North Somerset Retail Study

North Somerset Council

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1. INTRODUCTION

Scope and purpose

1.1 This report has been prepared by GVA Grimley Ltd in response to an instruction by North Somerset Council ('NSC'), dated September 2010, to prepare a Retail Study for North Somerset. This study will provide essential background information to assist NSC in the production of its Local Development Framework, including a Core Strategy for the whole of the District, an Area Action Plan for Weston-super-Mare town centre and supplementary planning guidance for the Weston Villages urban extension areas.

1.2 A retail and leisure study for North Somerset was undertaken by Donaldsons in 2006 ('the 2006 retail study') as part of the preparations for the Core Strategy and other LDF documents. Given the change in the economic climate since the 2006 retail study was completed, along with the further work which has been undertaken on the LDF in the interim, a refresh of the 2006 retail study is now required for the whole District with an emphasis on Weston.

1.3 In July 2009, NSC published the preferred options for the Weston-super-Mare Town Centre AAP for consultation. Later in 2009, a consultation draft of the North Somerset LDF Core Strategy was published. Both of these documents were guided by the results and recommendations of the 2006 retail study and this current study will guide future versions of the Core Strategy and AAP documents through to adoption.

1.4 The objectives of this study, as identified by NSC's study brief in August 2010, are as follows:

- identify existing patterns of shopping including the outflow of expenditure to nearby centres (or inflow from nearby centres);
- undertake health checks of the four main centres (Weston, Nailsea, Clevedon and Portishead) in accordance with guidance in PPS4
- provide expenditure-based forecasts of requirements for additional convenience and comparison floorspace taking into account any planned increase/decrease in market share forecasts and current market viability;
- identify any deficiencies in retail provision in the four main centres;
- specify the demand from the main operators for additional retail and commercial leisure facilities;

- assess the capacity of the town centres to accommodate future growth and where appropriate identify or confirm locations for additional retail and leisure development in all the four town centres and the Weston Urban Extension (now called Weston Villages).

1.5 In order to achieve the above aims, NSC requires a comprehensive analysis of retailing and town centre health across. Accordingly, this study includes the following key components:

- Provision of a policy analysis, based on the contents of Planning Policy Statement 4: Planning for Sustainable Economic Growth (2009) plus policies at the local level. At the local level, the Joint Replacement Structure Plan provides the current strategic context for retailing in North Somerset, supplemented by policies set out in the adopted North Somerset Replacement Local Plan. These plans are intended to be replaced by development plan documents in the North Somerset LDF and this study will inform policy formulation in the LDF and other related NSC policy documents.
- Overview of the retail hierarchy in North Somerset, focusing on a review of the vitality and viability of Weston, Nailsea, Portishead and Clevedon town centres.
- Assessment of retail capacity in the four main centres in North Somerset over the period 2010-2026, focusing on an assessment of quantitative need for different types of retail goods. This work will draw upon up-to-date population, per capita expenditure and shopping patterns data to provide a forecast capacity for the North Somerset area. As part of the assessment of need, we also review qualitative indicators of retail provision in the four main settlements in North Somerset.
- Following the assessment of town centre health and retail need, this study also provides a review of potential shopping development opportunities in North Somerset. In relation to Weston, this examines potential development opportunities identified in the retail core area in the July 2009 version of the draft AAP.
- Following the completion of each of the above tasks, this study outlines and assesses the policy options for retail development in North Somerset, with a particular focus on Weston town centre and the Weston Villages urban extension area. The outcome of this exercise is to identify the scale and form of retail development which is supportable in different locations in North Somerset, including the scope to enhance the role of existing centres and expand/create new centres.

1.6 A key contributor to all of the above tasks has been two pieces of empirical research. The first is a household telephone survey, specifically commissioned by NSC and GVA Grimley for this retail study. The survey interviewed 1,200 people across a wide geographical area, based on postcode sector areas, within the North Somerset administrative area plus adjoining local authority boundaries. A plan of the survey area is contained at Appendix A of this report. The survey, whose parameters are explained in greater detail in Section 5 of this report, has established the shopping habits of households for different types of food and non-food goods and has, in turn, contributed towards the detailed assessment of need for additional retail floorspace. The survey has also been structured to ascertain customer/visitor profiles, mode of travel to shopping destinations, plus a number of attitudinal questions determining what users think about the four main town centres in North Somerset. A full copy of the household survey tabulations is contained at Appendix B.

Structure of report

1.7 The remainder of this report is structured as follows:

- **Section 2** of this report provides an analysis of current national planning policy guidance in PPS4, plus an overview of retail and town centres contained within the development plan for the area and emerging planning policies.
- In **Section 3** national retail and leisure trends are analysed. This includes a look back at recent historic trends, plus examination of likely future trends at the national level.
- **Section 4** provides an assessment of the health of the town centres in Weston, Nailsea, Portishead and Clevedon, focusing on the health check indicators outlined in Annex D of PPS4.
- **Section 5** sets out an assessment of future need for additional retail floorspace provision in the four main towns in North Somerset, examining both quantitative and qualitative factors.
- Drawing upon the findings of preceding chapters, **Section 6** outlines the broad policy options for the retail aspects of the North Somerset LDF, examining future trends for floorspace capacity and an assessment of potential retail development sites.
- **Section 7** provides a summary of the main findings of the study and provides an outline of the recommended retail planning strategy for the main settlements in North Somerset.

1.8 All plans, statistical tables and other documents referred to in the text of this study are contained in appendices at the rear of this document.

2. PLANNING POLICY CONTEXT

Overview

2.1 This chapter outlines the salient planning policy context for retailing and town centres at the national, strategic and local level. In particular, it outlines national planning policy in Planning Policy Statement 4: Planning for Sustainable Economic Growth which was published in December 2009 and replaces PPS6 (2005). It also outlines the content of the statutory development plan for the area which, at the time of writing this report, comprises the regional spatial strategy (RPG10), Joint Replacement Structure Plan (September 2002) and the North Somerset Replacement Local Plan.

2.2 It should be noted that the Secretary of State for Communities and Local Government sent a letter on 27th May 2010 to local planning authorities and the Planning Inspectorate highlighting the Coalition Government's plans to rapidly abolish regional strategies and return decision-making powers on housing and planning to local councils. This was followed by a statement in Parliament on 6th July 2010 which confirmed the revocation of regional strategies. The effect of this decision was to remove RPG10 from role as part of development plan for the North Somerset Council area and also remove any weight which could be attached to its intended replacement (the Regional Spatial Strategy for the South West 'SWRSS', which was at an advanced stage of preparation at the time of the revocation of the regional strategy).

2.3 However, the Secretary of State's July 2010 decision was subject to a legal challenge by CALA Homes and in November 2010 a High Court judgement was issued which found in favour of CALA Homes' claim. As a consequence, RPG10 remains part of the development plan for the local area and the weight which can be afforded to the draft SWRSS will need to be balanced against the Coalition Government's renewed commitment to the abolition of regional strategies which will now occur through primary legislation.

2.4 At the local level, North Somerset Council is making good progress with the preparation of the various development plan documents associated with its Local Development Framework and the content and status of each salient DPD is recorded later in this section.

National Retail Planning Policy

2.5 In December 2009 the Department for Communities and Local Government published Planning Policy Statement 4: Planning for Sustainable Economic Growth. This document replaces, amongst other things, Planning Policy Statement 6: Planning for Town Centres (2005) and sets out national planning policies for economic development, including main town centre uses. The introductory section of PPS4 notes that the plan-making policies in this document should be taken into account by local planning authorities in the preparation of local development documents and are also a material consideration in development management decisions.

2.6 The document notes that the overarching objective of central government is for sustainable economic growth and, to help achieve this, the government's objectives for planning are to:

- Building prosperous communities by improving the economic performance of the cities, towns, regions, sub-regions and local areas, both urban and rural.
- To reduce the gap in economic growth rates between regions, promoting regeneration and tackling deprivation.
- Deliver more sustainable patterns of developments to reduce the need to travel, especially by car and respond to climate change.
- Promote the vitality and viability of town and other centres as important places for communities. To do this the government wants:
- New economic growth and development of main town centre uses to be focused in existing centres with the aim of offering a wide range of services to communities in an attractive and safe environment and remedying deficiencies in provision in areas with poor access to facilities.
- Competition between retailers and enhanced consumer choice through the provision of innovative and efficient shopping, leisure, tourism and local services in town centres which allow genuine choice to meet the needs of the entire community (particularly socially excluded groups).
- The historic archaeological and architectural heritage of centres to be conserved and, where appropriate, enhanced to provide a sense of place and focus for the community and for civic activity.

2.7 Policy EC1 of PPS4 deals with using evidence to plan positively. EC1.3 notes that, at the local level, the evidence base should:

- Be informed by regional assessments.
- Assess the detailed need for land or floorspace for economic developments, including for all main town centre uses over the Plan period.

- Identify any deficiencies in the provision of local convenience shopping and other facilities which serve people's day-to-day needs.
- Assess the existing and future supply of land for economic development, ensuring that existing site allocations for economic development are re-assessed against the policies in PPS4.
- Assess the capacity of existing centres to accommodate new town centre development taking account of the role of centres in the hierarchy and identify centres in decline where change needs to be managed.

2.8 When assessing the need for retail and leisure development, local planning authorities should:

- Take account of both the quantitative and qualitative need for additional floorspace for different types of retail and leisure developments.
- In deprived areas which lack access to a range of services and facilities give additional weight to meeting these qualitative deficiencies. However any benefits in respect of regeneration and employment should not be taken into account, although they may be material considerations in the site selection process.
- When assessing quantitative need, have regard to relevant market information and economic data, including a realistic assessment of existing and forecast population levels, forecast expenditure for specific classes of goods to be sold (within the broad categories of comparison and convenience goods), forecast improvements in retail sales density.
- When assessing qualitative need for retail uses:
    - Assess whether there is provision and distribution of shopping, leisure and local services which allow genuine choice to meet the needs of the whole community, particularly those living in deprived areas, in light of the objective to promote the vitality and viability of town centres and the application of the sequential approach.
    - Take into account the degree to which shops may be over-trading and whether there is a need to increase competition and retail mix.

2.9 Policy EC3 deals with planning for centres and notes that regional planning bodies and local planning authorities should:

- Set flexible policies for their centres which are able to respond to changing economic circumstances and encourage, where appropriate, high density development accessible by public transport, walking and cycling.

- Define a network (a pattern of provision of centres) and hierarchy (the role and relationship of centres in the network) of centres that is resilient to anticipated future economic changes to meet the needs of their catchments, having:
- Made choices about which centres will accommodate any identified need for growth in town centre uses, considering expansion where necessary, taking into account the need to avoid an over-concentration of growth in centres. Identifying deficiencies in the network of centres should be addressed by promoting centres to function at a higher level in the hierarchy or designating new centres where necessary, giving priority to deprived areas which are experiencing significant levels of multiple deprivations where there is a need for better access to services, facilities and employment by socially excluded groups.
- Ensure any extensions to centres are carefully integrated with the existing centre in terms of design including the need to allow easy pedestrian access.
- Where existing centres are in decline, consider the scope for consolidating and strengthening the centres by seeking to focus a wider range of services there, promoting the diversification of uses and improving the environment.
- Where reversing decline in existing centres is not possible, consider re-classifying the centre at a lower level within the hierarchy of centres reflecting this revised status in the policies applied to the area. This may include allowing retail units to change to other uses whilst aiming, wherever possible, to attain opportunities for vital local services.
- Ensure that the need for any new expanded or redeveloped out-of-centre regional or sub-regional shopping centre or any significant change in the role and function of centres is considered through the regional spatial strategy.
- At the local level, define the extent of the centre and the primary shopping area in their adopted proposals map, having considered distinguishing between realistically defined primary and secondary frontages in designated centres and set policies that make clear which uses will be permitted in such locations.
- At the local level, consider setting floorspace thresholds with a scale of edge-of-centre and out-of-centre developments which should be subject to an impact assessment under Policy EC16.1 and specify the geographic areas these thresholds will apply to.
- Identify any locally important impacts on centres which should be tested under Policy EC16.1.F.
- At the local level, encourage residential or office development above ground floor retail leisure or other facilities within centres, ensuring that housing in out-of-centre mixed use

developments is not in itself used as a reason to justify additional floorspace for main town centre uses in such locations.

- At the local level, identify sites or buildings within existing centres suitable for development, conversion or change of use.
- At the local level, use tools such as local development orders, area action plans, compulsory purchase orders and town centre strategies to address the transport, land assembly, crime prevention, planning and design issues associated with the growth and management of their centres.

2.10 Policy EC4 of PPS4 asks that local planning authorities should proactively plan to promote competitive town centre environments and provide consumer choice by:

- Supporting a diverse range of uses which appeal to a wide range of age and social groups, ensuring that these are distributed throughout the centre.
- Planning for a strong retail mix so that the range and quality of the comparison and convenience retail offer meets the requirements of the local catchment area, recognising that smaller shops can significantly enhance the character and vibrancy of a centre.
- Supporting shops, services and other important small-scale economic uses (including post offices, petrol stations, village halls and public houses) in local centres and villages.
- Identifying sites in the centre or, failing that, on the edge of the centre capable of accommodating larger format developments where a need for such developments has been identified.
- Retaining and enhancing existing markets and, where appropriate, re-introducing or creating new ones, ensuring that markets remain attractive and competitive by investing in their improvement.
- Taking measures to conserve and, where appropriate, enhance the established character and diversity of their town centres.

2.11 Policy EC4 also includes reference to the evening and night-time economy in town centres and advises that local planning authorities should:

- Encourage a diverse range of complementary evening and night-time uses which appeal to a wide range of age and social groups, making provision where appropriate, for leisure, cultural and tourism activities.

- Identify the number and scale of leisure developments taking into account their potential impact on the character and function of the centre, including that of anti-social behaviour and crime.

2.12 Policy EC5 advises that local planning authorities should identify an appropriate range of sites to accommodate the identified need, ensuring that sites are capable of accommodating a range of business models in terms of scale, format, car parking provision and scope for disaggregation. Further information on Policy EC5, including the application of the sequential approach when selecting sites for town centre uses and assessing the impact of proposed locations can be found in Section 5 later in this report.

2.13 Policies EC14 to EC17 provide guidance on development management associated with applications for main town centre uses including retail development. Policy EC14 notes that a sequential assessment is required for planning applications for main town centre uses that are not in an existing centre and are not in accordance with an up to date development plan. In addition, an assessment addressing the impacts of a particular development is required for planning applications for retail uses which are not in an existing centre and not in accordance with an up-to-date development plan. In advance of development plans being revised to reflect PPS4, an assessment of impacts is necessary for planning applications for retail development below 2,500 sq m as well as the compulsory requirement for developments over 2,500 sq m. An impact assessment is also required for planning applications in an existing centre which are not in accordance with the development plan and which would substantially increase the attraction of the centre to an extent that the development could have an impact upon other centres. Policies EC15 and EC16 outline detailed guidance in relation to the assessment of impact and the consideration of sequential assessments, whilst Policy EC17 provides clear guidance to local planning authorities in their consideration of planning applications for development of a main town centre use which is not in a centre and not in accordance with an up-to-date development plan. Policy EC17.1 notes that such applications should be refused planning permission where:

- The applicant has not demonstrated compliance with the requirements of the sequential approach (Policy EC15); or
- There is clear evidence that the proposal is likely to lead to significant adverse impacts in terms of any one of the impacts set out in Policies EC10.2 and EC16.1, taking account of the likely cumulative effect of recent permissions, developments under construction and completed developments.

2.14 Where no significant adverse impacts have been identified under Policies EC10.2 and EC16.1, Policy EC17 notes that planning applications should be determined by taking account of:

- The positive and negative impacts of the proposal in terms of Policies EC10.2 and EC16.1 and any other material considerations; and
- The likely cumulative effect of recent permissions, developments under construction and completed developments.

Regional Strategy (RPG10)

2.15 Guidance at the regional level, contained within RPG10 (adopted September 2001), pre-dates the publication of PPS4 (and former PPS6). Nevertheless, RPG10 remains, at the time of writing this report, a component of the Development Plan. It directs local planning authorities, in formulating their planning policies and proposals, to consider the following:

- Seek to locate uses which attract large numbers of people in the centres of the Principal Urban Areas (PUAs) and in the other designated centres for growth specified in the spatial strategy.
- Encourage town centre developments of an appropriate scale in the market towns and larger settlements elsewhere in the region in keeping with their size and function and which can help to reduce the need to travel and encourage journeys by modes other than the private car.
- Ensure the vitality and viability of existing centres is maintained, by assessing the need for new development and by applying the sequential test. For convenience provision, RPG10 advises that a distribution of provision should be maintained, that minimises the lengths and frequency of trips.

Joint Replacement Structure Plan

2.16 Weston-super-Mare is defined within the Joint Replacement Structure Plan (JRSP) as a Principal Urban Area (PUA) and as a sub-regional centre, it is promoted as a priority location for major retail, commercial and leisure investment. Policy 2(f) seeks to ensure that retail uses which involve large movements of people are steered to locations where their road vehicle movements will be minimised and public transport access is maximised.

