2.2%	1	0.0%	0	0.0%	0	2.9%	0	0.8%	0
Less often	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / no particular pattern)	7.7%	47	5.4%	11	12.1%	7	6.7%	4	7.5%	3	11.0%	13	4.0%	3	6.1%	1	10.9%	5
Mean:		*2.14*		*2.51*		*2.23*		*2.05*		*2.01*		*1.85*		*1.68*		*1.58*		*2.15*
Weighted base:		605		204		60		56		33		120		68		15		48
Sample:		587		76		73		71		74		79		69		63		82

MeanScore: (£)

Q16 How much does your household normally spend on top-up shopping per trip?
Those who do top-up shopping at Q11:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
£1 - £5	18.3%	111	23.2%	47	18.8%	11	13.4%	7	12.5%	4	13.7%	17	19.4%	13	20.1%	3	15.8%	8
£6 - £10	23.5%	142	25.3%	52	21.4%	13	37.4%	21	21.9%	7	17.8%	21	27.3%	19	10.9%	2	16.7%	8
£11 - £15	11.6%	70	7.7%	16	8.8%	5	5.5%	3	18.5%	6	14.7%	18	16.1%	11	18.3%	3	17.9%	9
£16 - £20	18.1%	109	23.7%	48	11.6%	7	14.7%	8	14.7%	5	21.1%	25	11.6%	8	24.9%	4	8.0%	4
£21 - £25	4.2%	26	5.4%	11	5.1%	3	0.8%	0	2.3%	1	2.4%	3	5.5%	4	4.7%	1	6.4%	3
£26 - £30	4.5%	27	3.0%	6	12.2%	7	2.2%	1	4.3%	1	3.2%	4	4.8%	3	1.1%	0	8.4%	4
£31 - £35	0.4%	3	0.0%	0	0.0%	0	2.5%	1	3.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£36 - £40	2.2%	14	1.6%	3	1.0%	1	4.7%	3	0.0%	0	2.9%	3	0.0%	0	0.0%	0	7.4%	4
£41 - £45	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	4.9%	3	1.0%	0	1.7%	1
£46 - £50	1.3%	8	2.4%	5	2.4%	1	1.0%	1	1.4%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0
£51 - £55	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£56 - £60	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
£61 - £65	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£66 - £70	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£71 - £75	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£76 - £80	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	3.0%	0	0.0%	0
£81 - £85	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£86 - £90	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£91 - £95	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£96 - £100	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.7%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	0
£101+	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0
(Don't know / varies)	12.2%	74	6.1%	13	18.0%	11	14.8%	8	18.3%	6	17.4%	21	10.4%	7	13.9%	2	13.0%	6
(Refused)	1.9%	11	1.5%	3	0.8%	0	3.0%	2	0.0%	0	3.6%	4	0.0%	0	0.0%	0	3.9%	2
Mean:		*15.63*		*14.53*		*15.91*		*14.67*		*18.09*		*16.71*		*14.71*		*17.82*		*18.08*
Weighted base:		605		204		60		56		33		120		68		15		48
Sample:		587		76		73		71		74		79		69		63		82

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Q17 Where did you LAST go to buy clothing or footwear goods? *Excl. Nulls*																		
Matalan, Park Lane, Kidderminster	1.0%	7	2.2%	6	0.7%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Bewdley	0.2%	2	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birmingham City Centre	2.9%	22	2.0%	5	0.7%	1	0.7%	1	2.2%	1	6.0%	8	4.7%	4	7.2%	2	1.2%	1
Bridgnorth	0.6%	5	0.6%	1	0.0%	0	0.0%	0	7.5%	3	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Brierley Hill (EXCLUDING Intu Merry Hill Shopping Centre)	1.2%	9	0.0%	0	0.0%	0	0.6%	0	0.0%	0	5.7%	8	0.0%	0	0.0%	0	1.6%	1
Bromsgrove	2.4%	19	0.0%	0	0.0%	0	0.6%	0	0.0%	0	1.0%	1	18.0%	17	0.0%	0	0.0%	0
Droitwich	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	15.8%	3	0.0%	0
Hereford	1.6%	12	1.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.4%	8
Kidderminster Town Centre (NOT Weavers Wharf)	11.4%	87	19.1%	49	15.7%	12	8.0%	6	7.4%	3	7.9%	11	0.8%	1	3.9%	1	6.7%	4
Kidderminster Town Centre (ONLY Weavers Wharf)	18.2%	139	25.0%	64	30.2%	24	27.7%	22	17.5%	7	8.8%	12	2.6%	2	0.0%	0	13.9%	8
Ludlow	1.3%	10	0.0%	0	0.0%	0	9.5%	8	0.8%	0	0.9%	1	0.0%	0	0.0%	0	0.7%	0
Malvern	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	1	0.7%	0
Merry Hill Shopping Centre (Intu), Brierley Hill	15.2%	116	19.1%	49	1.5%	1	8.4%	7	4.4%	2	29.0%	41	12.0%	11	1.7%	0	10.2%	6
Redditch	2.2%	17	0.0%	0	0.7%	1	0.7%	1	0.0%	0	0.0%	0	16.9%	16	2.0%	0	0.0%	0
Shrewsbury	0.4%	3	0.0%	0	0.0%	0	0.7%	1	4.7%	2	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Solihull	1.2%	9	0.0%	0	0.0%	0	0.7%	1	0.7%	0	1.9%	3	6.3%	6	0.0%	0	0.0%	0
Stourbridge	2.0%	15	0.6%	1	0.0%	0	0.0%	0	0.0%	0	9.7%	14	0.0%	0	0.0%	0	0.0%	0
Stourport-on-Severn	1.4%	10	0.0%	0	9.0%	7	0.6%	0	0.0%	0	1.5%	2	0.0%	0	0.0%	0	1.4%	1
Telford	1.8%	14	0.0%	0	1.1%	1	4.9%	4	21.9%	9	0.0%	0	0.0%	0	0.0%	0	0.9%	0
Tenbury Wells	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	1
Wolverhampton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Worcester	9.4%	72	4.9%	13	18.2%	14	13.8%	11	0.0%	0	3.2%	4	9.9%	9	32.6%	7	24.3%	13
Crossley Retail Park, Kidderminster	0.8%	6	1.2%	3	0.7%	1	0.0%	0	6.1%	2	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Merry Hill Retail Park, Dudley	6.4%	49	8.1%	21	2.7%	2	6.2%	5	0.7%	0	7.8%	11	10.2%	9	0.7%	0	0.0%	0
Weavers Wharf, Kidderminster	2.8%	22	5.9%	15	2.6%	2	1.8%	1	4.1%	2	0.0%	0	0.0%	0	6.5%	1	0.0%	0
Abroad	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	1.1%	0	0.0%	0
Cheltenham Town Centre	0.3%	2	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	1.2%	1
Junction 10 Retail Park, Bentley Mill Way, Walsall	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0
Longbridge	1.1%	9	0.7%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	5.0%	5	3.9%	1	0.0%	0
Manchester City Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ombersley Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.2%	1	0.0%	0
Rubery Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Sainsbury's, Carpet Trades Way, Kidderminster	0.6%	4	1.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stratford-upon-Avon Town Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.8%	0	0.0%	0
Wychbold Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Internet / catalogue / mail order	9.3%	71	5.8%	15	11.6%	9	11.7%	9	14.8%	6	9.5%	13	9.6%	9	12.4%	3	13.1%	7
Other	2.2%	17	1.7%	4	3.1%	2	1.7%	1	4.1%	2	1.9%	3	1.7%	2	0.7%	0	4.7%	3
Weighted base:		763		255		79		81		40		140		92		22		54
Sample:		764		96		95		96		92		92		98		99		96

Column %ges.

Q18 Where else do you buy clothing or footwear? [MR]
Those who buy clothing and footwear at Q17: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Matalan, Park Lane, Kidderminster	0.9%	5	0.8%	1	0.0%	0	1.0%	0	0.0%	0	1.3%	1	0.0%	0	3.2%	0	4.4%	1
Bewdley	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0
Birmingham City Centre	7.9%	40	3.1%	6	10.5%	6	13.8%	6	9.0%	2	10.8%	10	12.9%	8	5.2%	1	2.0%	0
Bridgnorth	1.9%	10	2.3%	4	0.0%	0	0.0%	0	20.8%	5	0.0%	0	0.0%	0	1.1%	0	0.0%	0
Brierley Hill (EXCLUDING Intu Merry Hill Shopping Centre)	2.0%	10	3.6%	7	1.0%	1	0.0%	0	1.3%	0	1.6%	1	1.1%	1	0.0%	0	2.8%	1
Bromsgrove	2.0%	10	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0	14.3%	9	3.9%	1	0.0%	0
Droitwich	1.1%	6	0.9%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	25.9%	3	0.0%	0
Hereford	0.9%	5	0.0%	0	0.0%	0	1.7%	1	1.8%	0	0.0%	0	0.0%	0	0.0%	0	13.8%	3
Kidderminster Town Centre (NOT Weavers Wharf)	12.6%	64	17.0%	31	10.1%	6	15.6%	7	11.0%	3	11.7%	11	1.1%	1	16.5%	2	13.0%	3
Kidderminster Town Centre (ONLY Weavers Wharf)	14.2%	72	10.5%	19	17.4%	10	15.1%	7	19.0%	5	18.5%	17	11.5%	7	8.0%	1	22.9%	5
Ludlow	0.1%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Malvern	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	0	3.3%	1
Merry Hill Shopping Centre (Intu), Brierley Hill	19.6%	100	17.6%	32	22.1%	13	10.7%	5	14.7%	4	38.1%	35	12.4%	8	0.0%	0	9.5%	2
Redditch	3.2%	16	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	23.3%	15	3.9%	1	0.0%	0
Shrewsbury	1.9%	10	2.3%	4	0.0%	0	7.9%	4	3.9%	1	0.0%	0	0.0%	0	0.0%	0	3.6%	1
Solihull	4.6%	23	3.3%	6	2.6%	2	0.0%	0	0.0%	0	4.8%	4	15.0%	10	1.8%	0	5.1%	1
Stourbridge	1.9%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.0%	8	1.8%	1	0.0%	0	0.0%	0
Stourport-on-Severn	1.1%	5	0.0%	0	6.4%	4	1.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Telford	1.2%	6	0.0%	0	1.0%	1	0.0%	0	22.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wolverhampton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Worcester	14.6%	74	11.4%	21	20.6%	12	21.8%	10	2.3%	1	6.4%	6	20.0%	13	37.4%	5	29.1%	7
Blackpole Retail Park, Worcester	0.3%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	1.7%	0
Crossley Retail Park, Kidderminster	3.6%	19	7.6%	14	0.8%	0	1.0%	0	1.1%	0	3.5%	3	0.0%	0	0.0%	0	0.0%	0
Merry Hill Retail Park, Dudley	8.3%	42	8.7%	16	12.2%	7	12.4%	6	9.7%	2	5.7%	5	7.7%	5	2.8%	0	0.0%	0
Weavers Wharf, Kidderminster	3.3%	17	7.9%	14	0.0%	0	2.0%	1	1.7%	0	0.0%	0	0.0%	0	8.6%	1	0.0%	0
Cheltenham Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	0	3.3%	1
Easter Park, Worcester Road, Kidderminster	0.1%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Longbridge	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.9%	4	0.0%	0	0.0%	0
Lye Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Carpet Trades Way, Kidderminster	0.4%	2	0.9%	2	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / catalogue / mail order	10.4%	53	11.5%	21	7.0%	4	16.0%	7	7.4%	2	13.0%	12	6.5%	4	5.0%	1	5.3%	1
Other	1.6%	8	0.0%	0	2.3%	1	3.4%	2	1.8%	0	2.6%	2	1.1%	1	3.9%	1	5.1%	1
Weighted base:		509		184		58		46		26		93		65		13		24
Sample:		481		64		70		56		54		57		66		68		46

Column %ges.

Q19 When shopping for clothing and footwear at (LOCATION MENTIONED AT Q17), do you normally link this trip with another activity?
Those who buy clothing and footwear (excluding via the Internet) at Q17:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Yes - go shopping for other non-food items	7.2%	51	7.4%	18	2.6%	2	7.3%	5	12.0%	4	10.1%	13	4.7%	4	8.6%	2	5.7%	3
Yes - go shopping for food items	4.6%	33	1.0%	2	6.7%	5	10.9%	8	12.1%	4	4.6%	6	1.7%	1	8.9%	2	7.9%	4
Yes - get fuel	0.3%	2	0.0%	0	0.7%	0	0.0%	0	0.7%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Yes - travel to / from school / college / university	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - travel to / from work	1.2%	9	1.8%	4	0.8%	1	1.9%	1	0.0%	0	0.0%	0	2.4%	2	0.7%	0	0.8%	0
Yes - use sports / leisure or entertainments facilities	1.2%	9	0.0%	0	0.8%	1	4.9%	4	0.0%	0	2.0%	3	0.8%	1	0.0%	0	2.2%	1
Yes - visit café / pub / restaurant	13.9%	99	13.8%	34	25.2%	19	4.9%	4	8.0%	3	15.5%	20	17.1%	14	12.2%	2	6.0%	3
Yes - visit family / friends	2.2%	16	1.6%	4	0.0%	0	2.5%	2	2.2%	1	2.5%	3	2.3%	2	4.3%	1	6.6%	3
Yes - visit financial service such as bank, building society, post office	1.5%	11	1.8%	4	0.0%	0	3.0%	2	0.7%	0	0.0%	0	2.3%	2	2.0%	0	3.1%	1
Yes - visit health service such as doctor, dentist, hospital, opticians	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Yes - visit other service such as launderette, hairdresser, recycling	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.8%	0
Yes - Other	1.3%	9	1.8%	4	0.8%	1	0.0%	0	0.0%	0	2.9%	4	0.0%	0	2.5%	0	0.0%	0
No	59.7%	425	62.6%	154	51.6%	39	57.8%	42	56.6%	21	57.7%	76	65.8%	55	47.6%	9	62.0%	29
Yes - go window shopping / browsing	2.6%	18	5.2%	13	4.0%	3	0.6%	0	0.9%	0	0.9%	1	0.0%	0	2.0%	0	0.0%	0
Yes - holiday activities	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	1.3%	0	1.0%	0
(Don't know / varies)	3.9%	28	3.1%	8	6.9%	5	6.1%	4	5.0%	2	2.8%	4	2.2%	2	8.4%	2	3.9%	2
Weighted base:		712		246		75		73		37		131		83		19		47
Sample:		699		92		90		90		85		85		93		82		82

Column %ges.

Q20 Where did you LAST buy books, CDs or DVDs?
Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Bewdley	0.2%	1	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birmingham City Centre	1.2%	7	0.0%	0	0.0%	0	0.9%	1	0.0%	0	6.4%	7	0.0%	0	0.0%	0	0.0%	0
Bridgnorth	0.6%	4	0.0%	0	0.0%	0	0.9%	1	9.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bromsgrove	1.7%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.4%	10	0.8%	0	0.0%	0
Droitwich	1.2%	7	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	24.2%	4	2.5%	1
Hereford	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1
Kidderminster Town Centre (NOT Weavers Wharf)	6.2%	36	13.4%	26	5.4%	3	2.4%	2	0.8%	0	2.6%	3	0.0%	0	1.6%	0	3.8%	2
Kidderminster Town Centre (ONLY Weavers Wharf)	2.3%	13	2.2%	4	4.9%	3	0.0%	0	3.1%	1	1.2%	1	0.0%	0	0.0%	0	8.4%	4
Leominster	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	2
Ludlow	1.2%	7	0.0%	0	0.0%	0	7.7%	5	0.0%	0	1.2%	1	0.0%	0	0.0%	0	2.5%	1
Merry Hill Shopping Centre (Intu), Brierley Hill	7.5%	44	6.2%	12	3.4%	2	2.3%	1	8.1%	3	18.6%	19	4.8%	3	0.0%	0	7.5%	3
Redditch	1.1%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.2%	7	0.0%	0	0.0%	0
Shrewsbury	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Solihull	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	2	0.0%	0	0.0%	0
Stourbridge	1.5%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.2%	9	0.0%	0	0.0%	0	0.0%	0
Stourport-on-Severn	0.9%	5	0.0%	0	5.8%	4	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.8%	0	0.0%	0
Telford	0.8%	5	0.0%	0	0.0%	0	0.0%	0	14.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tenbury Wells	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1
Worcester	5.7%	33	6.9%	13	3.4%	2	10.5%	7	0.0%	0	0.0%	0	7.3%	5	17.0%	3	8.2%	3
Crossley Retail Park, Kidderminster	0.7%	4	1.6%	3	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0
Merry Hill Retail Park, Dudley	2.5%	15	0.7%	1	0.0%	0	4.5%	3	0.0%	0	7.5%	8	4.2%	3	0.0%	0	0.0%	0
Weavers Wharf, Kidderminster	0.3%	2	0.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Amblecote Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Blackheath Town Centre	0.4%	2	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cookley Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Kinver Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Morrisons, Buntsford Park Road, Bromsgrove	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0
Ombersley Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0
Sainsbury's, Carpet Trades Way, Kidderminster	0.1%	1	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0
Internet / catalogue / mail order	61.2%	357	66.4%	130	74.4%	46	68.3%	43	59.1%	19	49.8%	52	50.7%	32	54.8%	10	55.5%	23
Other	0.7%	4	0.0%	0	1.3%	1	0.0%	0	1.4%	0	1.2%	1	1.1%	1	0.0%	0	1.6%	1
Weighted base:		582		197		62		63		32		104		64		18		42
Sample:		549		75		67		70		65		65		63		74		70

Q21 Where did you LAST buy small household goods, such as home furnishings, glass and china items?
Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
B&Q, Green Street, Kidderminster	0.5%	2	0.0%	0	1.5%	1	1.0%	0	0.0%	0	0.0%	0	0.0%	0	7.3%	1	0.0%	0
Carters Furniture, New Road, Kidderminster	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0
Homebase, Chester Road South, Kidderminster	0.9%	4	2.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Matalan, Park Lane, Kidderminster	0.2%	1	0.0%	0	0.9%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wigleys DIY, Sandy Lane Industrial Estate, Stourport	0.1%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bewdley	0.1%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birmingham City Centre	1.9%	10	0.8%	2	1.5%	1	1.2%	1	1.7%	0	2.5%	2	6.6%	3	2.5%	0	2.6%	1
Bridgnorth	0.2%	1	0.0%	0	0.0%	0	0.0%	0	3.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bromsgrove	1.5%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.6%	8	0.0%	0	0.0%	0
Droitwich	1.3%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	1.5%	1	29.0%	4	0.0%	0
Halesowen	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0
Hereford	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	2
Kidderminster Town Centre (NOT Weavers Wharf)	22.2%	112	31.4%	66	14.4%	8	36.0%	16	13.0%	3	17.4%	14	3.0%	1	2.8%	0	10.0%	3
Kidderminster Town Centre (ONLY Weavers Wharf)	9.5%	48	6.8%	14	26.4%	15	9.5%	4	5.4%	1	15.3%	12	1.5%	1	0.0%	0	0.0%	0
Leominster	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0
Ludlow	0.9%	5	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.2%	4
Malvern	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	0	0.0%	0
Merry Hill Shopping Centre (Intu), Brierley Hill	8.4%	43	5.5%	12	0.0%	0	3.0%	1	2.7%	1	28.2%	23	12.3%	6	0.0%	0	1.8%	0
Redditch	1.7%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.6%	9	0.0%	0	0.0%	0
Shrewsbury	0.2%	1	0.0%	0	0.0%	0	0.0%	0	3.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Solihull	1.2%	6	0.8%	2	4.1%	2	1.2%	1	0.0%	0	0.0%	0	3.3%	2	1.6%	0	0.0%	0
Stourbridge	1.7%	9	0.0%	0	0.9%	0	0.0%	0	0.0%	0	9.9%	8	0.0%	0	0.9%	0	0.0%	0
Stourport-on-Severn	0.5%	2	0.0%	0	4.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Telford	1.1%	5	0.0%	0	0.0%	0	0.0%	0	20.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tenbury Wells	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	1
Worcester	5.1%	26	4.7%	10	4.6%	3	13.9%	6	0.0%	0	2.5%	2	4.5%	2	7.8%	1	7.2%	2
Blackpole Retail Park, Worcester	2.3%	12	0.0%	0	1.0%	1	2.0%	1	0.0%	0	0.0%	0	10.4%	5	24.0%	4	6.4%	2
Crossley Retail Park, Kidderminster	10.7%	54	17.6%	37	10.0%	6	2.2%	1	10.8%	3	5.6%	4	2.5%	1	1.6%	0	7.8%	2
Merry Hill Retail Park, Dudley	1.3%	7	0.8%	2	2.3%	1	1.2%	1	0.0%	0	1.5%	1	4.3%	2	0.0%	0	0.0%	0
Weavers Wharf, Kidderminster	0.4%	2	0.0%	0	1.0%	1	2.2%	1	0.0%	0	0.0%	0	0.0%	0	3.1%	0	0.0%	0
Dudley Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Homebase, Sherwood Road, Bromsgrove	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1	0.0%	0	0.0%	0
Ikea, Park Lane, Wednesbury	1.7%	9	0.0%	0	2.7%	2	0.0%	0	3.1%	1	4.1%	3	5.4%	2	0.0%	0	1.5%	0
Junction 10 Retail Park, Bentley Mill Way, Walsall	0.2%	1	0.0%	0	0.9%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Longbridge	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1	1.6%	0	0.0%	0
Sainsbury's, Carpet Trades Way, Kidderminster	1.4%	7	2.0%	4	0.0%	0	4.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1
Wednesbury Town Centre	0.6%	3	0.0%	0	2.7%	2	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0
Internet / catalogue / mail order	19.5%	99	27.5%	58	19.8%	11	17.6%	8	21.1%	6	5.6%	4	4.3%	2	14.5%	2	28.7%	7
Other	0.9%	4	0.0%	0	1.0%	1	0.0%	0	13.0%	3	0.0%	0	0.0%	0	1.9%	0	0.0%	0
Weighted base:		507		211		57		45		27		80		46		15		26
Sample:		443		74		63		52		55		49		44		63		43

Q22 Where did you LAST buy goods such as toys, games, bicycles and other sports or recreational goods?
Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Go Outdoors, Hoo Farm Industrial Estate, Kidderminster	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0
Screwfix, Easter Park, Kidderminster	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	2	0.0%	0	0.0%	0	0.0%	0
Birmingham City Centre	1.1%	5	1.2%	2	0.0%	0	0.0%	0	0.0%	0	2.6%	2	2.5%	1	0.0%	0	0.0%	0
Bridgnorth	0.2%	1	0.0%	0	0.0%	0	0.0%	0	4.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bromsgrove	2.9%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	26.4%	13	1.9%	0	0.0%	0
Droitwich	0.9%	4	0.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	19.0%	2	1.4%	0
Halesowen	1.1%	5	2.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0
Hereford	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.6%	3
Kidderminster Town Centre (NOT Weavers Wharf)	11.3%	54	18.2%	35	8.0%	5	22.6%	9	5.3%	1	1.7%	1	1.5%	1	1.1%	0	6.1%	2
Kidderminster Town Centre (ONLY Weavers Wharf)	8.8%	42	4.0%	8	19.5%	12	20.1%	8	12.1%	3	8.4%	6	0.0%	0	9.1%	1	14.9%	4
Merry Hill Shopping Centre (Intu), Brierley Hill	6.0%	28	2.3%	4	2.3%	1	1.2%	0	7.0%	2	22.8%	17	7.9%	4	0.0%	0	0.0%	0
Redditch	0.7%	3	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	4.2%	2	5.4%	1	0.0%	0
Shrewsbury	0.3%	1	0.0%	0	0.0%	0	0.0%	0	5.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Solihull	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	2.5%	1	0.0%	0	0.0%	0
Stourbridge	2.0%	10	0.7%	1	0.0%	0	0.0%	0	0.0%	0	11.2%	8	0.0%	0	0.0%	0	0.0%	0
Stourport-on-Severn	0.4%	2	0.0%	0	3.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0
Telford	1.3%	6	0.0%	0	0.0%	0	3.4%	1	19.5%	4	0.0%	0	0.0%	0	0.0%	0	1.7%	0
Tenbury Wells	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	0
Wolverhampton	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0
Worcester	2.0%	10	0.7%	1	4.8%	3	1.2%	0	0.0%	0	0.0%	0	2.5%	1	11.5%	1	7.5%	2
Blackpole Retail Park, Worcester	0.4%	2	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	0	0.0%	0
Crossley Retail Park, Kidderminster	21.5%	102	42.0%	81	23.2%	14	7.9%	3	6.3%	1	0.0%	0	3.0%	1	3.1%	0	3.1%	1
Merry Hill Retail Park, Dudley	4.2%	20	0.9%	2	0.0%	0	0.0%	0	0.0%	0	22.7%	17	3.2%	2	0.0%	0	0.0%	0
Weavers Wharf, Kidderminster	0.7%	4	0.0%	0	1.0%	1	1.2%	0	0.0%	0	0.0%	0	1.8%	1	4.4%	1	4.0%	1
Abroad	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0
Cradley Heath Town Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Drayton Village Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Longbridge	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1	0.0%	0	0.0%	0
Lye Village Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0
Oldbury Town Centre	0.9%	5	1.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1	0.0%	0	0.0%	0
Sainsbury's, Carpet Trades Way, Kidderminster	0.1%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wychbold Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	0	0.0%	0
Internet / catalogue / mail order	29.1%	139	25.1%	48	33.7%	21	37.9%	15	38.9%	9	15.6%	11	36.1%	17	36.6%	5	47.0%	13
Other	1.0%	5	0.0%	0	1.9%	1	2.0%	1	0.0%	0	1.7%	1	1.8%	1	0.0%	0	2.4%	1
Weighted base:		476		193		61		39		22		73		47		12		28
Sample:		394		71		61		41		45		41		43		49		43

Column %ges.

Q23 Where did you LAST buy chemist goods, including health and beauty products?
Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Bewdley	2.2%	16	0.0%	0	0.0%	0	21.3%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birmingham City Centre	0.6%	5	0.6%	2	0.7%	1	0.7%	1	0.0%	0	0.0%	0	0.8%	1	5.1%	1	0.0%	0
Bridgnorth	2.6%	20	0.0%	0	0.0%	0	1.0%	1	44.7%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brierley Hill (EXCLUDING Intu Merry Hill Shopping Centre)	0.3%	2	0.0%	0	0.0%	0	0.6%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Bromsgrove	8.8%	66	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	74.7%	66	2.2%	0	0.0%	0
Droitwich	3.3%	25	0.0%	0	5.9%	5	0.0%	0	0.0%	0	0.0%	0	4.4%	4	70.2%	15	0.8%	0
Hereford	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	2
Kidderminster Town Centre (NOT Weavers Wharf)	22.0%	167	53.8%	138	9.3%	8	13.8%	11	9.5%	4	3.3%	4	0.0%	0	2.4%	1	2.4%	1
Kidderminster Town Centre (ONLY Weavers Wharf)	12.5%	95	22.8%	59	15.3%	13	20.6%	16	3.1%	1	2.0%	3	0.0%	0	0.6%	0	6.2%	3
Leominster	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	2
Ludlow	1.0%	7	0.0%	0	0.0%	0	4.0%	3	3.8%	2	0.0%	0	0.0%	0	0.0%	0	5.0%	3
Malvern	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Merry Hill Shopping Centre (Intu), Brierley Hill	3.1%	23	2.1%	5	0.0%	0	1.0%	1	0.0%	0	8.6%	12	4.4%	4	0.0%	0	3.3%	2
Redditch	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	2.0%	0	0.0%	0
Shrewsbury	0.2%	2	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	0
Solihull	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Stourbridge	8.2%	62	0.9%	2	0.7%	1	0.0%	0	0.0%	0	43.8%	59	0.0%	0	0.0%	0	0.0%	0
Stourport-on-Severn	7.1%	54	1.2%	3	52.8%	45	4.0%	3	0.0%	0	0.9%	1	0.0%	0	1.3%	0	2.3%	1
Telford	0.5%	4	0.0%	0	0.0%	0	0.0%	0	8.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tenbury Wells	3.0%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	44.4%	23
Worcester	2.0%	15	0.5%	1	1.4%	1	3.1%	2	0.0%	0	0.0%	0	2.4%	2	3.1%	1	14.7%	8
Crossley Retail Park, Kidderminster	2.3%	18	5.6%	14	0.6%	0	0.7%	1	5.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Merry Hill Retail Park, Dudley	1.5%	11	0.0%	0	0.9%	1	0.0%	0	0.0%	0	7.1%	10	0.8%	1	0.0%	0	0.0%	0
Weavers Wharf, Kidderminster	0.4%	3	0.6%	2	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Areley Kings Village Centre	0.1%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bromyard Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0
Catshill Village Centre	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	5	0.0%	0	0.0%	0
Chaddesley Corbett Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0
Cheltenham Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Cleobury Mortimer Town Centre	1.9%	15	0.0%	0	0.0%	0	18.8%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Highley Village Centre	0.8%	6	0.0%	0	0.0%	0	0.0%	0	14.4%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinver Village Centre	1.8%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.1%	14	0.0%	0	0.0%	0	0.0%	0
Manchester City Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0
Morrisons, Buntsford Park Road, Bromsgrove	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	3	0.0%	0	0.0%	0
Morrisons, Green Street, Kidderminster	0.7%	5	1.2%	3	0.7%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Norton Village Centre	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	5	0.0%	0	0.0%	0	0.0%	0
Ombersley Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.8%	0
Sainsbury's, Carpet Trades Way, Kidderminster	2.0%	15	3.9%	10	0.0%	0	3.7%	3	5.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stratford-upon-Avon Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Tesco, Severn Road, Stourport	0.9%	7	0.6%	2	6.3%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wollaston Village Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0
Wombourne Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Internet / catalogue / mail order	3.7%	28	5.3%	13	3.3%	3	3.9%	3	0.8%	0	2.7%	4	0.8%	1	8.4%	2	3.6%	2
Other	3.1%	24	0.6%	2	1.0%	1	1.0%	1	0.6%	0	13.3%	18	0.8%	1	2.2%	0	1.5%	1
Weighted base:		759		256		85		77		42		136		88		22		51
Sample:		754		98		95		95		95		88		93		101		89

Q24 Where did you LAST buy electrical items, such as a washing machine, fridge, television or computers?
Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
B&Q, Green Street, Kidderminster	0.4%	3	0.7%	2	1.1%	1	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Homebase, Chester Road South, Kidderminster	0.7%	5	1.9%	4	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bewdley	0.7%	5	1.9%	4	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birmingham City Centre	0.7%	5	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	4.9%	4	1.5%	0	1.3%	1
Bridgnorth	0.8%	5	0.0%	0	0.0%	0	0.0%	0	13.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brierley Hill (EXCLUDING Intu Merry Hill Shopping Centre)	0.5%	3	0.0%	0	0.0%	0	0.7%	0	0.7%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Bromsgrove	4.4%	30	0.0%	0	0.7%	0	0.0%	0	0.7%	0	0.0%	0	40.0%	29	1.3%	0	0.0%	0
Droitwich	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.5%	3	0.0%	0
Halesowen	0.8%	6	1.9%	4	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Hereford	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.9%	4
Kidderminster Town Centre (NOT Weavers Wharf)	7.2%	49	12.5%	29	8.2%	6	12.6%	8	3.5%	1	2.2%	3	1.6%	1	1.5%	0	0.0%	0
Kidderminster Town Centre (ONLY Weavers Wharf)	2.8%	19	4.0%	9	7.0%	5	3.4%	2	2.7%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Leominster	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0
Ludlow	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0
Merry Hill Shopping Centre (Intu), Brierley Hill	2.9%	20	0.0%	0	1.4%	1	0.0%	0	0.0%	0	13.9%	17	2.6%	2	0.0%	0	0.0%	0
Redditch	1.4%	10	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	11.9%	9	2.3%	0	0.0%	0
Solihull	1.5%	10	0.0%	0	3.1%	2	0.0%	0	0.0%	0	0.0%	0	10.5%	8	0.8%	0	0.0%	0
Stourbridge	2.6%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.6%	18	0.0%	0	0.0%	0	0.0%	0
Stourport-on-Severn	3.2%	22	4.7%	11	7.9%	6	4.2%	3	0.0%	0	1.7%	2	0.0%	0	0.9%	0	0.0%	0
Telford	0.8%	5	0.0%	0	0.0%	0	0.0%	0	14.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tenbury Wells	2.7%	18	0.0%	0	0.0%	0	2.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	32.5%	17
Worcester	1.5%	10	1.2%	3	0.0%	0	3.2%	2	0.0%	0	0.0%	0	2.9%	2	7.4%	1	3.7%	2
Blackpole Retail Park, Worcester	1.8%	12	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	4.6%	3	24.9%	5	6.9%	4
Crossley Retail Park, Kidderminster	24.6%	167	38.5%	89	43.5%	33	28.8%	19	15.2%	6	11.6%	14	1.2%	1	6.3%	1	6.0%	3
Merry Hill Retail Park, Dudley	3.6%	25	0.0%	0	0.0%	0	1.1%	1	0.0%	0	15.8%	19	6.2%	4	0.0%	0	0.0%	0
Weavers Wharf, Kidderminster	1.0%	7	1.3%	3	2.7%	2	1.8%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0
Amblecote Village Centre	0.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	5	0.0%	0	0.0%	0	0.0%	0
Cleobury Mortimer Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cradley Heath Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Dudley Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kingswinford Local Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Lye Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Roman Way Retail Park, Droitwich	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.7%	1	0.0%	0
Sainsbury's, Carpet Trades Way, Kidderminster	1.1%	8	0.0%	0	0.0%	0	6.1%	4	1.2%	0	1.7%	2	0.0%	0	0.0%	0	2.1%	1
Wollaston Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Internet / catalogue / mail order	28.2%	191	30.8%	71	22.8%	17	31.4%	21	44.5%	17	24.4%	30	13.6%	10	30.1%	6	36.6%	19
Other	1.1%	7	0.7%	2	0.0%	0	2.1%	1	1.2%	0	3.0%	4	0.0%	0	0.8%	0	0.0%	0
Weighted base:		678		232		75		67		39		122		72		19		51
Sample:		672		87		86		87		85		78		74		83		92

Column %ges.