2.17 Policy 7 in the JRSP focuses on the role of Weston-super-Mare and looks to maintain and enhance the vitality and viability of its town centre, making provision for new or upgraded tourist attractions and supporting its regeneration. The policy seeks to improve the amount, range and quality of shopping and leisure facilities in the town centre through refurbishment, redevelopment and extensions. Environmental improvements are to be secured including traffic management to achieve reductions in pedestrian/traffic conflicts in the town centre as well as improved bus facilities.

2.18 The JRSP identifies a hierarchy or centres with Bath and Bristol identified as *City Centres* and Weston-super-Mare as a *Sub-Regional Centre.* Policy 38 seeks to make provision to improve the range and quality of shopping, community, leisure and related facilities and within centres to encourage high-density, mixed use development, including residential and business units. These are to be integrated with improvements to access by public transport and for pedestrians and cyclists, as well as traffic management and car parking strategies.

North Somerset Replacement Local Plan

2.17 The North Somerset Replacement Local Plan was adopted in March 2007 and takes into account guidance within PPS6 (2005). However, it was published prior to the adoption of PPS4 in 2009. The Secretary of State issued a Direction on the 23 March 2010 identifying which policies have expired. All remaining policies were 'saved' and those relevant to retail development are considered below.

2.18 Chapter 10 sets out the Local Plan's policies towards retailing and town centres and sets out how Weston-super-Mare is to be maintained and strengthened as a sub-regional centre in addition to how the other centres within the Unitary Authority are to be enhanced and promoted as the focus for retail, leisure and other travel-intensive development. The main objectives of the Local Plan are to: maintain and enhance the vitality and viability of town centres; safeguard and promote the role of the town centres as priority locations for investment in major retail, leisure, office and community facilities and; to meet the shopping requirements of the local population maximising convenience, accessibility and reducing reliance on the car.

2.19 The four main centres (Weston-super-Mare, Clevedon, Nailsea and Portishead) are all identified within Policy RT/1 (in addition to some district centres such as Worle High Street, Queensway in Weston) as locations suitable for retail, leisure, community, office and other 'trip-intensive' development provided that certain criteria is met. The policy also states that development proposals at out-of-centre retail proposals that could be accommodated within town and district centres and be consistent with their scale and role, or would undermine their vitality and viability, will be refused.

2.20 Policy RT/2 relates to the rejuvenation of Weston-super-Mare and identifies what evidence is required for proposals which would result in the loss of shops (Use Class A1) from the primary shopping frontages. Supporting text to this policy contained within paragraph 10.12 states rejuvenation will be achieved through the provision of land for major retail development within and adjacent to the primary shopping area. Sites adjacent to the seafront are to the regenerated and refurbished with a greater range and mix of uses. With regards to the type of retail development, this is to better connect the shopping area with the seafront and provide a step change in the quality of the retail experience. The Local Plan recognises the benefits of adding a well-designed landmark department store. Paragraph 10.16 states that *"New retail development needs to make a positive contribution to the physical regeneration of underutilised land between the rear of the Winter Gardens and the rear of the Sovereign Centre and pedestrian routes to the seafront, as part of any retail expansion, as well as improve the physical integration of the existing Town Centre with the buildings and spaces fronting Royal Parade".*

2.21 Policy RT/3 considers other town centres and refers specifically to the extension of the convenience shopping at North Worle (Queensway) and Portishead. Furthermore, the policy identifies that redevelopments, refurbishments and changes of uses that serve to reinforce the role of the 'other centres' will be permitted. The Local Plan was prepared in light of the recommendations contained within the 2006 Donaldsons retail study and paragraph 10.26 of the Plan notes that he town centres of Clevedon, Nailsea and Portishead are all well provided for in terms of food retail floorspace up until the end of the plan period (2011). With regards to non-food retail, these centres were identified as having modest capacity and paragraph 10.27 states that should non-food proposals come forward within any of these three towns, their form and scale should be appropriate to the role of its corresponding centre and proposals should not seek to attract expenditure from a wider area.

2.19 Having regard to other policies within Chapter 10 of Local Plan, these comprise:

- Policy RT/4 outlines proposals for a new district centre at Locking Castle, including a mix of local shops and services. This centre now includes a Morrisons supermarket, along with Matalan and Boots stores, a public house, chemist, health centre and library.
- Policy RT/5 relates to local shopping provision and outlines the policy framework to assess the loss of local shopping provision and the provision of new facilities to serve local needs.
- Major out-of-centre shopping proposals, including extensions to existing developments, are dealt with by Policy RT/6 of the Local Plan. It sets out nine criteria which out of centre retail

proposals must comply with, including the tests of need, sequential approach to site selection, retail impact, accessibility and other development management criteria.

Local Development Framework

2.23 North Somerset Council is progressing with the preparation of the Local Development Framework (LDF) which will supersede the existing Replacement Local Plan. The portfolio of development plan documents (DPDs) in the LDF comprises the following:

- Core Strategy
- Site Allocations
- Development Management
- Weston Town Centre Area Action Plan

2.20 In addition to the above DPDs there will also be Supplementary Planning Documents (SPDs) prepared to cover the planned urban extensions to Weston, known as Weston Villages, plus a SPD on Development Contributions. In addition, there is also an existing SPD for the Dolphin Square area in Weston town centre.

Core Strategy

2.21 A consultation draft of the Core Strategy was published in November 2009 and was prepared in the context of the emerging Regional Spatial Strategy. Following action taken by the Coalition Government to revoke Regional Strategies, NSC's Executive Committee considered the implications for the Core Strategy and agreed that the overall strategy and approach set out in the consultation draft remained fit for purpose. However, it was recognised that there were two key areas, namely to the need to identify a new locally-derived North Somerset-wide housing requirement and the revised approach to strategic growth at Weston, which required further consultation. During Autumn 2010, a key changes consultation exercise is being undertaken which relates to the following three areas:

- A new North Somerset-wide Housing requirement of 13,400 dwellings between 2006-2026
- Revisions to the settlement strategy to include infilling-only within villages.
- A revised approach to strategic growth at Weston-super-Mare, including a reduction in the number of proposed dwellings from 9,000 (as identified in the draft RSS) to around 5,000-

6,000 within two new villages. Section 3.4 of the Key Changes consultation document indicates that each of the two new villages will contain a local centre, providing retailing and other community services to meet day to day work, leisure and shopping needs.

2.22 Apart from the above changes, the remaining parts of the consultation draft Core Strategy remain intact and the salient retail and town centre elements of that document are summarised below.

2.23 Policy CS21 in the November 2009 consultation draft Core Strategy relates to retail hierarchy and provision. Weston-super-Mare is identified as a sub-regional centre with Clevedon, Nailsea and Portishead defined as town centres. Boundaries of the centres are to be defined as part of the emerging Site Allocations DPD.

2.24 Policy CS21 goes on to note that proposals for town centre uses within the identified town centres will provided that they are of an appropriate scale, support the shopping environment and improve the mix of town centre uses in each centre. The policy goes on to note that proposals for town centre uses outside identified centres will need to demonstrate that: there is a need for the development; the uses could not be located within or on the edge of defined centres; and, they would not have an adverse impact on the health of defined centres.

2.25 Draft Policy CS29 relates specifically to Weston-super-Mare Town Centre and identifies that the AAP will identify areas that will provide a focus for retail, leisure and entertainment facilities and commercial office development in order to regenerate the town and provide a prosperous, modern, vibrant town centre to serve the existing and future population of Weston. The policy states that the regeneration of the town centre will be achieved through the provision of land for major retail development. The two main sites prioritised for retail-led development within the Draft Consultation are Victoria Square and Dolphin Square.

2.26 Draft Policy CS31 concerns the market/coastal towns of Clevedon, Nailsea and Portishead. The policy notes that shopping and town centre uses are supported within all three towns which will improve the town centre environment and the retail, leisure, and employment offer. Hill Road in Clevedon is specifically identified for proposals which support its focus for specialist shopping and leisure. Within Nailsea, proposals for regenerating the town centre will be supported.

Weston-super-Mare Town Centre Area Action Plan

2.27 The preferred options Weston-super-Mare AAP document was published in July 2009 and is currently being reviewed having regard to further development viability and delivery advice. The purpose of the document is to identify a strategy and proposals for the development and regeneration of the town centre. The AAP identifies nine objectives for the town centre which are summarised below:

- Objective 1: Make provision for an increase in retail and leisure uses to create a more competitive retail and commercially active centre.
- Objective 2: Increase the amount of high quality tourist accommodation, indoor attractions and activities, and focus on the towns existing qualities to appeal to niche markets.
- Objective 3: Strengthen physical and visual connections between all areas of the town, particularly between the retail core and the seafront.
- Objective 4: Encourage more people to live and work in the town centre making it an inclusive, desirable and safe place to live, work and visit.
- Objective 5: Improve the urban fabric and raise the quality of urban design. Redevelop key sites setting an exemplar for the future development of the town.
- Objective 6: Redevelop key gateway sites.
- Objective 7: Ensure an integrated, convenient and sustainable public transport network, including the consideration of a future Park and Ride facility.
- Objective 8: Aim to develop a vibrant evening economy.
- Objective 9: Seek to protect and enhance the environment (including flood risk, habitats etc).

2.26 Draft Policy RT1 of the WTCAAP seeks to make retail provision within the town centre for approximately 20,050sqm of net additional comparison retail and approximately 2,250sqm of net additional convenience floorspace. These figures were based on the 2006 Donaldsons retail study and will be updated as a result of the findings of this study. Chapter 7 of the AAP document outlines the key areas of change within the town centre and arranges them into three areas: the Gateway Area, the Retail Core and the Seafront. The following regeneration sites within the three areas are identified:

Seafront

- *Birnbeck and Environs*
- *Melrose Car Park*
- *Tropicana*
- *Grand Pier*

Retail Core

- *Victoria Square*
- *St James Street*
- *Dolphin Square*
- *NCP Car Park site*
- *Tesco food store site*

Gateway Area

- *Locking Road Car Park*
- *Train Station Car Park*
- *Sunnyside Road*
- *Rugby Club*
- *Gas Works*
- *Avoncrest*

2.27 The focus for this study is on the sites within the defined Retail Core area, although the separate viability and deliverability advice report being prepared by GVA examines all of the sites included within section 7 of the July 2009 AAP.

Dolphin Square Supplementary Planning Document (SPD)

2.29 Alongside the preparation of the Weston town centre AAP, NSC has prepared a Supplementary Planning Document for the Dolphin Square area of the town centre. The SPD acts a supplementary guidance to Policy E1/A of the adopted Local Plan and provides a detailed planning policy framework for the redevelopment of the site. The SPD notes that redevelopment of the site should be for a mixture of land uses including retail, bars/restaurants/cafes, leisure, offices, residential and other community/tourism uses.

3. RETAIL AND LEISURE TRENDS

Introduction

3.1 To put our assessment of the quality of existing provision and the need for additional floorspace into context, it is relevant to consider the wider economic and social trends likely to influence retailing in North Somerset. A number of trends are likely to have a bearing on the future pattern of retail provision in North Somerset, and the opportunities arising from development proposals. This section examines key trends and drivers for change in the retail industry. We outline the key national trends in retailing and service provision of relevance to North Somerset drawing from a range of published data sources, including research by Verdict Analysis and Mintel.

Demographics

3.1 Over the last 15 years UK population has increased at a rate of approximately 0.4% pa, whilst the number of households has increased by 0.5% pa, as average household size has decreased to 2.34 in 2006, with smaller families, more divorces, people living longer etc. These trends are forecast to continue and will affect spending habits, how much we spend, on what and where.

3.2 Over the next 20 years the 65 and over age group is expected to grow by 4.5m or 47% and the under 65s age group by only 8%. Older shoppers have a younger mindset than in the past, are more fashion aware and, in recent years, more financially better off as a result of general house price growth as well as income growth (but post retirement income from pensions could be a concern if they do not achieve anticipated values). Over 65s will have more time to shop, will spend more on DIY and gardening and will expect good customer service. Clearly, the economic slowdown will impact upon disposable income and pension pots with more cautious spending patterns in the immediate future.

3.3 Younger shoppers will have higher education fees to pay, will experience higher housing costs, will be more computer literate and spend more on-line, and will spend more on entertainment/leisure so they may have less to spend in the retail sector.

Income & Expenditure

3.4 Incomes and expenditure grew strongly during the last 20 years, with retail expenditure growing faster than incomes. Overall, retail expenditure has increased by about 3.9% pa in real terms over the last 20 years, with most of this growth on comparison goods rather than convenience goods, where growth has been less than 1% pa. Comparison goods growth had been close to 5.3% pa over the last 30 years, over 6% pa over the last 20 years and were even stronger over the last 10 years. However, circumstances have reversed this pattern of growth.

3.5 The extremely rapid deterioration in the economic performance during the final months of 2008 is having far-reaching implications for available income and consequently expenditure. The UK economy has contracted by a substantial 5.7% in real terms since this recession began in mid-2008. The weakness has been broad-based, with exports hit by the global downturn and domestic demand constrained by rising unemployment and poor confidence. The decline has been exaggerated by a record drawdown in stocks. The manufacturing sector has been hardest hit, reflecting the slump in global demand. Construction remains depressed by a sharp fall in housing starts and the cancellation of many projects. The key services sector has also contracted, but at a gentler pace.

3.6 Household spending fell in real terms by 3.2% in the four quarters to 2009q1. The pace of decline accelerated from -0.4% in 2008q2 to -1.3% in 2009q1 as higher unemployment and slow growth in earnings hit spending. Experian estimate that spending fell a further 1% in the second quarter, taking the decline since the recession began to 4.2%.

3.7 Consumer expenditure on retail goods has been more resilient than total spending. The latest official retail sales data show spending in volume terms up 1.3% in the three months to June 2009. Experian believe this divergence between total consumer spending and retail expenditure reflects three major factors:

- consumers have cut back on big ticket items such as expensive holidays, household goods and cars, but continue to spend on other items
- huge discounting has kept volumes up
- there has been a transfer of spending from services (hospitality, personal care and entertainment) to retail spending on items enabling these activities to be carried on in the home.

3.8 The cost to retailers' margins from discounting and the transfer of spending from service providers in the high street has been a factor underlying the substantial rise from 7% to 11.5% over the past year in the number of vacant shops, according to Experian data. Some of the largest failures have been in the bulky goods sector, which has suffered from the downturn in the housing market. Lack of working capital as a result of the credit crunch has also played a key role.

3.9 The recession has been severe, but is entering a milder phase. Business surveys have improved, with the services purchasing managers index (PMI) (i.e. measuring consumer spending patterns, retail sales and performance against key targets etc) even moving into growth territory in Spring 2009 and continue to slow limited growth. Recent evidence from the mortgage market also suggests that the ferocity of the downturn may be abating. However it is too early to confirm whether this improvement will be sustained while unemployment is rising and lending remains constrained.

3.10 Experian expect the economy to stabilise in the short term, stemming from an end to heavy destocking (i.e. reducing the amount of stock held); a reduction in the rate of decline in house prices; a more marked revival of lending to businesses and a modest pick-up in export demand.

3.11 The upturn when it develops throughout 2010 will be gradual and patchy as investment and household spending remain weak and the global economy revives only slowly. In year-on-year terms, the implication is that consumer spending will shrink by 3.5% in 2009 and contract by a further 0.6% in 2010.

Medium-term outlook

3.12 The medium-term outlook is for much slower growth than was seen during the past 10-15 years. Experian expect GDP growth to average 2.0% a year in 2011-16 and consumer spending to average 2.2%. These rates compare with an annual average of near 3% in 1995-2007 for GDP and 3.2% for consumer spending.

3.13 The key reasons for this marked deceleration are:

- Government finances have deteriorated sharply. Recessions cut tax receipts and benefit payments rise. Bank bail-outs have exacerbated the fiscal deficit. Finances will remain under pressure even when the economy recovers, as an increasing number move into retirement, raising payments and reducing tax and National Insurance receipts. It is estimated that the government will have to find £40bn a year in the medium term through spending constraints and higher taxes. This will weigh down on consumer spending.
- The sharp reduction in investment (down 13% in the year to 2009q1) and cancellation or postponement of plans will inevitably depress medium-term growth prospects in many parts of the UK economy.

- There will be no boost on the scale of what was seen in the past decade from consumer credit. The banking sector will be more cautious and households' appetite for taking on credit will be less voracious as they seek to control their debts which are at historically high levels in relation to incomes. Moreover, savings are likely to be higher than in the past decade as job insecurity continues against backdrop of high unemployment and weak growth.
- The main engines of growth in the past decade – financial and business services and the housing market - will be less buoyant. London's financial services sector will be more tightly regulated and under pressure from centres in the Middle and Far East; a more subdued housing market will curb lending and real estate; and the now mature business services sector will not be able to repeat its 7.9% annual rate of expansion of 1995-2007.
- Public spending - a key creator of jobs in the past decade – will be severely constrained. This will prevent unemployment falling as rapidly as in the aftermath of the recession of the early 1990s.

Long-term outlook

3.14 While the economy may return to a stronger growth path in the second half of the next decade, Experian do not believe that it will repeat the exceptional performance of the period 1995-2007 as some of the issues constraining the medium-term outlook remain unresolved. Environmental factors including much higher energy costs will also constrain growth. Experian forecast GDP growth between 2016 and 2026 to average 2.4% a year.