Q25 Where did you LAST buy DIY and garden goods?
Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
B&Q, Green Street, Kidderminster	50.0%	340	75.2%	186	57.2%	42	55.6%	38	47.1%	17	29.4%	34	4.1%	3	24.3%	4	36.0%	16
Homebase, Chester Road South, Kidderminster	4.1%	28	4.7%	12	6.1%	4	2.3%	2	0.0%	0	6.6%	8	2.4%	2	2.4%	0	0.9%	0
Screwfix, Easter Park, Kidderminster	3.6%	25	6.2%	15	0.8%	1	8.8%	6	0.0%	0	1.8%	2	0.0%	0	1.6%	0	0.9%	0
Wigleys DIY, Sandy Lane Industrial Estate, Stourport	1.4%	10	0.0%	0	8.2%	6	4.1%	3	0.0%	0	0.0%	0	0.0%	0	5.1%	1	0.0%	0
Bridgnorth	0.7%	5	0.0%	0	0.0%	0	0.0%	0	14.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brierley Hill (EXCLUDING Intu Merry Hill Shopping Centre)	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Bromsgrove	6.9%	47	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	4	53.9%	42	1.6%	0	0.0%	0
Droitwich	1.5%	11	0.0%	0	2.9%	2	0.0%	0	0.0%	0	0.0%	0	3.5%	3	27.7%	5	1.9%	1
Halesowen	2.6%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.2%	17	0.0%	0	0.8%	0	0.0%	0
Hereford	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1
Kidderminster Town Centre (NOT Weavers Wharf)	3.4%	23	5.0%	12	1.5%	1	9.2%	6	4.7%	2	1.3%	1	0.0%	0	0.8%	0	0.0%	0
Kidderminster Town Centre (ONLY Weavers Wharf)	0.8%	5	0.7%	2	4.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Leominster	1.4%	10	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0	0.0%	0	20.2%	9
Ludlow	0.8%	5	0.0%	0	0.0%	0	5.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	2
Malvern	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0
Merry Hill Shopping Centre (Intu), Brierley Hill	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	1.5%	1	1.0%	0	0.0%	0
Redditch	1.9%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.4%	13	0.0%	0	0.0%	0
Shrewsbury	0.3%	2	0.0%	0	0.0%	0	0.0%	0	6.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Solihull	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Stourbridge	2.5%	17	0.0%	0	0.8%	1	0.0%	0	0.0%	0	14.3%	16	0.0%	0	0.0%	0	0.0%	0
Stourport-on-Severn	2.7%	18	1.0%	2	14.3%	11	7.4%	5	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.9%	0
Telford	0.9%	6	0.0%	0	0.0%	0	0.0%	0	18.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tenbury Wells	0.9%	6	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.8%	5
Wolverhampton	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Worcester	0.5%	3	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	1	2.7%	1
Blackpole Retail Park, Worcester	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	1	5.8%	3
Crossley Retail Park, Kidderminster	0.8%	5	0.7%	2	1.3%	1	1.5%	1	0.9%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Merry Hill Retail Park, Dudley	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	4	0.0%	0	0.0%	0	0.0%	0
Weavers Wharf, Kidderminster	0.1%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Albrighton Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Jinnah Road, Smallwood, Redditch	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	4	2.5%	0	0.0%	0
B&Q, Mill Street, Leominster	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	2
B&Q, Mucklow Hill, Halesowen	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	3	0.0%	0	1.4%	0	0.0%	0
Clent Village Centre	0.7%	5	0.6%	1	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.9%	1	0.0%	0	0.0%	0
Cleobury Mortimer Town Centre	0.1%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Droitwich Spa	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	3	0.0%	0	0.0%	0
Homebase, Hylton Road, Worcester	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	1
Homebase, Sherwood Road, Bromsgrove	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	4	0.0%	0	0.0%	0
Kingswinford Local Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Lye Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Norton Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Oldbury Town Centre	0.6%	4	1.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ombersley Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0
Roman Way Retail Park, Droitwich	0.9%	6	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	1.5%	1	18.9%	3	0.0%	0
Wollaston Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Wychbold Village Centre	0.3%	2	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Internet / catalogue / mail order	2.3%	16	3.1%	8	0.8%	1	2.5%	2	4.5%	2	1.1%	1	0.9%	1	2.2%	0	3.8%	2
Other	1.5%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.5%	10	0.0%	0	0.8%	0	0.0%	0
Weighted base:		680		248		73		68		35		115		79		18		45
Sample:		649		91		86		86		79		72		81		79		75

Column %ges.

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8

Q26 Where did you LAST buy furniture, carpets and floor coverings?
Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
B&Q, Green Street, Kidderminster	3.0%	14	2.7%	5	7.1%	3	6.2%	3	1.1%	0	3.6%	3	0.0%	0	0.0%	0	1.2%	0
Carters Furniture, New Road, Kidderminster	2.1%	10	1.4%	2	1.1%	0	8.8%	4	0.0%	0	1.7%	1	0.0%	0	1.3%	0	4.8%	2
Homebase, Chester Road South, Kidderminster	1.2%	6	1.0%	2	9.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rowe Carpets, Green Street, Kidderminster	0.4%	2	0.0%	0	0.0%	0	1.2%	1	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Wyre Forest Furniture Centre, Green Street, Kidderminster	0.3%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1
Bewdley	0.1%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birmingham City Centre	1.4%	7	0.0%	0	0.0%	0	2.8%	1	0.0%	0	3.3%	2	4.8%	3	2.5%	0	0.0%	0
Bridgnorth	1.0%	4	0.0%	0	0.0%	0	0.0%	0	17.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bromsgrove	5.4%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	45.4%	24	2.1%	0	0.0%	0
Droitwich	4.2%	19	2.9%	5	1.4%	1	8.2%	4	0.0%	0	2.6%	2	3.9%	2	47.4%	5	1.2%	0
Hereford	0.5%	2	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	1
Kidderminster Town Centre (NOT Weavers Wharf)	20.1%	92	31.5%	54	27.8%	12	24.3%	11	8.9%	2	8.9%	7	3.5%	2	12.2%	1	8.1%	3
Kidderminster Town Centre (ONLY Weavers Wharf)	5.8%	26	4.7%	8	16.9%	7	2.3%	1	15.9%	4	2.0%	1	0.0%	0	0.0%	0	13.6%	4
Leominster	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	2
Ludlow	0.6%	3	1.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1
Merry Hill Shopping Centre (Intu), Brierley Hill	1.0%	5	1.0%	2	0.0%	0	0.0%	0	0.0%	0	2.0%	1	2.2%	1	2.1%	0	0.0%	0
Redditch	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	3.9%	0	0.0%	0
Shrewsbury	0.8%	3	0.0%	0	0.0%	0	0.0%	0	12.0%	3	0.0%	0	0.0%	0	0.0%	0	1.2%	0
Solihull	0.6%	3	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	3.7%	2	0.0%	0	0.0%	0
Stourbridge	4.9%	22	0.0%	0	0.0%	0	1.2%	1	0.0%	0	29.7%	22	0.0%	0	0.0%	0	0.0%	0
Stourport-on-Severn	0.3%	1	0.0%	0	1.1%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Telford	0.3%	1	0.0%	0	0.0%	0	0.0%	0	4.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tenbury Wells	1.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.5%	5
Wolverhampton	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Worcester	2.1%	9	2.3%	4	1.1%	0	1.2%	1	0.0%	0	0.0%	0	2.6%	1	5.5%	1	7.1%	2
Blackpole Retail Park, Worcester	2.0%	9	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	10.3%	6	2.5%	0	8.3%	3
Crossley Retail Park, Kidderminster	15.0%	68	23.0%	40	13.5%	6	12.7%	6	17.7%	5	9.2%	7	7.5%	4	5.5%	1	3.8%	1
Merry Hill Retail Park, Dudley	3.0%	14	0.0%	0	3.7%	2	1.0%	0	0.0%	0	13.1%	10	3.5%	2	0.0%	0	0.0%	0
Weavers Wharf, Kidderminster	0.8%	4	1.0%	2	1.4%	1	1.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	0	2.4%	1
Amblecote Village Centre	0.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	3	0.0%	0	0.0%	0	0.0%	0
B&Q, Mill Street, Leominster	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0
Bilston Town Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Blackheath Town Centre	0.5%	2	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Catshill Village Centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	2	0.0%	0	0.0%	0
Cheltenham Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0
Clent Village Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0
Cleobury Mortimer Town Centre	0.4%	2	0.0%	0	0.0%	0	4.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dudley Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1
Easter Park, Worcester Road, Kidderminster	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0
Ikea, Park Lane, Wednesbury	1.9%	9	2.2%	4	1.9%	1	0.0%	0	4.5%	1	2.0%	1	2.2%	1	0.0%	0	1.2%	0
Kingswinford Local Centre	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	2	0.0%	0	0.0%	0	0.0%	0
Lye Village Centre	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	2	0.0%	0	0.0%	0	0.0%	0
Manchester City Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Oldbury Town Centre	0.9%	4	2.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Parkridge Retail Park, Droitwich	0.4%	2	0.0%	0	3.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0
Roman Way Retail Park, Droitwich	0.6%	3	1.0%	2	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	0	0.0%	0
Rubery Village Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Sainsbury's, Carpet Trades Way, Kidderminster	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1
Wednesbury Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / catalogue / mail order	12.0%	55	20.5%	35	2.7%	1	17.8%	8	10.1%	3	2.8%	2	4.0%	2	6.5%	1	9.3%	3

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Other	1.1%	5	0.0%	0	4.9%	2	0.0%	0	1.1%	0	2.8%	2	0.0%	0	1.3%	0	1.2%	0
Weighted base:		457		173		43		44		26		74		54		11		33
Sample:		441		69		53		56		50		45		55		51		62

Q27_1 Do you ever visit Kidderminster Town Centre?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Yes	79.2%	634	97.9%	258	90.4%	80	92.0%	77	67.2%	30	69.1%	104	38.1%	36	59.2%	13	67.0%	38
No	20.8%	167	2.1%	5	9.6%	8	8.0%	7	32.8%	14	30.9%	47	61.9%	58	40.8%	9	33.0%	19
Weighted base:		801		263		89		83		44		151		94		22		56
Sample:		801		100		100		100		100		100		100		101		100

Q27_2 Do you ever visit Stourport-on-Severn Town Centre?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Yes	27.4%	219	28.7%	75	77.3%	69	32.7%	27	11.1%	5	11.4%	17	9.7%	9	21.1%	5	22.2%	12
No	72.6%	582	71.3%	188	22.7%	20	67.3%	56	88.9%	39	88.6%	133	90.3%	85	78.9%	17	77.8%	44
Weighted base:		801		263		89		83		44		151		94		22		56
Sample:		801		100		100		100		100		100		100		101		100

Q27_3 Do you ever visit Bewdley Town Centre?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Yes	39.6%	317	50.1%	132	43.4%	38	69.5%	58	30.1%	13	34.1%	51	13.7%	13	8.5%	2	17.1%	10
No	60.4%	484	49.9%	131	56.6%	50	30.5%	25	69.9%	31	65.9%	99	86.3%	81	91.5%	20	82.9%	47
Weighted base:		801		263		89		83		44		151		94		22		56
Sample:		801		100		100		100		100		100		100		101		100

Q28 Which centre do you visit the most?
Those who visit one or more town centres at Q27:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Kidderminster	82.1%	542	97.7%	252	44.1%	38	56.4%	45	86.0%	26	88.7%	99	89.1%	35	78.9%	12	88.5%	36
Stourport-on Severn	9.7%	64	1.8%	5	50.4%	44	4.6%	4	0.0%	0	3.3%	4	3.6%	1	14.5%	2	11.5%	5
Bewdley	8.2%	54	0.5%	1	5.5%	5	39.0%	31	14.0%	4	8.0%	9	7.3%	3	6.7%	1	0.0%	0
(Don't know / varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		660		258		87		80		30		111		39		15		40
Sample:		614		97		98		95		72		75		43		64		70

MeanScore: visits per week

Q29 How often do you visit Kidderminster Town Centre?
Those who visit Kidderminster Town Centre at Q27:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Daily	3.3%	21	3.1%	8	13.1%	11	0.7%	1	2.8%	1	0.0%	0	0.0%	0	0.0%	0	3.2%	1
Two or three times a week	14.6%	93	26.8%	69	10.0%	8	13.8%	11	6.5%	2	2.3%	2	0.0%	0	1.1%	0	2.3%	1
Once a week	32.1%	203	45.7%	118	25.6%	21	29.1%	22	25.2%	7	26.3%	27	2.0%	1	4.3%	1	18.0%	7
Once a fortnight	14.0%	89	9.8%	25	15.2%	12	26.9%	21	9.6%	3	13.7%	14	15.8%	6	18.7%	2	14.6%	6
Once every three weeks	2.8%	17	1.2%	3	4.7%	4	3.6%	3	9.8%	3	2.3%	2	0.0%	0	8.6%	1	3.8%	1
Once a month	14.1%	89	8.3%	21	18.7%	15	20.8%	16	11.7%	3	14.3%	15	15.4%	6	25.6%	3	26.3%	10
Less often	17.9%	114	3.8%	10	11.8%	9	4.6%	4	30.1%	9	39.8%	41	66.8%	24	37.0%	5	31.9%	12
(Don't know / no particular pattern)	1.2%	7	1.3%	3	0.7%	1	0.6%	0	4.4%	1	1.2%	1	0.0%	0	4.6%	1	0.0%	0
Mean:		*1.07*		*1.45*		*1.60*		*0.90*		*0.79*		*0.49*		*0.21*		*0.32*		*0.66*
Weighted base:		634		258		80		77		30		104		36		13		38
Sample:		575		97		88		90		70		69		40		57		64

Q30 What are the main reasons for visiting Kidderminster? [MR]
Those who visit Kidderminster Town Centre at Q27:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Go shopping for non food items	69.8%	443	68.4%	176	60.7%	49	75.7%	58	63.2%	19	75.4%	78	82.1%	29	65.6%	9	66.0%	25
Go shopping for other food items	49.9%	317	50.7%	130	36.6%	29	77.6%	59	49.7%	15	45.7%	48	40.2%	14	25.6%	3	46.7%	18
Get fuel	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Travel to / from school / college / university	0.3%	2	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	1
Travel to / from work	4.3%	28	4.9%	13	15.0%	12	1.4%	1	2.8%	1	0.0%	0	0.0%	0	0.0%	0	2.5%	1
Use sports / leisure or entertainments facilities	2.9%	18	3.9%	10	0.7%	1	2.5%	2	0.9%	0	4.5%	5	2.0%	1	1.8%	0	0.0%	0
Visit café / pub / restaurant	6.3%	40	8.1%	21	13.6%	11	1.4%	1	5.9%	2	1.4%	1	3.9%	1	4.0%	1	6.0%	2
Visit family / friends	3.7%	24	1.3%	3	3.2%	3	1.6%	1	6.9%	2	4.7%	5	19.2%	7	10.8%	1	3.8%	1
Visit financial service such as bank, building society, post office	17.2%	109	25.2%	65	22.6%	18	18.9%	14	5.4%	2	5.7%	6	2.0%	1	0.0%	0	9.1%	3
Visit health service such as doctor, dentist, hospital, opticians	3.5%	22	3.6%	9	2.0%	2	4.4%	3	3.1%	1	4.4%	5	2.0%	1	3.3%	0	3.3%	1
Visit other service such as laundrette, hairdresser, recycling	1.0%	6	0.0%	0	5.5%	4	0.0%	0	4.5%	1	0.0%	0	0.0%	0	1.1%	0	1.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
A change of scene	0.4%	3	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0	3.3%	1	0.0%	0	0.0%	0
Go window shopping / browsing	5.1%	33	7.2%	18	1.3%	1	1.2%	1	14.4%	4	3.5%	4	6.4%	2	4.7%	1	3.5%	1
Part of an overall day out	1.0%	6	0.5%	1	1.3%	1	0.0%	0	0.0%	0	1.2%	1	6.3%	2	2.9%	0	0.0%	0
Visit Marks & Spencer	0.9%	6	0.0%	0	0.0%	0	0.0%	0	3.8%	1	4.3%	4	0.0%	0	0.0%	0	0.0%	0
Visit the market	1.0%	6	2.1%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	1.7%	1
(Don't know)	1.5%	10	1.3%	3	0.0%	0	0.0%	0	8.8%	3	1.2%	1	0.0%	0	4.1%	1	5.3%	2
Weighted base:		634		258		80		77		30		104		36		13		38
Sample:		575		97		88		90		70		69		40		57		64

Q31 Are there any measures that would encourage you to visit Kidderminster more often? [MR]
Those who visit Kidderminster Town Centre at Q27:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
(No changes / improvements needed)	31.5%	200	13.3%	34	40.8%	33	31.3%	24	29.9%	9	45.2%	47	57.6%	21	58.5%	8	66.5%	25
Better disabled access	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0
Better lighting	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better public transport links	1.5%	10	0.0%	0	6.8%	5	0.0%	0	0.0%	0	2.3%	2	3.3%	1	0.0%	0	1.7%	1
Better range of non-food shops	10.2%	65	11.2%	29	15.7%	13	10.4%	8	7.9%	2	10.9%	11	0.0%	0	2.2%	0	3.8%	1
Better security / safety	0.2%	1	0.0%	0	0.6%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	0	0.0%	0
Better services (e.g. bank, library, hairdressers etc.)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improve the market	1.1%	7	2.3%	6	0.0%	0	0.7%	1	1.5%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0
Less betting shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less charity shops	6.3%	40	9.0%	23	12.4%	10	0.6%	0	3.4%	1	4.2%	4	0.0%	0	2.2%	0	2.1%	1
Less cheap shops	0.3%	2	0.0%	0	1.9%	2	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less takeaways	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less traffic congestion / improved access	1.6%	10	1.6%	4	0.0%	0	1.3%	1	1.1%	0	3.9%	4	0.0%	0	3.3%	0	1.2%	0
Less vacant / empty shops	12.9%	82	19.3%	50	8.9%	7	13.5%	10	17.8%	5	2.0%	2	13.3%	5	4.0%	1	5.3%	2
Longer opening hours	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Make it more attractive / nicer environment	7.1%	45	8.2%	21	4.1%	3	11.5%	9	13.2%	4	2.0%	2	6.6%	2	2.9%	0	8.8%	3
More / better places to eat	1.2%	7	0.0%	0	0.0%	0	5.3%	4	0.0%	0	3.1%	3	0.0%	0	1.1%	0	0.0%	0
More chain / well known stores	7.7%	49	10.8%	28	8.2%	7	7.3%	6	18.7%	6	0.0%	0	5.6%	2	0.0%	0	2.5%	1
More clothing shops	12.8%	81	24.4%	63	9.5%	8	3.9%	3	16.3%	5	2.6%	3	0.0%	0	2.9%	0	0.0%	0
More food stores	1.6%	10	3.4%	9	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More independent / specialised stores	3.4%	21	2.4%	6	10.1%	8	3.7%	3	8.1%	2	0.0%	0	0.0%	0	3.6%	0	3.5%	1
More leisure facilities (leisure centres, cinema, health and fitness clubs, etc)	0.4%	2	0.0%	0	0.7%	1	0.7%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
More national high-street chain stores	3.0%	19	4.9%	13	2.5%	2	2.5%	2	3.1%	1	0.0%	0	0.0%	0	0.0%	0	4.0%	2
More quality shops	5.3%	34	9.1%	23	4.4%	4	4.9%	4	3.6%	1	0.0%	0	3.3%	1	1.1%	0	2.1%	1
More road crossings	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0
More shops for old people	0.2%	2	0.0%	0	1.3%	1	0.0%	0	1.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More shops for young people	0.2%	1	0.0%	0	0.7%	1	0.0%	0	1.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More shops open on a Sunday	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
New / better shopping mall	0.2%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Parking - make it cheaper	3.5%	22	2.9%	7	6.2%	5	7.8%	6	6.6%	2	1.4%	1	0.0%	0	1.8%	0	0.0%	0
Parking - make it free	7.9%	50	8.7%	22	5.4%	4	9.8%	7	6.6%	2	11.0%	11	5.3%	2	1.8%	0	1.7%	1
Parking - make more spaces available	3.2%	20	1.5%	4	1.9%	2	7.2%	6	10.6%	3	3.0%	3	5.3%	2	5.1%	1	1.2%	0
Pedestrianised shopping area(s)	1.9%	12	0.6%	2	0.0%	0	0.0%	0	1.5%	0	9.3%	10	0.0%	0	0.0%	0	0.0%	0
Update / refurbish the shopping area	6.9%	44	8.4%	22	5.6%	4	12.5%	10	13.3%	4	2.0%	2	3.3%	1	5.1%	1	0.0%	0
Other	2.6%	16	4.5%	12	0.0%	0	2.1%	2	2.2%	1	1.8%	2	0.0%	0	2.2%	0	0.0%	0
Better advertising / information / maps	0.5%	3	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	3.3%	1	0.0%	0	1.7%	1
Better variety of all types of shops	1.1%	7	2.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improve / pull-down Crown House	1.1%	7	2.3%	6	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0
Less traffic congestion / roadworks	0.8%	5	0.0%	0	0.7%	1	0.9%	1	0.0%	0	3.3%	3	0.0%	0	0.0%	0	0.0%	0
Make the shops closer together / more compact	1.2%	8	1.7%	4	0.7%	1	0.0%	0	0.0%	0	0.0%	0	6.0%	2	0.0%	0	1.7%	1
More friendly staff / clientele	0.2%	1	0.0%	0	0.0%	0	1.4%	1	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Open a Primark store	0.5%	3	0.6%	2	0.0%	0	1.0%	1	2.8%	1	0.0%	0	0.0%	0	1.1%	0	0.0%	0
(Don't know)	4.0%	25	5.0%	13	1.7%	1	1.0%	1	4.8%	1	4.5%	5	5.1%	2	11.4%	1	2.1%	1
Weighted base:		634		258		80		77		30		104		36		13		38
Sample:		575		97		88		90		70		69		40		57		64

MeanScore: visits per week

Q32 How often do you visit Stourport-on-Severn Town Centre?
Those who visit Stourport-on-Severn Town Centre at Q27:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Daily	8.2%	18	8.7%	7	16.7%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Two or three times a week	14.9%	33	5.7%	4	39.6%	27	3.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	0
Once a week	17.2%	38	11.7%	9	23.5%	16	35.4%	10	12.2%	1	0.0%	0	0.0%	0	15.2%	1	15.8%	2
Once a fortnight	11.1%	24	12.5%	9	9.8%	7	23.9%	6	5.6%	0	0.0%	0	7.8%	1	0.0%	0	6.3%	1
Once every three weeks	3.9%	8	9.6%	7	0.0%	0	1.7%	0	5.6%	0	0.0%	0	0.0%	0	3.0%	0	3.2%	0
Once a month	10.9%	24	8.1%	6	3.9%	3	10.7%	3	17.7%	1	26.0%	4	26.0%	2	0.0%	0	36.5%	5
Less often	31.6%	69	39.7%	30	4.8%	3	24.9%	7	59.0%	3	74.0%	13	66.2%	6	73.9%	3	35.2%	4
(Don't know / no particular pattern)	2.1%	5	4.1%	3	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.8%	0	0.0%	0
Mean:		*1.28*		*1.07*		*2.50*		*0.62*		*0.28*		*0.15*		*0.18*		*0.26*		*0.42*
Weighted base:		219		75		69		27		5		17		9		5		12
Sample:		238		37		86		32		15		12		10		22		24

Q33 What are the main reasons for visiting Stourport on Severn? [MR]
Those who visit Stourport-on-Severn Town Centre at Q27:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Go shopping for non food items	37.1%	81	15.5%	12	50.4%	35	64.9%	18	44.7%	2	32.4%	6	20.8%	2	17.2%	1	57.4%	7
Go shopping for other food items	30.9%	68	16.1%	12	56.0%	38	34.3%	9	33.7%	2	0.0%	0	7.8%	1	26.4%	1	34.8%	4
Get fuel	0.6%	1	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	0	3.2%	0
Travel to / from school / college / university	0.7%	2	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Travel to / from work	8.0%	18	12.7%	10	4.6%	3	13.3%	4	0.0%	0	0.0%	0	0.0%	0	24.0%	1	0.0%	0
Use sports / leisure or entertainments facilities	15.8%	35	24.4%	18	6.6%	4	20.5%	6	9.3%	0	22.6%	4	15.5%	1	9.1%	0	0.0%	0
Visit café / pub / restaurant	6.0%	13	7.2%	5	4.4%	3	1.7%	0	11.1%	1	18.3%	3	0.0%	0	6.1%	0	3.2%	0
Visit family / friends	6.4%	14	9.2%	7	3.8%	3	5.4%	1	17.7%	1	7.1%	1	7.8%	1	6.1%	0	0.0%	0
Visit financial service such as bank, building society, post office	7.7%	17	3.1%	2	16.9%	12	1.7%	0	0.0%	0	0.0%	0	13.0%	1	3.0%	0	9.5%	1
Visit health service such as doctor, dentist, hospital, opticians	3.4%	8	2.2%	2	4.1%	3	4.0%	1	5.6%	0	0.0%	0	0.0%	0	5.1%	0	11.6%	1
Visit other service such as laundrette, hairdresser, recycling	5.2%	11	7.5%	6	4.6%	3	3.4%	1	0.0%	0	0.0%	0	0.0%	0	18.5%	1	6.3%	1
Other	0.8%	2	0.0%	0	0.9%	1	0.0%	0	6.6%	0	0.0%	0	0.0%	0	0.0%	0	6.3%	1
General convenience	0.8%	2	0.0%	0	2.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Go walking	3.6%	8	5.9%	4	2.9%	2	0.0%	0	0.0%	0	0.0%	0	13.0%	1	3.0%	0	0.0%	0
Go window shopping / browsing	7.1%	16	4.4%	3	7.3%	5	0.0%	0	15.9%	1	11.9%	2	20.8%	2	3.0%	0	19.4%	2
Part of an overall day out	2.7%	6	1.9%	1	0.0%	0	0.0%	0	0.0%	0	21.2%	4	9.2%	1	0.0%	0	0.0%	0
(Don't know)	3.7%	8	4.1%	3	1.7%	1	3.4%	1	6.6%	0	11.9%	2	0.0%	0	4.8%	0	3.2%	0
Weighted base:		219		75		69		27		5		17		9		5		12
Sample:		238		37		86		32		15		12		10		22		24

Q34 Are there any measures that would encourage you to visit Stourport-on-Severn more often? [MR]
Those who visit Stourport-on-Severn Town Centre at Q27:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
(No changes / improvements needed)	55.6%	122	73.6%	56	31.0%	21	63.1%	17	54.9%	3	66.9%	12	36.3%	3	51.9%	2	65.8%	8
Better disabled access	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better lighting	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better public transport links	0.4%	1	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	0
Better range of non-food shops	5.5%	12	3.1%	2	11.7%	8	0.0%	0	19.8%	1	0.0%	0	9.2%	1	0.0%	0	0.0%	0
Better security / safety	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better services (e.g. bank, library, hairdressers etc.)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improve the market	0.2%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less betting shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less charity shops	4.2%	9	3.1%	2	7.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	0	10.0%	1
Less cheap shops	0.9%	2	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	0
Less takeaways	1.5%	3	3.1%	2	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less traffic congestion / improved access	0.7%	1	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less vacant / empty shops	2.8%	6	0.0%	0	6.2%	4	0.0%	0	0.0%	0	0.0%	0	13.0%	1	0.0%	0	6.3%	1
Longer opening hours	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Make it more attractive / nicer environment	5.0%	11	7.9%	6	1.4%	1	13.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	0
More / better places to eat	1.6%	4	0.0%	0	2.2%	2	0.0%	0	0.0%	0	11.9%	2	0.0%	0	0.0%	0	0.0%	0
More chain / well known stores	5.1%	11	2.2%	2	12.5%	9	1.7%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	0	3.2%	0
More clothing shops	3.0%	7	0.0%	0	8.9%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	0	3.2%	0
More food stores	2.9%	6	0.0%	0	7.4%	5	0.0%	0	0.0%	0	7.1%	1	0.0%	0	0.0%	0	0.0%	0
More independent / specialised stores	5.7%	13	7.9%	6	8.8%	6	0.0%	0	9.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More leisure facilities (leisure centres, cinema, health and fitness clubs, etc)	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	24.0%	1	0.0%	0
More national high-street chain stores	1.2%	3	0.0%	0	0.9%	1	0.0%	0	0.0%	0	11.9%	2	0.0%	0	0.0%	0	0.0%	0
More quality shops	1.5%	3	3.1%	2	0.9%	1	0.0%	0	6.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More road crossings	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More shops for old people	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More shops for young people	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More shops open on a Sunday	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
New / better shopping mall	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Parking - make it cheaper	2.4%	5	0.0%	0	4.0%	3	5.2%	1	6.6%	0	0.0%	0	7.8%	1	0.0%	0	0.0%	0
Parking - make it free	2.8%	6	0.0%	0	6.4%	4	4.5%	1	6.6%	0	0.0%	0	0.0%	0	5.1%	0	0.0%	0
Parking - make more spaces available	6.5%	14	2.2%	2	14.6%	10	3.4%	1	6.6%	0	0.0%	0	13.0%	1	3.0%	0	0.0%	0
Pedestrianised shopping area(s)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Update / refurbish the shopping area	1.9%	4	0.0%	0	3.5%	2	0.0%	0	0.0%	0	7.1%	1	0.0%	0	5.1%	0	3.2%	0
Other	5.2%	11	5.0%	4	4.5%	3	3.7%	1	0.0%	0	7.1%	1	13.0%	1	0.0%	0	9.5%	1
(Don't know)	3.3%	7	3.7%	3	0.7%	0	5.2%	1	9.3%	0	0.0%	0	7.8%	1	7.8%	0	8.4%	1
Weighted base:		219		75		69		27		5		17		9		5		12
Sample:		238		37		86		32		15		12		10		22		24

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	

MeanScore: visits per week

Q35 How often do you visit Bewdley Town Centre?
Those who visit Bewdley Town Centre at Q27:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Daily	3.0%	9	0.0%	0	0.0%	0	16.2%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Two or three times a week	8.1%	26	0.0%	0	5.6%	2	36.7%	21	2.1%	0	4.0%	2	0.0%	0	0.0%	0	0.0%	0
Once a week	9.0%	29	8.1%	11	10.6%	4	22.2%	13	7.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a fortnight	5.8%	18	4.3%	6	21.0%	8	3.5%	2	8.6%	1	2.4%	1	0.0%	0	12.6%	0	0.0%	0
Once every three weeks	2.0%	6	4.5%	6	0.0%	0	0.0%	0	3.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a month	19.9%	63	28.5%	38	22.2%	9	6.8%	4	28.1%	4	13.5%	7	9.2%	1	0.0%	0	10.9%	1
Less often	49.2%	156	49.9%	66	39.3%	15	11.8%	7	48.1%	6	80.2%	41	81.7%	10	79.9%	2	89.1%	9
(Don't know / no particular pattern)	3.1%	10	4.5%	6	1.3%	0	2.8%	2	2.1%	0	0.0%	0	9.2%	1	7.5%	0	0.0%	0
Mean:		*0.66*		*0.26*		*0.46*		*2.39*		*0.32*		*0.23*		*0.12*		*0.16*		*0.12*
Weighted base:		317		132		38		58		13		51		13		2		10
Sample:		263		47		48		70		31		30		14		9		14

Q36 What are the main reasons for visiting Bewdley? [MR]
Those who visit Bewdley Town Centre at Q27:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Go shopping for non food items	21.0%	67	21.8%	29	8.0%	3	43.0%	25	25.1%	3	6.3%	3	10.9%	1	0.0%	0	19.1%	2
Go shopping for other food items	16.1%	51	15.3%	20	0.0%	0	44.3%	26	16.3%	2	6.3%	3	0.0%	0	0.0%	0	0.0%	0
Get fuel	0.3%	1	0.0%	0	0.0%	0	0.0%	0	6.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Travel to / from school / college / university	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Travel to / from work	2.2%	7	0.0%	0	2.2%	1	10.4%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Use sports / leisure or entertainments facilities	19.9%	63	19.7%	26	22.7%	9	18.8%	11	26.7%	4	21.0%	11	10.9%	1	7.5%	0	17.1%	2
Visit café / pub / restaurant	21.3%	68	24.7%	33	20.9%	8	10.0%	6	21.8%	3	19.1%	10	17.4%	2	39.6%	1	58.3%	6
Visit family / friends	14.7%	46	15.4%	20	8.7%	3	8.4%	5	2.4%	0	27.5%	14	22.3%	3	35.7%	1	0.0%	0
Visit financial service such as bank, building society, post office	3.2%	10	0.0%	0	0.0%	0	17.5%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Visit health service such as doctor, dentist, hospital, opticians	4.6%	15	4.3%	6	2.6%	1	12.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.9%	1
Visit other service such as laundrette, hairdresser, recycling	4.4%	14	5.8%	8	4.8%	2	6.4%	4	0.0%	0	0.0%	0	5.5%	1	0.0%	0	0.0%	0
Other	0.3%	1	0.0%	0	0.0%	0	0.0%	0	6.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
General convenience	0.8%	2	0.0%	0	0.0%	0	2.1%	1	0.0%	0	2.4%	1	0.0%	0	0.0%	0	0.0%	0
Go walking	5.5%	18	3.3%	4	15.4%	6	0.0%	0	5.9%	1	8.7%	4	14.6%	2	7.5%	0	0.0%	0
Go window shopping / browsing	8.0%	25	6.3%	8	14.5%	6	1.9%	1	18.3%	2	8.7%	4	16.4%	2	32.8%	1	6.9%	1
Part of an overall day out	7.8%	25	7.4%	10	4.3%	2	0.0%	0	0.0%	0	18.2%	9	23.8%	3	7.5%	0	6.9%	1
(Don't know)	3.2%	10	1.3%	2	3.7%	1	7.1%	4	4.1%	1	4.0%	2	0.0%	0	0.0%	0	4.1%	0
Weighted base:		317		132		38		58		13		51		13		2		10
Sample:		263		47		48		70		31		30		14		9		14

Q37 Are there any measures that would encourage you to visit Bewdley more often? [MR]
Those who visit Bewdley Town Centre at Q27:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
(No changes / improvements needed)	66.2%	210	70.2%	93	73.2%	28	43.0%	25	71.4%	9	65.8%	34	88.1%	11	39.0%	1	93.2%	9
Better disabled access	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better lighting	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better public transport links	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better range of non-food shops	1.8%	6	0.0%	0	0.0%	0	9.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better security / safety	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better services (e.g. bank, library, hairdressers etc.)	1.6%	5	0.0%	0	1.5%	1	7.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improve the market	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less betting shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less charity shops	1.3%	4	1.3%	2	1.5%	1	3.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less cheap shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less takeaways	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less traffic congestion / improved access	1.7%	5	3.3%	4	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less vacant / empty shops	0.8%	2	0.0%	0	1.5%	1	3.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Longer opening hours	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Make it more attractive / nicer environment	0.1%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better places to eat	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More chain / well known stores	2.3%	7	1.3%	2	4.0%	2	6.8%	4	0.0%	0	0.0%	0	0.0%	0	12.6%	0	0.0%	0
More clothing shops	2.6%	8	4.3%	6	6.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.6%	0	0.0%	0
More food stores	0.4%	1	0.0%	0	0.0%	0	1.7%	1	2.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More independent / specialised stores	1.5%	5	1.1%	1	0.0%	0	4.9%	3	3.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More leisure facilities (leisure centres, cinema, health and fitness clubs, etc)	0.7%	2	0.0%	0	0.0%	0	0.0%	0	2.1%	0	4.0%	2	0.0%	0	0.0%	0	0.0%	0
More national high-street chain stores	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More quality shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More road crossings	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More shops for old people	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More shops for young people	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More shops open on a Sunday	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
New / better shopping mall	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Parking - make it cheaper	1.1%	3	0.0%	0	5.5%	2	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Parking - make it free	4.9%	16	6.6%	9	5.2%	2	7.6%	4	4.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Parking - make more spaces available	12.0%	38	13.2%	17	8.3%	3	17.7%	10	13.5%	2	6.8%	3	6.5%	1	23.2%	0	6.9%	1
Pedestrianised shopping area(s)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Update / refurbish the shopping area	0.5%	2	0.0%	0	1.5%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0	12.6%	0	0.0%	0
Other	3.9%	12	3.6%	5	5.5%	2	8.2%	5	0.0%	0	0.0%	0	5.5%	1	0.0%	0	0.0%	0
(Don't know)	6.4%	20	4.3%	6	2.6%	1	0.9%	1	5.5%	1	23.5%	12	0.0%	0	12.6%	0	0.0%	0
Weighted base:		317		132		38		58		13		51		13		2		10
Sample:		263		47		48		70		31		30		14		9		14

Q38 Why don't you visit Kidderminster Town Centre? [MR]
Those who do not visit Kidderminster Town Centre at Q27:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
(No particular reason)	38.3%	64	0.0%	0	49.1%	4	54.7%	4	48.3%	7	27.9%	13	45.9%	27	35.2%	3	35.0%	7
It's rundown / needs a revamp	7.7%	13	0.0%	0	26.5%	2	11.6%	1	5.1%	1	9.6%	4	0.0%	0	7.9%	1	21.4%	4
Lack of cafes / restaurants	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lack of chain / well known stores	1.4%	2	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0	1.2%	1	10.6%	1	2.1%	0
Lack of foodstores	0.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	0	0.0%	0
Lack of independent stores	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.1%	1	0.0%	0
Litter / unclean	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Not a nice environment	4.5%	8	0.0%	0	5.8%	0	31.5%	2	0.0%	0	0.0%	0	0.0%	0	6.1%	1	23.9%	4
Parking is expensive	2.0%	3	30.7%	2	0.0%	0	0.0%	0	1.9%	0	2.6%	1	0.0%	0	1.9%	0	0.0%	0
Parking is hard / lack of spaces	3.5%	6	0.0%	0	0.0%	0	0.0%	0	3.8%	1	7.0%	3	0.0%	0	7.1%	1	7.8%	1
Parking is to far from shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor access by foot / cycle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor access by public transport	0.7%	1	0.0%	0	0.0%	0	0.0%	0	6.0%	1	0.0%	0	0.0%	0	4.1%	0	0.0%	0
Poor access for disabled	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor quality market	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor quality shops	0.7%	1	0.0%	0	9.8%	1	0.0%	0	2.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor range of non-food shops	7.4%	12	25.9%	1	0.0%	0	0.0%	0	5.4%	1	8.0%	4	3.7%	2	3.1%	0	21.4%	4
Poor range of services (e.g. bank, library, hairdresser etc.)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor security / feels unsafe	0.3%	0	0.0%	0	5.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
There is nothing to do there	6.7%	11	25.9%	1	0.0%	0	0.0%	0	3.2%	0	13.3%	6	3.2%	2	4.5%	0	4.2%	1
Too busy / noisy	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Too expensive	0.3%	0	0.0%	0	0.0%	0	6.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Too long / inconvenient journey	23.0%	38	43.4%	2	11.7%	1	0.0%	0	16.9%	2	10.9%	5	40.0%	23	18.6%	2	14.5%	3
Too many betting shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Too many charity shops	1.2%	2	0.0%	0	16.7%	1	0.0%	0	1.9%	0	0.0%	0	0.0%	0	2.6%	0	0.0%	0
Too many cheap shops	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	0	2.1%	0
Traffic congestion	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	3.7%	0	2.5%	0
Vacant / empty shops	1.4%	2	0.0%	0	6.9%	1	6.9%	0	0.0%	0	2.6%	1	0.0%	0	1.6%	0	0.0%	0
Other	4.3%	7	0.0%	0	0.0%	0	18.5%	1	16.8%	2	7.0%	3	0.0%	0	2.6%	0	0.0%	0
Layout - too spread out	3.2%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.7%	5	0.0%	0	0.0%	0	2.1%	0
Not familiar with the area	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	8.3%	1	2.1%	0
Prefer other centres	2.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.2%	2	3.2%	2	0.0%	0	0.0%	0
(Don't know)	2.2%	4	0.0%	0	0.0%	0	0.0%	0	1.9%	0	5.7%	3	0.0%	0	1.6%	0	3.6%	1
Weighted base:		167		5		8		7		14		47		58		9		19
Sample:		226		3		12		10		30		31		60		44		36

Column %ges.

Q38A Why don't you visit Stourport-on-Severn Town Centre? [MR]
Those who do not visit Stourport-on-Severn Town Centre at Q27:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
(No particular reason)	39.9%	232	42.0%	79	15.8%	3	59.4%	33	42.0%	16	28.5%	38	40.2%	34	43.7%	8	47.4%	21
It's rundown / needs a revamp	3.2%	18	5.4%	10	0.0%	0	4.3%	2	1.2%	0	2.4%	3	0.0%	0	4.5%	1	3.3%	1
Lack of cafes / restaurants	0.7%	4	2.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lack of chain / well known stores	2.6%	15	5.5%	10	0.0%	0	0.0%	0	0.8%	0	0.9%	1	0.8%	1	7.4%	1	2.4%	1
Lack of foodstores	0.3%	2	0.0%	0	2.9%	1	0.0%	0	0.8%	0	0.0%	0	0.0%	0	3.5%	1	0.0%	0
Lack of independent stores	2.0%	12	4.4%	8	0.0%	0	0.0%	0	1.7%	1	1.1%	1	0.0%	0	4.7%	1	1.5%	1
Litter / unclean	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	0	0.0%	0
Not a nice environment	1.3%	7	2.1%	4	0.0%	0	0.0%	0	2.3%	1	1.1%	1	0.0%	0	0.8%	0	1.8%	1
Parking is expensive	1.0%	6	2.3%	4	0.0%	0	1.0%	1	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Parking is hard / lack of spaces	1.6%	9	2.3%	4	0.0%	0	1.6%	1	0.7%	0	0.9%	1	0.0%	0	5.2%	1	3.8%	2
Parking is to far from shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	0	0.0%	0
Poor access by foot / cycle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor access by public transport	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.7%	0	1.1%	1	0.0%	0	0.8%	0	0.0%	0
Poor access for disabled	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor quality market	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor quality shops	1.6%	9	2.3%	4	9.5%	2	0.0%	0	0.0%	0	2.0%	3	0.0%	0	0.8%	0	0.0%	0
Poor range of non-food shops	4.3%	25	1.8%	3	25.3%	5	7.1%	4	2.3%	1	5.2%	7	3.4%	3	0.8%	0	3.9%	2
Poor range of services (e.g. bank, library, hairdresser etc.)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor security / feels unsafe	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	0	0.0%	0
There is nothing to do there	7.2%	42	5.6%	10	45.5%	9	2.6%	1	3.0%	1	4.9%	7	4.0%	3	14.1%	2	16.8%	7
Too busy / noisy	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Too expensive	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Too long / inconvenient journey	33.2%	193	28.8%	54	0.0%	0	17.3%	10	41.2%	16	46.3%	62	48.4%	41	20.2%	4	16.3%	7
Too many betting shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Too many charity shops	0.9%	5	0.0%	0	9.5%	2	1.0%	1	0.0%	0	1.1%	1	0.0%	0	0.8%	0	2.6%	1
Too many cheap shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Traffic congestion	0.7%	4	0.0%	0	0.0%	0	1.8%	1	1.9%	1	1.4%	2	0.0%	0	0.0%	0	0.9%	0
Vacant / empty shops	0.1%	1	0.0%	0	2.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	1.3%	8	0.9%	2	0.0%	0	4.5%	3	0.8%	0	1.5%	2	0.0%	0	2.2%	0	1.5%	1
Not familiar with the area	2.1%	12	4.4%	8	3.9%	1	0.0%	0	1.2%	0	0.0%	0	1.0%	1	4.4%	1	2.0%	1
Prefer other centres	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	2.2%	2	0.0%	0	0.0%	0
Too old / ill / disabled	0.4%	2	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.9%	0
(Don't know)	1.6%	9	0.0%	0	0.0%	0	2.5%	1	3.0%	1	4.0%	5	0.8%	1	2.5%	0	0.9%	0
Weighted base:		582		188		20		56		39		133		85		17		44
Sample:		563		63		14		68		85		88		90		79		76

Column %ges.

Q38B Why don't you visit Bewdley Town Centre? [MR]
Those who do not visit Bewdley Town Centre at Q27:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
(No particular reason)	42.4%	205	38.7%	51	34.8%	17	70.2%	18	52.2%	16	37.0%	37	45.8%	37	40.8%	8	45.4%	21
It's rundown / needs a revamp	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lack of cafes / restaurants	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Lack of chain / well known stores	2.3%	11	1.7%	2	2.7%	1	0.0%	0	1.0%	0	6.4%	6	0.0%	0	1.4%	0	1.8%	1
Lack of foodstores	0.4%	2	0.0%	0	1.6%	1	3.0%	1	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.0%	0
Lack of independent stores	1.0%	5	2.8%	4	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	1.4%	0	0.8%	0
Litter / unclean	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Not a nice environment	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Parking is expensive	1.4%	7	0.0%	0	7.8%	4	5.8%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Parking is hard / lack of spaces	4.8%	23	9.5%	12	3.3%	2	5.8%	1	4.0%	1	2.5%	2	0.0%	0	1.4%	0	8.2%	4
Parking is to far from shops	0.3%	2	0.0%	0	0.0%	0	1.8%	0	1.5%	0	0.0%	0	0.0%	0	0.7%	0	1.0%	0
Poor access by foot / cycle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor access by public transport	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Poor access for disabled	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor quality market	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor quality shops	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.5%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Poor range of non-food shops	5.7%	28	2.5%	3	10.8%	5	10.4%	3	6.4%	2	7.9%	8	1.5%	1	2.4%	0	10.2%	5
Poor range of services (e.g. bank, library, hairdresser etc.)	0.4%	2	0.0%	0	3.0%	2	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor security / feels unsafe	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
There is nothing to do there	6.3%	30	10.2%	13	4.5%	2	8.8%	2	9.5%	3	3.5%	3	1.7%	1	4.5%	1	8.1%	4
Too busy / noisy	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Too expensive	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Too long / inconvenient journey	33.8%	164	38.9%	51	25.9%	13	0.0%	0	19.6%	6	37.4%	37	47.6%	38	40.2%	8	21.3%	10
Too many betting shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Too many charity shops	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Too many cheap shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Traffic congestion	0.9%	5	3.3%	4	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Vacant / empty shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Other	0.8%	4	1.8%	2	0.0%	0	0.0%	0	0.9%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
It doesn't have any shops that I need	0.7%	3	0.0%	0	4.2%	2	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Not familiar with the area	0.8%	4	0.0%	0	3.0%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	3.8%	1	1.8%	1
Prefer other centres	0.8%	4	0.0%	0	0.0%	0	0.0%	0	1.5%	0	1.2%	1	2.3%	2	0.0%	0	0.8%	0
Too old / ill / disabled	0.3%	1	0.0%	0	0.0%	0	3.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0
(Don't know)	1.5%	7	0.0%	0	0.0%	0	0.0%	0	0.9%	0	5.1%	5	0.0%	0	6.7%	1	0.8%	0
Weighted base:		484		131		50		25		31		99		81		20		47
Sample:		538		53		52		30		69		70		86		92		86

Q39 Do you make use of electronic shopping? [MR/PR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Home Internet / catalogue / mail order shopping	66.8%	535	74.7%	196	64.0%	57	67.2%	56	70.7%	31	57.8%	87	59.8%	56	60.8%	13	68.5%	39
Portable Internet / catalogue / mail order shopping through a mobile phone	21.5%	172	27.4%	72	32.5%	29	15.3%	13	12.4%	5	18.7%	28	7.2%	7	32.4%	7	19.4%	11
TV shopping	2.0%	16	2.9%	8	2.5%	2	0.0%	0	2.8%	1	2.2%	3	0.8%	1	3.9%	1	0.0%	0
(None of these)	30.5%	245	23.2%	61	33.1%	29	29.3%	24	28.2%	12	40.3%	61	38.2%	36	35.0%	8	23.4%	13
Weighted base:		801		263		89		83		44		151		94		22		56
Sample:		801		100		100		100		100		100		100		101		100

Q40 Which goods or services do you currently purchase via electronic (home / mobile) shopping? [MR]
Those who shop via electronic shopping at Q39:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Books	53.5%	298	53.0%	107	53.4%	32	54.9%	32	54.6%	17	57.7%	52	58.6%	34	38.9%	6	43.2%	19
CDs, DVDs, music, computer games	45.4%	253	46.1%	93	45.5%	27	55.1%	32	57.8%	18	30.3%	27	48.8%	28	33.0%	5	50.9%	22
Clothes & shoes	39.2%	218	39.1%	79	44.7%	27	45.0%	26	55.2%	17	28.7%	26	39.4%	23	37.3%	5	35.0%	15
Concert / theatre tickets	0.5%	3	0.0%	0	0.0%	0	2.5%	1	1.4%	0	0.0%	0	1.2%	1	1.7%	0	0.0%	0
Craft / hobby items & stationery	3.8%	21	2.5%	5	11.4%	7	1.7%	1	5.2%	2	2.7%	2	1.2%	1	4.6%	1	7.5%	3
DIY goods	5.7%	32	5.3%	11	6.6%	4	4.5%	3	6.4%	2	5.9%	5	5.9%	3	1.0%	0	7.9%	3
Food	8.8%	49	5.9%	12	12.9%	8	6.1%	4	4.5%	1	16.3%	15	6.9%	4	6.5%	1	10.9%	5
Furniture, soft furnishings and floor coverings	7.5%	42	8.7%	17	11.1%	7	8.6%	5	3.8%	1	5.8%	5	3.9%	2	1.0%	0	9.2%	4
Garden items	1.6%	9	0.0%	0	6.6%	4	0.9%	1	5.6%	2	1.4%	1	1.2%	1	1.7%	0	1.5%	1
Gifts	14.6%	81	9.0%	18	26.0%	15	21.0%	12	7.8%	2	17.4%	16	13.5%	8	26.2%	4	13.2%	6
Health and beauty, chemist items	5.6%	31	2.0%	4	19.0%	11	3.7%	2	10.6%	3	5.2%	5	7.9%	5	3.0%	0	1.5%	1
Holiday / travel tickets	1.6%	9	0.0%	0	7.4%	4	1.7%	1	2.3%	1	0.0%	0	2.4%	1	2.6%	0	2.0%	1
Jewellery	2.4%	13	1.2%	2	6.6%	4	0.9%	1	1.4%	0	3.6%	3	0.0%	0	14.5%	2	2.0%	1
Major electrical items	20.0%	112	18.0%	36	26.8%	16	21.3%	12	37.0%	12	14.8%	13	15.0%	9	15.8%	2	25.3%	11
Small electrical items	23.6%	131	13.9%	28	32.0%	19	38.8%	23	36.1%	11	28.5%	26	17.9%	10	9.1%	1	29.7%	13
Small household goods	10.7%	60	4.3%	9	16.1%	10	21.6%	13	11.9%	4	6.8%	6	15.9%	9	10.3%	1	19.0%	8
Sports goods	2.3%	13	3.3%	7	3.4%	2	0.0%	0	1.0%	0	0.0%	0	1.4%	1	3.6%	1	5.4%	2
Toys	10.1%	56	9.2%	18	19.4%	11	0.9%	1	11.4%	4	10.2%	9	6.9%	4	18.3%	3	15.0%	6
Vehicle parts	1.0%	5	0.0%	0	3.2%	2	1.3%	1	1.9%	1	0.0%	0	2.0%	1	1.7%	0	1.5%	1
Other	0.7%	4	0.8%	2	1.0%	1	1.7%	1	2.3%	1	0.0%	0	0.0%	0	1.0%	0	0.0%	0
Pet products	0.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	3	0.0%	0	8.8%	1	0.0%	0
(Don't know / can't remember)	8.8%	49	15.1%	30	1.0%	1	13.4%	8	0.0%	0	5.0%	4	3.9%	2	3.0%	0	7.2%	3
Weighted base:		557		202		59		59		32		90		58		14		43
Sample:		496		68		62		68		65		53		54		54		72

Q41A Do you normally have books delivered, or do you normally use Click & Collect?
Those who buy books via electronic shopping at Q40:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Delivered (incl. downloads)	92.1%	274	90.4%	97	87.7%	28	94.2%	30	95.5%	16	94.9%	49	91.0%	31	79.9%	4	100.0%	19
Click & Collect	2.2%	7	4.0%	4	0.0%	0	0.0%	0	0.0%	0	2.3%	1	0.0%	0	20.1%	1	0.0%	0
(Varies)	5.7%	17	5.6%	6	12.3%	4	5.8%	2	4.5%	1	2.8%	1	9.0%	3	0.0%	0	0.0%	0
Weighted base:		298		107		32		32		17		52		34		6		19
Sample:		250		33		27		35		36		28		34		20		37

Q41B Do you normally have CDs, DVDs, music delivered, or do you normally use Click & Collect?
Those who buy CDs, DVDs and music via electronic shopping at Q40:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Delivered (incl. downloads)	90.3%	228	86.1%	80	80.3%	22	95.6%	31	95.7%	17	89.4%	24	95.8%	27	100.0%	5	100.0%	22
Click & Collect	2.5%	6	4.6%	4	2.2%	1	0.0%	0	0.0%	0	5.3%	1	0.0%	0	0.0%	0	0.0%	0
(Varies)	7.2%	18	9.3%	9	17.6%	5	4.4%	1	4.3%	1	5.3%	1	4.2%	1	0.0%	0	0.0%	0
Weighted base:		253		93		27		32		18		27		28		5		22
Sample:		215		28		21		34		34		18		28		14		38

Q41C Do you normally have clothes & shoes delivered, or do you normally use Click & Collect?
Those who buy clothes and shoes via electronic shopping at Q40:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Delivered (incl. downloads)	83.6%	183	80.1%	63	68.5%	18	89.7%	24	87.9%	15	81.8%	21	91.2%	21	96.9%	5	100.0%	15
Click & Collect	6.8%	15	7.6%	6	6.6%	2	2.1%	1	3.4%	1	18.2%	5	5.2%	1	3.1%	0	0.0%	0
(Varies)	9.5%	21	12.3%	10	24.9%	7	8.2%	2	8.6%	2	0.0%	0	3.6%	1	0.0%	0	0.0%	0
Weighted base:		218		79		27		26		17		26		23		5		15
Sample:		183		24		23		29		33		16		18		19		21

Q41D Do you normally have concert / theatre tickets delivered, or do you normally use Click & Collect?
Those who buy concert / theatre tickets via electronic shopping at Q40:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Delivered (incl. downloads)	84.0%	2	0.0%	0	0.0%	0	68.6%	1	100.0%	0	0.0%	0	100.0%	1	100.2%	0	0.0%	0
Click & Collect	16.0%	0	0.0%	0	0.0%	0	31.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		3		0		0		1		0		0		1		0		0
Sample:		6		0		0		3		1		0		1		1		0

Column %ges.

Q41E Do you normally have craft / hobby items & stationery delivered, or do you normally use Click & Collect?
Those who buy hbboy items and stationery via electronic shopping at Q40:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Delivered (incl. downloads)	69.1%	15	66.7%	3	33.4%	2	54.2%	1	100.0%	2	100.0%	2	100.0%	1	99.9%	1	100.0%	3
Click & Collect	4.9%	1	0.0%	0	8.7%	1	45.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Varies)	26.0%	6	33.3%	2	58.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		21		5		7		1		2		2		1		1		3
Sample:		30		3		6		2		5		2		1		4		7

Q41F Do you normally have DIY goods delivered, or do you normally use Click & Collect?
Those who buy DIY goods via electronic shopping at Q40:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Delivered (incl. downloads)	85.9%	27	100.0%	11	0.0%	0	79.3%	2	100.0%	2	100.0%	5	100.0%	3	100.3%	0	100.0%	3
Click & Collect	1.7%	1	0.0%	0	0.0%	0	20.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Varies)	12.4%	4	0.0%	0	100.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		32		11		4		3		2		5		3		0		3
Sample:		30		6		1		5		4		3		4		1		6

Q41G Do you normally have food delivered, or do you normally use Click & Collect?
Those who buy food via electronic shopping at Q40:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Delivered (incl. downloads)	91.1%	45	100.0%	12	49.1%	4	100.0%	4	100.0%	1	100.0%	15	100.0%	4	100.0%	1	90.1%	4
Click & Collect	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Varies)	8.9%	4	0.0%	0	50.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.9%	0
Weighted base:		49		12		8		4		1		15		4		1		5
Sample:		43		4		6		5		4		7		4		5		8

Q41H Do you normally have furniture, soft furnishings and floor coverings delivered, or do you normally use Click & Collect?
Those who buy furniture, soft furnishings and floor coverings via electronic shopping at Q40:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Delivered (incl. downloads)	64.1%	27	36.4%	6	40.8%	3	100.0%	5	100.0%	1	100.0%	5	100.0%	2	100.3%	0	100.0%	4
Click & Collect	26.5%	11	63.6%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Varies)	9.3%	4	0.0%	0	59.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		42		17		7		5		1		5		2		0		4
Sample:		30		4		4		7		3		2		3		1		6

Q41I Do you normally have garden items delivered, or do you normally use Click & Collect?
Those who buy garden items via electronic shopping at Q40:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Delivered (incl. downloads)	56.8%	5	0.0%	0	0.0%	0	100.0%	1	100.0%	2	100.0%	1	100.0%	1	100.2%	0	100.0%	1
Click & Collect	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Varies)	43.2%	4	0.0%	0	100.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		9		0		4		1		2		1		1		0		1
Sample:		11		0		1		1		5		1		1		1		1

Q41J Do you normally have gifts delivered, or do you normally use Click & Collect?
Those who buy gifts via electronic shopping at Q40:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Delivered (incl. downloads)	84.7%	69	77.9%	14	69.3%	11	95.6%	12	88.9%	2	81.6%	13	100.0%	8	100.0%	4	100.0%	6
Click & Collect	4.5%	4	9.1%	2	0.0%	0	4.4%	1	0.0%	0	9.2%	1	0.0%	0	0.0%	0	0.0%	0
(Varies)	10.8%	9	12.9%	2	30.7%	5	0.0%	0	11.1%	0	9.2%	1	0.0%	0	0.0%	0	0.0%	0
Weighted base:		81		18		15		12		2		16		8		4		6
Sample:		77		7		13		11		8		10		7		11		10

Q41K Do you normally have health and beauty, chemist items delivered, or do you normally use Click & Collect?
Those who buy health and beauty and chemist items via electronic shopping at Q40:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Delivered (incl. downloads)	71.1%	22	100.0%	4	30.5%	3	100.0%	2	100.0%	3	100.0%	5	74.4%	3	100.0%	0	100.0%	1
Click & Collect	16.3%	5	0.0%	0	34.8%	4	0.0%	0	0.0%	0	0.0%	0	25.6%	1	0.0%	0	0.0%	0
(Varies)	12.6%	4	0.0%	0	34.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		31		4		11		2		3		5		5		0		1
Sample:		28		2		6		4		4		3		5		3		1

Q41L Do you normally have holiday / travel tickets delivered, or do you normally use Click & Collect?
Those who buy holiday / travel tickets via electronic shopping at Q40:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Delivered (incl. downloads)	53.8%	5	0.0%	0	11.2%	0	100.0%	1	100.1%	1	0.0%	0	100.0%	1	62.8%	0	100.0%	1
Click & Collect	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Varies)	46.2%	4	0.0%	0	88.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	37.4%	0	0.0%	0
Weighted base:		9		0		4		1		1		0		1		0		1
Sample:		12		0		2		2		2		0		2		2		2

Column %ges.

Q41M Do you normally have jewellery delivered, or do you normally use Click & Collect?
Those who buy jewellery via electronic shopping at Q40:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Delivered (incl. downloads)	71.0%	10	100.0%	2	0.0%	0	100.0%	1	100.0%	0	100.0%	3	0.0%	0	100.0%	2	100.0%	1
Click & Collect	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Varies)	29.0%	4	0.0%	0	100.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		13		2		4		1		0		3		0		2		1
Sample:		13		1		1		1		1		2		0		5		2

Q41N Do you normally have major electrical items delivered, or do you normally use Click & Collect?
Those who buy major electrical items via electronic shopping at Q40:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Delivered (incl. downloads)	91.2%	102	88.9%	32	68.0%	11	96.3%	12	97.7%	11	100.0%	13	100.0%	9	100.0%	2	100.0%	11
Click & Collect	3.3%	4	6.5%	2	3.7%	1	3.7%	0	2.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Varies)	5.5%	6	4.6%	2	28.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		112		36		16		12		12		13		9		2		11
Sample:		122		17		16		17		24		9		10		8		21

Q41O Do you normally have small electrical items delivered, or do you normally use Click & Collect?
Those who buy small electrical items via electronic shopping at Q40:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Delivered (incl. downloads)	90.3%	119	94.1%	26	70.1%	13	98.0%	22	97.2%	11	95.2%	24	88.6%	9	87.2%	1	83.9%	11
Click & Collect	3.2%	4	0.0%	0	6.2%	1	2.0%	0	2.8%	0	0.0%	0	11.4%	1	12.9%	0	6.7%	1
(Varies)	6.5%	9	5.9%	2	23.7%	4	0.0%	0	0.0%	0	4.8%	1	0.0%	0	0.0%	0	9.4%	1
Weighted base:		131		28		19		23		11		26		10		1		13
Sample:		137		11		20		26		23		13		12		8		24

Q41P Do you normally have small household goods delivered, or do you normally use Click & Collect?
Those who buy small household goods via electronic shopping at Q40:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Delivered (incl. downloads)	85.5%	51	100.0%	9	44.7%	4	100.0%	13	91.4%	3	100.0%	6	91.0%	8	90.4%	1	74.8%	6
Click & Collect	3.5%	2	0.0%	0	14.3%	1	0.0%	0	8.6%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	0
(Varies)	11.0%	7	0.0%	0	41.0%	4	0.0%	0	0.0%	0	0.0%	0	9.0%	1	9.6%	0	20.4%	2
Weighted base:		60		9		10		13		4		6		9		1		8
Sample:		76		2		9		15		11		5		11		7		16

Q41Q Do you normally have sports goods delivered, or do you normally use Click & Collect?
Those who buy sports goods via electronic shopping at Q40:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Delivered (incl. downloads)	100.0%	13	100.0%	7	100.0%	2	0.0%	0	100.1%	0	0.0%	0	100.0%	1	100.0%	1	100.0%	2
Click & Collect	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		13		7		2		0		0		0		1		1		2
Sample:		15		2		3		0		1		0		1		3		5

Q41R Do you normally have toys delivered, or do you normally use Click & Collect?
Those who buy toys via electronic shopping at Q40:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Delivered (incl. downloads)	81.2%	46	79.0%	15	74.9%	9	100.0%	1	100.0%	4	86.8%	8	79.3%	3	77.0%	2	81.2%	5
Click & Collect	11.3%	6	12.0%	2	13.2%	2	0.0%	0	0.0%	0	13.2%	1	20.7%	1	23.0%	1	0.0%	0
(Varies)	7.5%	4	9.0%	2	11.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.8%	1
Weighted base:		56		18		11		1		4		9		4		3		6
Sample:		56		6		9		1		9		7		4		9		11

Q41S Do you normally have vehicle parts delivered, or do you normally use Click & Collect?
Those who buy vehicle parts via electronic shopping at Q40:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Delivered (incl. downloads)	87.6%	5	0.0%	0	100.0%	2	100.0%	1	100.1%	1	0.0%	0	100.0%	1	100.2%	0	0.0%	0
Click & Collect	12.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	1
(Varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		5		0		2		1		1		0		1		0		1
Sample:		9		0		3		1		2		0		1		1		1

Q41T Do you normally have (OTHER MENTIONED AT Q40) delivered, or do you normally use Click & Collect?
Those who buy other items via electronic shopping at Q40:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Delivered (incl. downloads)	45.4%	2	0.0%	0	0.0%	0	100.0%	1	100.1%	1	0.0%	0	0.0%	0	100.3%	0	0.0%	0
Click & Collect	54.6%	2	100.0%	2	100.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		4		2		1		1		1		0		0		0		0
Sample:		7		1		1		2		2		0		0		1		0

Column %ges.