3.15 Non-store retail sales, excluding e-tailing, are expected to decline over the next ten years, but this will be more than offset by the growth of e-tailing, resulting in overall growth in non-store sales in absolute and percentage terms. Total non-store convenience retail sales (including e-tailing) are expected to increase from 2.5% of sales in 2006 to 4.8% in 2013, rising to 6% in 2026, whilst total comparison non-store retail sales are expected to increase from 6.8% in 2006 to around 9.1% in 2013, before stabilising.

3.16 The impact of growth in e-retailing on future demands for retail floorspace is an important consideration and has been factored into the forecasts set out later in this report. Factors such as the processing of online grocery orders by retailers such as Tesco and Sainsburys in local stores, and the potential use of shops as showrooms and/or collection points may mean that the growth in Internet sales will not necessarily lead to an equivalent reduction in floorspace requirements. However, Tesco has recently announced that it is to trial 'dark stores' which have no customer access and are simply used for picking internet deliveries.

3.17 According to Verdict, as customers become more concerned about the economic outlook, they are becoming more selective in their purchasing habits. With rising living costs, disposable incomes are being squeezed, and as a result customers are shopping around more to find the best possible value. Increasingly retailers are finding it harder to please customers, and across all sectors, retailers are converting fewer customers into main users and shoppers are less loyal to their main stores.

Sales Efficiency

3.18 In undertaking retail capacity and impact assessments it is generally accepted that an allowance should be made for growth in the turnover 'efficiency' (or 'productivity') of existing retail floorspace to reflect what has happened in the past about retailers' ability to achieve productivity increases. Such an allowance also helps maintain the vitality and viability of town centre businesses.

3.19 This growth represents the ability of retailers to increase their productivity and absorb higher than inflation increases in their costs (such as rents, rates and service charges) by increasing their average sales densities. The application of a turnover 'efficiency' growth rate is a standard approach used in retail planning studies.

3.20 Although hard quantitative evidence is limited, comparison businesses in particular have, over time, increased sales densities by achieving improvements in productivity in the use of floorspace. Analysis of past data is difficult as over the last 20 years sales densities increases have been affected by changes in the use of retail floorspace, with higher value space-efficient electrical goods replacing lower value space intensive goods, the growth in out-of-centre retailing, a number of one-off events like Sunday Trading and longer opening hours, and the very strong growth of retail expenditure relative to the growth in floorspace.

3.21 Evidently, in the current economic climate many retailers have struggled to increase or even maintain sales density levels and, together with other financial problems, have led retailers into closure, such as Woolworths and Adams. With the expectation of weaker expenditure growth in the future than over the last 10 years, sales density growth is likely to be towards the bottom end of the range. Therefore, we are now incorporating a 1.3% efficiency rate for comparison retailing up to 2016 and 2% pa thereafter and a 0.1% efficiency rate for convenience retailing up to 2016 and 0.5% pa thereafter.

Employment

3.22 Over the last 20 years retail expenditure has increased at about 4% pa, but retail employment has increased much more slowly. Total employees in retail employment have increased from 2.2 million to 3.0 million, an increase of 1.5% pa. However, this growth has been in part time employees. Full time equivalent (FTE) employment has hardly increased at all, from about 2.1 million to 2.2 million, a 0.4% pa increase.

3.23 Over the next 15 years Experian Business Strategies expect a marginal increase in FTE employment in the retail sector with a slightly higher increase in part time employment. Evidently, this needs to be monitored in the forthcoming years based on the slow down in the economy and corresponding growing levels of unemployment with significant consequences for available retail expenditure and retail sector employment positions.

Location

3.24 Strong income and expenditure growth has affected retailing in another important way – the rise in car ownership and mobility. In 1961 only 30% of households had a car (one or more cars) but only 2% of these had more than one car. With public transport (and walking and cycling) the dominant mode of transport, shopping choices were limited and distances travelled were short. By 1970 car ownership had increased significantly so that nearly 50% of households had one or more cars and the number of households with two or more cars had quadrupled but was still under 10%.

3.25 Currently about 77% of households have one or more cars and a third of households have two or more cars, a huge increase in mobility over the last 30-40 years. Households are now much more mobile than they were and therefore their choices of where to shop and the distances they can travel are much greater. These trends will continue but the rate of change may well diminish, particularly in light of the economic slow-down. It would seem likely, however, that levels of mobility will be retained although frequency of travel may decline as the number of cars per household may fall in the economic downturn. This may increase the demand for other modes of travel.

3.26 Increased mobility and affluence has favoured larger centres over smaller centres. As a result larger centres have increased in size and importance relative to smaller centres which has further reinforced the attraction of larger centres to more mobile shoppers. Smaller centres have, therefore, lost market share and have seen much less new development than the overall rate of expenditure growth would imply.

3.27 Increased mobility and affluence has also stimulated out-of-centre development, which has grown much more rapidly than town centre development. Over the last 20 years the majority of retail development has been in edge or out-of-centre locations. This has led to increasingly restrictive planning policy in favour of town centres over the last 10 years, but only recently has the growth in out-of-centre development started to slow. This slow down is expected to continue, but Verdict still expect sales at out-of-centre locations to increase at a faster rate than at in-centre locations.

3.28 The new PPS4 (like the previous PPS6) reinforces town centre first objectives and the sequential site test is still a cornerstone of retail planning policy, favouring town centre sites and necessitating consideration of the disaggregation of retail park proposals so that smaller sites are considered. However, it is also recognised that individual retailers' business models are also relevant.

3.29 In May 2006 the Office of Fair Trading (OFT) referred the supply of groceries by retailers in the UK to the Competition Commission (CC) for investigation under Section 131 of the Enterprise Act 2002. The CC published its findings in April 2008 and reported that "in many respects, competition in the UK groceries industry is effective and delivers good outcomes for consumers, but not all is well". The two main areas of concern highlighted were:

1) that a number of grocery retailers have strong positions in several local markets. Barriers faced by competing retailers that could otherwise enter these markets mean that consumers get a poorer retail offer than would otherwise be the case, while those grocery retailers with strong local market positions earn additional profits due to weak competition in those markets, and

2) the transfer of risk and unexpected costs by grocery retailers to their suppliers through various supply chain practices if unchecked will have an adverse effect on investment and innovation on the supply chain and therefore, on consumers.

3.30 A number of steps to address the problems were posed including the recommendation of the introduction of a competition test as part of the planning process for new stores, to favour new retailers other than those which already have significant market shares in an area. This recommendation has been subject to a successful legal challenge by Tesco and a new version of the competition test was published in October 2009. The updated recommended test (2009) would be applied to all grocery retail planning applications (extensions and new stores) that resulted in stores with a net sales area of over 1,000sq m and the Office of Fair Trading would be become a statutory consultee to the LPA and would advise it whether a planning application passed or failed the competition test. The test is as follows:

The OFT would::

(a) assess concentration across an area defined using a 10-minute drive-time isochrone (calculated using a standard, readily available software package) around the store that is to be developed;

(b) count the number of fascias (including that of the retailer that might operate the developed store) operating stores with net sales area of over 1,000 sq metres within the isochrone. The fascias would include all full-range grocery store operators;

(c) (Where the number of fascias is three or fewer) calculate the share of groceries sales area within the isochrone that the grocery retailer operating the developed store would have after the development had been implemented; and

(d) provide advice to the LPA on:

(i) whether the applicant, being a large grocery retailer, had passed or failed the Test; or

(ii) where a planning application was submitted by a third party, which grocery retailers would fail the Test.

A retailer would pass the Test for a development within a particular local area (i.e. within a 10-minute isochrone around the development) if:

(a) it was a new entrant in the local area;

(b) the total number of fascias in the local area was four or more; or

(c) the total number of fascias was three or fewer but the grocery retailer operating the development would have less than 60 per cent of groceries sales area in the local area.

A retailer would fail the Test if:

(a) the grocery retailer was not a new entrant in the local area;

(b) the total number of fascias in the local area was three or fewer; and

(c) the retailer would have 60 per cent or more of groceries sales area (including the new development) in the local

A development that did not result in an increase in groceries sales area would still be subject to the Test, since planning conditions would be required to prevent an increase in groceries sales area in the future, but would pass it automatically.

In order to ensure the effective working of the Test, the OFT also recommend that:

(a) the Department of Communities and Local Government (CLG) and the devolved administrations took such steps as were necessary (including changes to planning policy) to ensure that when an LPA gave open A1 planning permission (which would allow any type of retail development), it should limit the grocery sales area in the development to less than 1,000 sq metres (as an anti-avoidance provision); and
(b) CLG and the devolved administrations took such steps as were necessary to ensure that LPAs should take account of the OFT's advice on the result of the Test and should only approve applications that failed the Test in exceptional circumstances:
(i) the particular development would produce identified benefits for the local area that would clearly outweigh the detriment to local people from the area becoming or remaining highly concentrated in terms of grocery retailing; and
(ii) the development, or any similar development, would not take place without the involvement of a large grocery retailer that had failed the Test.

3.31 Recommendations were also made by the Competition Commission to try and prevent retailers using the control of land sites in highly concentrated markets as a means of inhibiting entry by competing retailers. These steps would have implications on the potential new locations that some retailers could look to develop within.

Size of Units

3.32 The growth of multiple traders and increased competition between companies has meant that the retail structure is increasingly dominated by large companies requiring larger shop units. Shopping centres and out-of-centre development that has been able to accommodate this demand for larger sized units (typically 500-2,000 sq m or larger) have grown in importance, reinforcing the trend of higher order centres and out-of-centre retailing growing in relative importance (i.e. polarisation in the retail hierarchy).

3.33 The growth in the size of stores has caused a contraction in the number of shop units and consumer choice. This is particularly evident in the food sector, with a marked decline in the number of smaller and more specialist food retailers (greengrocers, butchers, fishmongers, bakers etc), and a large increase of superstores. This is indicated by Verdict Research which shows a 31% reduction in the total number of convenience stores over the last 10 years, as space is concentrated into a smaller number of larger stores.

3.34 Whilst the number of superstores (>25,000 sq ft) has increased by 37%, food specialists and off licences/tobacconists have declined by 35% and 57% respectively. These trends may well weaken in the future due to possible market saturation of large foodstores and concerns over lack of competition due to the market dominance of a few key multiples.

Foodstores

3.35 A by-product of the restriction of new development of large foodstores is the growth in applications to extend existing stores and the changing composition of floorspace within existing foodstores. There is an increasing emphasis on the sale of comparison goods at the expense of convenience goods, as expenditure growth rates for comparison goods are much higher than for convenience goods and margins are greater, although sales densities are often lower. This trend poses an increasing threat to smaller centres, as larger foodstores will increasingly sell a wider product range of day-to-day convenience and comparison goods and services. According to Verdict, non-food floorspace in the larger format stores of the top 4 grocers now accounts for between 28% of the Morrisons store sales area portfolio and 50% of the Asda store sales area portfolio.

Shopping & Leisure

3.36 Due to increased affluence and mobility, and the rise of the internet, shoppers no longer merely shop to satisfy ‘needs’, they increasingly shop to satisfy ‘wants’ as well. Retailing in the higher order centres and the more attractive smaller centres is changing and arguably becoming more of a quasi leisure experience. Leisure spending growth is continuing to outstrip that of retail, and despite the economic slowdown, at the moment consumers seem to be willing to continue spending on leisure.

3.37 Quality restaurants, coffee shops, cafes and bars, as well as health and fitness centres and multiplexes in larger centres, are therefore important to attract shoppers and encourage longer stays and higher spending. Better integration of retail and leisure facilities mutually benefits both sectors. Pedestrianised streets and covered retail areas are also important in attracting shoppers, as is the overall attractiveness of the town centre, along with good accessibility and car parking.

3.38 A number of factors have helped drive the growth of leisure provision in town centres. Planning policy is important as is the fact that urban living is fashionable. Town centres can offer consumers a much more vibrant atmosphere in which to eat and drink and they also offer a much wider choice of leisure venues, allowing more spontaneous decisions. For bars, restaurants and health & fitness clubs, the attraction of the town centre is 'daytime trade' and the ability to capitalise on proximity to businesses and shoppers.

Internet Shopping/E-Tailing

3.39 Online spending is growing at its fastest rate for six years, driven by convenience and low prices, and so far e-retailing is showing no signs of being affected by the recent economic downturn. According to Verdict (2008), the e-retail market grew by 35% between 2006 and 2007, which is considerably higher than the 3.6% growth in the total retail market, and e-retail is expected to continue outperforming the total retail sector over the next five years.

3.40 Worth £14.7bn in 2007, the online market is becoming an increasingly important contributor to retail, accounting for 5.2% of all retail sales, (up from 3.8% in 2006). Verdict's research found that almost 66% of UK households now have access to the Internet, with 55.5% having broadband access, which is making online shopping easier, faster and more reliable. As technology continues to improve, it will fuel further growth in the market. Overall the internet shopper population is forecast to grow by approximately 50% between 2007 and 2012.

3.41 The online market is dominated by the electrical and food & grocery sub-sectors, which between them account for around half of all sales. The food & grocery sub-sector, with rapid growth of 39.5% in 2007 is expected to overtake electricals in the top spot. Online clothing and footwear sales grew 38% during 2007, and with sales of £1.7bn, clothing & footwear is the UK's third largest online market.

3.42 Books are one of the online market's most mature sectors – having been present in the online arena for over a decade. The category came to prominence by Amazon back in 1995, culminating today in approximately £1 in every £7 spent on the category going through online. In 2007, the online book market grew by 15% to £504m, although was the lowest growth for four years indicative of the approaching maturity of the market. The effects of on-line book sales were felt in late 2009 with the fall of Borders UK into administration. A number of potential developments regarding books are on the horizon which have the potential to alter the dynamics of the sector, notably the digitisation of books. The immediate impact of this development in the short term is limited, although should give traditional book retailers 'food for thought' regarding the creation of their long term strategies.

3.43 Although only accounting for a very small share of online spending, the market which saw the most dramatic online growth in 2007 was furniture and floor coverings, growing by 41% from

£0.4bn to £0.7bn, despite the slowdown in the sector overall, with Ikea's launch of a transactional website being sited as one of the drivers of growth. The music & video sector continues to have the overall highest online market penetration at 30.8% of total sector sales, and this is forecast to double by 2012, which could have implications for physical store requirements.

3.44 As a consequence of this growth, there are huge pressures on retailers as the Internet has provided an attractive alternative for many consumers. Shoppers are selecting their own retail mix online and shopping centres need to compete with this choice, which is not only driven by price and range, but also service and expertise. Town centres will increasingly have to provide a retail experience that the Internet and supermarkets are unable to match, and the market will respond in some way to the varying impacts on different retail sectors. In accordance with national policy, the emphasis should be on the overall town centre experience, the mix of uses, and not just the retail offer.

Summary

- Incomes and expenditure have shown strong growth over the last 20 years, with retail expenditure growing faster than incomes. This has seen corresponding increases in sales densities within existing retail floorspace, which has also been driven by factors such as high value space efficiency and longer opening hours. Crucially, for NSC the current economic slow down will have an impact on the retail sector and growth forecasts will need to reflect recent publications from Experian Business Strategies.
- Heightened mobility through increased car ownership, alongside growth in affluence, has favoured larger centres over smaller centres. Shoppers are more willing to travel further a field to higher order centres which have increased in size and importance relative to smaller centres, leading to a consequent fall in their market share.
- The composition of town centres has changed through new development, with a growing number of companies requiring larger shop units to meet their shop format ratios. This has again favoured the larger centres which generally have the space to meet such requirements and are able to accommodate this demand. This is particular noticeable in the convenience sector, which has seen a 37% increase in food superstores, but a 31% fall in total number of convenience stores over the last 10 years. This has led to current concerns in respect of lack of competition and market dominance.
- Leisure spending growth is continuing to outstrip that of retail, and despite the economic slowdown, at the moment consumers seem to be willing to continue spending on leisure – although this may change in the coming months. Nevertheless, the mix of uses in a town

centre is vital to offer choice to shoppers, and quality restaurants, coffee shops, cafes, bars and other leisure facilities are all important to encourage frequency of visit and longer stay times.

- As competition from the internet increases, town centres need to offer a quality destination where people want to spend time and gain access to facilities not available on the web. There has been a continued polarisation towards larger centres and the provision of larger stores in these larger centres. Where smaller centres have been unable to diversify their offer or create niche markets and a mix of retail, leisure and service facilities they have suffered.

4. TOWN CENTRE HEALTH CHECKS

Introduction

4.1 The purpose of this section is to provide an assessment of the current state of retailing within North Somerset and its relationship to surrounding areas. This will be carried out through compiling health checks of the four main town centres, plus an overview of out-of-centre provision. Part 4 of the Practical Guidance on Need, Impact and the Sequential Approach in PPS4 refers to the development of town centre strategies. Such strategies need to be based on sound evidence which should include an audit of existing centres, to identify their current role, their vitality and viability, and their potential to accommodate new development and/or change having regard to identified needs. Town centre health checks provide the opportunity to consider a centre's performance over time, in relation to national trends and to similar sized centres elsewhere. For the purposes of reviewing the health of town centres within North Somerset, this study will draw comparisons between each of the four centres and also to national trends. Annex D of PPS4 identifies the indicators used for assessing the health of town centres.

4.2 Measurement of vitality and viability of town centre health is achieved through a basket of tried and tested indicators. The information gathered for town centres is useful not only to inform the review of allocations and policies, but is also useful for assessing the likely impact of retail development proposals. In line with the project brief issued by NSC, the health of the four main centres in the District (Weston-super-Mare, Clevedon, Portishead and Nailsea) has been assessed. The indicators which have been reviewed for each of the centres are:

- diversity of main town centre uses (by number type and amount of floorspace);
- the amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations;
- the potential capacity for growth or change of centres in network;
- retailer representation and intentions to change representation;
- shopping rents;
- proportion of vacant street level property;
- commercial yields on non-domestic property;
- accessibility;

- customer and residents' views and behaviour;
- perception of safety and crime; and
- state of the town centre environment quality.

4.3 It should be noted that due to the size and function of some of the centres, it is not possible to gather information on a number of the indictors, particularly retail rents and commercial yields.

4.4 Information on the indictors of town centre health listed above has been gathered from a number of sources, including North Somerset Council, Experian GOAD, Focus Reports and the Valuation Office. This information has been supplemented by land-use surveys undertaken by North Somerset Council in September/October 2010. In addition, a review of retailer requirements for representation in the main centres has also been undertaken. This sought to identify retailer interest in the main centres.

The Sub-Regional Retail Hierarchy

The Existing Position

4.5 North Somerset is located in the north-western part of the South West region. It is bordered by Bristol City to the north, Sedgemoor District to the south and Mendip to the east. The district covers an area of approximately 145 square miles. The main town is Weston-super-Mare and this is situated approximately 18 miles south west of Bristol.

4.6 Table A below shows the level of total retail floorspace in the main settlements in North Somerset, when compared with retail floorspace within the major settlements in surrounding administrative areas. The table below also provides a VenueScore ranking for each centre for 2007 and 2010. The VenueScore database ranks individual based on a 'basket' of retailer representation and floorspace information, to enable a comparison to be drawn between the performance of different centres and over time.

Table A: Sub-Regional Shopping Hierarchy

Tier/Centre	Total Floorspace (GOAD) (sq m gross)	VenueScore Ranking 2007	VenueScore Ranking 2010
Weston-super-Mare (centre)	79,627	191	173
Clevedon	15,923	682	740
Portishead	24,805	1013	921
Nailsea	21.804	868	812
Burnham-on-Sea	22,910	868	921
Bridgwater	55,825	306	301
Wells	27,062	706	533
Street	35,776	725	716
Glastonbury	20,847	1623	1304
Shepton Mallet	27,722	1830	1448
Taunton	106,438	80	81
Bristol (Broadmead)	131,476	12	27

Source: Goad & VenueScore.

4.7 The above data indicates that Weston has improved its VenueScore ranking over the past three years, rising from 191st to 173rd nationally. Nailsea and Portishead's rankings have also improved slightly, whilst Clevedon's ranking has fallen although it remains second highest of the four main town centres in North Somerset followed by Nailsea and then Portishead in fourth. In terms of comparison with other towns, Weston has more retail floorspace than Bridgwater and also has a significantly better VenueScore ranking.

4.8 In addition to a comparison of the four main North Somerset town against other centres in the sub-region, Council officers has also asked that this report compares Weston against other comparable large seaside tourist destinations across the UK. These are outlined below and, it is clear that in terms of size, Weston is smaller than towns such as Southend-on-Sea, Southport, Blackpool and Eastborne. It is comparable in size to Torquay, Llandudno and Great Yarmouth, although it is smaller than the Torbay area as a whole (Torquay, Brixham and Paignton).

Table B: Comparable Seaside Towns

Tier/Centre	Total Floorspace (GOAD) (sq m gross)	VenueScore Ranking 2007	VenueScore Ranking 2010
Weston-super-Mare	79,627	191	173
Southend	109,876	57	59
Torquay	72,269	152	108
Blackpool	109,950	69	90
Southport	128,308	102	n/a
Eastborne	107,461	107	126
Llandudno	69,352	233	262
Colwyn Bay	43,794	547	492
Great Yarmouth	80,760	194	183

Source: Goad & VenueScore.

Weston-super-Mare Town Centre

Structure of the Town Centre

4.9 Weston-super-Mare is the main town within the unitary authority, accommodating a large proportion of the retail, commercial and residential development. It is a predominantly seaside tourism and is strategically located close to Junction 21 of the M5. The predominant route into the town is via the A370 which leads directly onto the M5 at Junction 21 and also provides direct access to Bristol. The town is also sited on the Exeter to Bristol railway line. The town centre includes a range of services as well as being the District's administrative centre. However, whilst having a unique seaside offer and benefiting from its strategic location off the M5, there is a recognised loss of retail expenditure to other towns and cities, including Bridgwater to the south and Bristol to the north east and both of these towns also constrain Weston's wider catchment area. Weston-super-Mare has a resident population of 80,076 (2001 Census).

4.10 The town centre is structured around the pedestrianised section of the High Street which leads onto the Sovereign Centre, an indoor shopping centre comprising of approximately 40 retail units. The other main area within the town centre is Dolphin Square which is accessed from the southern end of the High Street. Dolphin Square is subject to regeneration proposals which seek to redevelop the 1960s development with leisure, retail and hotel uses. A planning application is anticipated by the end of 2010.

4.11 In addition to the regeneration of Dolphin Square, there are a number of other proposals which seek to improve both the retail offer and the attractiveness of the gateway to both the town centre and the pier. These are identified within the Weston-super-Mare Town Centre Area Action Plan which forms part of the emerging Local Development Framework (LDF). This document was published at Preferred Options stage in July 2009. The document identifies that the perception of the town centre is that it is underachieving in terms of its competitiveness with other comparable centres in the sub-region due to access constraints and its relatively poor retail offer. It would appear that there is an unclear retail hierarchy in the town with the out-of-town retail offer attracting a significant amount of retail expenditure.

4.12 The North Somerset Replacement Local Plan contains policies which seek to enhance the role of the town centre and secure attractive shopping facilities. Whilst Policy RT/1 looks to reinforce the role of the town centre, it also seeks to encourage a greater diversity of uses in order to compete with retail destinations beyond North Somerset. The roles of the shopping frontages are to be reinforced. Draft Policy RT1 in the Weston-super-Mare Town Centre AAP (Preferred Options June 2009) makes provision for approximately 20,050 sqm of net additional comparison retail and approximately 2,250 sqm of net additional convenience goods retail floorspace within the town centre up to 2016. It further identifies that the preferred location for new retail development will be within or adjacent to the retail core. However, this allocation is potentially dependent on the RSS allocation which has since been revoked.

4.13 The defined town centre within the Local Plan incorporates parts of Victoria Place, South Terrace, Lower Church Road, Wadham Street, Old Post Office Lane, West Street, Worthy Lane, Victoria Quadrant, Orchard Street, Burlington Street, Meadow Street, Orchard Place, Alexandra Parade, Locking Road, Walliscote Grove Road, Carlton Street, Beach Road, Oxford Street, Gloucester Street, St James Street, Union Place, High Street, Oxford Place, Richmond Street, York Street, Royal Parade, Salisbury Terrace, Victoria Square, St Margaret's Terrace, South Parade, West Street, North Street, Palmer Street, Hopkins Street and the Sovereign Centre. Within the town centre, primary shopping frontages (Policy RT/2) are located on Waterloo Street, Walliscote Road, Regent Street, Meadow Street, High Street and the Sovereign Centre. Policy RT/2 only permits the loss of retail premises for alternative uses (non Class A1) should clear evidence be presented.

4.14 The Weston-super-Mare Town Centre AAP (Preferred Options June 2009) identifies areas within the town centre for redevelopment and/or growth. Draft Policy RC1 'Regeneration of the Retail Core' identifies that the regeneration of the retail core will be achieved through the allocation of land for major retail development within and adjacent to the primary shopping area. It further states that the two main sites for retail development are Victoria Square and Dolphin Square. Small independent retailers are promoted at Orchard Street, Meadow Street and Grove Village. The draft AAP identifies the following sites for redevelopment within the main retail core:

- Victoria Square – Preferred Option to redevelop the site for 6,800 sqm of comparison retail uses; hotel; approximately 157 residential units; cafes and restaurants; offices and; improved pedestrian routes.
- Dolphin Square and Carlton Street Car Park – Preferred Option to redevelop the site for approximately 8,000 sqm of retail floorspace; replacement and expansion of existing bars/restaurants/cafes; leisure and tourism uses; offices; approximately 350 residential units; community uses and; sufficient car parking. Proposals have since been progressed and an application for retail, leisure and hotel uses is expected to be submitted by the end of 2010.
- Tesco Site – This is on the periphery of the retail core. The preferred option is to expand and reconfigure the existing food provision to create approximately 4,500 sqm of net additional retail floorspace and a minimum of 2,250 sqm of this as convenience retail.
- NCP Car Park Site – This site is bounded by Regent Street and the High Street. It is proposed to redevelop the site for approximately 7,000 sqm of comparison uses; approximately 164 residential units; cafes and restaurants; offices and; a distinct landmark building.
- St James Street Area – This is currently a mixed use area bounded by Regent Street, Oxford Street, St James Street and Royal Parade. The preferred option for this area is to create a café and restaurant culture along St James Street and encourage refurbishment or redevelopment of certain buildings.

Diversity of Uses

4.15 Information on the diversity of uses within the town centre boundary has been obtained from GOAD (2009) and updated by GVA Grimley using North Somerset Council's Land Use Surveys (October 2010). This information indicates the composition of centre as follows:

Table C: Retail Composition of Weston-super-Mare town centre, 2009-2010

Sector	2009		2010		Selected Somerset	UK
	No.	%	No.	%	Average %	Average %
Convenience	42	8.8	44	9.2	7.78	9.48
Comparison	197	41.1	184	38.5	46.57	42.08
Service	172	35.9	161	33.7	33.97	34.64
Vacant	62	12.9	83	17.4	10.38	12.60
Miscellaneous	6	1.3	6	1.3	1.30	1.20
Total	**479**	**100**	**478**	**100**	**100**	**100**

Source: Experian GOAD and GVA Grimley. Figures may not add due to rounding

4.16 The above analysis identifies that the proportion of convenience uses has increased from the 2009 surveys and this figure is now broadly in line with the UK Average whilst higher than the 'Somerset Town' average. Conversely, the proportion of comparison units has decreased and is now substantially below that of the 'Somerset Town' average and the national average. Service provision is in line with the UK and county wide average, although it has decreased noticeably since 2009.

4.17 We have also updated the floorspace within Weston town centre for the convenience and comparison goods retail sectors, plus the service sector and vacant floorspace, and this is contained in Table D below. It indicates that the amount of floorspace occupied by convenience goods retailers has remained relatively static over the past year and is slightly below the national and Somerset average levels. The amount of floorspace occupied by comparison good retailers has fallen by around 1,000sq m gross since 2009, although the proportion of floorspace occupied by comparison retail uses is commensurate with national and Somerset average levels. Whilst the amount of floorspace occupied by service uses has also fallen, the proportion of space within service use remains slightly above the national and Somerset average probable due to the tourist function of Weston.

Table D: Retail Floorspace Composition of Weston-super-Mare town centre, 2009-2010

Sector	2009		2010		Selected Somerset	UK
	No.	%	No.	%	Average %	Average %
Convenience	11,511	14.5	11,501	14.6	18.8	17.51
Comparison	38,982	49.0	37,914	48.2	49.7	47.6
Service	20,476	25.7	18,655	23.7	22.3	22.91
Vacant	7,813	9.8	9,821	12.5	8.4	11.00
Miscellaneous	845	1.1	845	1.1	0.9	0.98
Total	**79,627**	**100**	**78,736**	**100**	**100**	**100**

Source: Experian GOAD and GVA Grimley. Figures may not add due to rounding

Retailer Representation

4.18 WSM town centre has the highest concentration of multiple retailers in the District. Multiple comparison retailers currently located within the town centre include: Marks & Spencer; Dorothy Perkins; Burtons; New Look; WH Smith; Peacocks; Topshop; Boots; Next; Accessorize; Evans; BHS and; Wilkinson. The majority of these occupiers are located on the High Street and within the Sovereign Centre.

4.19 Having regard to overall comparison uses, the proportion of clothes and footwear retailers is similar to national average levels, as are the proportion of books/arts/crafts, furniture and electrical goods retailers. The proportion of DIY retailers are below national average levels, as are sports and recreational goods stores. The proportion of department stores and catalogue showrooms in the town centre is also slightly above average, as are the proportion of gift shops (which is unsurprising given the tourism role of Weston).

4.20 In relation to the convenience retail sector, the largest store is the Tesco supermarket located on the eastern side of the centre. This store has a net sales area of 4,500sq m and sells a wide range of convenience and comparison goods. The store has been, for a number of years, one of the most popular convenience shopping destinations in Weston and is served by a large surface level car park which also accommodates a petrol filling station. In relation to other convenience retail floorspace in the town centre, the Marks & Spencer store has a foodhall, whilst there is also a selection of bakers, butchers, greengrocers, off-licences and newsagents. The proportions of greengrocers and bakers in Weston town centre are above the national average whilst there is a below average provision of butchers and off-licences.

4.21 As already noted, the proportion of service uses and floorspace within the town centre is commensurate with national and Somerset average levels. Within the service sector there is an above average proportion of restaurant, café, fast food and take away. The proportion of health and beauty, travel agents and estate agency uses is similar to national average levels whilst the proportion of banks and building societies is below average.

4.22 Outside of Weston town centre, there is a significant amount of convenience and comparison retail stores, located in defined district and local centres plus out of centre supermarkets and retail warehouses. A summary of provision is outlined below:

- Queensway, Worle. This District Centre is dominated by a large Sainsburys supermarket which extends to 4,200sq m net sales, selling a wide range of convenience and comparison goods. Also within the centre are QS, Clarks, TK Maxx, Argos, Homebase, Post Office and Lloyds pharmacy uses, plus a McDonalds fast food take-away.
- Worle High Street. This District Centre contains just over 100 retail and commercial units. The centre includes a Co-op foodstore, along with a range of convenience, comparison and services uses, mostly occupied by local independent traders.
- Locking Castle is the recently developed District Centre and including a Morrisons store (2,900sq m net sales area) plus retail units occupied by Matalan and Boots, plus a public house, health centre, library and nursery.

- Out of centre supermarkets. In addition to the large supermarkets in the town centre, Queensway and Locking Castle, there are two Lidl stores in Weston located at Summer Lane and Winterstoke Road, plus a recently opened Waitrose (in the former B&Q unit) and an Aldi store at Flowerdown Retail Park. It should be noted that the Core Strategy proposes to allocate the ASDA at Phillips Road, plus surrounding area, as a district centre.
- Out of centre retail warehouses. There is a large collection of retail warehouses in Weston, the majority of which are located around the Winterstoke Road, Marchfields Way and Herluin Way area. Weston Retail Park and Gallagher Retail Park are the two largest collections of retail warehouse units.

Commercial Yields and Rental Levels on Retail Property

4.23 In relation to the financial characteristics of retail property in WSM, we have obtained data in relation to commercial yields on retail property. As a measure of retail viability, commercial yields on retail floorspace are also a valuable indicator, but one that needs to be used with care. The level of yield on its own is of less value than in comparison with other yields at different points in time and in different locations. Yields measured consistently over time can provide an indication of the direction in which a particular town centre is moving. This trend can be compared with national levels of yield and with those towns of similar size and type, or with neighbouring and competing towns. In short, the lower the yield the better the performance of a centre. A comparative analysis of this type, conducted on a regular basis, can give an indication of how the viability of retailing in a town centre is changing.

4.24 Table E below outlines the commercial yields on retail property for Weston between 2003 and 2008, compared with the trends within surrounding towns and other medium and large centres in Somerset and Bristol.

Table E: Commercial Yields on Retail Property in Sub-Region, 2003-2008

Centre	Apr 2003	Jan 2004	July 2004	Jan 2005	July 2005	Jan 2006	July 2006	Jan 2007	July 2007	Jan 2008	July 2008
WSM	7.0	7.0	7.0	7.0	7.0	7.0	7.0	7.0	7.5	7.5	7.5
Yeovil	7.0	7.0	7.0	7.0	6.75	6.25	5.5	5.0	5.0	5.0	5.0
Bridgwater	8.0	8.0	8.0	7.0	7.75	7.0	6.0	6.0	6.0	6.0	6.0
Frome	9.0	9.0	8.25	8.25	7.75	7.0	7.0	7.0	7.0	7.0	7.0
Wells	8.0	8.0	8.0	7.0	7.0	6.75	6.75	6.75	6.25	6.0	6.0
Taunton	6.0	6.0	6.0	5.75	5.75	5.25	4.75	4.5	4.5	4.5	4.5
Bristol (Broadmead)	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.5	5.5	5.5

Source: Valuation Office statistics

4.25 Table E only provides yield information up to July 2008 as no information exists for 2009 and 2010. The yields indicate that Weston in 2008 was being outperformed by all of the comparable centres. Interestingly, retail yields for Weston remained consistent up until July 2007, with an increase experienced from July 2007 onwards. All of the other centres in the sub-region all experienced decreasing (i.e. improving) yields over the same period and no increase between 2007-2008 thus indicating that Weston has been out-performed by other large centres in the sub-regional over the past several years.