Q42 Which of these activities do you (or other members of your household) participate in? [MR/PR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Health & fitness / leisure centre activities	28.2%	226	25.5%	67	31.6%	28	36.3%	30	35.7%	16	26.9%	41	32.4%	30	20.4%	5	17.4%	10
Cinema	54.9%	440	61.4%	161	44.3%	39	56.4%	47	49.2%	22	48.8%	74	60.5%	57	37.5%	8	57.2%	32
Restaurants, bars, pubs etc.	82.7%	663	79.5%	209	76.6%	68	82.6%	69	83.4%	37	89.2%	134	88.4%	83	83.1%	18	80.3%	45
Ten-pin bowling	17.8%	143	20.3%	53	24.8%	22	18.6%	15	13.2%	6	9.7%	15	16.6%	16	13.6%	3	23.0%	13
Bingo	2.7%	22	3.8%	10	2.9%	3	0.6%	0	0.6%	0	3.5%	5	2.9%	3	1.3%	0	0.7%	0
Theatre / concert halls / museums / art galleries	50.6%	405	44.2%	116	32.5%	29	52.4%	44	56.0%	25	60.9%	92	64.1%	60	54.1%	12	50.5%	28
(None of these)	8.7%	70	10.1%	27	10.6%	9	5.8%	5	9.7%	4	8.2%	12	5.4%	5	8.8%	2	9.9%	6
Weighted base:		801		263		89		83		44		151		94		22		56
Sample:		801		100		100		100		100		100		100		101		100

Q43 Which centre / facility did you LAST visit for indoor sports or health and fitness activity?
Those who participate in health & fitness or leisure centre activities at Q42: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
247 Fitness, Foley Grove. Kidderminster	4.3%	10	5.0%	3	6.6%	2	13.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	0
Bewdley Leisure Centre, Stourport Road, Bewdley	0.2%	1	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Forest Glades Leisure Centre (includes Glades Gym), Bromsgrove Street, Kidderminster	6.9%	15	21.4%	14	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	0	0.0%	0
Gymphobics, Blackwell Street, Kidderminster	1.3%	3	3.5%	2	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mecure Hotel (Gym with membership within hotel complex), Habberley Road, Bewdley	5.5%	12	10.0%	7	0.0%	0	18.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stourport Leisure Centre (includes Kinetika Gym), Harold Davies Drive, Stourport	8.6%	19	12.9%	9	21.3%	6	12.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.4%	1
Stourport Sports Centre, Kingsway, Stourport	6.2%	14	7.4%	5	31.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	0
Bewdley	2.0%	4	0.0%	0	2.2%	1	5.7%	2	0.0%	0	5.0%	2	0.0%	0	0.0%	0	0.0%	0
Bridgnorth	2.5%	5	0.0%	0	0.0%	0	0.0%	0	39.2%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brierley Hill	4.9%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	26.8%	11	0.0%	0	0.0%	0	0.0%	0
Bromsgrove	13.8%	31	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.6%	3	95.2%	28	3.2%	0	0.0%	0
Droitwich	2.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	58.4%	3	10.8%	1
Kidderminster	13.9%	31	26.4%	18	21.1%	6	15.3%	5	1.9%	0	6.0%	2	0.0%	0	5.3%	0	0.0%	0
Ludlow	2.6%	6	0.0%	0	0.0%	0	14.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.5%	1
Redditch	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	5.3%	0	0.0%	0
Stourbridge	8.5%	19	0.0%	0	0.0%	0	2.6%	1	0.0%	0	44.6%	18	0.0%	0	0.0%	0	0.0%	0
Stourport-on-Severn	2.8%	6	3.5%	2	14.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Telford	0.7%	2	0.0%	0	0.0%	0	0.0%	0	11.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tenbury Wells	1.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	43.2%	4
Wolverhampton	0.3%	1	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Worcester	2.6%	6	6.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.3%	1	8.0%	1
Abberley Village Centre	0.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	0
Alveley Village Centre	0.9%	2	0.0%	0	0.0%	0	0.0%	0	5.6%	1	3.0%	1	0.0%	0	0.0%	0	0.0%	0
Cleobury Mortimer Town Centre	1.1%	2	0.0%	0	0.0%	0	8.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cookley Village Centre	1.1%	2	3.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
David Corfield Gymnasium, Cosford Park Long Lane, Albrighton	0.1%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dudley Town Centre	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	1	0.0%	0	0.0%	0	0.0%	0
Highley Village Centre	1.4%	3	0.0%	0	0.0%	0	0.0%	0	21.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinver Village Centre	0.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	2	0.0%	0	0.0%	0	0.0%	0
Ombersley Village Centre	0.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.4%	0	0.0%	0
The Severn Centre, Bridgnorth Road, Highley	0.6%	1	0.0%	0	0.0%	0	2.6%	1	3.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wombourne Village Centre	1.0%	2	0.0%	0	0.0%	0	0.0%	0	15.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		221		67		26		30		14		41		29		5		10
Sample:		190		23		23		28		25		24		24		22		21

Q44 Which centre / facility did you LAST visit to go the cinema?
Those who go to the cinema at Q42: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Empire Cinema, Rubery, Great Park, Birmingham	23.5%	100	19.7%	31	22.9%	9	9.5%	4	1.3%	0	14.0%	10	79.5%	44	18.4%	1	0.0%	0
Majestic Cinema, Bridgnorth	3.4%	14	0.0%	0	0.0%	0	3.4%	1	60.9%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Odeon, Foregate, Worcester	2.6%	11	1.5%	2	3.7%	1	5.0%	2	0.0%	0	0.0%	0	0.0%	0	17.2%	1	11.9%	4
Odeon, Merry Hill Centre	24.1%	103	27.9%	44	11.4%	4	14.1%	6	14.2%	3	62.9%	45	0.0%	0	0.0%	0	0.0%	0
Reel Cinema, Quinton/Halesowen	3.1%	13	6.0%	9	0.0%	0	4.8%	2	2.1%	0	1.7%	1	0.0%	0	2.1%	0	0.0%	0
Regal Cinema, Tenbury Wells	4.6%	20	3.0%	5	0.0%	0	4.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	41.2%	13
Showcase Cinema, Dudley	5.0%	21	8.1%	13	0.0%	0	0.0%	0	0.0%	0	11.9%	9	0.0%	0	0.0%	0	0.0%	0
The Electric Cinema, Birmingham City Centre	0.1%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Vue Cinema, Friar Street, Worcester	11.1%	47	6.3%	10	32.2%	12	31.4%	12	0.0%	0	0.0%	0	1.3%	1	47.3%	4	25.4%	8
Bewdley	0.1%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birmingham City Centre	1.9%	8	2.5%	4	1.3%	0	0.0%	0	0.0%	0	1.7%	1	4.2%	2	0.0%	0	0.0%	0
Bridgnorth	0.4%	2	0.0%	0	0.0%	0	0.0%	0	8.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brierley Hill	0.8%	3	1.0%	2	1.5%	1	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Bromsgrove	1.9%	8	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.6%	6	0.0%	0	0.0%	0
Hereford	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	2
Kidderminster	10.5%	45	19.4%	31	10.3%	4	13.1%	5	0.0%	0	1.7%	1	0.0%	0	4.7%	0	9.8%	3
Ludlow	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.1%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0
Malvern	0.1%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Redditch	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0
Shrewsbury	0.2%	1	0.0%	0	0.0%	0	0.0%	0	3.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Solihull	0.4%	2	0.0%	0	4.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stourbridge	0.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	3	0.0%	0	0.0%	0	0.0%	0
Telford	1.3%	5	0.0%	0	0.0%	0	10.7%	4	5.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tenbury Wells	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0
Worcester	0.6%	3	0.0%	0	6.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheltenham Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0
Dudley Town Centre	0.1%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Odeon, Garrick Lane, The Old Market, Hereford	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	1
Ombersley Memorial Hall, Sandys Road, Ombersley	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	0	0.0%	0
Reel Cinema, Green Street, Kidderminster	1.7%	7	3.8%	6	1.5%	1	1.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Regal Cinema, Port Street, Evesham	0.2%	1	0.0%	0	0.0%	0	1.2%	0	1.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St Austell Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	0	0.0%	0
Weston-super-Mare Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.4%	0	0.0%	0
Weighted base:		426		159		38		39		22		72		56		8		32
Sample:		378		60		41		44		47		41		55		35		55

Column %ges.

Q45 Which centre / facility did you LAST go to for restaurants, bars and pubs?

Those who go to restaurants, pubs and / or bars at Q42: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Bewdley	8.1%	51	10.8%	21	10.8%	7	29.7%	20	0.8%	0	2.1%	3	0.0%	0	0.0%	0	0.0%	0
Birmingham City Centre	9.5%	60	10.8%	21	10.9%	7	8.2%	5	0.0%	0	19.0%	24	1.8%	1	0.8%	0	1.1%	0
Bridgnorth	3.8%	24	3.0%	6	0.9%	1	1.9%	1	43.5%	15	0.0%	0	0.0%	0	0.0%	0	2.4%	1
Brierley Hill	1.7%	10	3.0%	6	0.0%	0	0.0%	0	0.0%	0	3.6%	4	0.0%	0	0.0%	0	0.0%	0
Bromsgrove	10.2%	64	3.0%	6	0.9%	1	0.0%	0	0.0%	0	2.9%	4	67.0%	53	5.8%	1	0.0%	0
Droitwich	2.8%	17	5.6%	11	0.8%	0	0.0%	0	0.8%	0	0.0%	0	3.3%	3	12.3%	2	1.8%	1
Halesowen	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Hereford	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	3
Kidderminster	20.7%	130	49.6%	99	8.1%	5	11.4%	8	3.7%	1	6.5%	8	1.8%	1	2.9%	1	17.0%	7
Leominster	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1
Ludlow	1.1%	7	0.0%	0	2.3%	2	4.4%	3	0.9%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	2
Malvern	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0
Shrewsbury	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Solihull	0.5%	3	1.2%	2	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stourbridge	4.4%	28	1.7%	3	0.8%	0	0.7%	0	0.0%	0	18.6%	23	0.0%	0	0.0%	0	0.0%	0
Stourport-on-Severn	5.0%	31	0.7%	1	40.1%	26	3.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	1
Telford	0.9%	6	0.0%	0	0.0%	0	6.3%	4	4.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tenbury Wells	2.0%	13	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	28.5%	13
Wolverhampton	0.3%	2	0.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Worcester	6.4%	40	3.9%	8	11.4%	7	12.4%	8	0.0%	0	3.3%	4	3.0%	2	21.8%	4	15.3%	7
Other	10.5%	66	2.0%	4	8.0%	5	8.1%	5	19.1%	7	20.0%	25	14.2%	11	15.8%	3	12.9%	6
Abberley Village Centre	1.1%	7	0.0%	0	0.9%	1	5.5%	4	6.3%	2	0.0%	0	0.0%	0	0.0%	0	1.8%	1
Areley Kings Village Centre	0.1%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bournheath Village Centre	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	3	0.0%	0	0.0%	0
Catshill Village Centre	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	4	0.0%	0	0.0%	0
Chaddesley Corbett Village Centre	0.6%	4	0.8%	2	0.0%	0	0.0%	0	0.0%	0	1.5%	2	0.0%	0	0.0%	0	0.0%	0
Chelmarsh Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Clent Village Centre	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	4	0.0%	0	0.0%	0	0.0%	0
Cleobury Mortimer Town Centre	0.5%	3	0.0%	0	0.0%	0	3.4%	2	3.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cutnall Green Village Centre	0.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	19.9%	4	0.0%	0
Far Forest Village Centre	0.3%	2	0.0%	0	0.0%	0	1.9%	1	1.3%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0
Hagley Village Centre	1.7%	11	3.0%	6	0.0%	0	0.0%	0	0.0%	0	3.6%	4	0.0%	0	2.4%	0	0.0%	0
Highley Village Centre	0.6%	4	0.0%	0	0.0%	0	0.0%	0	10.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinver Village Centre	2.6%	16	0.0%	0	0.0%	0	0.7%	0	0.0%	0	12.4%	16	0.0%	0	0.8%	0	0.0%	0
Ombersley Village Centre	0.9%	6	0.0%	0	2.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.4%	3	2.7%	1
Stottesdon Village Centre	0.3%	2	0.0%	0	0.0%	0	2.0%	1	1.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		630		199		65		66		34		125		79		18		44
Sample:		618		76		79		75		74		80		82		78		74

Q46 Which centre / facility did you LAST visit to go ten-pin bowling?

Those who go ten-pin bowling at Q42: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Bowl Xtreme, Worcester	24.9%	35	21.8%	12	53.8%	11	55.4%	9	0.0%	0	0.0%	0	0.0%	0	89.6%	2	10.8%	1
Bowlplex, Dudley	10.1%	14	3.1%	2	2.9%	1	3.5%	1	0.0%	0	77.7%	11	0.0%	0	0.0%	0	0.0%	0
Hollywood Bowl, Rubery, Birmingham	18.0%	25	17.4%	9	8.6%	2	5.0%	1	0.0%	0	0.0%	0	85.6%	13	5.2%	0	0.0%	0
Birmingham City Centre	9.5%	13	20.8%	11	7.4%	2	0.0%	0	0.0%	0	0.0%	0	4.5%	1	0.0%	0	0.0%	0
Bridgnorth	0.2%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brierley Hill	4.3%	6	2.6%	1	0.0%	0	8.5%	1	0.0%	0	22.3%	3	0.0%	0	0.0%	0	0.0%	0
Bromsgrove	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	1	0.0%	0	0.0%	0
Leominster	8.3%	12	0.0%	0	0.0%	0	14.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	76.2%	9
Malvern	0.4%	0	0.0%	0	2.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stourbridge	4.5%	6	4.4%	2	19.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stourport-on-Severn	0.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	0
Telford	4.1%	6	0.0%	0	0.0%	0	5.0%	1	85.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wolverhampton	0.5%	1	0.0%	0	0.0%	0	5.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Worcester	12.3%	17	26.8%	14	5.7%	1	3.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.8%	1
Abroad	1.2%	2	3.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bristol City Centre	0.2%	0	0.0%	0	0.0%	0	0.0%	0	5.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardiff City Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.2%	0	0.0%	0
Claverley Village Centre	0.2%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Strikes, Byford Road, Sudbury	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.4%	1	0.0%	0	0.0%	0
Weighted base:		140		53		20		15		6		15		16		3		12
Sample:		122		19		21		20		11		8		15		9		19

Q47 Which centre / facility did you LAST visit to play bingo?
Those who go to Bingo at Q42: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Gala Bingo, Birmingham Great Park, Rubery, Birmingham	5.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	43.4%	1	0.0%	0	0.0%	0
Mecca Bingo, Brierley Hill	16.8%	4	16.6%	2	0.0%	0	0.0%	0	0.0%	0	38.5%	2	0.0%	0	0.0%	0	0.0%	0
Shipleys Bingo, Kidderminster	34.1%	8	59.8%	6	58.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgnorth	1.2%	0	0.0%	0	0.0%	0	0.0%	0	100.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bromsgrove	3.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	25.9%	1	0.0%	0	0.0%	0
Redditch	3.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	30.7%	1	0.0%	0	0.0%	0
Stourport-on-Severn	2.2%	0	0.0%	0	19.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Worcester	2.7%	1	0.0%	0	22.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Burford Village Centre	1.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	0
Cleehill Village Centre	2.1%	0	0.0%	0	0.0%	0	99.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinver Village Centre	9.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	38.5%	2	0.0%	0	0.0%	0	0.0%	0
Ombersley Village Centre	1.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	99.9%	0	0.0%	0
Online	10.7%	2	23.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wordsley Village Centre	5.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	23.0%	1	0.0%	0	0.0%	0	0.0%	0
Weighted base:		22		10		3		0		0		5		3		0		0
Sample:		18		4		3		1		1		3		3		2		1

Q48 Which centre / facility do you normally visit for art / culture activities (i.e. theatres / galleries / museums)?
'Those who visit theatres, concert halls, museums and / or art galleries at Q42: AND Excl. Nulls

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Artrix, Slideslow Drive, Bromsgrove	1.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.1%	5	0.0%	0	0.0%	0
Dudley Museum & Art Gallery, Priory Street, Dudley	0.2%	1	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Grand Theatre, Lichfield Street, Wolverhampton	2.4%	9	1.4%	1	0.0%	0	1.8%	1	26.3%	6	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Rose Theatre, Chester Road, Kidderminster	4.9%	18	12.8%	13	0.0%	0	3.2%	1	0.0%	0	4.4%	4	0.0%	0	1.3%	0	0.0%	0
Swan Theatre, The Moors, Worcester	1.4%	5	0.0%	0	6.1%	2	3.6%	2	0.0%	0	0.0%	0	1.2%	1	7.8%	1	1.5%	0
The Merry Hill Centre, Brierley Hill	0.4%	2	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Worcester City Art Gallery & Museum	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	0	0.0%	0
Bewdley	1.7%	7	3.3%	3	1.7%	0	1.3%	1	10.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birmingham City Centre	45.7%	174	37.9%	39	61.7%	18	32.4%	14	16.2%	3	61.8%	54	61.3%	36	25.0%	3	24.7%	7
Bridgnorth	0.4%	2	0.0%	0	0.0%	0	1.3%	1	2.1%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1
Bromsgrove	0.7%	3	1.4%	1	1.7%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0
Central London / West End	14.8%	56	13.2%	13	9.2%	3	24.5%	11	18.9%	4	17.5%	15	8.0%	5	7.1%	1	16.8%	5
Droitwich	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	8.3%	1	0.0%	0
Hereford	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1
Kidderminster	2.1%	8	7.4%	8	1.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0
Leominster	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	1
Ludlow	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	0
Malvern	11.3%	43	11.4%	12	12.1%	3	19.0%	8	4.7%	1	2.8%	2	6.6%	4	36.1%	4	31.3%	8
Redditch	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0
Shrewsbury	2.0%	8	4.2%	4	0.0%	0	0.0%	0	13.9%	3	0.0%	0	0.0%	0	0.0%	0	1.5%	0
Stourbridge	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	2	0.0%	0	0.0%	0	0.0%	0
Stourport-on-Severn	0.3%	1	0.0%	0	1.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	0
Telford	0.1%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tenbury Wells	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	1
Wolverhampton	0.7%	3	0.0%	0	0.0%	0	0.0%	0	1.3%	0	2.8%	2	0.0%	0	0.0%	0	0.0%	0
Worcester	1.2%	4	1.4%	1	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0	8.1%	1	4.5%	1
Abergavenny Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0
Abroad	0.5%	2	0.0%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0
Bilston Town Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0
Bristol City Centre	0.1%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheltenham Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0
Coventry City Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1
Great Malvern Local Centre	0.1%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hitchin Town Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Kendal Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0
Kington Town Centre, Herefordshire	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0
Liverpool City Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llandudno Town Centre, Wales	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2	0.0%	0	0.0%	0	0.0%	0
Manchester City Centre	1.0%	4	2.3%	2	0.0%	0	3.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milton Keynes Town Centre	0.2%	1	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0
Oxford City Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Palace Theatre, Alcester Street, Redditch	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Pershore Town Centre	0.1%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stratford-upon-Avon Town Centre	1.0%	4	1.6%	2	0.0%	0	0.0%	0	0.0%	0	1.4%	1	1.4%	1	0.0%	0	0.0%	0
Tewkesbury Town Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0
Walsall Town Centre	0.3%	1	0.0%	0	0.0%	0	1.8%	1	1.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		380		102		29		43		21		88		59		11		27
Sample:		400		48		38		57		47		54		58		51		47

Column %ges.

Q49 Which leisure facilities would you like to see more of in the Kidderminster area? [MR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Bars / pubs	1.7%	14	1.6%	4	2.4%	2	4.4%	4	0.0%	0	2.3%	3	0.0%	0	0.0%	0	0.0%	0
Better shopping facilities	2.9%	23	3.0%	8	4.0%	4	1.7%	1	3.4%	2	2.3%	3	4.0%	4	0.6%	0	2.3%	1
Bowling alley	7.4%	59	15.4%	41	10.6%	9	6.0%	5	2.9%	1	1.4%	2	0.9%	1	0.6%	0	0.0%	0
Cinema	7.2%	58	11.0%	29	11.3%	10	5.6%	5	1.9%	1	2.3%	3	9.9%	9	3.7%	1	0.0%	0
Hotels	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0
Restaurants	4.1%	33	3.1%	8	6.9%	6	10.4%	9	0.7%	0	2.3%	3	1.8%	2	3.7%	1	6.4%	4
Health & fitness facilities (e.g. gym)	4.0%	32	7.5%	20	3.9%	3	2.9%	2	3.3%	1	1.4%	2	3.0%	3	1.7%	0	0.0%	0
Theatre	1.3%	11	0.0%	0	1.2%	1	2.1%	2	0.6%	0	3.9%	6	1.2%	1	0.0%	0	0.7%	0
Concert hall / venue	1.2%	9	1.2%	3	1.2%	1	0.0%	0	0.0%	0	2.2%	3	2.0%	2	0.6%	0	0.0%	0
Bingo	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0
More children's facilties / activities	6.4%	51	12.5%	33	9.2%	8	2.3%	2	1.7%	1	1.4%	2	3.5%	3	2.5%	1	2.1%	1
Other	1.3%	10	0.5%	1	0.0%	0	0.6%	0	0.0%	0	2.5%	4	2.8%	3	6.2%	1	1.4%	1
Art gallery / museum	1.3%	11	0.0%	0	0.0%	0	0.9%	1	0.0%	0	6.4%	10	0.0%	0	0.6%	0	0.0%	0
Bigger / better swimming pool	5.7%	46	5.8%	15	5.0%	4	9.2%	8	1.9%	1	4.3%	7	6.5%	6	3.2%	1	7.5%	4
Ice-skating rink	2.0%	16	5.2%	14	0.7%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1
More / better activities for the disabled	0.5%	4	0.0%	0	1.7%	2	1.5%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
More teenagers' facilties / activities	0.5%	4	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2	0.6%	0	0.0%	0
Sports centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.7%	0
(None)	53.7%	431	38.3%	101	38.1%	34	62.4%	52	66.1%	29	66.7%	101	66.9%	63	67.0%	15	66.2%	37
(Don't know)	12.6%	101	17.8%	47	16.3%	14	2.1%	2	18.6%	8	12.3%	19	2.5%	2	13.6%	3	10.5%	6
Weighted base:		801		263		89		83		44		151		94		22		56
Sample:		801		100		100		100		100		100		100		101		100

GEN Gender of respondent.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Male	29.6%	237	19.7%	52	43.8%	39	33.8%	28	16.1%	7	41.3%	62	23.7%	22	33.6%	7	35.1%	20
Female	70.4%	564	80.3%	211	56.2%	50	66.2%	55	83.9%	37	58.7%	89	76.3%	71	66.4%	15	64.9%	37
Weighted base:		801		263		89		83		44		151		94		22		56
Sample:		801		100		100		100		100		100		100		101		100

AGE Could I ask how old you are?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
18 to 24	5.1%	41	4.2%	11	4.4%	4	4.4%	4	9.8%	4	6.4%	10	5.9%	6	0.0%	0	5.5%	3
25 to 34	9.9%	79	12.7%	33	17.6%	16	21.8%	18	9.8%	4	0.0%	0	0.0%	0	20.3%	4	5.5%	3
35 to 44	18.2%	146	32.8%	86	22.3%	20	17.0%	14	13.3%	6	5.0%	7	4.6%	4	9.9%	2	10.7%	6
45 to 54	20.2%	162	25.9%	68	25.8%	23	18.3%	15	18.3%	8	17.2%	26	14.2%	13	6.1%	1	12.4%	7
55 to 64	17.7%	142	11.6%	31	13.1%	12	16.7%	14	21.8%	10	16.3%	25	33.9%	32	20.5%	5	27.0%	15
65 +	26.6%	213	10.1%	27	15.1%	13	19.3%	16	26.0%	11	52.6%	79	39.0%	36	39.2%	9	37.7%	21
(Refused)	2.3%	18	2.5%	7	1.8%	2	2.6%	2	1.0%	0	2.6%	4	2.4%	2	4.1%	1	1.1%	1
Weighted base:		801		263		89		83		44		151		94		22		56
Sample:		801		100		100		100		100		100		100		101		100

ADU How many adults, including yourself, aged 16 years or over old are there living in your household ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
One	15.8%	127	9.7%	26	22.2%	20	10.5%	9	13.5%	6	21.5%	32	19.8%	19	20.5%	5	20.3%	11
Two	55.8%	447	63.2%	166	50.0%	44	61.7%	51	53.1%	23	52.1%	79	44.2%	41	60.8%	13	50.4%	28
Three	17.2%	138	15.8%	41	15.7%	14	20.9%	17	9.6%	4	12.3%	18	26.7%	25	11.2%	2	27.0%	15
Four or more	9.6%	77	9.0%	24	10.4%	9	6.1%	5	22.8%	10	13.4%	20	7.3%	7	4.8%	1	1.2%	1
(Refused)	1.6%	13	2.2%	6	1.8%	2	0.9%	1	1.0%	0	0.8%	1	1.9%	2	2.7%	1	1.1%	1
Weighted base:		801		263		89		83		44		151		94		22		56
Sample:		801		100		100		100		100		100		100		101		100

CHI How many children aged under 16 are there living in your household?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
None	66.2%	531	43.0%	113	57.7%	51	68.1%	57	72.4%	32	89.6%	135	89.7%	84	72.6%	16	76.2%	43
One	12.9%	103	23.3%	61	14.7%	13	7.3%	6	9.3%	4	6.1%	9	1.3%	1	11.8%	3	10.2%	6
Two	15.4%	123	26.9%	71	15.6%	14	22.1%	18	11.3%	5	1.0%	1	7.1%	7	10.9%	2	8.2%	5
Three	3.8%	30	4.5%	12	10.2%	9	0.0%	0	5.3%	2	2.5%	4	0.0%	0	2.7%	1	4.3%	2
Four or more	0.2%	2	0.0%	0	0.0%	0	1.7%	1	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Refused)	1.6%	13	2.2%	6	1.8%	2	0.9%	1	1.0%	0	0.8%	1	1.9%	2	2.0%	0	1.1%	1
Weighted base:		801		263		89		83		44		151		94		22		56
Sample:		801		100		100		100		100		100		100		101		100

CAR How many cars does your household own or have the use of?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
None	2.9%	23	1.2%	3	5.8%	5	1.1%	1	3.1%	1	3.2%	5	5.0%	5	1.9%	0	5.1%	3
One	34.3%	274	33.0%	87	44.8%	40	19.6%	16	25.3%	11	41.2%	62	34.7%	33	33.3%	7	32.8%	18
Two	40.3%	323	41.6%	109	29.4%	26	49.2%	41	46.2%	20	34.2%	52	45.0%	42	47.9%	11	39.0%	22
Three or more	20.9%	167	22.0%	58	18.2%	16	29.2%	24	23.7%	10	20.5%	31	13.3%	12	14.2%	3	22.0%	12
(Refused)	1.6%	13	2.2%	6	1.8%	2	0.9%	1	1.7%	1	0.8%	1	1.9%	2	2.7%	1	1.1%	1
Weighted base:		801		263		89		83		44		151		94		22		56
Sample:		801		100		100		100		100		100		100		101		100

PC Postcode

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
B61 0	5.1%	41	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	43.7%	41	0.0%	0	0.0%	0
B61 7	2.1%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.9%	17	0.0%	0	0.0%	0
B61 8	2.8%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	24.2%	23	0.0%	0	0.0%	0
B61 9	1.7%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.2%	13	0.0%	0	0.0%	0
DY101	2.4%	19	7.4%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
DY102	3.4%	27	10.3%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
DY103	5.9%	47	17.9%	47	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
DY104	8.4%	67	25.6%	67	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
DY115	6.1%	49	18.6%	49	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
DY116	4.1%	33	12.5%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
DY117	2.5%	20	7.7%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
DY121	1.9%	16	0.0%	0	0.0%	0	18.7%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
DY122	3.1%	24	0.0%	0	0.0%	0	29.4%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
DY123	0.2%	1	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
DY130	3.4%	27	0.0%	0	30.6%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
DY138	4.2%	33	0.0%	0	37.7%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
DY139	3.5%	28	0.0%	0	31.7%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
DY140	1.1%	9	0.0%	0	0.0%	0	10.4%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
DY148	2.5%	20	0.0%	0	0.0%	0	24.5%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
DY149	1.6%	13	0.0%	0	0.0%	0	15.2%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
DY7 5	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0
DY7 6	4.5%	36	0.0%	0	0.0%	0	0.0%	0	0.0%	0	23.8%	36	0.0%	0	0.0%	0	0.0%	0
DY8 2	3.2%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.0%	26	0.0%	0	0.0%	0	0.0%	0
DY8 3	5.5%	44	0.0%	0	0.0%	0	0.0%	0	0.0%	0	29.1%	44	0.0%	0	0.0%	0	0.0%	0
DY9 0	5.4%	43	0.0%	0	0.0%	0	0.0%	0	0.0%	0	28.6%	43	0.0%	0	0.0%	0	0.0%	0
WR158	5.3%	42	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	74.7%	42
WR6 6	1.8%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	25.3%	14
WR9 0	2.8%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	22	0.0%	0
WV156	2.1%	17	0.0%	0	0.0%	0	0.0%	0	37.7%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0
WV166	3.4%	27	0.0%	0	0.0%	0	0.0%	0	62.3%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		801		263		89		83		44		151		94		22		56
Sample:		801		100		100		100		100		100		100		101		100

QUOTA Zone

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Zone 1	32.8%	263	100.0%	263	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 2	11.1%	89	0.0%	0	100.0%	89	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 3	10.4%	83	0.0%	0	0.0%	0	100.0%	83	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 4	5.5%	44	0.0%	0	0.0%	0	0.0%	0	100.0%	44	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 5	18.8%	151	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	151	0.0%	0	0.0%	0	0.0%	0
Zone 6	11.7%	94	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	94	0.0%	0	0.0%	0
Zone 7	2.8%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	22	0.0%	0
Zone 8	7.0%	56	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	56
Weighted base:		801		263		89		83		44		151		94		22		56
Sample:		801		100		100		100		100		100		100		101		100

APPENDIX THREE – RETAIL NEED ANALYSIS

Wyre Forest Retail and Commercial Leisure Assessment

Retail Capacity Tables

Contents:

Wyre Forest Retail and Commercial Leisure Assessment

Retail Capacity Analysis - Conveneince Goods

Table 1: Population

Year	Zone 1	2	3	4	5	6	7	8	Total
2014	67,481	22,610	20,456	11,656	37,655	25,245	5,481	14,671	205,255
2016	67,711	22,680	20,616	11,782	37,797	25,522	5,518	14,794	206,420
2021	68,363	22,934	21,015	12,114	38,133	26,288	5,615	15,096	209,558
2026	69,087	23,139	21,232	12,400	38,435	27,057	5,734	15,468	212,552
2031	69,724	23,256	21,297	12,549	38,666	27,842	5,783	15,763	214,880
2032	*69863*	*23260*	*21273*	*12550*	*38671*	*28000*	*5780*	*15822*	215,219

Source: Experian Retail Planner Data based on ONS Population Projections

Wyre Forest Retail and Commercial Leisure Assessment

Retail Capacity Analysis - Conveneince Goods

Table 2: Convenience Goods Expenditure Per Head

Year	Zone 1	2	3	4	5	6	7	8
2014	£2,081	£2,134	£2,447	£2,296	£2,273	£2,038	£2,391	£2,440
2016	£2,081	£2,134	£2,447	£2,296	£2,273	£2,038	£2,391	£2,440
2021	£2,069	£2,121	£2,432	£2,282	£2,259	£2,026	£2,377	£2,425
2026	£2,056	£2,109	£2,418	£2,269	£2,246	£2,014	£2,362	£2,411
2031	£2,046	£2,098	£2,406	£2,257	£2,235	£2,004	£2,351	£2,399

Source: Experian Retail Planner Data
Growth based on Experian Retail Planner Briefing Note 13 - Table 6 adjusted for SFT via stores.

Wyre Forest Retail and Commercial Leisure Assessment

Retail Capacity Analysis - Conveneince Goods

Table 3: Convenience Goods Expenditure Generated

Year	Zone 1	2	3	4	5	6	7	8	Total
	£m	£m	£m	£m	£m	£m	£m	£m	£m
2014	£140.43	£48.25	£50.06	£26.76	£85.59	£51.45	£13.11	£35.80	£451.44
2016	£140.91	£48.40	£50.45	£27.05	£85.91	£52.01	£13.19	£36.10	£454.02
2021	£141.41	£48.65	£51.12	£27.65	£86.16	£53.25	£13.34	£36.61	£458.19
2026	£142.05	£48.79	£51.33	£28.13	£86.32	£54.48	£13.55	£37.29	£461.95
2031	£142.65	£48.79	£51.23	£28.33	£86.40	£55.78	£13.59	£37.81	£464.59

Wyre Forest Retail and Commercial Leisure Assessment

Retail Capacity Analysis - Conveneince Goods

Table 4: Convenience Goods Shopping Patterns - Main Food

	Zone								
	1	2	3	4	5	6	7	8	Total
Centre / Store	%	%	%	%	%	%	%	%	%
Iceland, Kidderminster	2.71%	0.00%	0.87%	0.00%	0.00%	0.00%	0.00%	0.00%	0.99%
Kidderminster Town Centre Others	0.00%	0.00%	0.00%	0.62%	0.00%	0.00%	0.00%	0.00%	0.03%
B&M, Kidderminster	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
M&S, Weavers Wharf, Kidderminster	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Poundland, Kidderminster	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Kidderminster Town Centre									
Aldi, Kidderminster	15.10%	3.76%	10.54%	0.62%	2.45%	0.00%	0.00%	0.83%	7.05%
Farm Foods, Kidderminster	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Morrisons, Kidderminster	27.01%	12.30%	12.87%	8.71%	2.45%	0.00%	2.80%	2.59%	14.16%
Sainsbury's, Kidderminster	23.43%	5.38%	23.23%	14.86%	11.74%	0.00%	0.64%	6.48%	14.24%
Tesco, Kidderminster	17.89%	6.28%	8.05%	2.09%	0.82%	0.00%	1.93%	6.40%	8.20%
Asda, Kidderminster	0.63%	0.00%	0.00%	0.62%	0.00%	0.00%	0.00%	0.00%	0.24%
Tesco Express (Esso), Bewdley Hill, Kidderminster	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Co-op, Franche Road, Kidderminster	1.43%	0.00%	1.42%	0.74%	0.00%	0.00%	0.00%	0.00%	0.66%
Tesco Express, Comberton Hill, Kidderminster	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Kidderminster (outside town centre)	0.00%	0.00%	0.65%	0.00%	0.00%	0.00%	0.00%	0.00%	0.07%
Tesco Express, Stourbridge Road, Kidderminster	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Kidderminster (Non Town Centre)									
Co-op, Lombard Street / Tan Lane, Stourport-on-Severn	0.00%	6.38%	0.00%	0.00%	0.00%	0.00%	1.28%	0.70%	0.76%
Stourport-on-Severn Town Centre Others	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Stourport-on-Severn Town Centre									
Tesco, Stourport-on-Severn	0.90%	41.75%	2.86%	0.00%	0.00%	0.00%	7.45%	6.01%	5.67%
Lidl, Stourport-on-Severn	1.70%	16.06%	13.45%	0.74%	1.37%	0.00%	0.00%	1.18%	4.06%
Stourport-on-Severn (outside town centre)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Stourport-on-Severn (Non Town Centre)									
Co-op, Load Street, Bewdley	0.00%	0.00%	1.70%	0.00%	0.00%	0.00%	0.00%	0.00%	0.18%
Tesco Express, Bewdley	0.00%	0.00%	1.58%	0.00%	0.00%	0.00%	0.00%	0.00%	0.17%
Bewdley Town Centre Others	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Bewdley Town Centre									
Co-op, Kidderminster Road, Bewdley	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Bewdley (outside town centre)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Bewdley (Non Town Centre)									
Other Locations in Wyre Forest									
Warbler Place, Spennells (inc Tesco Express)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Stourport Road, Foley Park, Kidderminster (inc Tesco Express)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Cookley Village Centre (inc Tesco Express)	3.54%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.17%

Chaddesley Corbett Village Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Willowfield Drive, Marlpool (inc Spar)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Lime Tree Walk, Lickhill (inc Spar)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Blakedown Village Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
The Parade, Broadwaters	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Lister Road, Sutton Park	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Bewdley Road, Blakebrook	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Areley Common	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
The Lakes Road, Bewdley	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Calder Road, Burlish	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Canterbury Road, Habberley Estate	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Burcher Green, Comberton Estate	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Queens Road, Areley Kings	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Tennyson Way, Offmore Farm	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Baskerville Road, Sion Hill	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Audley Drive, Ferndale	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Chester Road South, Hoobrook	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Queensway, Wribbenhall, Bewdley	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Selected Other Popular Locations									
Aldi, Bridgnorth	0.00%	0.00%	1.58%	24.84%	0.00%	0.00%	0.00%	0.00%	1.53%
Aldi, Bromsgrove	0.00%	0.00%	1.70%	0.00%	0.00%	22.72%	0.00%	0.00%	2.85%
Aldi, Ludlow	0.00%	0.00%	3.54%	1.78%	0.00%	0.00%	0.00%	16.73%	1.65%
Aldi, Stourbridge	0.84%	0.00%	0.00%	0.00%	7.26%	0.00%	0.00%	0.00%	1.64%
Aldi, Wollaston	0.00%	0.00%	0.00%	0.00%	6.18%	0.00%	0.00%	0.00%	1.16%
Asda, Bromsgrove	0.00%	0.00%	0.00%	0.00%	0.00%	35.36%	0.00%	0.00%	4.16%
Morrisons, Bromsgrove	0.00%	0.00%	0.00%	0.00%	0.00%	17.29%	3.44%	0.00%	2.13%
Morrisons, Droitwich	0.00%	0.58%	0.00%	0.00%	0.00%	0.00%	23.33%	1.54%	0.82%
Sainsbury's, Ambelcote, Brierley Hill	0.00%	0.00%	0.00%	0.00%	5.59%	0.00%	0.00%	0.00%	1.05%
Sainsbury's, Bridgnorth	0.00%	0.00%	0.00%	27.16%	0.00%	0.00%	0.00%	0.00%	1.49%
Tesco Extra, Stourbridge	0.00%	2.15%	0.00%	0.00%	15.63%	0.00%	0.00%	0.00%	3.16%
Tesco, Ludlow	0.00%	0.00%	6.22%	1.92%	0.00%	0.00%	0.00%	5.45%	1.14%
Waitrose, Droitwich	0.00%	0.69%	0.00%	0.00%	0.00%	5.89%	19.38%	1.88%	1.44%
Waitrose, Stourbridge	0.63%	0.00%	0.00%	0.00%	16.81%	0.00%	0.00%	0.00%	3.37%
Others	0.00%	1.61%	5.95%	9.27%	25.28%	12.15%	27.11%	41.16%	11.13%
Internet	4.18%	3.07%	3.82%	6.04%	4.44%	6.59%	12.65%	9.06%	3.66%

Wyre Forest Retail and Commercial Leisure Assessment

Retail Capacity Analysis - Conveneince Goods

Table 5: **Convenience Goods Shopping Patterns - Top Up**

	Zone									
	1	2	3	4	5	6	7	8	Total	
Centre / Store	%	%	%	%	%	%	%	%	%	%
Iceland, Kidderminster	1.64%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.56%	
Kidderminster Town Centre Others	5.98%	0.91%	0.00%	0.82%	0.00%	0.00%	0.00%	0.00%	2.18%	
B&M, Kidderminster	0.00%	2.81%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.26%	
M&S, Weavers Wharf, Kidderminster	0.69%	1.08%	0.00%	0.82%	0.00%	0.00%	0.00%	0.00%	0.38%	
Poundland, Kidderminster	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	
Kidderminster Town Centre										
Aldi, Kidderminster	3.77%	0.00%	2.54%	0.00%	1.03%	0.00%	0.00%	0.00%	1.74%	
Farm Foods, Kidderminster	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	
Morrisons, Kidderminster	3.64%	1.08%	0.98%	0.00%	2.07%	0.00%	0.98%	0.00%	1.88%	
Sainsbury's, Kidderminster	5.14%	3.27%	9.17%	0.00%	0.00%	0.00%	0.00%	0.87%	2.99%	
Tesco, Kidderminster	3.29%	0.00%	0.83%	0.00%	0.00%	0.00%	0.00%	2.68%	1.41%	
Asda, Kidderminster	2.13%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.73%	
Tesco Express (Esso), Bewdley Hill, Kidderminster	1.98%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.68%	
Co-op, Franche Road, Kidderminster	7.14%	0.00%	2.36%	0.97%	0.00%	0.00%	0.00%	0.00%	2.72%	
Tesco Express, Comberton Hill, Kidderminster	2.13%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.73%	
Kidderminster (outside town centre)	17.64%	0.00%	0.00%	0.00%	0.00%	2.06%	0.00%	0.00%	6.28%	
Tesco Express, Stourbridge Road, Kidderminster	2.80%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.96%	
Kidderminster (Non Town Centre)										
Co-op, Lombard Street / Tan Lane, Stourport-on-Severn	0.00%	10.84%	0.00%	0.00%	0.00%	0.00%	0.00%	2.34%	1.17%	
Stourport-on-Severn Town Centre Others	0.00%	6.32%	0.00%	6.49%	0.00%	0.00%	0.00%	0.00%	0.94%	
Stourport-on-Severn Town Centre										
Tesco, Stourport-on-Severn	0.00%	39.20%	4.50%	0.00%	0.00%	0.00%	0.98%	1.75%	4.17%	
Lidl, Stourport-on-Severn	0.00%	6.77%	2.48%	0.00%	0.00%	0.00%	0.00%	0.00%	0.85%	
Stourport-on-Severn (outside town centre)	0.00%	3.99%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.37%	
Stourport-on-Severn (Non Town Centre)										
Co-op, Load Street, Bewdley	0.00%	0.00%	4.84%	0.00%	0.00%	0.00%	0.00%	0.00%	0.46%	
Tesco Express, Bewdley	0.00%	0.00%	20.68%	0.00%	0.00%	0.00%	0.00%	0.00%	1.94%	
Bewdley Town Centre	0.82%	0.00%	12.11%	0.00%	0.00%	0.00%	0.00%	0.00%	1.42%	
Bewdley Town Centre										
Co-op, Kidderminster Road, Bewdley	0.00%	0.00%	4.35%	0.00%	0.00%	0.00%	0.00%	0.00%	0.41%	
Bewdley (outside town centre)	0.00%	0.00%	0.83%	0.00%	0.00%	0.00%	0.00%	0.00%	0.08%	
Bewdley (Non Town Centre)										
Other Locations in Wyre Forest										
Warbler Place, Spennells (inc Tesco Express)	16.35%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	5.60%	
Stourport Road, Foley Park, Kidderminster (inc Tesco Express)	7.89%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	2.70%	
Cookley Village Centre (inc Tesco Express)	3.03%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.04%	

Chaddesley Corbett Village Centre	0.00%	0.00%	0.00%	0.00%	1.03%	0.00%	1.95%	0.00%	0.25%
Willowfield Drive, Marlpool (inc Spar)	0.00%	0.00%	0.00%	0.00%	1.03%	0.00%	0.00%	0.00%	0.21%
Lime Tree Walk, Lickhill (inc Spar)	0.00%	1.08%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.10%
Blakedown Village Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
The Parade, Broadwaters	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Lister Road, Sutton Park	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Bewdley Road, Blakebrook	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Areley Common	0.00%	0.00%	0.00%	0.82%	0.00%	0.00%	0.00%	0.00%	0.05%
The Lakes Road, Bewdley	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Calder Road, Burlish	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Canterbury Road, Habberley Estate	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Burcher Green, Comberton Estate	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Queens Road, Areley Kings	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Tennyson Way, Offmore Farm	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Baskerville Road, Sion Hill	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Audley Drive, Ferndale	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Chester Road South, Hoobrook	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Queensway, Wribbenhall, Bewdley	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Selected Other Popular Locations									
Aldi, Bridgnorth	0.82%	0.00%	0.00%	11.04%	0.00%	0.00%	0.00%	0.00%	0.90%
Aldi, Bromsgrove	0.00%	0.00%	0.00%	0.00%	0.00%	5.85%	0.00%	0.00%	0.67%
Aldi, Ludlow	0.00%	0.00%	0.98%	0.00%	0.00%	0.00%	0.00%	0.00%	0.09%
Aldi, Stourbridge	0.00%	0.00%	0.00%	0.00%	10.69%	0.00%	0.00%	0.00%	2.13%
Aldi, Wollaston	0.00%	0.00%	0.00%	0.00%	15.97%	0.00%	0.00%	0.00%	3.19%
Asda, Bromsgrove	2.13%	0.00%	0.00%	0.00%	0.00%	25.75%	0.98%	0.00%	3.72%
Morrisons, Bromsgrove	0.00%	0.00%	0.00%	0.00%	0.00%	7.08%	0.00%	0.00%	0.81%
Morrisons, Droitwich	5.49%	1.08%	0.00%	0.00%	0.00%	0.00%	24.52%	1.46%	2.69%
Sainsbury's, Ambelcote, Brierley Hill	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Sainsbury's, Bridgnorth	0.00%	0.00%	0.98%	17.45%	0.00%	0.00%	0.00%	0.00%	1.07%
Tesco Extra, Stourbridge	0.00%	3.06%	0.00%	0.00%	8.19%	0.00%	0.00%	0.00%	1.92%
Tesco, Ludlow	0.00%	0.00%	2.21%	2.52%	0.00%	0.00%	0.00%	1.75%	0.48%
Waitrose, Droitwich	0.00%	2.81%	0.00%	0.00%	0.00%	0.00%	21.12%	0.87%	0.84%
Waitrose, Stourbridge	0.00%	0.00%	0.00%	0.00%	8.20%	0.00%	0.00%	0.00%	1.64%
Others	5.48%	8.49%	29.37%	59.06%	51.79%	59.26%	49.50%	88.28%	33.85%
Internet	0.00%	7.22%	0.83%	0.00%	0.00%	0.00%	0.00%	0.00%	0.74%

Wyre Forest Retail and Commercial Leisure Assessment

Retail Capacity Analysis - Conveneince Goods

Table 6: **Convenience Goods Shopping Patterns - Combined (Main and Top Up)**

	Zone								
	1	2	3	4	5	6	7	8	Total
Centre / Store	%	%	%	%	%	%	%	%	%
Iceland, Kidderminster	2.39%	0.00%	0.61%	0.00%	0.00%	0.00%	0.00%	0.00%	0.86%
Kidderminster Town Centre Others	1.79%	0.27%	0.00%	0.68%	0.00%	0.00%	0.00%	0.00%	0.68%
B&M, Kidderminster	0.00%	0.84%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.08%
M&S, Weavers Wharf, Kidderminster	0.21%	0.32%	0.00%	0.25%	0.00%	0.00%	0.00%	0.00%	0.11%
Poundland, Kidderminster	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Kidderminster Town Centre									
Aldi, Kidderminster	11.70%	2.63%	8.14%	0.44%	2.02%	0.00%	0.00%	0.58%	5.45%
Farm Foods, Kidderminster	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Morrisons, Kidderminster	20.00%	8.93%	9.30%	6.09%	2.33%	0.00%	2.25%	1.81%	10.47%
Sainsbury's, Kidderminster	17.94%	4.75%	19.01%	10.40%	8.22%	0.00%	0.45%	4.80%	10.86%
Tesco, Kidderminster	13.51%	4.40%	5.88%	1.46%	0.57%	0.00%	1.35%	5.29%	6.16%
Asda, Kidderminster	1.08%	0.00%	0.00%	0.44%	0.00%	0.00%	0.00%	0.00%	0.39%
Tesco Express (Esso), Bewdley Hill, Kidderminster	0.59%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.20%
Co-op, Franche Road, Kidderminster	3.14%	0.00%	1.70%	0.81%	0.00%	0.00%	0.00%	0.00%	1.28%
Tesco Express, Comberton Hill, Kidderminster	0.64%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.22%
Kidderminster (outside town centre)	5.29%	0.00%	0.46%	0.00%	0.00%	0.62%	0.00%	0.00%	1.93%
Tesco Express, Stourbridge Road, Kidderminster	0.84%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.29%
Kidderminster (Non Town Centre)									
Co-op, Lombard Street / Tan Lane, Stourport-on-Severn	0.00%	7.72%	0.00%	0.00%	0.00%	0.00%	0.90%	1.19%	0.89%
Stourport-on-Severn Town Centre Others	0.00%	1.89%	0.00%	1.95%	0.00%	0.00%	0.00%	0.00%	0.28%
Stourport-on-Severn Town Centre									
Tesco, Stourport-on-Severn	0.63%	40.98%	3.35%	0.00%	0.00%	0.00%	5.51%	4.73%	5.22%
Lidl, Stourport-on-Severn	1.19%	13.27%	10.16%	0.52%	0.96%	0.00%	0.00%	0.83%	3.10%
Stourport-on-Severn (outside town centre)	0.00%	1.20%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.11%
Stourport-on-Severn (Non Town Centre)									
Co-op, Load Street, Bewdley	0.00%	0.00%	2.64%	0.00%	0.00%	0.00%	0.00%	0.00%	0.26%
Tesco Express, Bewdley	0.00%	0.00%	7.31%	0.00%	0.00%	0.00%	0.00%	0.00%	0.70%
Bewdley Town Centre Others	0.25%	0.00%	3.63%	0.00%	0.00%	0.00%	0.00%	0.00%	0.43%
Bewdley Town Centre									
Co-op, Kidderminster Road, Bewdley	0.00%	0.00%	1.30%	0.00%	0.00%	0.00%	0.00%	0.00%	0.12%
Bewdley (outside town centre)	0.00%	0.00%	0.25%	0.00%	0.00%	0.00%	0.00%	0.00%	0.02%
Bewdley (Non Town Centre)									
Other Locations in Wyre Forest									
Warbler Place, Spennells (inc Tesco Express)	4.90%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.68%
Stourport Road, Foley Park, Kidderminster (inc Tesco Express)	2.37%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.81%
Cookley Village Centre (inc Tesco Express)	3.39%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.13%

Chaddesley Corbett Village Centre	0.00%	0.00%	0.00%	0.00%	0.31%	0.00%	0.58%	0.00%	0.08%
Willowfield Drive, Marlpool (inc Spar)	0.00%	0.00%	0.00%	0.00%	0.31%	0.00%	0.00%	0.00%	0.06%
Lime Tree Walk, Lickhill (inc Spar)	0.00%	0.32%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.03%
Blakedown Village Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
The Parade, Broadwaters	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Lister Road, Sutton Park	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Bewdley Road, Blakebrook	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Areley Common	0.00%	0.00%	0.00%	0.25%	0.00%	0.00%	0.00%	0.00%	0.01%
The Lakes Road, Bewdley	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Calder Road, Burlish	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Canterbury Road, Habberley Estate	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Burcher Green, Comberton Estate	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Queens Road, Areley Kings	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Tennyson Way, Offmore Farm	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Baskerville Road, Sion Hill	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Audley Drive, Ferndale	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Chester Road South, Hoobrook	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Queensway, Wribbenhall, Bewdley	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Selected Other Popular Locations									
Aldi, Bridgnorth	0.25%	0.00%	1.10%	20.70%	0.00%	0.00%	0.00%	0.00%	1.34%
Aldi, Bromsgrove	0.00%	0.00%	1.19%	0.00%	0.00%	17.66%	0.00%	0.00%	2.20%
Aldi, Ludlow	0.00%	0.00%	2.77%	1.25%	0.00%	0.00%	0.00%	11.71%	1.18%
Aldi, Stourbridge	0.59%	0.00%	0.00%	0.00%	8.29%	0.00%	0.00%	0.00%	1.79%
Aldi, Wollaston	0.00%	0.00%	0.00%	0.00%	9.12%	0.00%	0.00%	0.00%	1.77%
Asda, Bromsgrove	0.64%	0.00%	0.00%	0.00%	0.00%	32.48%	0.29%	0.00%	4.03%
Morrisons, Bromsgrove	0.00%	0.00%	0.00%	0.00%	0.00%	14.23%	2.41%	0.00%	1.74%
Morrisons, Droitwich	1.65%	0.73%	0.00%	0.00%	0.00%	0.00%	23.69%	1.52%	1.38%
Sainsbury's, Ambelcote, Brierley Hill	0.00%	0.00%	0.00%	0.00%	3.92%	0.00%	0.00%	0.00%	0.74%
Sainsbury's, Bridgnorth	0.00%	0.00%	0.29%	24.24%	0.00%	0.00%	0.00%	0.00%	1.36%
Tesco Extra, Stourbridge	0.00%	2.42%	0.00%	0.00%	13.40%	0.00%	0.00%	0.00%	2.79%
Tesco, Ludlow	0.00%	0.00%	5.01%	2.10%	0.00%	0.00%	0.00%	4.34%	0.94%
Waitrose, Droitwich	0.00%	1.33%	0.00%	0.00%	0.00%	4.12%	19.90%	1.58%	1.26%
Waitrose, Stourbridge	0.44%	0.00%	0.00%	0.00%	14.23%	0.00%	0.00%	0.00%	2.85%
Others	1.64%	3.68%	12.97%	24.21%	33.23%	26.28%	33.83%	55.29%	17.95%
Internet	2.93%	4.31%	2.92%	4.23%	3.11%	4.62%	8.85%	6.34%	2.78%

Wyre Forest Retail and Commercial Leisure Assessment

Retail Capacity Analysis - Conveneince Goods

Table 7: **Convenience Goods Shopping Market Share Turnovers 2016**

	Zone								
	1	2	3	4	5	6	7	8	Total
Centre / Store	£m	£m	£m	£m	£m	£m	£m	£m	£m
Iceland, Kidderminster	£3.367	£0.000	£0.308	£0.000	£0.000	£0.000	£0.000	£0.000	£3.675
Kidderminster Town Centre Others	£2.528	£0.132	£0.000	£0.185	£0.000	£0.000	£0.000	£0.000	£2.845
B&M, Kidderminster	£0.000	£0.408	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.408
M&S, Weavers Wharf, Kidderminster	£0.293	£0.157	£0.000	£0.067	£0.000	£0.000	£0.000	£0.000	£0.516
Poundland, Kidderminster	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Kidderminster Town Centre	**£6.188**	**£0.697**	**£0.308**	**£0.251**	**£0.000**	**£0.000**	**£0.000**	**£0.000**	**£7.443**
Aldi, Kidderminster	£16.492	£1.273	£4.106	£0.118	£1.736	£0.000	£0.000	£0.211	£23.936
Farm Foods, Kidderminster	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Morrisons, Kidderminster	£28.181	£4.322	£4.691	£1.649	£2.003	£0.000	£0.297	£0.654	£41.796
Sainsbury's, Kidderminster	£25.280	£2.298	£9.588	£2.814	£7.060	£0.000	£0.059	£1.733	£48.833
Tesco, Kidderminster	£19.040	£2.129	£2.968	£0.396	£0.490	£0.000	£0.178	£1.908	£27.109
Asda, Kidderminster	£1.524	£0.000	£0.000	£0.118	£0.000	£0.000	£0.000	£0.000	£1.642
Tesco Express (Esso), Bewdley Hill, Kidderminster	£0.838	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.838
Co-op, Franche Road, Kidderminster	£4.430	£0.000	£0.860	£0.219	£0.000	£0.000	£0.000	£0.000	£5.508
Tesco Express, Comberton Hill, Kidderminster	£0.901	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.901
Kidderminster (outside town centre)	£7.458	£0.000	£0.231	£0.000	£0.000	£0.322	£0.000	£0.000	£8.010
Tesco Express, Stourbridge Road, Kidderminster	£1.185	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£1.185
Kidderminster (Non Town Centre)	**£88.838**	**£8.749**	**£18.337**	**£5.195**	**£9.553**	**£0.322**	**£0.534**	**£4.295**	**£159.759**
Co-op, Lombard Street / Tan Lane, Stourport-on-Severn	£0.000	£3.735	£0.000	£0.000	£0.000	£0.000	£0.118	£0.431	£4.285
Stourport-on-Severn Town Centre Others	£0.000	£0.917	£0.000	£0.527	£0.000	£0.000	£0.000	£0.000	£1.444
Stourport-on-Severn Town Centre	**£0.000**	**£4.652**	**£0.000**	**£0.527**	**£0.000**	**£0.000**	**£0.118**	**£0.431**	**£5.729**
Tesco, Stourport-on-Severn	£0.884	£19.836	£1.690	£0.000	£0.000	£0.000	£0.726	£1.707	£24.843
Lidl, Stourport-on-Severn	£1.677	£6.423	£5.125	£0.140	£0.823	£0.000	£0.000	£0.298	£14.485
Stourport-on-Severn (outside town centre)	£0.000	£0.579	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.579
Stourport-on-Severn (Non Town Centre)	**£2.561**	**£26.837**	**£6.815**	**£0.140**	**£0.823**	**£0.000**	**£0.726**	**£2.005**	**£39.906**
Co-op, Load Street, Bewdley	£0.000	£0.000	£1.331	£0.000	£0.000	£0.000	£0.000	£0.000	£1.331
Tesco Express, Bewdley	£0.000	£0.000	£3.686	£0.000	£0.000	£0.000	£0.000	£0.000	£3.686
Bewdley Town Centre Others	£0.347	£0.000	£1.833	£0.000	£0.000	£0.000	£0.000	£0.000	£2.180
Bewdley Town Centre	**£0.347**	**£0.000**	**£6.851**	**£0.000**	**£0.000**	**£0.000**	**£0.000**	**£0.000**	**£7.198**
Co-op, Kidderminster Road, Bewdley	£0.000	£0.000	£0.658	£0.000	£0.000	£0.000	£0.000	£0.000	£0.658
Bewdley (outside town centre)	£0.000	£0.000	£0.125	£0.000	£0.000	£0.000	£0.000	£0.000	£0.125
Bewdley (Non Town Centre)	**£0.000**	**£0.000**	**£0.782**	**£0.000**	**£0.000**	**£0.000**	**£0.000**	**£0.000**	**£0.782**
Other Locations in Wyre Forest									
Warbler Place, Spennells (inc Tesco Express)	£6.910	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£6.910
Stourport Road, Foley Park, Kidderminster (inc Tesco Express)	£3.334	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£3.334

Cookley Village Centre (inc Tesco Express)	£4.772	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£4.772
Chaddesley Corbett Village Centre	£0.000	£0.000	£0.000	£0.000	£0.266	£0.000	£0.077	£0.000	£0.343
Willowfield Drive, Marlpool (inc Spar)	£0.000	£0.000	£0.000	£0.000	£0.266	£0.000	£0.000	£0.000	£0.266
Lime Tree Walk, Lickhill (inc Spar)	£0.000	£0.157	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.157
Blakedown Village Centre	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*
The Parade, Broadwaters	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*
Lister Road, Sutton Park	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*
Bewdley Road, Blakebrook	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*
Areley Common	*£0.000*	*£0.000*	*£0.000*	*£0.067*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.067*
The Lakes Road, Bewdley	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*
Calder Road, Burlish	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*
Canterbury Road, Habberley Estate	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*
Burcher Green, Comberton Estate	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*
Queens Road, Areley Kings	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*
Tennyson Way, Offmore Farm	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*
Baskerville Road, Sion Hill	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*
Audley Drive, Ferndale	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*
Chester Road South, Hoobrook	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*
Queensway, Wribbenhall, Bewdley	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*	*£0.000*
Selected Other Popular Locations									
Aldi, Bridgnorth	£0.347	£0.000	£0.557	£5.599	£0.000	£0.000	£0.000	£0.000	£6.503
Aldi, Bromsgrove	£0.000	£0.000	£0.599	£0.000	£0.000	£9.185	£0.000	£0.000	£9.784
Aldi, Ludlow	£0.000	£0.000	£1.397	£0.338	£0.000	£0.000	£0.000	£4.227	£5.962
Aldi, Stourbridge	£0.831	£0.000	£0.000	£0.000	£7.122	£0.000	£0.000	£0.000	£7.954
Aldi, Wollaston	£0.000	£0.000	£0.000	£0.000	£7.831	£0.000	£0.000	£0.000	£7.831
Asda, Bromsgrove	£0.901	£0.000	£0.000	£0.000	£0.000	£16.892	£0.039	£0.000	£17.831
Morrisons, Bromsgrove	£0.000	£0.000	£0.000	£0.000	£0.000	£7.400	£0.317	£0.000	£7.717
Morrisons, Droitwich	£2.319	£0.354	£0.000	£0.000	£0.000	£0.000	£3.125	£0.547	£6.345
Sainsbury's, Ambelcote, Brierley Hill	£0.000	£0.000	£0.000	£0.000	£3.364	£0.000	£0.000	£0.000	£3.364
Sainsbury's, Bridgnorth	£0.000	£0.000	£0.148	£6.558	£0.000	£0.000	£0.000	£0.000	£6.706
Tesco Extra, Stourbridge	£0.000	£1.171	£0.000	£0.000	£11.509	£0.000	£0.000	£0.000	£12.680
Tesco, Ludlow	£0.000	£0.000	£2.529	£0.568	£0.000	£0.000	£0.000	£1.565	£4.662
Waitrose, Droitwich	£0.000	£0.642	£0.000	£0.000	£0.000	£2.145	£2.626	£0.570	£5.983
Waitrose, Stourbridge	£0.623	£0.000	£0.000	£0.000	£12.226	£0.000	£0.000	£0.000	£12.850
Others	£2.316	£1.779	£6.544	£6.549	£28.548	£13.671	£4.463	£19.959	£83.830
Internet	£4.123	£2.088	£1.473	£1.144	£2.669	£2.400	£1.168	£2.289	£17.354