4.26 We have also sought yields for the comparable seaside towns over the same period (2003-2008) and this data is shown in Table F below. The data indicates that, at 2008, Weston had lower levels of investor confidence in town centre retail property than Southend, Torquay, Southport, Eastbourne, Llandudno and Blackpool, although it had better yields than Colwyn Bay and similar yields to Great Yarmouth. Like the previous analysis, it is clear that all of the other comparable towns improved their yield levels between 2003-2007 whilst Weston did not.

Table F: Commercial Yields on Retail Property in Sub-Region, 2003-2008

Centre	Apr 2003	Jan 2004	July 2004	Jan 2005	July 2005	Jan 2006	July 2006	Jan 2007	July 2007	Jan 2008	July 2008
WSM	7.0	7.0	7.0	7.0	7.0	7.0	7.0	7.0	7.5	7.5	7.5
Southend-On-Sea	6.5	6.5	6.25	6.25	6	6	5.5	5.0	5.0	4.75	4.75
Torquay	7.5	7.5	7.5	7.0	7.0	6.75	6.25	5.5	5.5	5.0	6.0
Southport	7.0	7.0	7.0	7.0	7.0	6.25	6.25	6.25	6.25	6.5	6.5
Eastbourne	6.0	6.0	6.0	6.5	6.5	6.5	6.5	6.0	6.0	6.0	6.0
Llandudno	7.0	7.0	7.0	7.0	7.0	7.0	6.5	6.5	6.5	6.5	6.75
Colwyn Bay	8.5	8.5	8.5	8.5	8.5	8.5	8.0	7.75	7.75	7.75	8.0
Great Yarmouth	7.0	7.0	7.0	7.0	7.0	7.5	7.5	7.5	7.5	7.5	7.5
Blackpool	6.0	6.0	6.0	6.0	6.0	5.0	5.0	5.0	5.0	5.0	5.0

4.27 Rental information for Zone A retail space in Weston has also been obtained and indicates that rental levels were at £40 sqm in 2008 (Table G). There is no information on rents for the other three centres in North Somerset. Therefore, in order to provide some useful comparisons, data has been identified, where possible, for centres in surrounding administrative areas:

Table G: Zone A Rental Levels, 2000-2009 (£/sq ft)

Centre	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Weston	70	70	75	80	80	90	90	90	90	85
Wells							60	65	65	60
Yeovil	70	70	70	70	80	85	90	100	100	85
Taunton	110	110	120	125	130	135	140	140	140	120
Bridgwater	35	35	35	35	40	45	50	50	50	40
Bristol	175	175	180	180	185	185	190	200	200	200

Source: Focus

4.28 The information on rental values demonstrates that rental values in Weston are comparable with that of Yeovil and outperform Wells and Bridgwater. However, rental levels are considerably higher in Bristol and Taunton. Unlike its yield data, rental levels in Weston have been improving in recent years, rising from £70/sq ft in 2000 to £85/sq ft in 2009.

4.29 We have also obtained rental data for town centre retail property in the comparable seaside towns and this is contained in Table H below. It indicates that Weston has, at 2009, better rental levels than Torquay, Southport, Llandudno and Great Yarmouth, although it is outperformed by Southend, Eastbourne and Blackpool.

Table H: Zone A Rental Levels – Comparable Seaside Towns, 2000-2009 (£/sq ft)

Centre	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Weston	70	70	75	80	80	90	90	90	90	85
Southend-On-Sea	100	100	110	110	110	110	115	120	120	100
Torquay	75	75	80	85	85	85	85	90	90	75
Southport	110	100	90	85	80	80	80	85	85	70
Eastbourne	95	90	95	95	100	110	110	110	110	100
Llandudno	70	75	75	75	80	80	85	85	90	70
Colwyn Bay	30	30	30	30	35	40	40	40	170	155
Great Yarmouth	55	55	65	65	70	70	70	75	75	65
Blackpool	110	110	110	115	115	120	125	125	125	115

Retailer Requirements

4.30 As part of the work undertaken for the viability and deliverability advice report for the Town Centre AAP, GVA undertook research in relation to known retailer requirements. The research uncovered that are a number of current potential retail requirements who can not currently be accommodated within the existing retail provision in the town centre. These include Debenhams, Primark, TK Maxx, River Island, Iceland, 99p Stores, H&M, and Brantano. In addition, there are a number of smaller/standard shop requirements from retailers such as Costa Coffee, Edinburgh Woollen Mill, Holland and Barrett, Caffe Nero, Pizza Express as well as potential relocations such as New Look and Poundland who have requirements to upsize. It is likely that these requirements could total around 8,400sq m (90,000 sq ft) of new floorspace.

4.31 We've also obtained data on retailer requirements for Weston over the period 1997 to January 2010 in order to understand the popularity of the town to the retail industry over the past decade. This information is contained in Table I below and is also compared against other centres both within the District and also those in the sub-region. The table indicates that Weston had experienced a steady increase in requirements up to 2005 and has a general level of requirements which is not too dissimilar to Yeovil and above Bridgwater. After 2005, requirements began to fall steadily between 2006-2007 and then a dramatic fall to 2009, which was a phenomenon experienced by all other centres in the sub-region.

Table I: Retailer Requirements – Weston and other towns in the sub-region 1997-2010

Year	Weston	Clevedon	Nailsea	Bridgwater	Yeovil	Taunton	Bristol
2010 (Jan)	11	6	3	7	13	22	157
2009	13	7	4	9	14	28	128
2008	-	-	-	-	-	-	-
2007	36	9	10	21	41	70	156
2006	45	7	7	25	41	76	160
2005	52	8	8	29	49	79	158
2004	47	12	5	24	40	78	145
2003	44	9	3	26	42	72	146
2002	34	14	2	20	37	71	155
2001	36	7	2	16	30	50	139
2000	37	4	2	18	37	48	139
1999	28	2	1	6	27	36	136
1998	27	4	0	4	27	43	150
1997	28	5	2	10	33	45	136

4.32 Table J below outlines the scale of retailer requirements in Weston since 1997 compared to other seaside towns. As can be seen, the majority of centres have has similar levels of retailer demand, although Southend, Southport, Eastbourne and Blackpool have slightly higher levels of requirements than Weston.

Table J: Retailer Requirements – Weston and comparable seaside towns 1997-2010

Year	Weston	Southend	Torquay	Southport	Eastbourne	Llandudno	Colwyn Bay	Great Yarmouth	Blackpool
2010	11	19	14	25	24	13	3	11	23
2009	13	24	18	30	33	12	3	15	32
2008									
2007	36	59	56	44	54	29	5	30	49
2006	45	64	63	58	59	34	7	32	65
2005	52	60	44	58	65	30	6	32	59
2004	47	58	43	56	57	30	8	27	54
2003	44	62	43	57	62	23	8	27	57
2002	34	60	45	54	55	16	4	19	66
2001	36	39	34	52	59	24	5	23	69
2000	37	43	33	55	51	26	9	19	67
1999	28	52	34	55	45	29	7	18	64
1998	27	56	32	56	41	28	10	22	64
1997	28	49	24	44	29	20	10	14	56

Proportion of Vacant Street Level Property

4.33 In 2009, there were 62 vacant units in WSM town centre. The re-survey of the town centre in 2010 indicates that vacant units have increased considerably to 83 units, or 17.4% of total units within the centre. This proportion is significantly above both national and Somerset average levels. One reason for the increase may be due to the 2009 survey being undertaken at the end of the summer period whilst the 2010 survey was undertaken during the Autumn when some of the more tourist-related uses may have closed down. Nevertheless, the number of vacancies in the town centre is high, indicating a lack of demand for available space and/or a mis-match between supply and demand. It should also be noted that the majority of vacancies are along the peripheral streets, namely: Orchard Place; Orchard Street; Richmond Street; Alexandra Parade; Meadow Street; and Alfred Street. However, there are a number of vacancies also occurring within along the High Street, within the prime shopping area.

Accessibility

4.34 Weston-super-Mare resides in the south west corner of the District and benefits from a highly accessible position with regards to road and rail access. Weston is located approximately 22 miles to the south west of Bristol and 16 miles to the north of Bridgwater. The town does benefit from its proximity to the M5 and a significant amount of traffic visiting the town will travel via Junction 21 and the A370. However, Junction 21 does experience congestion during peak periods, which can detract from the attractiveness of the town.

4.35 The town has a railway station which is located within walking distance of the town centre and provides rail access via the Bristol – Exeter line. London is approximately two and a half hours by train. The town is situated on low lying ground and the area around the town centre is generally flat in nature, thus improving access for pedestrians and cyclists.

4.36 When driving to the town centre, there are a number of public car parks available:

- *Seafront*
- *Carlton Street*
- *Grove Park*
- *Melrose, Knightstone Road*
- *Locking Road off Francis Fox Road*
- *Hampton, Raglan Place*

- *Knightstone Causeway*
- *Tesco supermarket*

4.37 There are also a number of privately owned car parking facilities located at:

- *Sovereign Centre – 850 spaces*
- *NCP, High Street – 407 spaces*
- *Dolphin Square – 124 spaces*

4.38 With regards to the provision of bus services within Weston-super-Mare, there are frequent services to Worle, Hutton, Bleadon, Chew Valley, Yatton, Clevedon, Nailsea, Bristol (centre) and Bristol Cribbs Causeway. Daily services are also provided to Bath, Burnham-on-Sea, Bridgwater, Almondsbury and Dursley.There are a number of bus stops located within the town centre. These are concentrated at the northern end of the High Street, Regent Street, Alexandra Parade and Oxford Street.

Customer Views and Behaviour

4.39 As part of the household shopping survey undertaken in October 2010, survey respondents were asked questions about their usage of Weston town centre and their attitude towards different aspects of the centre.

4.40 The findings from the questionnaire identified that approximately 70% of those surveyed considered shopping as their main purpose for visiting WSM town centre. The remainder of respondents visited the centre for a number of reasons and this was largely divided between using financial services; social / leisure reasons; employment and; tourism / sight-seeing. With regards to the types of goods and services normally bought from the town centre, these were typically clothes and shoes (55%). Food and groceries accounted for 49% of those questioned. When asked how much respondents normally spent within the town centre, 15% spent between £0-£20, with £18% spending between £21 and £40 and 32% spending over £40 per visit.

4.41 The questionnaire proceeded to ask why people chose to go to WSM for their shopping and to visit services. The vast majority (77%) did so because the centre was close to their home compared to 7% who visited the centre due to its range of shops. The survey also identified that the majority of people who visit the centre regularly stay in the centre for between one and two hours. With regards to accessing the town centre, 76% did do by car /van (either as a driver or passenger), 15% travelled by bus and only 6% walked with less than 1% by bicycle.

4.42 When considering likes and dislikes of WSM town centre, the most popular 'like' was its convenience to where they lived (32%). However, 18% did not like anything in particular and only 8% most valued the centre's selection of shops (multiples as oppose to independents). The survey then asked what people disliked most about the town centre. 35% responded with 'nothing', 8% mostly disliked the lack of safety and a further 8% regarded the unattractive environment as their biggest dislike. As an improvement that would encourage people to visit the town centre more often, 38% could not think of anything in particular whereas 13% thought that the choice of multiple retailers could be improved.

State of Town Centre Environmental Quality

4.43 The town centre benefits from a number of historic and prominent buildings which are centred in and around the High Street, Royal Parade and towards the seafront. Furthermore, there are a number of open spaces which could be further utilised in terms of their connectivity with the retail core. A significant advantage to the town centre is its proximity to the seafront and the historic pier. It has been identified within a number of planning policy documents that links with the seafront and the High Street should be further improved. Interspersed with the high quality buildings within the town centre are less attractive developments dating from the 1960's. In particular, Dolphin Square is recognised as a key part of the town centre which would greatly benefit from improvement.

4.44 The Weston-super-Mare Town Centre Area Action Plan (TCAAP) (Preferred Options, July 2009) sets out a vision for the town centre. This vision looks to deliver *"a good quality, diverse and year-round shopping and leisure destination set within a high quality built environment which has retained its historic identity and capitalises on its seafront location and the natural beauty of the area".* This is partly informed by the Weston Area Development Framework (ADF) Final Report (June 2005) which identifies that *"the town centre is perceived to be uncompetitive with other centres in the sub-region because of access constraints and a relatively poor retail offer".* Both documents proposed principles / objectives for the town centre. The ADF identifies the following principles:

- Improve the quality and quantity of the retail offer. In particular, attract a department store and deliver the other retail projects identified through the economics strategy;

- Implement 'Civic Pride' projects;
- Enhance sense of place by developing a series of distinctive 'zones' or 'quarters';
- Bring forward the redevelopment of key sites e.g. Dolphin Square, Tropicana, Knightstone Island and Birnbeck Island;
- Quantify and identify new uses for vacant floorspace within the town centre;
- Increase the residential population of the town centre and seafront areas to increase vitality, extend hours of operations, and improve natural surveillance;
- Build on the planned investment in sea defences to deliver a 'step change' project, such as a marina;
- Provide a new mixed-use landmark building in the town centre which will improve legibility between the seafront and the trading core and;
- Utilise the planned relocation of the Council offices in terms of its potential redevelopment which may act as a catalyst for ongoing improvements.

4.45 The draft TCAPP was informed by the above principles and, in addition, looks to sustain and enhance the vitality and viability of the town centre as a whole whilst promoting reinvestment in the existing retail core. One mechanism that has been devised to improve the environmental quality of the town is the 'Civic Pride Initiative: Connecting Spaces, Places and People' (2003) which seeks to act as a catalyst in the economic regeneration of the seafront and the town centre. This is through a comprehensive 'facelift' and upgrading of public and private spaces. The document identifies twelve public realm enhancement projects. The first of such projects started in September 2004 at Big Lamp Corner with lighting, seating, new paving and trees installed at the southern end of the pedestrianised section of the High Street. The second phase of improvements at Big Lamp Corner included the installation of the Siliica, a 26 metre high illuminated spire, which displays public information and accommodates a kiosk and a bus shelter. Further improvements include those at the Grove Village area including improved traffic management and street enhancements. Improvements at these additional sites/locations have also been identified:

- Orchard Street;
- Knightstone Island;

- Weston Gateway (highway improvements between Junction 21 (M5) and the town centre)'
- The Tropicana;
- The Boulevard;
- Pier Square and Regent Street and;
- The Promenade.

Summary

4.46 Weston-super-Mare is the main centre within the District and is identified as a Sub-Regional Centre in the retail hierarchy set out within the Joint Replacement Structure Plan. The town benefits from a highly accessible location both in terms of the road network and public transport links. When driving into the town centre, congestion is experienced along the A370 which is the main connection to Junction 21 of the M5 and further onto Bristol. The predominant asset of the town centre is its seafront location and a number of existing planning policy documents aspire to enhance the connectivity between the High Street and the seafront. The town centre also has a number of historic and prominent buildings. However, these are currently undermined in places by dated post-war developments and high vacancy rates around the periphery of the centre which leads to the centre exhibiting higher than average vacant unit and floorspace levels.

4.47 Whilst Weston town centre is able to attract a significant proportion of expenditure from the local area, the proportion of comparison uses within the town centre is lower than average and there has been little additions to the retail floorspace stock in recent years. There are, however, a number of requirements from comparison goods retailers for additional floorspace which, despite the current economic downturn, indicates that there remains interest in the town centre which should be capitalised upon when planning for the future growth in the town centre. The town centre also benefits from a large Tesco store on its eastern edge which contributes to the overall attractiveness of the town centre.

Clevedon Town Centre

Structure of the Town Centre

4.48 Clevedon is located alongside the Severn estuary and grew in popularity during the Victorian period. The town is accessed from the M5 (Junction 20 located on the eastern boundary of the town). It is traditionally a seaside location and seeks to serve both its population in addition to tourists. There are a number of large Victorian buildings in and around the town centre which arose as a result of its popularity during this era. The 2001 census recorded a population of 21,957 in the main urban area.

4.49 The Local Plan defines two separate shopping areas within Clevedon: Clevedon Triangle (which is the defined town centre) and Clevedon Hill Road (which is a district centre). The Clevedon Triangle area includes Old Church Road, The Triangle Centre, Old Street, Station Road, Lower Queen's Road, and parts of Melbourne Terrace, Kenn Road, Great Western Road, Lime Kiln Lane and Arundel Road. The southern side of Old Street, Old Church Road, Station Road and The Triangle Centre form the town centre's primary retail frontage. This part of the town centre is predominantly within a conservation area, apart from the far western and eastern parts which fall outside.

4.50 Clevedon Hill Road is close to the seafront and includes Hill Road, the north western side of Bellevue Road and parts of Alexander Road and Woodlands Road. The entirety of this part of the town centre is located within a designated Conservation Area.

Diversity of Uses

4.51 Information on the diversity of uses within Clevedon town centre has been obtained using data from GOAD (2009) and updated by GVA Grimley using survey data collected by North Somerset Council in October 2010. For the avoidance of doubt the GOAD information relates to the defined town centre in the Local Plan and excludes the Hill Road district centre area. This information indicates the composition of the town centre as follows:

Table K: Retail Composition of Clevedon town centre, 2009-2010

Sector	2009		2010		Selected Somerset	UK
	No.	%	No.	%	Average %	Average %
Convenience	11	9.73	11	9.73	7.78	9.48
Comparison	48	42.5	49	42.5	46.57	42.08
Service	39	34.5	40	35.4	33.97	34.64
Vacant	13	11.5	11	9.73	10.38	12.60
Miscellaneous	2	1.8	2	1.8	1.30	1.20
Total	**113**	**100**	**113**	**100**	**100**	**100**

Source: Experian GOAD and GVA Grimley. Figures may not add due to rounding

4.52 The above analysis identifies that the proportion of comparison, convenience and service units within the town centre is broadly in line with the national average. In the context of the Somerset average, Clevedon has a higher than average proportion of convenience and service uses and a lower than average proportion of comparison uses. Over the period 2009-2010, the number of convenience goods uses has remained static whilst the number of comparison and service uses has increased slightly.

4.53 Outlined below is the distribution of floorspace by retail and service sector in Clevedon, for the years 2009-2010. The data has been obtained from GOAD and updated by GVA in October 2010. The data shows that there has been marginal rises in the amount of floorspace occupied by convenience, comparison and service uses and the proportion of floorspace occupied by convenience retail uses is well above the national and Somerset average levels (mainly due to the presence of the Morrisons and Lidl foodstores). The proportion of floorspace occupied by service uses in Clevedon town centre is also higher that national and Somerset average levels, whilst the proportion of comparison retail floorspace is below average.

Table L: Retail Floorspace Composition of Clevedon town centre, 2009-2010

Sector	2009		2010		Selected Somerset	UK
	No.	%	No.	%	Average %	Average %
Convenience	4,125	25.9	4,209	26.4	18.8	17.51
Comparison	5,695	35.8	6,234	39.2	49.7	47.6
Service	4,227	26.5	4,431	27.8	22.3	22.91
Vacant	1,737	10.9	910	5.7	8.4	11.00
Miscellaneous	139	0.9	139	0.9	0.9	0.98
Total	**15,923**	**100**	**15,923**	**100**	**100**	**100**

Source: Experian GOAD and GVA Grimley. Figures may not add due to rounding

Retailer Representation

4.54 There are a small multiple retailers within the town centre. In the convenience sector, the largest stores are Morrisons and Co-op foodstores. The Morrisons store extends to 1,700sq m net sales and provides a reasonably wide range of convenience goods, supplemented by a small range of comparison goods. The store is served by an adjacent surface level car park. The Co-op store is much smaller and functions as a top-up food shopping destination. On the western edge of the centre is a 1,000sq m net Lidl discount foodstore with an adjacent dedicated customer car parking area. Elsewhere in the town centre there are three bakers, one butcher, one greengrocer, one off-licence and one newsagent.

4.55 Within the comparison goods retail sector there are a small number of national multiples including New Look, Clinton Cards, Boots, Superdrug and Holland & Barrett. This is not an insignificant amount of national multiple retailers for a town of the size of Clevedon. Other comparison retailers are local independent traders. In relation to comparison goods retailers, the proportion of clothing and footwear retailers is below average, as is the DIY and hardware sector. The proportion of furniture/carpets/textile retailers and books/arts/craft retails are well above average levels, as are the proportion of charity, pets and other comparison goods stores.

4.56 Within the service sector, most national high street banks and building societies are represented within the town. The proportion of the uses is similar average levels, whilst there is a higher than average proportion of health and beauty uses, estate agents and travel agents in Clevedon town centre.

Retailer Requirements

4.57 There are, at present, two known retailer requirements in Clevedon. These are from Holland & Barratt and Co-op Funeralcare and both extend to 800-1,200sq ft gross. Table I earlier in this section sets out the trends over time for retailer requirements in Clevedon. It indicates that Clevedon is well below Weston in terms of known requirements, although it attracts the second highest number of requirements in North Somerset. The peak in requirements occurred in 2002 (14) and 2004 (12).

Proportion of Vacant Street Level Property

4.51 In 2009 there were 13 vacant units in the town. Further surveys undertaken in 2010 have identified this number has fallen to 11 units which represents 9.7% of the total number of units.

This is below both the UK and Somerset town average level and therefore suggests that the centre is performing well in terms of demand for retail space. Indeed, whilst the reduction in the number of vacant units has been relatively small, the amount of vacant floorspace has reduced significantly and the proportion of vacant floorspace is now well below national and Somerset average levels.

Accessibility

4.52 Clevedon is located approximately one mile to the west of the M5 motorway (Junction 20) which provides easy access to Weston-super-Mare to the South (approximately 11 miles) and Bristol to the north (approximately 13 miles). Being so close to the M5, Clevedon is particularly accessible via private car. In terms of vehicular access, the closest car parks to the town centre are located to the rear of the Triangle Centre and adjacent to Old Church Road. The Lidl store also has a car parking area which is also used by visitors to the town centre. The nearest train station to Clevedon is Yatton train station which is located approximately 4 miles south of Clevedon. This provides train services to Bristol, Bridgwater and Taunton as well as the cross country line to London Paddington. With regards to bus services there are regular services to Nailsea, Bristol and Weston-super-Mare.

Customer Views and Behaviour

4.53 As part of the household survey, undertaken in October 2010, shopping behaviour patterns and attitudes towards Clevedon town centre were obtained.

4.54 The survey sought to identify the main reason why people visited Clevedon town centre. It identified that 62% did so for shopping, 5% because they worked in the centre and a further 5% to visit financial services. When visiting the centre, those surveyed usually bought food/groceries (78%), personal and luxury goods (24%), clothes and shoes (17%), DIY and hardware goods (12%). In terms of spend, 23% of respondents typically spent £20 or less, with 10% spending on average between £41 and £50 and 23% spending over £50 per visit (which is likely to be influenced by the presence of foodstores in the town centre).

4.55 With regards to why people visit Clevedon town centre for shopping and service requirements, it was identified that 71% did so because it was close to where they lived. 8% of those surveyed visited the town due to its good range of shops and 6% because of its attractive environment. Once in the town centre, 37% stayed for between 30 minutes and an hour whilst 30% stayed for between one and two hours. With regards to accessibility, walking is a popular mode of travel with 26% of those surveyed who normally walk to the centre. However 66% still rely on car / van to access the town centre.

4.56 In Clevedon town centre, 21% of those asked regarded the convenience of the centre as what they most liked. Furthermore, 7% most valued its character and 6% because they felt safe. With regards to dislikes, the majority of those surveyed (67%) did not identify anything in particular. For those who did identify negative issues, 8% mostly disliked the poor selection of multiple shops. Furthermore, 46% could not identify a specific improvement which would encourage them to visit the centre more often. Of those who could identify specific improvements, 14% would like to see the choice of multiple shops improved whereas 11% sought the improvement of the choice of independent shops.

State of Town Centre Environmental Quality

4.57 Clevedon town centre contains a mix of building styles and the centre is covered by the Clevedon Triangle Conservation Area. The most attractive parts of the centre comprise the Victorian buildings around The Triangle and Old Church Road. A clock tower in the centre of The Triangle is one of the most striking features in the town centre, whilst Old Church Road is a narrow one way street with a good sense of enclosure. Elsewhere in the centre there are a mixture of building styles along Old Street, with some areas in need of improvement, whilst the Triangle Centre provides a relatively modern retail development.

Summary

4.58 Clevedon town centre is assessed to be a reasonably healthy town centre which has a range of convenience, comparison and service uses. The Morrisons supermarket performs an anchor retail function, attracting a large amount of main and top-up food shopping trips and also benefitting the centre in terms of linked trips. This is supplemented by a Lidl store on the western edge of the centre. For a town of this size, Clevedon also has a reasonable range of comparison retailers and vacancies within the centre have fallen over the past year. Overall, Clevedon town centre functions as a day to day shopping and service destination, with a number of higher order trips likely to be lost to surrounding larger town centres.

Nailsea Town Centre

Structure of the Town Centre

4.59 Nailsea is situated in the north east of the district, approximately 8 miles to the south west of Bristol and 11 miles to the north east of Weston-super-Mare. The town is served primarily by the B3130 which leads westwards to Junction 20 of the M5. East of the town is the A370 and A38 which provides links to Bristol Airport, located approximately 10 miles from the town, and the Bristol. The town has a population of 17,649 (2001 census).

4.60 The Replacement Local Plan defines the town centre to include the High Street, Link Road, Colliers Walk, Crown Glass Place, Somerset Square, Clevedon Walk and parts of Brockway and Christchurch Close. The town centre area is linear in format, running from a Tesco supermarket in the east to the Crown Glass Shopping Centre and the library to the west. Primary Shopping Frontage is identified along Somerset Square, Colliers Walk, Clevedon Walk and the far western end of the High Street. Somerset Square is allocated in the local plan as an Amenity Area (Policy ECH/1).

Diversity of Uses

4.61 Information on the diversity of uses within the town centre boundary has been obtained from GOAD (2009) and updated using North Somerset Council's survey data (collected in October 2010). This information indicates the composition of centre as follows:

Table M: Retail Composition of Nailsea town centre, 2009-2010

Sector	2009		2010		Selected Somerset	UK
	No.	%	No.	%	Average %	Average %
Convenience	10	8.7	10	8.7	7.78	9.48
Comparison	47	40.9	46	40.0	46.57	42.08
Service	40	34.8	42	36.5	33.97	34.64
Vacant	17	14.8	16	13.9	10.38	12.60
Miscellaneous	1	0.9	1	0.9	1.30	1.20
Total	**115**	**100**	**115**	**100**	**100**	**100**

Source: Experian GOAD and GVA Grimley. Figures may not add due to rounding

4.62 The above analysis identifies that the number of convenience uses within the town centre has remained consistent and occupy a proportion of units which is slightly above the Somerset average or convenience uses in a town centre, but slightly below the national average. Since 2009 the number of comparison uses has fallen by one and now occupy 40% of all units in the town centre. The is below both the national and Somerset average levels. Since 2009 the number of service uses in the town centre has risen by two and service uses in Nailsea now occupy a proportion of units which is higher than average levels.

4.63 We have also updated the 2009 GOAD floorpsace date for Nailsea town centre and this is contained in Table VN below. It indicates that over the past year there has been very little change in the occupation of floorspace within the town centre. The proportion of floorspace occupied by service uses is below the national average which, when considered alongside the above average proportion of service, suggests that the service uses which are present are comparatively small in size. The proportion of floorspace occupied by convenience uses is also twice the national and Somerset average levels, which is not surprising given the presence of two large supermarkets (Tesco and Waitrose) whilst the proportion of floorspace occupied by comparison goods retailers is well below average levels.

Table N: Retail Floorspace Composition of Nailsea town centre, 2009-2010

Sector	2009		2010		Selected Somerset	UK
	No.	%	No.	%	Average %	Average %
Convenience	8,742	40.1	8,742	40.1	18.8	17.51
Comparison	7,005	32.1	6,940	31.8	49.7	47.6
Service	3,902	17.9	4,069	18.7	22.3	22.91
Vacant	2,016	9.2	1,914	8.8	8.4	11.00
Miscellaneous	139	0.6	139	0.6	0.9	0.98
Total	**21,804**	**100**	**21,804**	**100**	**100**	**100**

Source: Experian GOAD and GVA Grimley. Figures may not add due to rounding

Retailer Representation

4.64 As already noted, the town centre in Nailsea is dominated by two large supermarkets: Tesco and Waitrose. The Tesco store extends to 2,500sq m net sales area and provides a wide range of convenience goods, supplemented by a comparison goods offer. The store is served by an adjacent large surface level car park for around 300 cars and lies at the eastern end of the High Street. The Waitrose store lies within the Crown Glass Shopping Centre and extends to 2,100sq m net. The store was formerly occupied by Somerfield and re-opened as a Waitrose in 2010. The store also has a wide convenience goods retail offer and is served by a 150 space car park to the north of High Street. In relation to the remainder of the convenience sector in the town centre, there are two bakers, one greengrocer, an Iceland foodstore and a newsagent.

4.65 Within the comparison sector, national multiples include New Look, Peacocks, Boots, Superdrug, The Original Factory Shop and Clinton Cards. The remainder of retailers are local independent operators, with the proportion of clothes and shoes retailers well below average levels, above average levels of books/crafts/arts retailers and charity/pets/other comparison goods retailers. There is also a high proportion of chemist and optician uses in Nailsea town centre.

4.66 Within the service sector, a number of the national high street banks and building societies are represented, whilst there are also high proportions of travel estates, estate agents and health & beauty uses. There is a lower than average proportion of food and drink service uses in the town centre

Retailer Requirements

4.67 There is one identified requirement for the town. This is a requirement from Holland & Barratts which has identified a requirement across North Somerset. Table I earlier in this chapter provides a review of the level of retailer requirements in Nailsea over past several years. It indicates that Nailsea has historically has a low level of requirements, below Weston and Clevedon with a peak of 10 requirements in 2007.

Proportion of Vacant Street Level Property

4.67 The number of vacant units in Nailsea town centre has fallen by one from 17 to 16 in 2010. As a proportion of total units in the town centre, vacancies comprise 14% which is higher than both the national and Somerset averages. Vacancies are dispersed throughout the centre, although there are a number within the Crown Glass Shopping Centre.

Accessibility

4.68 Nailsea is located approximately 15 miles to the north east of Weston-super-Mare and approximately 10 miles west of Bristol city centre. The A370 runs to the south of the town with Junction 19 of the M5 motorway approximately 4 miles to the north east making Nailsea highly accessible by car.

4.69 There is a large amount of parking within the town centre, including facilities associated with the Tesco and Waitrose stores plus additional areas to the west of the Crown Glass Shopping Centre and to the south of the High Street on Station Road.

4.70 Nailsea and Backwell train station is located on Station Road and is approximately a mile from the town centre. The station provides local services to Bristol, Bridgwater and Taunton as well as Intercity services to London Paddington and has a public car park with parking for approximately 100 cars.

4.71 Within Nailsea, there are bus services which run from the town centre. Frequent services are provided to Clevedon, Tickenham, Wraxhall, Long Ashton and Bristol (centre). These are provided from Stock Way North, Link Road and the High Street.

Customer Views and Behaviour

4.72 The October 2010 household survey obtained shopping patterns and shopper's attitudes towards Nailsea town centre. The survey identified that the most popular reason for visiting Nailsea town centre was for shopping (75%). Other reasons included visiting financial services (5%) and use of other services (e.g. hairdresser, optician etc) (4%). With regards to the types of goods and services usually bought from the town centre, 86% normally bought food / groceries, 24% personal and luxury goods, 23% clothes and shoes and 13% services. With regards to how much people normally spend in Nailsea town centre, the most popular response was between £11and £20 and 39% of those surveyed typically stayed in the town centre for between 30 minutes and an hour whereas 35% stayed for between one and two hours.

4.73 When asked why people chose to go to Nailsea, a significant majority (90%) does so because it is close to where they live, with only 5% of people visiting the centre due to its ease of parking and only 5% due to its range of shops. With regards to accessibility, it was established that from the survey, approximately 69% travelled by car / van either as a driver or a passenger with 26% who normally walk to the town centre. Only 2% of those surveyed travelled to the town centre by bus.

4.74 In terms of likes and dislikes, it was identified that 39% of respondents liked the convenience of visiting the town centre and, noticeably, 48% could not identify any particular characteristic which they disliked the most. In addition, 13% most disliked the apparent poor selection of multiple retailers in the town centre. When questioned over what improvements would encourage people to use the centre more often, the survey established that 24% would like to see an improvement in the choice of multiple shops, 12% would like to see more independent retailers and 8% seeks the development of new shopping facilities.

State of Town Centre Environmental Quality

4.76 Nailsea's urban fabric is a mixture of historic pre-Victorian design originating from its coal mining days and 1960's post-war development. Much of the core shopping area is pedestrianised with the aim of creating a shopper-friendly environment. However, in places the architectural quality of the centre is poor and appears dated in parts. The main areas of public realm include Somerset Square in the primary shopping area which contains a children's play park, a secondary public square to the rear of Iceland at Crown Glass Place and on the town centre periphery, Scotch Horn playing fields which includes a skate park and pedestrian/cycle routes through to Tesco and the High Street. There are a number of green wedges around Christchurch and the Stockway car park. Towards the eastern end of the High Street, the attractiveness of the centre drops with under-used and vacant land providing a poor eastern gateway to the centre.

4.77 The shopping precinct and area of Somerset Square includes a number of benches and flower beds along the main thoroughfare with street trees added along Colliers Walk in recent years to improve the greenery of the public realm. The town library holds a predominant, pavilion style presence in Somerset Square and lacks a welcoming quality.

4.78 The predominant building height is two to three storeys along the High Street, and the area exhibits traditional shop frontages. Traffic calming measures and the introduction of more flowerbeds and bins has, in areas, reduced the width of the pavement.

Summary

4.75 Whilst its town centre benefits from two large supermarkets (Waitrose and Tesco), which are likely to attract a large number of trips to the town centre and also have the potential to benefit the town centre through linked trips, Nailsea town centre continues to suffer from a higher than average vacancy rate. Indeed, the proportions of comparison retail (lower than average) and service uses (higher than average) suggest that Nailsea is currently performing the role of a day-to-day shopping and service centre, which may be unable to retain a significant amount of higher order non-food shopping trips. There is also a need to focus upon the appearance of the town centre and the ability of retail units to continue to attract/retain retailers and other commercial businesses.