Wyre Forest Retail and Commercial Leisure Assessment

Retail Capacity Analysis - Conveneince Goods

Table 8: **Convenience Goods Shopping Market Share Turnovers 2021**

	Zone 1	2	3	4	5	6	7	8	Total
Centre / Store	£m	£m	£m	£m	£m	£m	£m	£m	£m
Iceland, Kidderminster	£3.379	£0.000	£0.312	£0.000	£0.000	£0.000	£0.000	£0.000	£3.691
Kidderminster Town Centre Others	£2.537	£0.133	£0.000	£0.189	£0.000	£0.000	£0.000	£0.000	£2.859
B&M, Kidderminster	£0.000	£0.410	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.410
M&S, Weavers Wharf, Kidderminster	£0.294	£0.158	£0.000	£0.068	£0.000	£0.000	£0.000	£0.000	£0.520
Poundland, Kidderminster	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Kidderminster Town Centre	**£6.210**	**£0.700**	**£0.312**	**£0.257**	**£0.000**	**£0.000**	**£0.000**	**£0.000**	**£7.479**
Aldi, Kidderminster	£16.551	£1.280	£4.161	£0.121	£1.741	£0.000	£0.000	£0.214	£24.067
Farm Foods, Kidderminster	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Morrisons, Kidderminster	£28.282	£4.344	£4.753	£1.685	£2.008	£0.000	£0.300	£0.663	£42.036
Sainsbury's, Kidderminster	£25.371	£2.310	£9.716	£2.876	£7.080	£0.000	£0.060	£1.758	£49.170
Tesco, Kidderminster	£19.108	£2.140	£3.007	£0.404	£0.492	£0.000	£0.180	£1.936	£27.267
Asda, Kidderminster	£1.530	£0.000	£0.000	£0.121	£0.000	£0.000	£0.000	£0.000	£1.650
Tesco Express (Esso), Bewdley Hill, Kidderminster	£0.841	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.841
Co-op, Franche Road, Kidderminster	£4.446	£0.000	£0.871	£0.223	£0.000	£0.000	£0.000	£0.000	£5.540
Tesco Express, Comberton Hill, Kidderminster	£0.904	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.904
Kidderminster (outside town centre)	£7.485	£0.000	£0.234	£0.000	£0.000	£0.329	£0.000	£0.000	£8.048
Tesco Express, Stourbridge Road, Kidderminster	£1.190	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£1.190
Kidderminster (Non Town Centre)	**£105.707**	**£10.074**	**£22.741**	**£5.430**	**£11.322**	**£0.329**	**£0.541**	**£4.570**	**£160.713**
Co-op, Lombard Street / Tan Lane, Stourport-on-Severn	£0.000	£3.755	£0.000	£0.000	£0.000	£0.000	£0.120	£0.437	£4.311
Stourport-on-Severn Town Centre Others	£0.000	£0.922	£0.000	£0.539	£0.000	£0.000	£0.000	£0.000	£1.460
Stourport-on-Severn Town Centre	**£0.000**	**£4.676**	**£0.000**	**£0.539**	**£0.000**	**£0.000**	**£0.120**	**£0.437**	**£5.772**
Tesco, Stourport-on-Severn	£0.887	£19.938	£1.712	£0.000	£0.000	£0.000	£0.735	£1.732	£25.003
Lidl, Stourport-on-Severn	£1.683	£6.456	£5.193	£0.143	£0.825	£0.000	£0.000	£0.302	£14.602
Stourport-on-Severn (outside town centre)	£0.000	£0.582	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.582
Stourport-on-Severn (Non Town Centre)	**£2.570**	**£26.975**	**£6.905**	**£0.143**	**£0.825**	**£0.000**	**£0.735**	**£2.034**	**£40.186**
Co-op, Load Street, Bewdley	£0.000	£0.000	£1.349	£0.000	£0.000	£0.000	£0.000	£0.000	£1.349
Tesco Express, Bewdley	£0.000	£0.000	£3.735	£0.000	£0.000	£0.000	£0.000	£0.000	£3.735
Bewdley Town Centre Others	£0.348	£0.000	£1.857	£0.000	£0.000	£0.000	£0.000	£0.000	£2.205
Bewdley Town Centre	**£0.348**	**£0.000**	**£6.941**	**£0.000**	**£0.000**	**£0.000**	**£0.000**	**£0.000**	**£7.290**
Co-op, Kidderminster Road, Bewdley	£0.000	£0.000	£0.666	£0.000	£0.000	£0.000	£0.000	£0.000	£0.666
Bewdley (outside town centre)	£0.000	£0.000	£0.127	£0.000	£0.000	£0.000	£0.000	£0.000	£0.127
Bewdley (Non Town Centre)	**£0.000**	**£0.000**	**£0.793**	**£0.000**	**£0.000**	**£0.000**	**£0.000**	**£0.000**	**£0.793**
Other Locations in Wyre Forest									
Warbler Place, Spennells (inc Tesco Express)	£6.934	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£6.934
Stourport Road, Foley Park, Kidderminster (inc Tesco Express)	£3.346	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£3.346

Cookley Village Centre (inc Tesco Express)	£4.789	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£4.789
Chaddesley Corbett Village Centre	£0.000	£0.000	£0.000	£0.000	£0.267	£0.000	£0.078	£0.000	£0.345
Willowfield Drive, Marlpool (inc Spar)	£0.000	£0.000	£0.000	£0.000	£0.267	£0.000	£0.000	£0.000	£0.267
Lime Tree Walk, Lickhill (inc Spar)	£0.000	£0.158	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.158
Blakedown Village Centre	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
The Parade, Broadwaters	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Lister Road, Sutton Park	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Bewdley Road, Blakebrook	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Areley Common	£0.000	£0.000	£0.000	£0.068	£0.000	£0.000	£0.000	£0.000	£0.068
The Lakes Road, Bewdley	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Calder Road, Burlish	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Canterbury Road, Habberley Estate	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Burcher Green, Comberton Estate	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Queens Road, Areley Kings	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Tennyson Way, Offmore Farm	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Baskerville Road, Sion Hill	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Audley Drive, Ferndale	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Chester Road South, Hoobrook	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Queensway, Wribbenhall, Bewdley	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Selected Other Popular Locations									
Aldi, Bridgnorth	£0.348	£0.000	£0.565	£5.722	£0.000	£0.000	£0.000	£0.000	£6.635
Aldi, Bromsgrove	£0.000	£0.000	£0.607	£0.000	£0.000	£9.404	£0.000	£0.000	£10.010
Aldi, Ludlow	£0.000	£0.000	£1.416	£0.345	£0.000	£0.000	£0.000	£4.287	£6.048
Aldi, Stourbridge	£0.834	£0.000	£0.000	£0.000	£7.142	£0.000	£0.000	£0.000	£7.977
Aldi, Wollaston	£0.000	£0.000	£0.000	£0.000	£7.854	£0.000	£0.000	£0.000	£7.854
Asda, Bromsgrove	£0.904	£0.000	£0.000	£0.000	£0.000	£17.295	£0.039	£0.000	£18.238
Morrisons, Bromsgrove	£0.000	£0.000	£0.000	£0.000	£0.000	£7.576	£0.321	£0.000	£7.897
Morrisons, Droitwich	£2.327	£0.356	£0.000	£0.000	£0.000	£0.000	£3.161	£0.555	£6.399
Sainsbury's, Ambelcote, Brierley Hill	£0.000	£0.000	£0.000	£0.000	£3.374	£0.000	£0.000	£0.000	£3.374
Sainsbury's, Bridgnorth	£0.000	£0.000	£0.150	£6.703	£0.000	£0.000	£0.000	£0.000	£6.853
Tesco Extra, Stourbridge	£0.000	£1.177	£0.000	£0.000	£11.541	£0.000	£0.000	£0.000	£12.718
Tesco, Ludlow	£0.000	£0.000	£2.563	£0.580	£0.000	£0.000	£0.000	£1.587	£4.730
Waitrose, Droitwich	£0.000	£0.645	£0.000	£0.000	£0.000	£2.196	£2.656	£0.579	£6.076
Waitrose, Stourbridge	£0.626	£0.000	£0.000	£0.000	£12.261	£0.000	£0.000	£0.000	£12.887
Others	£2.325	£1.788	£6.631	£6.693	£28.629	£13.997	£4.514	£20.245	£84.822
Internet	£4.138	£2.099	£1.492	£1.169	£2.677	£2.458	£1.181	£2.322	£17.536

Wyre Forest Retail and Commercial Leisure Assessment

Retail Capacity Analysis - Conveneince Goods

Table 9: **Convenience Goods Shopping Market Share Turnovers 2026**

	Zone								
	1	2	3	4	5	6	7	8	Total
Centre / Store	£m	£m	£m	£m	£m	£m	£m	£m	£m
Iceland, Kidderminster	£3.394	£0.000	£0.313	£0.000	£0.000	£0.000	£0.000	£0.000	£3.707
Kidderminster Town Centre Others	£2.548	£0.133	£0.000	£0.192	£0.000	£0.000	£0.000	£0.000	£2.874
B&M, Kidderminster	£0.000	£0.411	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.411
M&S, Weavers Wharf, Kidderminster	£0.295	£0.158	£0.000	£0.069	£0.000	£0.000	£0.000	£0.000	£0.523
Poundland, Kidderminster	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Kidderminster Town Centre	**£6.238**	**£0.702**	**£0.313**	**£0.261**	**£0.000**	**£0.000**	**£0.000**	**£0.000**	**£7.515**
Aldi, Kidderminster	£16.626	£1.283	£4.179	£0.123	£1.745	£0.000	£0.000	£0.218	£24.173
Farm Foods, Kidderminster	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Morrisons, Kidderminster	£28.410	£4.357	£4.774	£1.714	£2.012	£0.000	£0.305	£0.675	£42.248
Sainsbury's, Kidderminster	£25.486	£2.316	£9.757	£2.926	£7.094	£0.000	£0.061	£1.790	£49.430
Tesco, Kidderminster	£19.195	£2.146	£3.020	£0.412	£0.492	£0.000	£0.183	£1.971	£27.419
Asda, Kidderminster	£1.537	£0.000	£0.000	£0.123	£0.000	£0.000	£0.000	£0.000	£1.659
Tesco Express (Esso), Bewdley Hill, Kidderminster	£0.845	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.845
Co-op, Franche Road, Kidderminster	£4.466	£0.000	£0.875	£0.227	£0.000	£0.000	£0.000	£0.000	£5.568
Tesco Express, Comberton Hill, Kidderminster	£0.908	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.908
Kidderminster (outside town centre)	£7.519	£0.000	£0.235	£0.000	£0.000	£0.337	£0.000	£0.000	£8.090
Tesco Express, Stourbridge Road, Kidderminster	£1.195	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£1.195
Kidderminster (Non Town Centre)	**£106.187**	**£10.103**	**£22.838**	**£5.524**	**£11.343**	**£0.337**	**£0.549**	**£4.655**	**£161.536**
Co-op, Lombard Street / Tan Lane, Stourport-on-Severn	£0.000	£3.765	£0.000	£0.000	£0.000	£0.000	£0.122	£0.445	£4.332
Stourport-on-Severn Town Centre Others	£0.000	£0.924	£0.000	£0.548	£0.000	£0.000	£0.000	£0.000	£1.472
Stourport-on-Severn Town Centre	**£0.000**	**£4.690**	**£0.000**	**£0.548**	**£0.000**	**£0.000**	**£0.122**	**£0.445**	**£5.805**
Tesco, Stourport-on-Severn	£0.891	£19.995	£1.720	£0.000	£0.000	£0.000	£0.746	£1.764	£25.115
Lidl, Stourport-on-Severn	£1.690	£6.474	£5.215	£0.145	£0.827	£0.000	£0.000	£0.308	£14.660
Stourport-on-Severn (outside town centre)	£0.000	£0.583	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.583
Stourport-on-Severn (Non Town Centre)	**£2.581**	**£27.053**	**£6.935**	**£0.145**	**£0.827**	**£0.000**	**£0.746**	**£2.072**	**£40.359**
Co-op, Load Street, Bewdley	£0.000	£0.000	£1.355	£0.000	£0.000	£0.000	£0.000	£0.000	£1.355
Tesco Express, Bewdley	£0.000	£0.000	£3.751	£0.000	£0.000	£0.000	£0.000	£0.000	£3.751
Bewdley Town Centre Others	£0.350	£0.000	£1.865	£0.000	£0.000	£0.000	£0.000	£0.000	£2.215
Bewdley Town Centre	**£0.350**	**£0.000**	**£6.971**	**£0.000**	**£0.000**	**£0.000**	**£0.000**	**£0.000**	**£7.321**
Co-op, Kidderminster Road, Bewdley	£0.000	£0.000	£0.669	£0.000	£0.000	£0.000	£0.000	£0.000	£0.669
Bewdley (outside town centre)	£0.000	£0.000	£0.127	£0.000	£0.000	£0.000	£0.000	£0.000	£0.127
Bewdley (Non Town Centre)	**£0.000**	**£0.000**	**£0.796**	**£0.000**	**£0.000**	**£0.000**	**£0.000**	**£0.000**	**£0.796**
Other Locations in Wyre Forest									
Warbler Place, Spennells (inc Tesco Express)	£6.966	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£6.966
Stourport Road, Foley Park, Kidderminster (inc Tesco Express)	£3.362	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£3.362

Cookley Village Centre (inc Tesco Express)	£4.810	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£4.810
Chaddesley Corbett Village Centre	£0.000	£0.000	£0.000	£0.000	£0.267	£0.000	£0.079	£0.000	£0.346
Willowfield Drive, Marlpool (inc Spar)	£0.000	£0.000	£0.000	£0.000	£0.267	£0.000	£0.000	£0.000	£0.267
Lime Tree Walk, Lickhill (inc Spar)	£0.000	£0.158	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.158
Blakedown Village Centre	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
The Parade, Broadwaters	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Lister Road, Sutton Park	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Bewdley Road, Blakebrook	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Areley Common	£0.000	£0.000	£0.000	£0.069	£0.000	£0.000	£0.000	£0.000	£0.069
The Lakes Road, Bewdley	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Calder Road, Burlish	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Canterbury Road, Habberley Estate	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Burcher Green, Comberton Estate	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Queens Road, Areley Kings	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Tennyson Way, Offmore Farm	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Baskerville Road, Sion Hill	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Audley Drive, Ferndale	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Chester Road South, Hoobrook	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Queensway, Wribbenhall, Bewdley	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Selected Other Popular Locations									
Aldi, Bridgnorth	£0.350	£0.000	£0.567	£5.822	£0.000	£0.000	£0.000	£0.000	£6.739
Aldi, Bromsgrove	£0.000	£0.000	£0.609	£0.000	£0.000	£9.621	£0.000	£0.000	£10.230
Aldi, Ludlow	£0.000	£0.000	£1.422	£0.351	£0.000	£0.000	£0.000	£4.367	£6.140
Aldi, Stourbridge	£0.838	£0.000	£0.000	£0.000	£7.156	£0.000	£0.000	£0.000	£7.994
Aldi, Wollaston	£0.000	£0.000	£0.000	£0.000	£7.868	£0.000	£0.000	£0.000	£7.868
Asda, Bromsgrove	£0.908	£0.000	£0.000	£0.000	£0.000	£17.694	£0.040	£0.000	£18.642
Morrisons, Bromsgrove	£0.000	£0.000	£0.000	£0.000	£0.000	£7.751	£0.326	£0.000	£8.077
Morrisons, Droitwich	£2.337	£0.357	£0.000	£0.000	£0.000	£0.000	£3.209	£0.565	£6.468
Sainsbury's, Ambelcote, Brierley Hill	£0.000	£0.000	£0.000	£0.000	£3.380	£0.000	£0.000	£0.000	£3.380
Sainsbury's, Bridgnorth	£0.000	£0.000	£0.151	£6.820	£0.000	£0.000	£0.000	£0.000	£6.971
Tesco Extra, Stourbridge	£0.000	£1.180	£0.000	£0.000	£11.563	£0.000	£0.000	£0.000	£12.743
Tesco, Ludlow	£0.000	£0.000	£2.574	£0.590	£0.000	£0.000	£0.000	£1.617	£4.780
Waitrose, Droitwich	£0.000	£0.647	£0.000	£0.000	£0.000	£2.247	£2.696	£0.589	£6.179
Waitrose, Stourbridge	£0.628	£0.000	£0.000	£0.000	£12.284	£0.000	£0.000	£0.000	£12.913
Others	£2.335	£1.793	£6.659	£6.810	£28.683	£14.320	£4.582	£20.620	£85.803
Internet	£4.156	£2.105	£1.499	£1.190	£2.682	£2.514	£1.199	£2.365	£17.710

Wyre Forest Retail and Commercial Leisure Assessment

Retail Capacity Analysis - Conveneince Goods

Table 10: **Convenience Goods Shopping Market Share Turnovers 2031**

	Zone								
	1	2	3	4	5	6	7	8	Total
Centre / Store	£m	£m	£m	£m	£m	£m	£m	£m	£m
Iceland, Kidderminster	£3.409	£0.000	£0.312	£0.000	£0.000	£0.000	£0.000	£0.000	£3.721
Kidderminster Town Centre Others	£2.559	£0.133	£0.000	£0.193	£0.000	£0.000	£0.000	£0.000	£2.886
B&M, Kidderminster	£0.000	£0.411	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.411
M&S, Weavers Wharf, Kidderminster	£0.297	£0.158	£0.000	£0.070	£0.000	£0.000	£0.000	£0.000	£0.524
Poundland, Kidderminster	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Kidderminster Town Centre	**£6.264**	**£0.702**	**£0.312**	**£0.263**	**£0.000**	**£0.000**	**£0.000**	**£0.000**	**£7.542**
Aldi, Kidderminster	£16.695	£1.283	£4.170	£0.124	£1.746	£0.000	£0.000	£0.221	£24.240
Farm Foods, Kidderminster	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Morrisons, Kidderminster	£28.529	£4.357	£4.764	£1.726	£2.014	£0.000	£0.306	£0.685	£42.382
Sainsbury's, Kidderminster	£25.593	£2.316	£9.738	£2.946	£7.101	£0.000	£0.061	£1.815	£49.571
Tesco, Kidderminster	£19.275	£2.146	£3.014	£0.414	£0.493	£0.000	£0.183	£1.999	£27.525
Asda, Kidderminster	£1.543	£0.000	£0.000	£0.124	£0.000	£0.000	£0.000	£0.000	£1.667
Tesco Express (Esso), Bewdley Hill, Kidderminster	£0.849	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.849
Co-op, Franche Road, Kidderminster	£4.485	£0.000	£0.873	£0.229	£0.000	£0.000	£0.000	£0.000	£5.587
Tesco Express, Comberton Hill, Kidderminster	£0.912	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.912
Kidderminster (outside town centre)	£7.550	£0.000	£0.234	£0.000	£0.000	£0.345	£0.000	£0.000	£8.129
Tesco Express, Stourbridge Road, Kidderminster	£1.200	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£1.200
Kidderminster (Non Town Centre)	**£106.631**	**£10.103**	**£22.794**	**£5.563**	**£11.354**	**£0.345**	**£0.551**	**£4.720**	**£162.061**
Co-op, Lombard Street / Tan Lane, Stourport-on-Severn	£0.000	£3.766	£0.000	£0.000	£0.000	£0.000	£0.122	£0.451	£4.339
Stourport-on-Severn Town Centre Others	£0.000	£0.924	£0.000	£0.552	£0.000	£0.000	£0.000	£0.000	£1.476
Stourport-on-Severn Town Centre	**£0.000**	**£4.690**	**£0.000**	**£0.552**	**£0.000**	**£0.000**	**£0.122**	**£0.451**	**£5.815**
Tesco, Stourport-on-Severn	£0.895	£19.996	£1.716	£0.000	£0.000	£0.000	£0.748	£1.788	£25.144
Lidl, Stourport-on-Severn	£1.697	£6.475	£5.205	£0.146	£0.827	£0.000	£0.000	£0.312	£14.663
Stourport-on-Severn (outside town centre)	£0.000	£0.583	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.583
Stourport-on-Severn (Non Town Centre)	**£2.592**	**£27.054**	**£6.921**	**£0.146**	**£0.827**	**£0.000**	**£0.748**	**£2.101**	**£40.390**
Co-op, Load Street, Bewdley	£0.000	£0.000	£1.352	£0.000	£0.000	£0.000	£0.000	£0.000	£1.352
Tesco Express, Bewdley	£0.000	£0.000	£3.744	£0.000	£0.000	£0.000	£0.000	£0.000	£3.744
Bewdley Town Centre Others	£0.351	£0.000	£1.861	£0.000	£0.000	£0.000	£0.000	£0.000	£2.213
Bewdley Town Centre	**£0.351**	**£0.000**	**£6.958**	**£0.000**	**£0.000**	**£0.000**	**£0.000**	**£0.000**	**£7.309**
Co-op, Kidderminster Road, Bewdley	£0.000	£0.000	£0.668	£0.000	£0.000	£0.000	£0.000	£0.000	£0.668
Bewdley (outside town centre)	£0.000	£0.000	£0.127	£0.000	£0.000	£0.000	£0.000	£0.000	£0.127
Bewdley (Non Town Centre)	**£0.000**	**£0.000**	**£0.795**	**£0.000**	**£0.000**	**£0.000**	**£0.000**	**£0.000**	**£0.795**
Other Locations in Wyre Forest									
Warbler Place, Spennells (inc Tesco Express)	£6.995	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£6.995
Stourport Road, Foley Park, Kidderminster (inc Tesco Express)	£3.376	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£3.376
Cookley Village Centre (inc Tesco Express)	£4.831	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£4.831

Chaddesley Corbett Village Centre	£0.000	£0.000	£0.000	£0.000	£0.268	£0.000	£0.079	£0.000	£0.347
Willowfield Drive, Marlpool (inc Spar)	£0.000	£0.000	£0.000	£0.000	£0.268	£0.000	£0.000	£0.000	£0.268
Lime Tree Walk, Lickhill (inc Spar)	£0.000	£0.158	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.158
Blakedown Village Centre	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
The Parade, Broadwaters	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Lister Road, Sutton Park	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Bewdley Road, Blakebrook	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Areley Common	£0.000	£0.000	£0.000	£0.070	£0.000	£0.000	£0.000	£0.000	£0.070
The Lakes Road, Bewdley	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Calder Road, Burlish	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Canterbury Road, Habberley Estate	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Burcher Green, Comberton Estate	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Queens Road, Areley Kings	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Tennyson Way, Offmore Farm	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Baskerville Road, Sion Hill	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Audley Drive, Ferndale	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Chester Road South, Hoobrook	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Queensway, Wribbenhall, Bewdley	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Selected Other Popular Locations									
Aldi, Bridgnorth	£0.351	£0.000	£0.566	£5.863	£0.000	£0.000	£0.000	£0.000	£6.780
Aldi, Bromsgrove	£0.000	£0.000	£0.608	£0.000	£0.000	£9.850	£0.000	£0.000	£10.459
Aldi, Ludlow	£0.000	£0.000	£1.419	£0.354	£0.000	£0.000	£0.000	£4.428	£6.200
Aldi, Stourbridge	£0.842	£0.000	£0.000	£0.000	£7.163	£0.000	£0.000	£0.000	£8.005
Aldi, Wollaston	£0.000	£0.000	£0.000	£0.000	£7.876	£0.000	£0.000	£0.000	£7.876
Asda, Bromsgrove	£0.912	£0.000	£0.000	£0.000	£0.000	£18.117	£0.040	£0.000	£19.068
Morrisons, Bromsgrove	£0.000	£0.000	£0.000	£0.000	£0.000	£7.936	£0.327	£0.000	£8.263
Morrisons, Droitwich	£2.347	£0.357	£0.000	£0.000	£0.000	£0.000	£3.220	£0.573	£6.497
Sainsbury's, Ambelcote, Brierley Hill	£0.000	£0.000	£0.000	£0.000	£3.383	£0.000	£0.000	£0.000	£3.383
Sainsbury's, Bridgnorth	£0.000	£0.000	£0.150	£6.868	£0.000	£0.000	£0.000	£0.000	£7.018
Tesco Extra, Stourbridge	£0.000	£1.180	£0.000	£0.000	£11.574	£0.000	£0.000	£0.000	£12.755
Tesco, Ludlow	£0.000	£0.000	£2.569	£0.594	£0.000	£0.000	£0.000	£1.639	£4.802
Waitrose, Droitwich	£0.000	£0.647	£0.000	£0.000	£0.000	£2.300	£2.706	£0.598	£6.250
Waitrose, Stourbridge	£0.631	£0.000	£0.000	£0.000	£12.296	£0.000	£0.000	£0.000	£12.927
Others	£2.345	£1.793	£6.646	£6.858	£28.711	£14.662	£4.599	£20.908	£86.523
Internet	£4.174	£2.105	£1.496	£1.198	£2.684	£2.575	£1.203	£2.398	£17.833

Wyre Forest Retail and Commercial Leisure Assessment

Retail Capacity Analysis - Conveneince Goods

Table 11: **Convenience Goods Turnovers - Main Town Centres and Free Standing Stores in the District**

	Year			
	2016	**2021**	**2026**	**2031**
Wyre Forest Main Town Centres				
Kidderminster Town Centre	**£7.443**	**£7.479**	**£7.515**	**£7.542**
Stourport-on-Severn Town Centre	**£5.729**	**£5.772**	**£5.805**	**£5.815**
Bewdley Town Centre	**£7.198**	**£7.290**	**£7.321**	**£7.309**
Wyre Forest Freestanding Stores/Locations				
Aldi, Kidderminster	£23.936	£24.067	£24.173	£24.240
Farm Foods, Kidderminster	£0.000	£0.000	£0.000	£0.000
Morrisons, Kidderminster	£41.796	£42.036	£42.248	£42.382
Sainsbury's, Kidderminster	£48.833	£49.170	£49.430	£49.571
Tesco, Kidderminster	£27.109	£27.267	£27.419	£27.109
Asda, Kidderminster	£1.642	£1.650	£1.659	£1.667
Tesco Express (Esso), Bewdley Hill, Kidderminster	£0.838	£0.841	£0.845	£0.849
Co-op, Franche Road, Kidderminster	£5.508	£5.540	£5.568	£5.587
Tesco Express, Comberton Hill, Kidderminster	£0.901	£0.904	£0.908	£0.912
Kidderminster (outside town centre)	£8.010	£8.048	£8.090	£8.129
Tesco Express, Stourbridge Road, Kidderminster	£1.185	£1.190	£1.195	£1.200
Kidderminster (Non Town Centre)	**£159.759**	**£160.713**	**£161.536**	**£162.061**
Tesco, Stourport-on-Severn	£24.843	£25.003	£25.115	£25.144
Lidl, Stourport-on-Severn	£14.485	£14.602	£14.660	£14.663
Stourport-on-Severn (outside town centre)	£0.579	£0.582	£0.583	£0.583
Stourport-on-Severn (Non Town Centre)	**£39.906**	**£40.186**	**£40.359**	**£40.390**
Co-op, Kidderminster Road, Bewdley	£0.658	£0.666	£0.669	£0.668
Bewdley (outside town centre)	£0.125	£0.127	£0.127	£0.127
Bewdley (Non Town Centre)	**£0.782**	**£0.793**	**£0.796**	**£0.795**
Other Locations in Wyre Forest	**£15.848**	**£15.907**	**£15.979**	**£16.044**

Notes:
Summary of estimated market share turnovers (from Tables 7 to 10)
Turnover estimates given relate only to the share of expenditure available within the adopted study area.

Wyre Forest Retail and Commercial Leisure Assessment

Retail Capacity Analysis - Conveneince Goods

Table 12: **Convenience Goods Benchmark Turnovers - Main Town Centres and Free Standing Stores in the District 2016**

	Convenience Sales Floorspace sqm	Trading Density £/sqm	Benchmark Turnover £m
Iceland, Kidderminster	420	£8,000	£3.360
Kidderminster Town Centre Others	320	£3,500	£1.120
B&M, Kidderminster	40	£3,500	£0.140
M&S, Weavers Wharf, Kidderminster	550	£8,000	£4.400
Poundland, Kidderminster	50	£3,500	£0.175
Kidderminster Town Centre			**£9.195**
Aldi, Kidderminster	550	£8,000	£4.400
Farm Foods, Kidderminster	500	£8,000	£4.000
Morrisons, Kidderminster	3100	£12,500	£38.750
Sainsbury's, Kidderminster	3950	£12,500	£49.375
Tesco, Kidderminster	3250	£12,500	£40.625
Asda, Kidderminster	740	£12,500	£9.250
Tesco Express (Esso), Bewdley Hill, Kidderminster	180	£12,500	£2.250
Co-op, Franche Road, Kidderminster	150	£8,000	£1.200
Tesco Express, Comberton Hill, Kidderminster	180	£12,500	£2.250
Kidderminster (outside town centre)	250	£3,500	£0.875
Tesco Express, Stourbridge Road, Kidderminster	180	£12,500	£2.250
Kidderminster (Non Town Centre)			**£155.225**
Co-op, Lombard Street / Tan Lane, Stourport-on-Severn	1100	£8,000	£8.800
Stourport-on-Severn Town Centre Others	450	£3,500	£1.575
Stourport-on-Severn Town Centre			**£10.375**
Tesco, Stourport-on-Severn	2200	£12,500	£27.500
Lidl, Stourport-on-Severn	850	£8,000	£6.800
Stourport-on-Severn (outside town centre)	250	£3,500	£0.875
Stourport-on-Severn (Non Town Centre)			**£35.175**
Co-op, Load Street, Bewdley	190	£8,000	£1.520
Tesco Express, Bewdley	280	£12,500	£3.500
Bewdley Town Centre Others	250	£350	£0.088
Bewdley Town Centre			**£5.108**
Co-op, Kidderminster Road, Bewdley	220	£800	£0.176
Bewdley (outside town centre)	150	£350	£0.053
Bewdley (Non Town Centre)			**£0.229**

Notes:
Conveneince store floorspace derived from various sources including IGD, VOA, Boyer surveys and WFDC Data

Trading Densities:

Main Grocer Operated Stores	£12,500/sqm
Discounters, Co-Op and Symbol Groups	£8,000/sqm
Local stores	£3,500/sqm

Benchmark turnover is product of sales area and trading density

Wyre Forest Retail and Commercial Leisure Assessment

Retail Capacity Analysis - Conveneince Goods

Table 13: **Convenience Goods Capacity Market Share -v- Benchmark Turnovers at Main Town Centres and Free Standing Stores in the District**

		2016			2021			2026			2031	
	Market Share	Benchmark	Capacity	Market Share	Benchmark	Capacity	Market Share	Benchmark	Capacity	Market Share	Benchmark	Capacity
	£M	*£M*	*£M*	*£M*	*£M*	*£M*	*£M*	*£M*	*£M*	*£M*	*£M*	*£M*
Wyre Forest Main Town Centres												
Kidderminster Town Centre	£7.443	£9.195	-£1.752	£7.479	£9.195	-£1.716	£7.515	£9.195	-£1.680	£7.542	£9.195	-£1.653
Stourport-on-Severn Town Centre	£5.729	£10.375	-£4.646	£5.772	£10.375	-£4.603	£5.805	£10.375	-£4.570	£5.815	£10.375	-£4.560
Bewdley Town Centre	£7.198	£5.108	£2.090	£7.290	£5.108	£2.182	£7.321	£5.108	£2.213	£7.309	£5.108	£2.201
Freestanding Stores/Locations												
Kidderminster (Non Town Centre)	£159.759	£155.225	£4.534	£160.713	£155.225	£5.488	£161.536	£155.225	£6.311	£162.061	£155.225	£6.836
Stourport-on-Severn (Non Town Centre)	£39.906	£35.175	£4.731	£40.186	£35.175	£5.011	£40.359	£35.175	£5.184	£40.390	£35.175	£5.215
Bewdley (Non Town Centre)	£0.782	£0.229	£0.554	£0.793	£0.229	£0.564	£0.796	£0.229	£0.568	£0.795	£0.229	£0.566

Notes:
Market Share Turnovers from Table 11
Benchmark Turnovers from Table 12. No allowance has been taken for the potential for trading efficency improvements in existing floorspace growth in conveneince sales is primarily online.
Capacity is difference between implied turnover and benchmark turnover

Wyre Forest Retail and Commercial Leisure Assessment

Retail Capacity Analysis - Conveneince Goods

Table 14: **Convenience Goods Capacity Converted to Floorspace**

	2016 Capacity	2016 Benchmark Density	2016 Sales Floorspace	2021 Capacity	2021 Benchmark Density	2021 Sales Floorspace	2026 Capacity	2026 Benchmark Density	2026 Sales Floorspace	2031 Capacity	2031 Benchmark Density	2031 Sales Floorspace
	£M	*£/sqm*	sqm	*£M*	*£M*	*£M*	*£M*	*£M*	*£M*	*£M*	*£M*	*£M*
Wyre Forest Main Town Centres												
Kidderminster Town Centre	-£1.752	£6,500	-269	-£1.716	£6,581.657	-261	-£1.680	£6,664.340	-252	-£1.653	£6,748.062	-245
Stourport-on-Severn Town Centre	-£4.646	£6,500	-715	-£4.603	£6,581.657	-699	-£4.570	£6,664.340	-686	-£4.560	£6,748.062	-676
Bewdley Town Centre	£2.090	£6,500	322	£2.182	£6,581.657	332	£2.213	£6,664.340	332	£2.201	£6,748.062	326

Notes:
Turnover Capacity from Table 13
Benchmark Turnovers for town centre floorspace applied at a rate of £6,500/sqm to reflect combination of local and discounter trading levels. There is however the potential for the benchmark trading to be higher should a national grocer be anticipated.
Capacity is difference between implied turnover and benchmark turnover

Wyre Forest Retail and Commercial Leisure Assessment

Retail Capacity Analysis - Comparison Goods

Table A: Population

Year	Zone 1	2	3	4	5	6	7	8	Total
2013	67,481	22,610	20,456	11,656	37,655	25,245	5,481	14,671	205,255
2016	67,711	22,680	20,616	11,782	37,797	25,522	5,518	14,794	206,420
2021	68,363	22,934	21,015	12,114	38,133	26,288	5,615	15,096	209,558
2026	69,087	23,139	21,232	12,400	38,435	27,057	5,734	15,468	212,552
2031	69,724	23,256	21,297	12,549	38,666	27,842	5,783	15,763	214,880
2032	69,863	23,260	21,273	12,550	38,671	28,000	5,780	15,822	215,219

Source: Experian Retail Planner Data based on ONS Population Projections

Wyre Forest Retail and Commercial Leisure Assessment

Retail Capacity Analysis - Comparison Goods

Table B: Comparison Goods Expenditure Per Head

Year	Zone 1	2	3	4	5	6	7	8
2014	£2,946	£3,143	£3,766	£3,463	£3,758	£3,040	£3,808	£3,743
2016	£3,158	£3,370	£4,038	£3,713	£4,029	£3,259	£4,083	£4,013
2021	£3,542	£3,779	£4,528	£4,164	£4,518	£3,655	£4,579	£4,500
2026	£4,146	£4,424	£5,300	£4,874	£5,289	£4,279	£5,359	£5,268
2031	£4,872	£5,198	£6,229	£5,727	£6,215	£5,028	£6,298	£6,190

Source: Experian Retail Planner Data
Growth based on Experian Retail Planner Briefing Note 13 - Table 6 adjusted for SFT via stores.