Portishead Town Centre

Structure of the Town Centre

4.76 Portishead is a coastal town on the Severn estuary located in the far north of North Somerset District. The town has traditionally served as a port accommodating associated industrial uses. However, much of the industrial area has since been redevelopment into a marina, which is a mixed use development comprising of residential, retail, leisure and community uses.

4.77 The town is primarily served by the A369 which provides connections to the M5 motorway, approximately 2.5 miles to the east. The town no longer benefits from a railway station although the reopening of the Portishead to Bristol railway line for passenger travel is being considered in viability terms.

4.78 The adopted Replacement Local Plan identifies the town centre as those streets comprising of the High Street, the far eastern parts of Stoke Road and Coombe Road, the far southern end of South Avenue and the western part of Harbour Road. Both sides of High Street, plus the Precinct, are defined as the primary shopping frontage. Two sites in the northern part of the defined town centre are safeguarded for specific land use, one for health care uses and one for community uses.

4.79 In 2003, a Waitrose store was opened on Harbour Road, as part of the Port Marina development. This falls within the eastern part of the defined town centre. The store is served by a large surface level car park.

Diversity of Uses

4.80 Information on the diversity of uses within the town centre boundary has been obtained from GOAD (2009) and updated by GVA Grimley using North Somerset Council’s annual surveys (October 2010).

Table O: Retail Composition of Portishead town centre, 2009-2010

Sector	2009		2010		Selected Somerset	UK
	No.	%	No.	%	Average %	Average %
Convenience	11	11.7	10	10.5	7.78	9.48
Comparison	37	39.4	43	45.3	46.57	42.08
Service	35	37.2	34	35.8	33.97	34.64
Vacant	11	11.7	8	8.4	10.38	12.60
Miscellaneous	0	0	0	0	1.30	1.20
Total	**94**	**100**	**95**	**100**	**100**	**100**

Source: Experian GOAD and GVA Grimley. Figures may not add due to rounding

4.87 Since 2009 the number of units occupied by convenience goods retailers has fallen from 11 to 10 and convenience retailer now occupy 10.5% of all units in Portishead town centre. This is above the national and Somerset average levels. The number of comparison uses has increased from 2009 and now occupy 45% of all town centre units, which is above the national average and broadly in line with the Somerset average. Since 2009, service uses have fallen by one unit and now occupy 36% of town centre units, which is above the national and Somerset average.

4.88 Floorspace data for the retail and service sectors in the town centre has also been obtained from GOAD (dated 2009) and updated to October 2010. This is contained in Table P below and indicates small decreases in the amount of floorspace occupied by convenience retail and service uses and an increase in comparison goods floorspace. Given the presence of the Waitrose and Co-op supermarkets in the town centre, the proportion of convenience goods floorspace in Portishead is almost twice the national and Somerset average levels. However, due to the size of these supermarkets, the proportion of floorspace occupied by comparison retail and service uses is noticeably lower than average.

Table P: Retail Floorspace Composition of Portishead town centre, 2009-2010

Sector	2009		2010		Selected Somerset	UK
	No.	%	No.	%	Average %	Average %
Convenience	7,953	32.1	7,878	31.6	18.8	17.51
Comparison	8,882	35.8	9,430	37.9	49.7	47.6
Service	4,431	17.9	4,357	17.5	22.3	22.91
Vacant	3,540	14.3	3,242	13.0	8.4	11.00
Miscellaneous	0	0	0	0	0.9	0.98
Total	**24,806**	**100**	**24,907**	**100**	**100**	**100**

Source: Experian GOAD and GVA Grimley. Figures may not add due to rounding

Retailer Representation

4.81 As already noted, there are two large foodstores within Portishead town centre: Waitrose and Co-op. The Waitrose store is located on Harbour Road and extends to 2,500sq m net and sells a wide range of convenience goods. The store is served by a large adjacent customer car park and is a short walk from the primary retail frontages. The Co-op store is smaller at 1,500sq m net and provides a modest range of convenience goods. It is served by a 150 space car park and lies to the east of the core retail area in the town centre. In addition to these stores are also smaller Budgens, McColls, Iceland and Costcutter stores in Portishead.

4.82 In relation to the comparison retail sector, there is a Lloyds Pharmacy, Boots, New Look, Argos, Homebase and Pets at Home.

Proportion of Vacant Street Level Property

4.90 Vacancy rates have fallen in the period since 2009 and now 8 units are recorded as vacant within the town centre. This corresponds to around 8% of all units in the town centre and is therefore below that of both the Somerset and national average levels.

Accessibility

4.91 Portishead is located approximately 20 miles to the north east of Weston-super-Mare and approximately 10.5 miles to the north west of Bristol. The A369 runs close to Portishead town centre and provides easy access to the M5 motorway enabling connections to Bristol and Weston-super-Mare.

4.92 The nearest train station is St Andrews Road Railway Station situated approximately 3 miles to the north west of Portishead. This station provides connections to Bristol Temple Meads station. The nearest train station providing direct trains to Weston-super-Mare is Nailsea and Backwell station located around 4 miles away to the south.

4.93 Bus services to the town provide frequent links to Weston-super-Mare, Nailsea, Bristol City Centre, Cribbs Causeway, Pill, Weston-in-Gordano and Abbots Leigh. These services depart from Combe Road within the town centre.

Customer Views and Behaviour

4.94 Data on shopping patterns and shoppers attitudes to various aspects of the town centre has been obtained from the October 2010 household survey. The survey established that the main reason for people visiting the town centre was for shopping (64%) and 9% visited the centre to access financial services. Social and leisure reasons accounted for 6% of those questioned. When asked what type of goods people bought on a regular basis, this identified a broad range of goods. Food / groceries were bought regularly by 76% of those questioned, but other popular responses included: services, personal and luxury goods, DIY and hardware goods, gifts, clothes and shoes and electrical goods. This demonstrates that the town centre is attractive across a range of retail goods and services.

4.96 With regards to typical expenditure in one visit, the most popular response was between £11 and £20 followed by between £21 and £30. In terms of why people visit the centre, the main response was due to its convenience and being close to where respondents lived. However, the range of shops also accounted for 8% of the responses. When in the town centre, the most popular response on average was between 30 minutes and 1 hour (40%). In terms of how people access the town centre, 76% travel by car (either as a driver or passenger) and 18% mostly walk.

4.97 When asked what people like about Portishead town centre, 29% most like the fact it is close to where they live, 7% like its character and 5% appreciated the range of multiple retailers. In terms of dislikes, 50% of those asked could not identify a particular dislike. Of those who could, 7% regarded there to be difficult parking and 7% thought there to be a poor range of multiple retailers. Concerning suggested improvements, 11% identified improvement to public transport, 8% identified an increase in the range of multiple retailers and a further 8% would like to see a larger supermarket introduced.

State of Town Centre Environmental Quality

4.98 Generally, Portishead town centre has a high quality environment with wide pavements for pedestrians, good quality street furniture, a number of pedestrian crossings and tree planting along each side of the High Street. The buildings are predominantly two to three-storey and the dominant architecture dates from the early Victorian period. The exception to this is the Precinct which is a post-war development and, whilst well maintained, is becoming dated in appearance. There is some on-street parking although this is relatively limited.

4.99 The town centre in Portishead is close to the dock area, which was previously dominated by industrial activities. However, since the Port Marina development started in 2001 this has regenerated the area and now accommodates a range of mixed use. The style of this area is very different to core retail area, with a number of retail warehouse buildings, residential apartments and other commercial activities.

Summary

4.100 The location of Portishead and its proximity to the Bristol urban area suggests that the health and overall function of the town centre will remain constrained. This is shown by shopping patterns which indicates of leakage of convenience and comparison shopping trips outside of Portishead. However, Portishead is assessed to be a healthy centre, with a reasonable range of retail and service provision which is able to cater for some of the needs of the town's expanding population. The town has two supermarkets (Co-op and Waitrose) which will be shortly be supplemented by new Sainsburys and Lidl stores and there is also a commitment for a new large retail warehouse selling furniture goods. Vacancies are also at a lower than average level and have fallen since 2009. However, the scale of the three retail commitments in Portishead suggests that the Council should pay close to attention to the health of the town centre in the coming years and should monitor the relationship of these new stores with visitation rates and changes in the land use sector in the town centre.

5. ASSESSMENT OF NEED FOR ADDITIONAL RETAIL FLOORSPACE IN NORTH SOMERSET

Introduction

5.1 A key element of the evidence base for the North Somerset Local Development Framework is the assessment of need and capacity for additional retail floorspace in North Somerset. PPS4 (2009) notes that an up to date assessment of the need for additional or replacement floorspace to accommodate key town centre uses is a fundamental component of the evidence base to underpin policy making.

5.2 Conventionally, the need for town centre uses is considered in terms of quantitative need and qualitative need. Both have a role to play in reaching an overall judgement about the scale and form of retail development which should be planned for and facilitated through development plans:

- Quantitative need is conventionally measured as expenditure capacity i.e. the balance between the turnover capacity of existing and committed facilities and available retail expenditure in any given area. Expenditure capacity, or quantitative need, can arise as a result of forecasts expenditure growth (either through population growth or increases in spending levels) or by identification of an imbalance between the existing facilities and the current levels of expenditure in an area.
- Qualitative need, on the other hand, includes more subjective measures. These include, for example, consumer choice, the appropriate distribution of facilities and the needs of those living in deprived areas. The ‘overtrading’ of existing retail facilities is also identified as a measure of qualitative need although evidence of significant overcrowding and congestion in stores may also be an indicator of quantitative need.

5.3 In the analysis which follows, quantitative and qualitative factors are considered in turn, both if which form the basis of more detailed assessment of need, and securing the appropriate scale of development in particular centres, through the life of the North Somerset LDF.

Quantitative Need

Introduction

5.4 In this section we establish the current performance of town centre and out-of-centre retail provision in the four main settlements (Weston-super-Mare, Nailsea, Clevedon and Portishead) in North Somerset, as the basis for a forecast of the need for further retail floorspace to the period 2026. The quantitative analysis statistical tables accompanying this assessment are attached at Appendix C.

5.5 We have used a conventional, widely accepted step by step methodology which draws upon the results of North Somerset household survey of existing shopping patterns to model the existing flow of expenditure for each retail destination. In the analysis which follows we have used the following step by step approach:

- Step 1: Definition of an appropriate geographical area of analysis for the quantitative assessment, hereafter know as the Study Area.
- Step 2: Calculate the current (2010) population and expenditure available within the Study Area and forecast future population and expenditure growth over a specific period. In this instance, we have used the period up to 2026, plus interim estimates at 2015 and 2021.
- Step 3: Calculate the levels of convenience with comparative expenditure flowing to stores and centres within the Study Area, using a market share analysis, based on the results of the North Somerset household survey undertaken by Research & Marketing.
- Step 4: In order to assess the quantitative need for additional retail floorspace, we have used a market share approach. This involves the assumption that retail floorspace within the four main settlements in North Somerset achieve a particular market share of available retail expenditure within the study area as a whole. This assessment is able to model changing forms of retail provision, including possible increases within or decreases in trade or follow the implementation of committed retail schemes.

5.6 In the analysis which follows, the following assumptions and data sources have been used:

- All monetary values have been indexed to 2008 prices.
- Having regard to best practice, the assessment has been carried out on a goods basis, rather than a business basis.

- Data on current shopping patterns has been derived from the North Somerset household survey 2010 (results contained at Appendix B).
- The Study Area for the assessment has been set to match the North Somerset household survey area. However, an allowance has also been made for net inflow of expenditure into the Study Area, which is described in more detail later in this section. 2010 population levels for the various zones in the Study Area has been derived from Experian Business Strategies ('EBS') data and projected forwards using data from North Somerset Council.
- Per capita retail expenditure for convenience and comparison goods has been derived from EBS and projected forward using GVA's in-house retail expenditure growth forecasts which are informed by research from EBS and Pitney Bowes (MapInfo).
- Account has also been taken of special forms of trading within the survey results and expenditure estimates. The special forms of trading sector includes sales from mail order companies, sales from the internet, market stalls and sales direct from the producer and manufacturer and our allowance for this type of shopping takes account of likely increases in this sector over the lifetime of the assessment. The proportion of expenditure attributed to special forms of trading outlined in the notes to Table 2 (Appendix C).
- When assessing the current trading performance of existing convenience retail facilities, reference has been made to data from Verdict Research and Retail Rankings. Estimates of company performance take into account non-store sales, where applicable.
- The quantitative assessment examines retail capacity over the period 2010 to 2026 including interim projections at 2015 and 2021.
- All of the statistical tables referred to in the quantitative assessment are contained at Appendix C.

Study area, population and expenditure estimates

5.7 In order to provide detailed factual information on shopping patterns in and around North Somerset, we have commissioned a new household interview survey covering 1,200 households. GVA Grimley designed the survey questionnaire in consultation with North Somerset Council officers and Research & Marketing (who undertook interviewing and data processing).

5.8 The area for the household survey has been set to cover the North Somerset administration area, plus parts of surrounding Districts such as Sedgemoor and Mendip, to ensure that all potential regular users of retail facilities in the main North Somerset towns are included within the survey. In order to inform our analysis, and to ensure that shopping patterns associated with the main North Somerset towns is fully understood, we have also taken account of the household survey data used to inform the South Bristol Retail Study plus the household survey commissioned to inform the recent Sainsburys supermarket planning application in Portishead.

5.9 The geographic area for the household survey commissioned for this study has been based on postal sectors which have been amalgamated to form wider survey zones. The survey area is shown on the plan attached at Appendix A and has been organised to allow each of the main North Somerset settlements to be contained within an individual zone. In the majority of instances, we have chosen to keep the same survey zones as the 2006 Donaldson retail study. For the avoidance of doubt, zones 1-8 & 10-12 remain consistent with the Donaldsons survey area whilst zone 9 has been extended eastwards to cover rural areas either side of the North Somerset / Mendip border. The use of matching survey zones enables a comparison to be made between shopping patterns in 2006 and current patterns in 2010. The survey area is shown on the plan attached at Appendix A and has been organised to allow each of the main Penwith settlements to be contained within an individual zone.

5.10 The survey results identify shopping patterns for households for both convenience and comparison goods. Where necessary, the survey results have been re-based to remove inappropriate responses, such as internet or mail order shopping and 'don't do' / 'don't know' responses. For convenience goods, the household survey includes questions on main food and top-up shopping. The results of the two types of food expenditure were then merged through the application of a weight which reflects the estimated proportion of expenditure accounted for each type.

5.11 The survey also includes seven questions on specific comparison goods types which coincide with EBS definitions of comparison goods expenditure. Comparison shopping patterns are split up in to the following sub-categories:

- Clothing, footwear and other fashion goods.
- Furniture, floor coverings and textiles.
- DIY and hardware products.
- Domestic appliances

- Smaller electrical products.
- Personal and luxury goods.
- Recreational goods.

5.12 As noted within the previous section, the Study Area has been broken down into 12 constituent zones, based on postcode sector areas. Population projections for these 12 zones are contained at Appendix C, Table 1.

5.13 2010 population data for each survey zone has been obtained from Experian Business Strategies and is shown in the 2010 column in Table 1 (Appendix C). With regards to projecting these 2010 population levels across the assessment period to 2015, 2021 and 2026 we have been provided with data and population growth assumptions from North Somerset Council officers and these are outlined below.

5.14 At the time of preparing this report, the housing growth strategy in North Somerset LDF Core Strategy plans for 13,400 new homes between 2006 and 2026. NSC officers have requested that the provision of these new homes will form the basis of future population growth levels in North Somerset rather than the use of population projection forecasts. In other words, the scale of population growth across the study will be based on the rate of housebuilding within each area rather than underlying population trends. 4,313 of the overall 13,400 housing unit target have been permitted and completed between 2006 and 2010 and a further 3,000 units were committed (via either planning permission or Local Plan allocation) at October 2010. This leaves 6,087 units to be provided between 2010 and 2026. Using data from NSC, we have distributed the 3,000 commitments across the relevant zones in the study area and these are phased to be provided between 2010 and 2015. NSC plans to provide the remaining 6,087 units as part of the Weston Villages area, which is located in zone 7 of the study area, and we have phased the introduction of these units on an consistent average annual rate for each year between 2010 and 2026. These residential growth rates have informed the future population levels in Zones 1-9, with Zones 10-12 being informed by growth rates planned for surrounding administrative areas.

5.15 When translating these North Somerset housing unit figures into population growth, we have used an average persons per house ratio of 2.36.

5.16 As a result of the above assumptions, Table 1 indicates that Zone 7 of the study area has by far the largest growth rate, with a 27% increase between 2010-2015, 61% increase between 2010-2021 and 88% growth over the whole assessment period (2010-2026). This zone contains the planned urban extensions in Weston. The zone with the next highest growth is Zone 2 (Portishead) whose growth occurs in the 2010-2015 period and leads to an increase of 13% in its population. The remaining zones in the North Somerset administrative area all have growth levels which are below 10% over the period 2010-2026.