Wyre Forest Retail and Commercial Leisure Assessment

Retail Capacity Analysis - Comparison Goods

Table C: Comparison Goods Expenditure Generated

Year	*Zone*								
	1	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**Total**
	£m	*£m*	*£m*	*£m*	*£m*	*£m*	*£m*	*£m*	*£m*
2014	£198.80	£71.06	£77.04	£40.36	£141.51	£76.74	£20.87	£54.91	£681.30
2016	£213.86	£76.42	£83.24	£43.74	£152.29	£83.18	£22.53	£59.37	£734.64
2021	£242.15	£86.67	£95.16	£50.44	£172.30	£96.09	£25.71	£67.94	£836.44
2026	£286.45	£102.36	£112.54	£60.44	£203.29	£115.76	£30.73	£81.48	£993.05
2031	£339.72	£120.89	£132.65	£71.87	£240.32	£139.98	£36.42	£97.58	£1,179.43

Product of Table A and Table B

Wyre Forest Retail and Commercial Leisure Assessment

Retail Capacity Analysis - Comparison Goods

Table D: **Comparison Goods Shopping Patterns - Combined Market Share %**

Year	*Zone*								
	1	**2**	**3**	**4**	**5**	**6**	**7**	**8**	
Wyre Forest Main Town Centres									
Kidderminster	40.97%	34.34%	33.79%	18.69%	12.89%	2.51%	8.06%	15.41%	26.19%
Stourport-on-Severn	0.67%	13.38%	1.59%	0.00%	0.81%	0.00%	0.52%	0.82%	2.09%
Bewdley	0.18%	0.00%	4.26%	0.00%	0.00%	0.00%	0.00%	0.00%	0.50%
Wyre Forest Others									
Crossley Retail Park, Kidderminster	15.24%	10.38%	5.41%	7.89%	2.63%	1.48%	1.90%	2.39%	8.74%
Sainsbury's, Carpet Trades Way, Kidderminster	1.37%	0.00%	1.89%	0.88%	0.16%	0.00%	0.00%	0.75%	0.79%
B&Q, Green Street, Kidderminster	2.73%	2.73%	2.51%	1.61%	1.25%	0.13%	1.72%	1.27%	1.97%
Bed City, MCF Complex, Kidderminster	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Carters Furniture, New Road, Kidderminster	0.11%	0.09%	0.72%	0.00%	0.14%	0.00%	0.10%	0.59%	0.18%
Go Outdoors, Hoo Farm Industrial Estate, Kidderminster	0.00%	0.00%	0.00%	0.00%	0.28%	0.00%	0.00%	0.00%	0.04%
Homebase, Chester Road South, Kidderminster	0.67%	1.03%	0.07%	0.00%	0.21%	0.08%	0.08%	0.03%	0.41%
JTF, Hoo Farm Industrial Estate, Kidderminster	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Matalan, Park Lane, Kidderminster	0.67%	0.34%	0.13%	0.00%	0.27%	0.00%	0.00%	0.00%	0.32%
Rowe Carpets, Green Street, Kidderminster	0.00%	0.00%	0.10%	0.00%	0.14%	0.00%	0.00%	0.00%	0.03%
Screwfix, Easter Park, Kidderminster	0.20%	0.03%	0.28%	0.00%	0.46%	0.00%	0.05%	0.03%	0.18%
Wigleys DIY, Sandy Lane Industrial Estate, Stourport-on-Severn	0.00%	0.27%	0.29%	0.00%	0.00%	0.00%	0.17%	0.00%	0.06%
Wyre Forest Furniture Centre, Green Street, Kidderminster	0.00%	0.11%	0.00%	0.00%	0.00%	0.00%	0.00%	0.17%	0.02%
Morrisons, Green Street, Kidderminster	0.18%	0.10%	0.00%	0.28%	0.00%	0.00%	0.00%	0.19%	0.10%
Tesco, Severn Road, Stourport-on-Severn	0.10%	0.95%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.14%
Easter Park, Worcester Road, Kidderminster	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.10%	0.01%
Main Competing Centres/Retail Parks									
Merry Hill Shopping Centre (Intu), Brierley Hill	7.65%	1.13%	3.41%	3.19%	19.73%	7.81%	0.74%	4.31%	7.88%
Merry Hill Retail Park, Dudley	2.76%	1.56%	2.51%	0.21%	10.07%	5.42%	0.20%	0.00%	3.71%
Worcester	3.04%	7.35%	7.70%	0.00%	1.31%	5.28%	15.44%	13.19%	4.82%
Bromsgrove	0.00%	0.06%	0.17%	0.07%	0.67%	32.96%	1.00%	0.00%	3.87%
Birmingham City Centre	0.96%	0.52%	0.75%	1.00%	3.21%	3.64%	3.66%	0.82%	1.64%
Redditch	0.00%	0.23%	0.48%	0.00%	0.00%	10.75%	2.24%	0.00%	1.32%
Hereford	0.52%	0.00%	0.14%	0.08%	0.00%	0.00%	0.00%	8.82%	0.79%
Stourbridge	0.40%	0.24%	0.10%	0.00%	17.23%	0.00%	0.12%	0.00%	3.17%
Telford	0.00%	0.32%	1.98%	16.60%	0.00%	0.00%	0.00%	0.50%	1.13%
Ludlow	0.08%	0.00%	4.29%	0.82%	0.34%	0.00%	0.00%	3.62%	0.80%
Bridgnorth	0.17%	0.00%	0.20%	14.07%	0.00%	0.00%	0.00%	0.22%	0.86%
Brierley Hill (EXCLUDING Intu Merry Hill Shopping Centre)	0.00%	0.00%	0.33%	0.07%	2.14%	0.00%	0.00%	0.48%	0.46%
Others	2.90%	6.51%	6.33%	12.76%	14.18%	16.43%	45.01%	23.55%	10.22%
Internet / catalogue / mail order	18.44%	18.33%	20.54%	21.78%	11.88%	13.52%	19.01%	22.74%	17.55%

Notes:
The combined comparison goods shopping patterns have been derived from the market share for each comparion goods category (from the household survey) weighted in accordance with the proportion of consumer spending on each good category

Wyre Forest Retail and Commercial Leisure Assessment

Retail Capacity Analysis - Comparison Goods

Table E: **Comparison Goods Shopping Patterns - 2016 Market Share Based Turnover £M**

Year	*Zone*								
	1	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**TOTAL**
Wyre Forest Main Town Centres									
Kidderminster	£87.622	£26.242	£28.128	£8.176	£19.634	£2.084	£1.816	£9.147	£182.848
Stourport-on-Severn	£1.423	£10.226	£1.327	£0.000	£1.241	£0.000	£0.117	£0.485	£14.818
Bewdley	£0.386	£0.000	£3.549	£0.000	£0.000	£0.000	£0.000	£0.000	£3.935
Wyre Forest Others									
Crossley Retail Park, Kidderminster	£32.594	£7.933	£4.506	£3.452	£4.003	£1.233	£0.428	£1.420	£55.568
Sainsbury's, Carpet Trades Way, Kidderminster	£2.922	£0.000	£1.572	£0.385	£0.247	£0.000	£0.000	£0.446	£5.571
B&Q, Green Street, Kidderminster	£5.845	£2.087	£2.087	£0.706	£1.909	£0.109	£0.388	£0.752	£13.883
Bed City, MCF Complex, Kidderminster	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Carters Furniture, New Road, Kidderminster	£0.242	£0.073	£0.603	£0.000	£0.209	£0.000	£0.024	£0.353	£1.503
Go Outdoors, Hoo Farm Industrial Estate, Kidderminster	£0.000	£0.000	£0.000	£0.000	£0.429	£0.000	£0.000	£0.000	£0.429
Homebase, Chester Road South, Kidderminster	£1.437	£0.784	£0.061	£0.000	£0.326	£0.064	£0.018	£0.017	£2.707
JTF, Hoo Farm Industrial Estate, Kidderminster	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Matalan, Park Lane, Kidderminster	£1.424	£0.259	£0.108	£0.000	£0.406	£0.000	£0.000	£0.000	£2.198
Rowe Carpets, Green Street, Kidderminster	£0.000	£0.000	£0.085	£0.000	£0.209	£0.000	£0.000	£0.000	£0.294
Screwfix, Easter Park, Kidderminster	£0.432	£0.020	£0.236	£0.000	£0.696	£0.000	£0.012	£0.017	£1.412
Wigleys DIY, Sandy Lane Industrial Estate, Stourport	£0.000	£0.203	£0.238	£0.000	£0.000	£0.000	£0.037	£0.000	£0.478
Wyre Forest Furniture Centre, Green Street, Kidderminster	£0.000	£0.086	£0.000	£0.000	£0.000	£0.000	£0.000	£0.099	£0.185
Morrisons, Green Street, Kidderminster	£0.385	£0.079	£0.000	£0.121	£0.000	£0.000	£0.000	£0.115	£0.699
Tesco, Severn Road, Stourport	£0.209	£0.724	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.932
Easter Park, Worcester Road, Kidderminster	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.059	£0.059
Main Competing Centres/Retail Parks									
Merry Hill Shopping Centre (Intu), Brierley Hill	£16.355	£0.864	£2.838	£1.397	£30.049	£6.494	£0.167	£2.556	£60.720
Merry Hill Retail Park, Dudley	£5.904	£1.196	£2.089	£0.092	£15.331	£4.509	£0.045	£0.000	£29.166
Worcester	£6.502	£5.617	£6.407	£0.000	£1.987	£4.396	£3.478	£7.833	£36.219
Bromsgrove	£0.000	£0.049	£0.144	£0.029	£1.019	£27.415	£0.225	£0.000	£28.881
Birmingham City Centre	£2.058	£0.396	£0.621	£0.437	£4.885	£3.026	£0.824	£0.490	£12.736
Redditch	£0.000	£0.174	£0.404	£0.000	£0.000	£8.941	£0.504	£0.000	£10.023
Hereford	£1.109	£0.000	£0.120	£0.037	£0.000	£0.000	£0.000	£5.236	£6.503
Stourbridge	£0.862	£0.183	£0.085	£0.000	£26.241	£0.000	£0.027	£0.000	£27.398
Telford	£0.000	£0.247	£1.648	£7.263	£0.000	£0.000	£0.000	£0.298	£9.456
Ludlow	£0.171	£0.000	£3.571	£0.360	£0.513	£0.000	£0.000	£2.149	£6.763
Bridgnorth	£0.361	£0.000	£0.167	£6.155	£0.000	£0.000	£0.000	£0.132	£6.815
Brierley Hill (EXCLUDING Intu Merry Hill Shopping Centre)	£0.000	£0.000	£0.273	£0.029	£3.256	£0.000	£0.000	£0.288	£3.847
Others	£6.194	£4.975	£5.272	£5.580	£21.601	£13.664	£10.141	£13.979	£81.406
Internet / catalogue / mail order	£39.430	£14.012	£17.097	£9.525	£18.094	£11.249	£4.282	£13.502	£127.191

Notes:
The market share turnovers are calculated from percentage market share for each centre (from Table D) multiplied by comparison goods expenditure generated (from Table C) . The turnovers a built up on a zone by zone basis.
Turnover estimates given relate only to the share of expenditure available within the adopted study area.

Wyre Forest Retail and Commercial Leisure Assessment

Retail Capacity Analysis - Comparison Goods

Table F: **Comparison Goods Shopping Patterns - 2021 Market Share Based Turnover £M**

Year	*Zone*								
	1	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**TOTAL**
Wyre Forest Main Town Centres									
Kidderminster	£99.210	£29.758	£32.155	£9.427	£22.214	£2.407	£2.072	£10.467	£207.711
Stourport-on-Severn	£1.611	£11.596	£1.518	£0.000	£1.404	£0.000	£0.133	£0.555	£16.817
Bewdley	£0.437	£0.000	£4.057	£0.000	£0.000	£0.000	£0.000	£0.000	£4.494
Wyre Forest Others									
Crossley Retail Park, Kidderminster	£36.905	£8.996	£5.151	£3.981	£4.529	£1.424	£0.488	£1.625	£63.098
Sainsbury's, Carpet Trades Way, Kidderminster	£3.308	£0.000	£1.797	£0.444	£0.279	£0.000	£0.000	£0.510	£6.339
B&Q, Green Street, Kidderminster	£6.618	£2.367	£2.386	£0.814	£2.160	£0.126	£0.443	£0.860	£15.774
Bed City, MCF Complex, Kidderminster	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Carters Furniture, New Road, Kidderminster	£0.274	£0.082	£0.690	£0.000	£0.236	£0.000	£0.027	£0.404	£1.713
Go Outdoors, Hoo Farm Industrial Estate, Kidderminster	£0.000	£0.000	£0.000	£0.000	£0.486	£0.000	£0.000	£0.000	£0.486
Homebase, Chester Road South, Kidderminster	£1.627	£0.889	£0.070	£0.000	£0.369	£0.074	£0.020	£0.019	£3.069
JTF, Hoo Farm Industrial Estate, Kidderminster	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Matalan, Park Lane, Kidderminster	£1.612	£0.294	£0.123	£0.000	£0.460	£0.000	£0.000	£0.000	£2.489
Rowe Carpets, Green Street, Kidderminster	£0.000	£0.000	£0.097	£0.000	£0.236	£0.000	£0.000	£0.000	£0.333
Screwfix, Easter Park, Kidderminster	£0.489	£0.022	£0.270	£0.000	£0.787	£0.000	£0.013	£0.019	£1.601
Wigleys DIY, Sandy Lane Industrial Estate, Stourport-on-Severn	£0.000	£0.230	£0.272	£0.000	£0.000	£0.000	£0.043	£0.000	£0.545
Wyre Forest Furniture Centre, Green Street, Kidderminster	£0.000	£0.097	£0.000	£0.000	£0.000	£0.000	£0.000	£0.114	£0.211
Morrisons, Green Street, Kidderminster	£0.435	£0.089	£0.000	£0.140	£0.000	£0.000	£0.000	£0.132	£0.796
Tesco, Severn Road, Stourport-on-Severn	£0.236	£0.821	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£1.057
Easter Park, Worcester Road, Kidderminster	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.068	£0.068
Main Competing Centres/Retail Parks									
Merry Hill Shopping Centre (Intu), Brierley Hill	£18.518	£0.980	£3.244	£1.611	£33.998	£7.501	£0.191	£2.925	£68.968
Merry Hill Retail Park, Dudley	£6.685	£1.356	£2.388	£0.106	£17.345	£5.209	£0.052	£0.000	£33.141
Worcester	£7.362	£6.370	£7.324	£0.000	£2.249	£5.077	£3.969	£8.963	£41.314
Bromsgrove	£0.000	£0.055	£0.165	£0.034	£1.153	£31.667	£0.256	£0.000	£33.331
Birmingham City Centre	£2.330	£0.449	£0.710	£0.504	£5.527	£3.495	£0.940	£0.560	£14.515
Redditch	£0.000	£0.198	£0.461	£0.000	£0.000	£10.328	£0.575	£0.000	£11.562
Hereford	£1.256	£0.000	£0.137	£0.043	£0.000	£0.000	£0.000	£5.992	£7.428
Stourbridge	£0.976	£0.208	£0.097	£0.000	£29.689	£0.000	£0.030	£0.000	£31.001
Telford	£0.000	£0.280	£1.884	£8.374	£0.000	£0.000	£0.000	£0.341	£10.879
Ludlow	£0.193	£0.000	£4.082	£0.415	£0.581	£0.000	£0.000	£2.459	£7.730
Bridgnorth	£0.408	£0.000	£0.191	£7.098	£0.000	£0.000	£0.000	£0.151	£7.848
Brierley Hill (EXCLUDING Intu Merry Hill Shopping Centre)	£0.000	£0.000	£0.312	£0.034	£3.684	£0.000	£0.000	£0.329	£4.360
Others	£7.013	£5.641	£6.027	£6.434	£24.440	£15.783	£11.572	£15.997	£92.908
Internet / catalogue / mail order	£44.645	£15.890	£19.545	£10.983	£20.472	£12.994	£4.886	£15.451	£144.865

Notes:
The market share turnovers are calculated from percentage market share for each centre (from Table D) multiplied by comparison goods expenditure generated (from Table C) . The turnovers a built up on a zone by zone basis.
Turnover estimates given relate only to the share of expenditure available within the adopted study area.

Wyre Forest Retail and Commercial Leisure Assessment

Retail Capacity Analysis - Comparison Goods

Table G: **Comparison Goods Shopping Patterns - 2026 Market Share Based Turnover £M**

Year	***Zone***								
	1	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**TOTAL**
Wyre Forest Main Town Centres									
Kidderminster	£117.361	£35.145	£38.028	£11.295	£26.209	£2.901	£2.477	£12.554	£245.971
Stourport-on-Severn	£1.905	£13.695	£1.795	£0.000	£1.656	£0.000	£0.159	£0.666	£19.877
Bewdley	£0.516	£0.000	£4.798	£0.000	£0.000	£0.000	£0.000	£0.000	£5.315
Wyre Forest Others	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Crossley Retail Park, Kidderminster	£43.657	£10.624	£6.091	£4.770	£5.344	£1.716	£0.584	£1.949	£74.734
Sainsbury's, Carpet Trades Way, Kidderminster	£3.913	£0.000	£2.125	£0.532	£0.330	£0.000	£0.000	£0.612	£7.512
B&Q, Green Street, Kidderminster	£7.829	£2.795	£2.822	£0.975	£2.548	£0.152	£0.529	£1.032	£18.682
Bed City, MCF Complex, Kidderminster	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Carters Furniture, New Road, Kidderminster	£0.324	£0.097	£0.816	£0.000	£0.279	£0.000	£0.032	£0.485	£2.032
Go Outdoors, Hoo Farm Industrial Estate, Kidderminster	£0.000	£0.000	£0.000	£0.000	£0.573	£0.000	£0.000	£0.000	£0.573
Homebase, Chester Road South, Kidderminster	£1.925	£1.049	£0.083	£0.000	£0.435	£0.090	£0.024	£0.023	£3.630
JTF, Hoo Farm Industrial Estate, Kidderminster	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Matalan, Park Lane, Kidderminster	£1.908	£0.347	£0.146	£0.000	£0.542	£0.000	£0.000	£0.000	£2.943
Rowe Carpets, Green Street, Kidderminster	£0.000	£0.000	£0.114	£0.000	£0.279	£0.000	£0.000	£0.000	£0.393
Screwfix, Easter Park, Kidderminster	£0.578	£0.026	£0.319	£0.000	£0.929	£0.000	£0.016	£0.023	£1.892
Wigleys DIY, Sandy Lane Industrial Estate, Stourport-on-Severn	£0.000	£0.271	£0.322	£0.000	£0.000	£0.000	£0.051	£0.000	£0.645
Wyre Forest Furniture Centre, Green Street, Kidderminster	£0.000	£0.115	£0.000	£0.000	£0.000	£0.000	£0.000	£0.136	£0.252
Morrisons, Green Street, Kidderminster	£0.515	£0.105	£0.000	£0.168	£0.000	£0.000	£0.000	£0.158	£0.946
Tesco, Severn Road, Stourport-on-Severn	£0.279	£0.969	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£1.249
Easter Park, Worcester Road, Kidderminster	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.081	£0.081
Main Competing Centres/Retail Parks									
Merry Hill Shopping Centre (Intu), Brierley Hill	£21.907	£1.157	£3.837	£1.930	£40.112	£9.037	£0.228	£3.509	£81.716
Merry Hill Retail Park, Dudley	£7.908	£1.601	£2.824	£0.127	£20.465	£6.275	£0.062	£0.000	£39.263
Worcester	£8.709	£7.523	£8.662	£0.000	£2.653	£6.117	£4.744	£10.751	£49.158
Bromsgrove	£0.000	£0.065	£0.195	£0.041	£1.361	£38.153	£0.306	£0.000	£40.121
Birmingham City Centre	£2.757	£0.530	£0.839	£0.604	£6.521	£4.211	£1.123	£0.672	£17.257
Redditch	£0.000	£0.233	£0.546	£0.000	£0.000	£12.443	£0.688	£0.000	£13.910
Hereford	£1.486	£0.000	£0.162	£0.051	£0.000	£0.000	£0.000	£7.187	£8.886
Stourbridge	£1.155	£0.246	£0.114	£0.000	£35.028	£0.000	£0.036	£0.000	£36.580
Telford	£0.000	£0.331	£2.228	£10.034	£0.000	£0.000	£0.000	£0.408	£13.002
Ludlow	£0.228	£0.000	£4.828	£0.497	£0.685	£0.000	£0.000	£2.949	£9.187
Bridgnorth	£0.483	£0.000	£0.226	£8.504	£0.000	£0.000	£0.000	£0.181	£9.394
Brierley Hill (EXCLUDING Intu Merry Hill Shopping Centre)	£0.000	£0.000	£0.370	£0.041	£4.347	£0.000	£0.000	£0.395	£5.152
Others	£8.296	£6.663	£7.128	£7.709	£28.836	£19.016	£13.833	£19.186	£110.667
Internet / catalogue / mail order	£52.814	£18.766	£23.114	£13.160	£24.153	£15.655	£5.841	£18.532	£172.035

Notes:
The market share turnovers are calculated from percentage market share for each centre (from Table D) multiplied by comparison goods expenditure generated (from Table C) . The turnovers a built up on a zone by zone basis.
Turnover estimates given relate only to the share of expenditure available within the adopted study area.

Wyre Forest Retail and Commercial Leisure Assessment

Retail Capacity Analysis - Comparison Goods

Table H: **Comparison Goods Shopping Patterns - 2031 Market Share Based Turnover £M**

Year	*Zone*								
	1	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**TOTAL**
Wyre Forest Main Town Centres									
Kidderminster	£139.185	£41.509	£44.824	£13.433	£30.984	£3.507	£2.935	£15.034	£291.411
Stourport-on-Severn	£2.260	£16.175	£2.115	£0.000	£1.958	£0.000	£0.189	£0.798	£23.494
Bewdley	£0.612	£0.000	£5.656	£0.000	£0.000	£0.000	£0.000	£0.000	£6.268
Wyre Forest Others									
Crossley Retail Park, Kidderminster	£51.775	£12.548	£7.180	£5.672	£6.317	£2.075	£0.692	£2.334	£88.592
Sainsbury's, Carpet Trades Way, Kidderminster	£4.641	£0.000	£2.505	£0.632	£0.390	£0.000	£0.000	£0.733	£8.901
B&Q, Green Street, Kidderminster	£9.285	£3.301	£3.326	£1.160	£3.012	£0.184	£0.627	£1.235	£22.131
Bed City, MCF Complex, Kidderminster	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Carters Furniture, New Road, Kidderminster	£0.384	£0.115	£0.962	£0.000	£0.330	£0.000	£0.038	£0.580	£2.409
Go Outdoors, Hoo Farm Industrial Estate, Kidderminster	£0.000	£0.000	£0.000	£0.000	£0.677	£0.000	£0.000	£0.000	£0.677
Homebase, Chester Road South, Kidderminster	£2.283	£1.239	£0.098	£0.000	£0.515	£0.109	£0.029	£0.028	£4.300
JTF, Hoo Farm Industrial Estate, Kidderminster	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Matalan, Park Lane, Kidderminster	£2.262	£0.410	£0.172	£0.000	£0.641	£0.000	£0.000	£0.000	£3.485
Rowe Carpets, Green Street, Kidderminster	£0.000	£0.000	£0.135	£0.000	£0.330	£0.000	£0.000	£0.000	£0.465
Screwfix, Easter Park, Kidderminster	£0.686	£0.031	£0.377	£0.000	£1.098	£0.000	£0.019	£0.028	£2.238
Wigleys DIY, Sandy Lane Industrial Estate, Stourport-on-Severn	£0.000	£0.321	£0.379	£0.000	£0.000	£0.000	£0.061	£0.000	£0.761
Wyre Forest Furniture Centre, Green Street, Kidderminster	£0.000	£0.136	£0.000	£0.000	£0.000	£0.000	£0.000	£0.163	£0.299
Morrisons, Green Street, Kidderminster	£0.611	£0.124	£0.000	£0.199	£0.000	£0.000	£0.000	£0.189	£1.123
Tesco, Severn Road, Stourport-on-Severn	£0.331	£1.145	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£1.476
Easter Park, Worcester Road, Kidderminster	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.097	£0.097
Main Competing Centres/Retail Parks	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Merry Hill Shopping Centre (Intu), Brierley Hill	£25.980	£1.367	£4.522	£2.295	£47.419	£10.928	£0.270	£4.202	£96.983
Merry Hill Retail Park, Dudley	£9.379	£1.891	£3.329	£0.151	£24.193	£7.588	£0.073	£0.000	£46.604
Worcester	£10.328	£8.885	£10.210	£0.000	£3.136	£7.397	£5.622	£12.874	£58.453
Bromsgrove	£0.000	£0.077	£0.230	£0.048	£1.608	£46.135	£0.363	£0.000	£48.461
Birmingham City Centre	£3.270	£0.626	£0.990	£0.718	£7.709	£5.092	£1.331	£0.805	£20.540
Redditch	£0.000	£0.276	£0.643	£0.000	£0.000	£15.046	£0.815	£0.000	£16.780
Hereford	£1.762	£0.000	£0.191	£0.061	£0.000	£0.000	£0.000	£8.606	£10.621
Stourbridge	£1.370	£0.290	£0.135	£0.000	£41.410	£0.000	£0.043	£0.000	£43.248
Telford	£0.000	£0.391	£2.627	£11.933	£0.000	£0.000	£0.000	£0.489	£15.440
Ludlow	£0.271	£0.000	£5.690	£0.592	£0.810	£0.000	£0.000	£3.531	£10.894
Bridgnorth	£0.573	£0.000	£0.267	£10.114	£0.000	£0.000	£0.000	£0.216	£11.170
Brierley Hill (EXCLUDING Intu Merry Hill Shopping Centre)	£0.000	£0.000	£0.436	£0.048	£5.139	£0.000	£0.000	£0.473	£6.095
Others	£9.839	£7.869	£8.402	£9.168	£34.089	£22.994	£16.394	£22.976	£131.732
Internet / catalogue / mail order	£62.634	£22.164	£27.245	£15.650	£28.553	£18.930	£6.922	£22.192	£204.292

Notes:
The market share turnovers are calculated from percentage market share for each centre (from Table D) multiplied by comparison goods expenditure generated (from Table C) . The turnovers a built up on a zone by zone basis.
Turnover estimates given relate only to the share of expenditure available within the adopted study area.

Wyre Forest Retail and Commercial Leisure Assessment

Retail Capacity Analysis - Comparison Goods

Table I: **Comparison Goods Shopping Patterns - Summary Market Share Based Turnover £M (2016 - 2031)**

	Year			
	2016	**2021**	**2026**	**2031**
Wyre Forest Main Town Centres				
Kidderminster	£182.848	£207.711	£245.971	£291.411
Stourport-on-Severn	£14.818	£16.817	£19.877	£23.494
Bewdley	£3.935	£4.494	£5.315	£6.268
Wyre Forest Others				
Crossley Retail Park, Kidderminster	£55.568	£63.098	£74.734	£88.592
Sainsbury's, Carpet Trades Way, Kidderminster	£5.571	£6.339	£7.512	£8.901
B&Q, Green Street, Kidderminster	£13.883	£15.774	£18.682	£22.131
Bed City, MCF Complex, Kidderminster	£0.000	£0.000	£0.000	£0.000
Carters Furniture, New Road, Kidderminster	£1.503	£1.713	£2.032	£2.409
Go Outdoors, Hoo Farm Industrial Estate, Kidderminster	£0.429	£0.486	£0.573	£0.677
Homebase, Chester Road South, Kidderminster	£2.707	£3.069	£3.630	£4.300
JTF, Hoo Farm Industrial Estate, Kidderminster	£0.000	£0.000	£0.000	£0.000
Matalan, Park Lane, Kidderminster	£2.198	£2.489	£2.943	£3.485
Rowe Carpets, Green Street, Kidderminster	£0.294	£0.333	£0.393	£0.465
Screwfix, Easter Park, Kidderminster	£1.412	£1.601	£1.892	£2.238
Wigleys DIY, Sandy Lane Industrial Estate, Stourport-on-Severn	£0.478	£0.545	£0.645	£0.761
Wyre Forest Furniture Centre, Green Street, Kidderminster	£0.185	£0.211	£0.252	£0.299
Morrisons, Green Street, Kidderminster	£0.699	£0.796	£0.946	£1.123
Tesco, Severn Road, Stourport-on-Severn	£0.932	£1.057	£1.249	£1.476
Easter Park, Worcester Road, Kidderminster	£0.059	£0.068	£0.081	£0.097
Main Competing Centres/Retail Parks				
Merry Hill Shopping Centre (Intu), Brierley Hill	£60.720	£68.968	£81.716	£96.983
Merry Hill Retail Park, Dudley	£29.166	£33.141	£39.263	£46.604
Worcester	£36.219	£41.314	£49.158	£58.453
Bromsgrove	£28.881	£33.331	£40.121	£48.461
Birmingham City Centre	£12.736	£14.515	£17.257	£20.540
Redditch	£10.023	£11.562	£13.910	£16.780
Hereford	£6.503	£7.428	£8.886	£10.621
Stourbridge	£27.398	£31.001	£36.580	£43.248
Telford	£9.456	£10.879	£13.002	£15.440
Ludlow	£6.763	£7.730	£9.187	£10.894
Bridgnorth	£6.815	£7.848	£9.394	£11.170
Brierley Hill (EXCLUDING Intu Merry Hill Shopping Centre)	£3.847	£4.360	£5.152	£6.095
Others	£81.406	£92.908	£110.667	£131.732
Internet / catalogue / mail order	£127.191	£144.865	£172.035	£204.292

Notes:
Summary of estimated market share turnovers from Tables E to H)
Turnover estimates given relate only to the share of expenditure available within the adopted study area.

Wyre Forest Retail and Commercial Leisure Assessment

Retail Capacity Analysis - Comparison Goods

Table J: **Comparison Goods Shopping Turnover and Floorspace Analysis**

Wyre Forest Main Town Centres	*Year*			
	2016	**2021**	**2026**	**2031**
Kidderminster				
Market Share Turnover	£182.848	£207.711	£245.971	£291.411
Comparison Goods Sales Floorspace	28,700			
Implied Sales Density	£6,371.00			
Anticipated Benchmark Sales Density	6500			
Anticipated Benchmark Turnover	£186.550	£200.97	£216.50	£233.23
Capacity for Additional Comparison Goods Shopping (Turnover)	**-£3.702**	**£6.744**	**£29.472**	**£58.180**
Stourport-on-Severn				
Market Share Turnover	£14.818	£16.817	£19.877	£23.494
Comparison Goods Sales Floorspace	5,050			
Implied Sales Density	£2,934.35			
Anticipated Benchmark Sales Density	4000			
Anticipated Benchmark Turnover	£20.200	£21.76	£23.44	£25.25
Capacity for Additional Comparison Goods Shopping (Turnover)	**-£5.382**	**-£4.945**	**-£3.566**	**-£1.760**
Bewdley				
Market Share Turnover	£3.935	£4.494	£5.315	£6.268
Comparison Goods Sales Floorspace	1500			
Implied Sales Density	£2,623.14			
Anticipated Benchmark Sales Density	4000			
Anticipated Benchmark Turnover	6	£6.46	£6.96	£7.50
Capacity for Additional Comparison Goods Shopping (Turnover)	**-£2.065**	**-£1.970**	**-£1.649**	**-£1.233**

Notes:
Summary of estimated market share turnovers from Tables E to H)
Turnover estimates given relate only to the share of expenditure available within the adopted study area.
Anticipated Benchmark Turnover is grown by 1.5% per annum to reflect trading efficency and allow for exisitng floorspace to share growth in expenditure.

Wyre Forest Retail and Commercial Leisure Assessment

Retail Capacity Analysis - Comparison Goods

Table K: **Comparison Goods Shopping Floorspace Need Analysis**

	Year			
	2016	**2021**	**2026**	**2031**
Kidderminster				
Capacity for Additional Comparison Goods Shopping (Turnover)	-£3.702	£6.744	£29.472	£58.180
Anticipated Benchmark Sales Density	£6,500	£7,002	£7,544	£8,127
Theoretical Floorspace Need	-570	963	3,907	7,159
Less Committed Floorspace	4,618	4,618	4,618	4,618
Revised Floorspace Need	-5,188	-3,655	-711	2,541
Stourport-on-Severn				
Capacity for Additional Comparison Goods Shopping (Turnover)	-£5.382	-£4.945	-£3.566	-£1.760
Anticipated Benchmark Sales Density	£4,000	£4,309	£4,642	£5,001
Theoretical Floorspace Need	-1,345	-1,147	-768	-352
Bewdley				
Capacity for Additional Comparison Goods Shopping (Turnover)	-£2.065	-£1.970	-£1.649	-£1.233
Anticipated Benchmark Sales Density	£4,000	£4,309	£4,642	£5,001
Theoretical Floorspace Need	-516	-457	-355	-247

Notes:
Summary of estimated market share turnovers from Tables E to H)
Turnover estimates given relate only to the share of expenditure available within the adopted study area.
Kidderminster Committed Floorspace - Weavers Wharf/Bullring Planning Permission (3,518sqm) and Brintons/Riverside Walk (assumed 1,100sqm retail component)

APPENDIX FOUR – LEISURE NEED ANALYSIS

Wyre Forest Retail and Commercial Leisure Assessment

Leisure Capacity Analysis

Table LC1: Population

Year	Zone 1	2	3	4	5	6	7	8	Total
2013	43,290	45,470	22,686	16,331	30,000	34,285	32,340	37,016	261,418
2016	45,098	47,322	23,653	17,011	31,210	35,636	33,585	38,440	271,955
2021	48,038	50,378	25,325	18,170	33,261	37,932	35,724	40,875	289,703
2026	50,672	53,063	26,863	19,258	35,134	40,050	37,679	43,124	305,843
2031	52,972	55,372	28,225	20,181	36,727	41,901	39,385	45,090	319,853

Source: Experian Retail Planner Data based on ONS Population Projections

Wyre Forest Retail and Commercial Leisure Assessment

Leisure Capacity Analysis

Table LC2: Leisure Spend Per Head

Year		Zone 1	2	3	4	5	6	7	8
Accomodation Services									
	2014	£175	£192	£235	£198	£252	£184	£254	£226
	2016	£180	£197	£242	£204	£259	£189	£261	£232
	2021	£193	£212	£259	£218	£278	£203	£280	£249
	2026	£207	£227	£278	£234	£298	£217	£300	£267
	2031	£222	£243	£298	£251	£319	£233	£322	£286
Cultural Services									
	2014	£291	£304	£332	£291	£358	£306	£348	£314
	2016	£299	£313	£341	£299	£368	£315	£358	£323
	2021	£321	£335	£366	£321	£395	£337	£384	£346
	2026	£344	£359	£392	£344	£423	£362	£411	£371
	2031	£369	£385	£421	£369	£453	£388	£441	£398
Games of Chance									
	2014	£169	£179	£163	£151	£160	£165	£154	£152
	2016	£174	£184	£168	£155	£165	£170	£158	£156
	2021	£186	£197	£180	£166	£176	£182	£170	£168
	2026	£200	£211	£193	£178	£189	£195	£182	£180
	2031	£214	£227	£206	£191	£203	£209	£195	£193
Hairdressing and Personal Grooming									
	2014	101	109	137	120	149	111	151	139
	2016	£104	£112	£141	£123	£153	£114	£155	£143
	2021	£111	£120	£151	£132	£164	£122	£166	£153
	2026	£119	£129	£162	£142	£176	£131	£178	£164
	2031	£128	£138	£174	£152	£189	£141	£191	£176
Recreation and Sport									
	2014	105	106	135	110	166	114	166	133
	2016	£108	£109	£139	£113	£171	£117	£171	£137
	2021	£116	£117	£149	£121	£183	£126	£183	£147
	2026	£124	£125	£160	£130	£196	£135	£196	£157
	2031	£133	£134	£171	£139	£210	£144	£210	£168
Restaraunts and Cafes									
	2014	£1,035	£1,087	£1,306	£1,180	£1,340	£1,076	£1,348	£1,278
	2016	£1,064	£1,118	£1,343	£1,213	£1,378	£1,106	£1,386	£1,314
	2021	£1,141	£1,198	£1,439	£1,301	£1,477	£1,186	£1,486	£1,409
	2026	£1,223	£1,284	£1,543	£1,394	£1,583	£1,271	£1,593	£1,510
	2031	£1,311	£1,377	£1,654	£1,495	£1,697	£1,363	£1,707	£1,619

Source: Experian Retail Planner Data 2014 in 2014 prices
Growth of 1.4% per annum applied based on long term trends as outlined in Experian Retial Planner Briefing Note 13, October 2015

Wyre Forest Retail and Commercial Leisure Assessment

Leisure Capacity Analysis

Table LC3: Leisure Spend Per Head

Year		Zone								Total
		1	2	3	4	5	6	7	8	
		£M	£M	£M	£M	£M	£M	£M	£M	£M
Accomodation Services										
	2014	£7.576	£8.730	£5.331	£3.234	£7.560	£6.308	£8.214	£8.366	£55.319
	2016	£8.115	£9.342	£5.715	£3.463	£8.087	£6.742	£8.771	£8.932	£59.167
	2021	£9.266	£10.661	£6.560	£3.965	£9.239	£7.693	£10.001	£10.182	£67.567
	2026	£10.478	£12.038	£7.459	£4.505	£10.461	£8.707	£11.308	£11.516	£76.472
	2031	£11.742	£13.466	£8.401	£5.061	£11.723	£9.765	£12.671	£12.907	£85.736
Cultural Services										
	2014	£12.597	£13.823	£7.532	£4.752	£10.740	£10.491	£11.254	£11.623	£82.813
	2016	£13.494	£14.792	£8.074	£5.090	£11.488	£11.212	£12.017	£12.410	£88.577
	2021	£15.408	£16.880	£9.267	£5.828	£13.125	£12.794	£13.703	£14.147	£101.151
	2026	£17.423	£19.060	£10.538	£6.622	£14.862	£14.480	£15.493	£15.999	£114.476
	2031	£19.525	£21.321	£11.869	£7.438	£16.654	£16.240	£17.360	£17.933	£128.341
Games of Chance										
	2014	£7.316	£8.139	£3.698	£2.466	£4.800	£5.657	£4.980	£5.626	£42.683
	2016	£7.836	£8.709	£3.964	£2.641	£5.134	£6.046	£5.318	£6.008	£45.657
	2021	£8.948	£9.939	£4.550	£3.024	£5.866	£6.899	£6.064	£6.848	£52.138
	2026	£10.118	£11.223	£5.174	£3.436	£6.642	£7.808	£6.856	£7.745	£59.002
	2031	£11.339	£12.554	£5.827	£3.860	£7.443	£8.757	£7.682	£8.681	£66.144
Hairdressing and Personal Grooming										
	2014	£4.372	£4.956	£3.108	£1.960	£4.470	£3.806	£4.883	£5.145	£32.700
	2016	£4.683	£5.304	£3.332	£2.099	£4.781	£4.067	£5.214	£5.494	£34.974
	2021	£5.348	£6.052	£3.824	£2.403	£5.462	£4.641	£5.946	£6.262	£39.939
	2026	£6.047	£6.834	£4.348	£2.731	£6.185	£5.253	£6.723	£7.083	£45.203
	2031	£6.777	£7.645	£4.898	£3.067	£6.931	£5.891	£7.533	£7.939	£50.680
Recreation and Sport										
	2014	£4.545	£4.820	£3.063	£1.796	£4.980	£3.908	£5.368	£4.923	£33.404
	2016	£4.869	£5.158	£3.283	£1.924	£5.327	£4.177	£5.732	£5.257	£35.727
	2021	£5.560	£5.886	£3.768	£2.203	£6.086	£4.766	£6.536	£5.992	£40.797
	2026	£6.287	£6.646	£4.285	£2.503	£6.891	£5.395	£7.390	£6.777	£46.173
	2031	£7.045	£7.434	£4.826	£2.812	£7.722	£6.050	£8.281	£7.596	£51.767
Restaraunts and Cafes										
	2014	£44.805	£49.426	£29.628	£19.271	£40.200	£36.891	£43.594	£47.306	£311.121
	2016	£47.993	£52.889	£31.762	£20.639	£43.001	£39.425	£46.549	£50.511	£332.769
	2021	£54.801	£60.358	£36.455	£23.632	£49.125	£44.987	£53.078	£57.578	£380.015
	2026	£61.967	£68.152	£41.453	£26.850	£55.627	£50.918	£60.013	£65.119	£430.099
	2031	£69.444	£76.237	£46.690	£30.163	£62.336	£57.106	£67.246	£72.989	£482.209

Source: Experian Retail Planner Data 2013 in 2013 prices
Growth of 1.3% per annum applied based on long term trends as outlined in Experian Retial Planner Briefing Note 12.1, October 2014

Leisure Capacity Analysis

Table LC4: Pattern of Food and Beverage Visits

	Zone 1	2	3	4	5	6	7	8	Total
Kidderminster	47.20%	7.77%	10.94%	3.47%	6.05%	1.70%	2.85%	16.45%	19.64%
Stourport-on-Severn	0.67%	38.39%	3.39%	0.00%	0.00%	0.00%	0.00%	3.20%	4.71%
Bewdley	10.23%	10.37%	28.49%	0.74%	1.98%	0.00%	0.00%	0.00%	7.68%
Wyre Forest Town Centres	**58.10%**	**56.53%**	**42.83%**	**4.21%**	**8.04%**	**1.70%**	**2.85%**	**19.65%**	**32.03%**
Main Others Outside District									
Bromsgrove	2.86%	0.86%	0.00%	0.00%	2.72%	63.69%	5.69%	0.00%	9.65%
Birmingham City Centre	10.25%	10.45%	7.87%	0.00%	17.72%	1.70%	0.78%	1.03%	9.01%
Stourbridge	1.59%	0.73%	0.67%	0.00%	17.39%	0.00%	0.00%	0.00%	4.17%
Worcester	3.72%	10.89%	11.96%	0.00%	3.04%	2.86%	21.22%	14.78%	6.10%
Kingston	9.52%	3.69%	3.13%	6.18%	0.63%	0.46%	0.47%	0.00%	2.84%
Bridgnorth	2.86%	0.86%	1.79%	40.74%	0.00%	0.00%	0.00%	2.33%	3.59%
Brierley Hill	2.86%	0.00%	0.00%	0.00%	3.33%	0.00%	0.00%	0.00%	1.58%
Droitwich	5.32%	0.73%	0.00%	0.74%	0.00%	3.12%	12.00%	1.74%	2.63%
Ludlow	0.00%	2.24%	4.18%	0.88%	0.00%	0.00%	0.00%	4.58%	1.02%
Tenbury Wells	0.00%	0.00%	0.00%	0.74%	0.00%	0.00%	0.00%	27.62%	1.93%
Others	2.91%	13.02%	27.58%	46.50%	47.13%	26.49%	57.00%	28.28%	25.45%

Source: Household Telephone Survey, Question 45.

Leisure Capacity Analysis

Table LC5: Pattern of Cinema Visits

	Zone 1	2	3	4	5	6	7	8	Total
Reel Cinema, Green Street, Kidderminster	22.76%	11.48%	11.94%	0.00%	1.66%	0.00%	4.58%	9.67%	11.72%
Wyre Forest Facilities	**22.76%**	**11.48%**	**11.94%**	**0.00%**	**1.66%**	**0.00%**	**4.58%**	**9.67%**	**11.72%**
Main Others Outside District									
Empire Cinema, Rubery, Great Park, Birmingham	19.40%	22.17%	7.95%	1.26%	13.77%	78.35%	18.06%	0.00%	22.74%
Odeon, Merry Hill Centre	27.38%	11.05%	11.81%	14.18%	61.85%	0.00%	0.00%	0.00%	23.33%
Vue Cinema, Friar Street, Worcester	6.20%	31.25%	26.25%	0.00%	0.00%	1.24%	46.50%	25.05%	10.73%
Regal Cinema, Tenbury Wells	2.92%	0.00%	3.78%	0.00%	0.00%	0.00%	0.00%	40.69%	4.46%
Showcase Cinema, Dudley	7.92%	0.00%	0.00%	0.00%	11.66%	0.00%	0.00%	0.00%	4.85%
Majestic Cinema, Bridgnorth	0.00%	0.00%	2.80%	60.86%	0.00%	0.00%	0.00%	0.00%	3.29%
Odeon, Foregate, Worcester	1.46%	3.60%	4.17%	0.00%	0.00%	0.00%	16.94%	11.74%	2.48%
Reel Cinema, Quinton/Halesowen	5.85%	0.00%	3.99%	2.11%	1.66%	0.00%	2.03%	0.00%	2.99%
Birmingham City Centre	2.49%	1.26%	0.00%	0.00%	1.66%	4.16%	0.00%	0.00%	1.84%
Bromsgrove	0.87%	0.00%	0.00%	0.00%	0.00%	11.47%	0.00%	0.00%	1.80%
Telford	0.00%	0.00%	8.90%	5.71%	0.00%	0.00%	0.00%	0.00%	1.23%
Others	2.77%	19.20%	18.42%	15.87%	7.75%	4.79%	11.88%	12.85%	8.55%

Source: Household Telephone Survey, Question 44.

Leisure Capacity Analysis

Table LC6: Pattern of Arts and Culture Visits

	Zone 1	2	3	4	5	6	7	8	Total
Rose Theatre, Chester Road, Kidderminster	11.26%	0.00%	3.16%	0.00%	4.23%	0.00%	1.19%	0.00%	4.56%
Kidderminster	6.48%	1.71%	0.00%	0.00%	0.00%	0.00%	1.19%	0.00%	2.01%
Stourport-on-Severn	0.00%	1.71%	0.00%	0.00%	0.00%	0.00%	0.00%	1.64%	0.24%
Bewdley	2.87%	1.71%	1.25%	8.74%	0.00%	0.00%	0.00%	0.00%	1.61%
Wyre Forest Facilities	**20.60%**	**5.14%**	**4.40%**	**8.74%**	**4.23%**	**0.00%**	**2.38%**	**1.64%**	**8.41%**
Main Others Outside District									
Birmingham City Centre	33.27%	61.74%	32.02%	14.05%	59.08%	60.43%	22.39%	23.51%	42.86%
Central London / West End	11.63%	9.18%	24.15%	16.42%	16.74%	7.86%	6.36%	16.05%	13.85%
Malvern	10.05%	12.08%	18.77%	4.06%	2.65%	6.48%	32.30%	29.86%	10.61%
Grand Theatre, Lichfield Street, Wolverhampton	1.21%	0.00%	1.77%	22.77%	1.33%	0.00%	0.00%	0.00%	2.22%
Shrewsbury	3.72%	0.00%	0.00%	12.06%	0.00%	0.00%	0.00%	1.38%	1.89%
Swan Theatre, The Moors, Worcester	0.00%	6.09%	3.53%	0.00%	0.00%	1.17%	6.96%	1.38%	1.29%
Worcester	1.21%	0.00%	2.11%	0.00%	0.00%	0.00%	7.22%	4.26%	1.08%
Others	18.32%	5.77%	13.25%	21.90%	15.98%	24.07%	22.39%	21.91%	17.79%

Source: Household Telephone Survey, Question 48.

Wyre Forest Retail and Commercial Leisure Assessment

Leisure Capacity Analysis

Table LC7: **Wyre Forest District Food and Drink Leisure Capacity and Need Analysis**

		Year			
		2016	2021	2026	2031
Sectors Spend Potential (Study Area)	£M	£332.769	£380.015	£430.099	£482.209
Wyre Forest - Town Centres Share	%	32.03%	32.03%	32.03%	32.03%
Wyre Forest - Town Centres Share	£M	£106.60	£121.73	£137.77	£154.47
Wyre Forest - Growth in Retained Spend (Capacity)	£M	0	£15.13	£31.18	£47.87
Assumed Trading Density (gross)	£/sqm	6,500	7,002	7,544	8,127
District wide Food and Drink Floorspace Requirement		0	2,161	4,133	5,891
District Need Approprtioned by Centre based on Usage					
Kidderminster	19.64%	-	424	812	1,157
Stourport-on-Severn	4.71%	-	102	195	278
Bewdley	7.68%	-	166	317	452

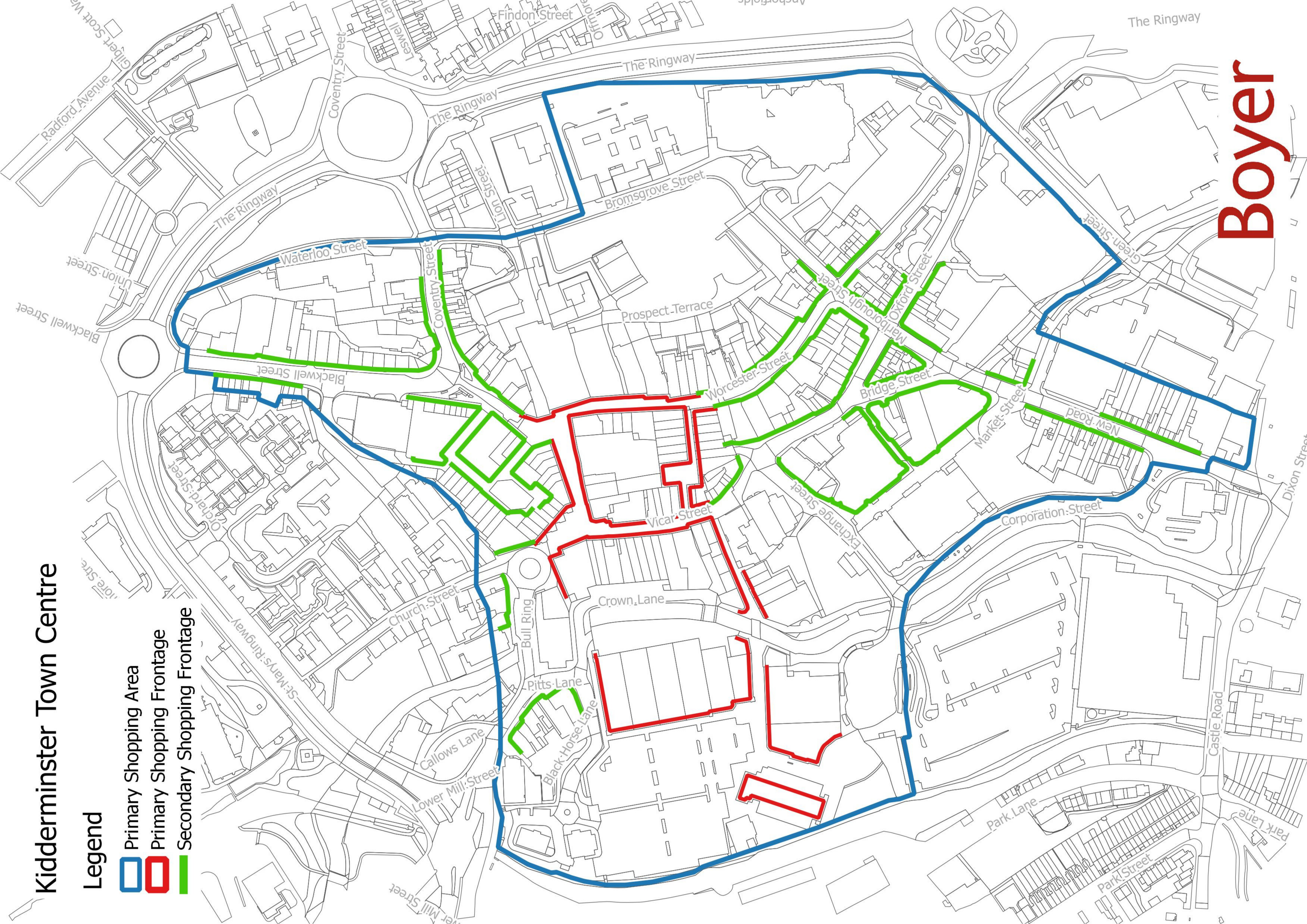
Source: Tables LC3 and LC4

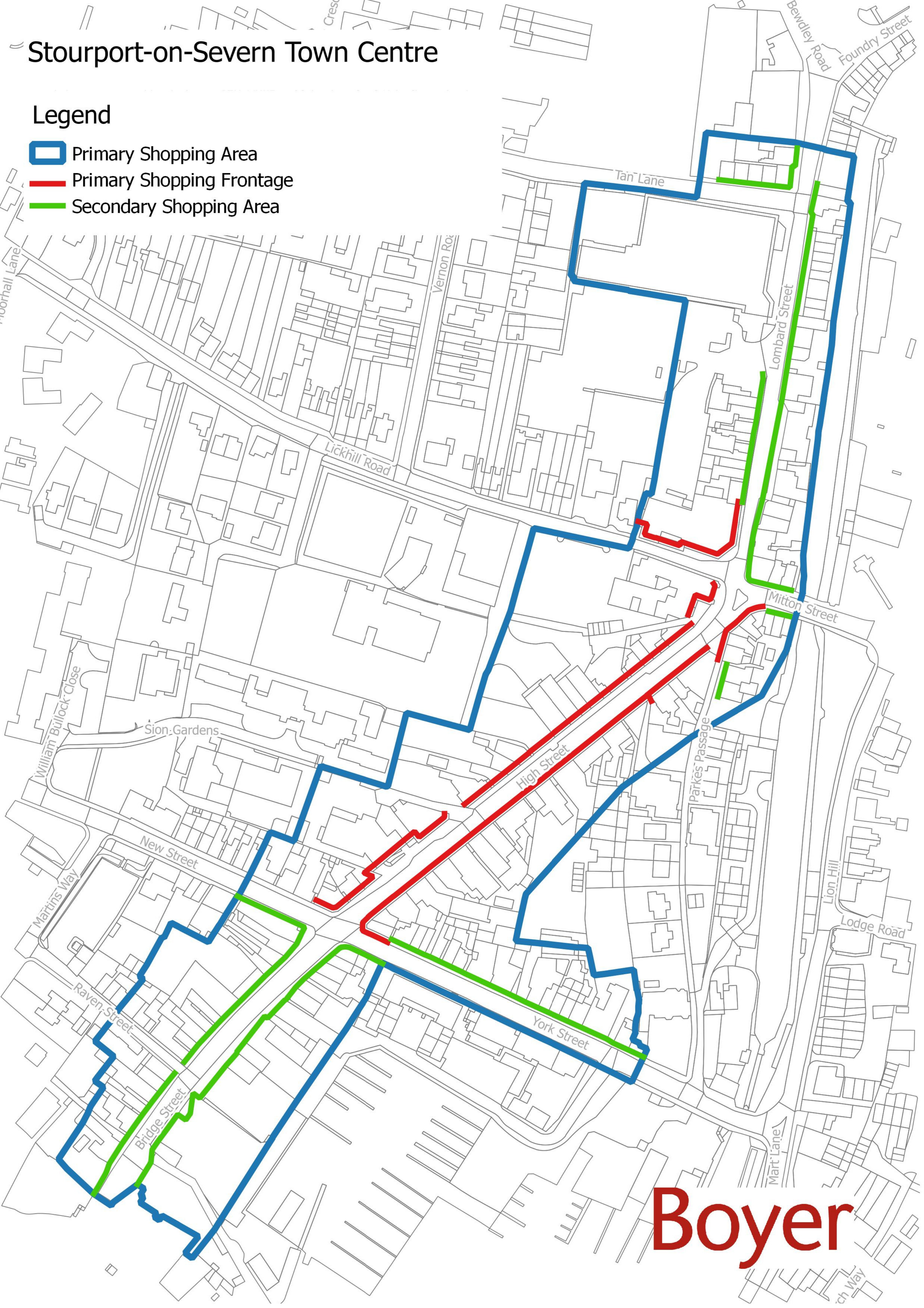
Notes:

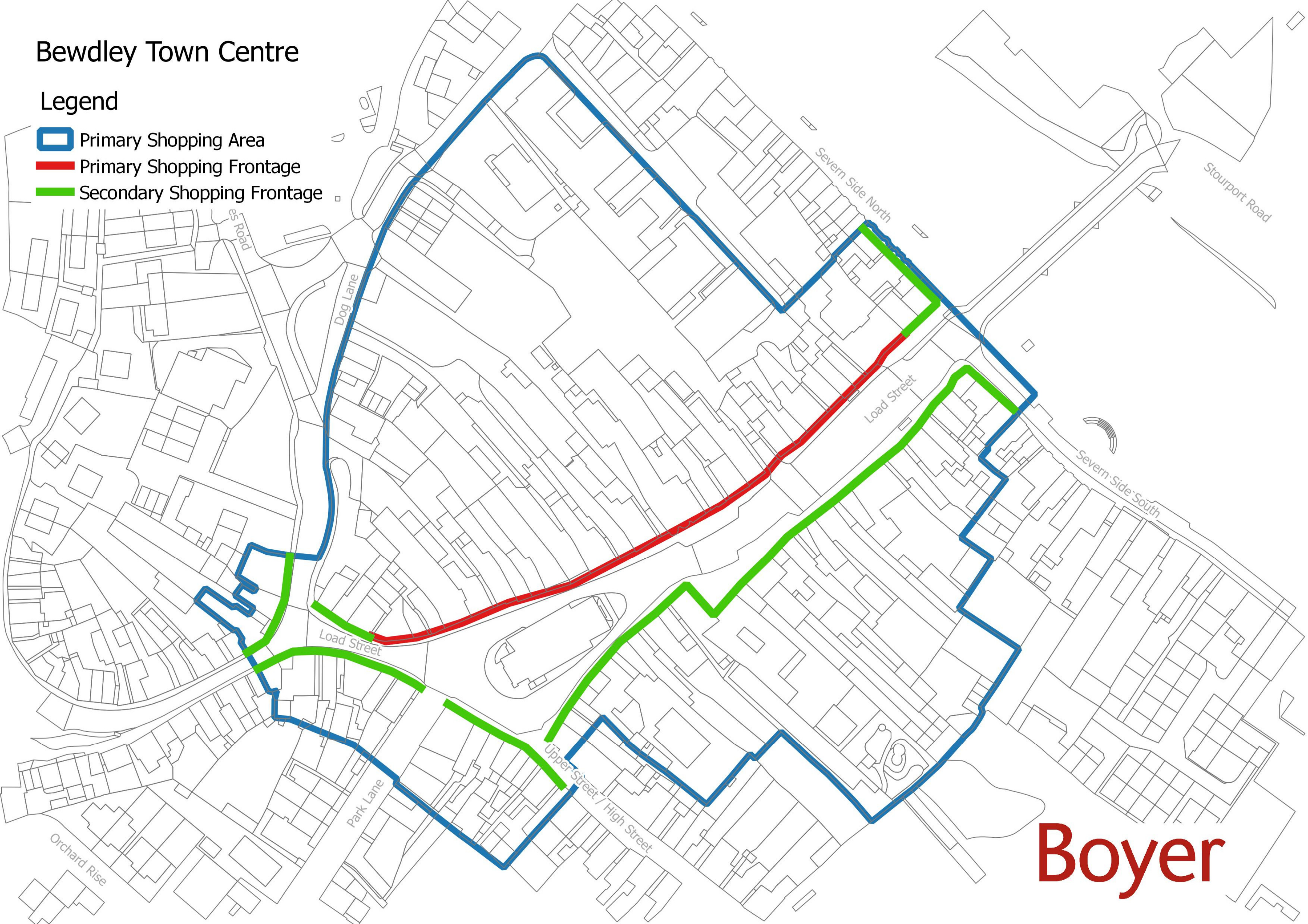
District's market share is held constant over study period for this theoretical exercise;

Trading density is an estimate and allowance is made for the density to grow by 1.5% per annum.

APPENDIX FIVE: SUGGESTED TOWN CENTRE PRIMARY SHOPPING AREAS AND FRONTAGES


Kidderminster Town Centre
Legend
Primary Shopping Area
Primary Shopping Frontage
Secondary Shopping Frontage
Boyer
The Ringway
Findon Street
Coventry Street
Radford Avenue
Gilbert Scott Way
Lion Street
Bromsgrove Street
Waterloo Street
Union Street
Blackwell Street
Prospect Terrace
Marlborough Street
Oxford Street
Green Street
Worcester Street
Bridge Street
Market Street
New Road
Dixon Street
Vicar Street
Exchange Street
Corporation Street
Orchard Street
Church Street
Bull Ring
Crown Lane
St Marys Ringway
Pitts Lane
Black Horse Lane
Callows Lane
Lower Mill Street
Castle Road
Park Lane
Park Street


Stourport-on-Severn Town Centre
Legend
Primary Shopping Area
Primary Shopping Frontage
Secondary Shopping Area
Bewdley Road
Foundry Street
Tan Lane
Lombard Street
Vernon Road
Lickhill Road
Mitton Street
High Street
Parkes Passage
Sion Gardens
William Bullock Close
New Street
Martins Way
Raven Street
Bridge Street
York Street
Lion Hill
Lodge Road
Mart Lane
Boyer


Bewdley Town Centre
Legend
Primary Shopping Area
Primary Shopping Frontage
Secondary Shopping Frontage
Severn Side North
Stourport Road
Dog Lane
Load Street
Load Street
Severn Side South
Upper Street / High Street
Park Lane
Orchard Rise
Boyer

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