5.17 In Table 2, the per capita expenditure figures obtained from EBS are broken down into convenience and various sub categories of comparison goods. For each goods category account has been taken of special forms of trading (internet, catalogue and mail order shopping) and future growth and expenditure (per annum). The growth rates applied to convenience and comparison goods expenditure for the years between 2010 and 2026 are given in the notes to Table 2. It should be noted that, due to the length of the forecasting period (2010-2026), the expenditure growth projections become less reliable in the medium to longer term and therefore should be treated with a degree of caution. Indeed, it would be appropriate, in any event, to review these expenditure figures of part of a wider review of the retail study at regular period and we recommend reviews after every five years.

5.18 By combining the population of per capita expenditure rates, Tables 3a to 3h set out the total retail expenditure within the study area by goods type. Table 3a estimates that convenience retail expenditure within the study area is expected to grow by £33m over the period of 2010 to 2015. Between 2010 and 2021, convenience expenditure within the study area will grow by £65m and the growth between 2010-2026 will be £95m. In relation to total comparison goods expenditure in the study area, Tables 3b to 3h indicate a current level of £750m at 2010, which will rise to £890million by 2015 and £1,366m by 2026.

Existing shopping patterns

5.19 The next stage of the quantitative assessment is to estimate current flows of retail expenditure within and surrounding North Somerset. Separate flows for convenience and comparison retail expenditure are provided and seven sub-categories of comparison goods expenditure have also been examined (to match the questions used within the North Somerset household survey).

5.20 Tables 4a/b and 5a/b at Appendix C set out the market share and turnover of convenience goods retail facilities in each of the settlements, indicating the level of expenditure which is drawn from each of the 12 survey zones to the four main towns in North Somerset. Table 4a provides the market shares of main food shopping facilities in the main settlements whilst Table 4b provides top-up food shopping market shares.

5.21 When analysing convenience shopping habits, the household survey has obtained patterns of main food and top-up food shopping and applied these to available convenience goods expenditure within each zone. In order to gain the most accurate estimate of expenditure flows, the proportion of total convenience goods expenditure flow to main and top-up food shopping destinations has been weighted according to the results from the North Somerset household survey.

5.22 Tables 5a and 5b indicate the amount of convenience goods expenditure that facilities in each of the town centres currently attract per annum, and splits this between the individual stores. The analysis at Table 5a indicates the amount of turnover which is derived from main food shopping trips and Table 5b provides a similar exercise for top-up food shopping.

5.23 When combined Tables 5a and 5b provides the following information regarding the flows of convenience goods expenditure in and around the main settlements in North Somerset in 2010. Tables 5c to 5h perform a similar exercise for centre/store turnover levels for main food and top-up food shopping at 2015, 2021 and 2026 assuming that existing market shares for individual stores/centres remain constant over the assessment period *(NB: The figures given below are turnover levels derived from the study area and further allowance may need to be made in order to estimate the total turnover of individual centres):*

- **WSM**. Zones 5, 6 and 7 cover the Weston urban area and the household survey indicates that convenience stores in Weston attract between 97% and 100% of main food shopping trips from residents of these zones. The market penetration rate for top-up food shopping from these zones is 95%-98%. The quantitative assessment suggests that the two best performing stores are the Tesco and ASDA stores with study area derived turnovers of £42m and £41m respectively. The Morrisons is assessed to have a turnover of £27m, with the Sainsburys attracting £28m of convenience goods expenditure. The fifth large store in Weston is the recently opened Waitrose store, which is assessed to attract around £12m of convenience goods expenditure.
- **Clevedon**. The Tesco store in Clevedon is, according to our quantitative assessment, able to attract around £25m of convenience goods expenditure from the study area. The Morrisons store attracts around £20.5m. Both stores attract a significant amount of main and top-up food shopping trips from Zone 4 of the study area, with further shopping trips drawn from Zone 8 (Yatton / Congresbury) and Zone 2 (Portishead). The Lidl store in Clevedon is assessed to attract around £3.4m of convenience goods expenditure from the study area.

- **Portishead**. Portishead lies in Zone 2 in the study area and the household survey indicates that around 63% of main food shopping trips from Zone 2 residents are retained in the town. 87% of top-up food shopping trips are retained. Stores in Portishead are also able to attract around 20% of main and top-up food trips from areas to the east (Zone 1). The Waitrose store has a turnover of around £16m and a similar turnover is achieved by the Co-op store.
- **Nailsea**. Nailsea is located in Zone 3 of the study area and the household survey results indicate that convenience stores in the town are able to retain 90% of locally generated main food shopping trips and 79% of top-up food shopping trips. The best performing store is the Tesco with a turnover of £28m. The quantitative analysis suggests that the Waitrose store has an annual turnover of £10m, although this estimate, and potentially other stores in Nailsea, should be used with caution as the Waitrose store has been trading for only a short period of time and shopping patterns may not yet have settled. The Iceland store is assessed to have a turnover of £1.8m, with a further £2.5m flowing to other convenience stores in the town.

5.24 In relation to comparison goods shopping habits, Tables 6 – 12 at Appendix C set out the market shares of existing facilities in the main towns by individual types of comparison goods. Again, the market share levels are taken from the results of the North Somerset household survey. Four versions of each table are provided (annotated A, B, C and D) in order to show turnover levels at 2010 (A), 2015 (B), 2021 (C) and 2026 (D) respectively. Each of these tables converts the market share levels into levels of expenditure flowing to each town centre, with the market share levels held constant between 2010 and 2026.

5.25 Using the results of the North Somerset household survey, flows of expenditure within the clothes and shoes, furniture and carpets, electrical, DIY, personal, luxury and recreational goods categories have been examined. We have examined individual types of comparison goods in order to ensure that particular nuances of shopping patterns in and around the individual towns are fully incorporated into the quantitative assessment. For example, the different towns within the District are likely to possess differing roles depending on a number of factors, including: their size, geographical position in relation to other settlement, their influence from tourism and their current size of retail offer.

5.26 By amalgamating flows of expenditure for individual types of comparison goods given in Tables 6 -12 at Appendix C, Table 13 provides a study area derived comparison goods turnover estimate for each of the four main towns. The study area derived turnover data contained within Tables 6-13 at Appendix C can be summarised as follows:

- **Weston-super-mare**. Weston attracts around £337m of comparison goods expenditure from the study area, with £214m of this expenditure attracted from Zones 5, 6 and 7 (which cover the Weston urban area). £16m of expenditure is attracted from the Clevedon area (Zone 4), with £45m of expenditure attracted from the rural areas to the east of Weston in North Somerset and Mendip Districts. Residents of Nailsea and Portishead contribute £6m and £5m of comparison goods expenditure to Weston respectively. In addition, £30m of expenditure is attracted from the Burnham-on-sea / Highbridge area.
- **Clevedon**. £25m of comparison goods expenditure from the study area flows to Clevedon. 70% (£17.8m) of this expenditure flows from the local area (Zone 4), with the remaining expenditure attracted from Portishead (£2.3m), Nailsea (£2.4m) and the Yatton/Congresbury (£1.7m) areas.
- **Portishead**. Portishead attracts £25.7m of comparison goods expenditure from the study area, 68% of which derives from the local area (Zone 2). The remainder of expenditure to Portishead flows from areas to the east (Zone 1, £4.3m), Clevedon (Zone 4, £2.2m) and Nailsea (Zone 3, £1.4m).
- **Nailsea**. Table 13 indicates that £13.5m of comparison goods expenditure generated by study area residents flows to stores in Nailsea. 87% of this expenditure is attracted from the local area (Zone 3) indicating that the town has a limited catchment area. The remaining expenditure is attracted from Zone 1 (£0.3m), Portishead (Zone 2, £0.5m), Clevedon (Zone 4, £0.5m) and Zone 9 (eastern parts of North Somerset District, £0.3m).

Baseline assessment of quantitative need

5.27 Following the establishment of current convenience and comparison store turnovers within each settlement, our quantitative assessment can move forward to the assessment of future retail floorspace capacity. The capacity analysis is presented at Tables 15 and 16 at Appendix D and the data contained therein is derived from the previous tables, in particular total available expenditure (Table 3), resident study area derived expenditure for existing convenience and comparison facilities in each of the towns (Tables 5a-5h and 13) and benchmark turnover of existing convenience facilities (Table 14).

5.28 As already noted at the start of this section, capacity arises from the difference between the turnover capacity of existing facilities and the available expenditure in an area. When assessing the difference, if any, between turnover capacity of existing facilities and available expenditure there are three key variables which will influence the extent of any quantitative need:

- **Apportioning growth**. As part of forecasting future needs, a judgement should be made on the proportion of growth which should be available to support more floorspace and the proportion which should be safeguarded to enable existing floorspace to increase its sales per square metre. The latter is commonly known as an allowance for increasing floorspace efficiency/productivity. Assumptions regarding potential increases in floorspace efficiency/productivity must be compatible with the assumptions made regarding overall growth in per capita retail expenditure. In this instance, a variable allowance for increases in floorspace efficiency/productivity has been adopted over the assessment period. For convenience retailing, we have allowed for +0.1% pa up to 2016 and +0.5%pa thereafter. For comparison goods retailing, we have allowed for +1.3%pa and +2%pa thereafter.

- **Existing baseline performance**. At the base year of the assessment (2010) a judgement must be reached on the balance between the turnover of existing facilities and their floorspace to determine whether there is an immediate need for more floorspace. Where existing retailers are achieving very low levels of turnover (which may be measured against their company average sales performance, or previous data for the centre) it may be appropriate to apportion a higher level of forecasts expenditure growth to support existing floorspace by setting a benchmark sales level which is higher than current actual store performance. Conversely, it may be appropriate to set a lower benchmark sale performance where existing facilities are performing well (as measured by comparison with company average sales levels, evidence of congestion/overcrowding or the lack of provision of new floorspace in a centre for several years).

  1. In this instance, our convenience retail floorspace assessment adopts company average sales levels (derived from published sources such as Verdict and Mintel) for the main grocery operators in order to set benchmark turnover levels. For other local / independent grocery/foodstore/convenience store operators, who have no published average sales performance data, an assumed average level is provided.

  2. For comparison retail floorspace, the use of published sales density is much more problematic given the large amount of stores, a significant number of which are local independents without any published data. In the previous 2006 Donaldsons retail study for NSC it was assumed that benchmark turnover levels matched current actual

performance levels at 2005 (i.e. capacity was in equilibrium at 2005). Therefore, we consider it appropriate for this study, which updates the 2006 Donaldsons analysis, to adopt the benchmark levels outlined by Donaldson, updated to 2010.

- **Changes to market share**. Given the dynamic and competitive nature of the retail industry it is possible for the market share of shopping facilities within a particular settlement to change over time. This has the potential to occur naturally, or as a result of specific interventions by a local planning authority through the grant of planning permission or through the implementation of a development plan allocation. The maintenance of existing market shares may perpetuate deficiencies in the retail network and there is also an underlying trend of polarisation of some forms of retailing to larger centres. Moreover, existing out of centre retail facilities may account for a significant share of available expenditure but it would necessarily be appropriate to plan for further growth in such locations and instead divert expenditure back to existing centres. Therefore, unlike the previous 2006 Donaldsons retail study, this study adopts a town-wide approach to assessing retail floorspace capacity in order that any future capacity produced by the success of out of centre facilities has the potential to be re-assigned back to town centres. Also, the following sections of this study assess the potential desirability and acceptability of planning for changes in the shopping market share of the main settlements in North Somerset through our policy options analysis in Section 6, alongside the capacity development sites to accommodate new retail floorspace. However, as a starting point, and in order to provide a baseline (or business as usual) scenario for retail floorspace capacity, the remainder of this section outlines current and future capacity based upon the continuation of current market shares only amended when there are commitments (i.e. planning permissions) for new retail floorspace in North Somerset.

5.29 In addition to expenditure which is flowing from local residents (living in the study area) to shops in the main towns in North Somerset, there will also be expenditure from other sources, such as people who reside just beyond the study area and, more importantly, visitors/tourists to the area. In relation to the former, this is likely to be relatively minor, given the geographical extent of our study area. However, the household survey and quantitative assessment data in the South Bristol Retail Study and the Retail Assessment supporting the recent Sainsburys planning application in Portishead have been examined in order to quantify any retail expenditure flowing to North Somerset from parts of the Bristol urban area.

5.30 The majority of expenditure inflow in North Somerset will derive from visitors and tourists to the area, particularly those visiting Weston-super-Mare. We have made an assessment of tourist/visitor for each centre based on a number of factors: the size of the centre and its retail composition, its likely position and attractiveness in the sub-regional tourism market, plus data provided by the Value of Tourism 2008 research report. The 2008 Value of Tourism report indicates that around tourists/visitors to North Somerset spent around £65m on shopping. Assuming that visitors to the area split their shopping expenditure on food and non-food goods in a similar way to local residents that would provide £25m of spending on convenience goods and £40m of spending on comparison goods. It is our view that, due to its attraction for tourists/visitors plus the range of facilities available in the town, the majority of this expenditure would be directed towards Weston-super-Mare and we have predicted that around 60% of all tourist convenience goods expenditure and 75% of all tourist comparison goods expenditure flows to Weston. The remaining convenience and comparison goods expenditure is then shared out equally between Nailsea, Clevedon, Portishead and other facilities across North Somerset.

5.31 The convenience goods quantitative need assessment for each of the main centres in North Somerset is contained in Tables 15a – 15d at Appendix C. The comparison goods quantitative need assessments for each centre are contained at Tables 16a – 16d at Appendix C. A common format is adopted and shows the following information:

- The total level of available retail expenditure within the study area;
- The level of expenditure which each centre attracts from the study area;
- The market share of each centre within the study area
- The level of expenditure inflow attracted by each centre;
- The total turnover of convenience or comparison facilities in each centre, which is a combination of resident’s spending derived from the study area plus trade inflow from beyond.
- The benchmark turnover of existing retail facilities in each settlement; and
- A residual expenditure estimate which is the different between the total turnover flowing to retail facilities in a particular settlement between 2010-2026 and the benchmark turnover of those facilities.

5.32 The market share of existing facilities at 2010, 2015, 2021 and 2026 within a particular settlement is calculated by comparing the total expenditure levels in Table 3 with convenience turnover levels given in Tables 5a-5h or comparison turnover levels in Table 13. It is the proportion of residents’ spending attracted from the study area relative to total available expenditure. In other words, it is an aggregate figure derived from zonal market penetration rates. It will be noted that the market share of individual settlements varies across the assessment period (2010-2026). This is due to two influencing factors.

5.33 First, differing rates of growth in each of the four main settlements in North Somerset. For example, with consistently higher levels of growth in Weston-super-Mare than other settlements the market share of food and non-food facilities in Weston will rise even though actual shopping patterns may not change. Conversely, on this same basis, the market share of the smaller towns will fall as, whilst shopping patterns do not change, the rate of increase in the shopping population is not as fast as Weston.

5.34 Second, account is taken of retail commitments which have the potential to affect shopping patterns in the four main settlements. At present, there are three retail commitments which have been taken into account in this baseline assessment of quantitative need: the new Sainsburys and Lidl stores in Portishead and an Arthur Llewellyn Jenkins furniture store also in Portishead. North Somerset Council has resolved to grant planning permission for both of these stores and are currently awaiting a decision from the Government Office for the South West whether or not to call in these applications for the Secretary of State’s own determination. Whilst formal planning permission has not yet been issued for these schemes, we treated them as commitments for the purposes of the quantitative need analysis given the decision of the Council to support these proposals.

5.35 The Sainsburys proposal will provide a supermarket located on land off Serbet Way. The store will have a net sales area of 2,787sq m with 2,230sq m devoted to the sale of convenience goods and the remaining 557sq m selling comparison goods. The proposed Lidl store is part of a mixed use development on land at Harbour Road and extends to 1,022sq m net.

5.36 In addition, planning permission was issued for a 7,432sq m gross Arthur Llewellyn Jenkins store on land adjacent to Wyndham Way in Portishead. The store, when constructed, will sell a range of furniture and will posses a net sales area of 5,574sq m across two floors.

5.37 However, whilst some changes have been made to the market shares for each of the main North Somerset settlements, it should be noted that this baseline quantitative analysis is only the starting point for the assessment of quantitative need for additional retail floorspace in North Somerset and further changes to the market share of convenience and/or comparison shopping in a particular town may be warranted as a result of the policy options analysis contained within the next section of this report.

5.38 Towards the bottom of each quantitative need analysis table a residual expenditure figure is provided. Where the residual figure is a positive number, this indicates that a quantitative need potentially exists for additional retail floorspace. Conversely, a deficit (minus figure) indicates that there is a potential oversupply of existing retail floorspace. Where a surplus level of expenditure exists, Tables 15 and 16 convert the residual expenditure level into a floorspace equivalent. In order to accomplish this task an average sales density is used. For convenience goods shopping, a sales density of £10,000/sq m at 2010 is used (projected forwards over the period 2010-2026 assuming annual increases in floorspace efficiency in line with existing retail floorspace). For comparison goods, a density of £5,000/sq m at 2010 is used (and again project forward over the period 2010-2026 assuming increases in floorspace efficiency). Both of these sales densities are averages and retail performances of individual operators can vary, particularly for convenience goods operators. For example large national grocery operators such as Asda, Waitrose, Morrisons and Tesco have sales densities in excess of £10,000 per square metre. In contrast, smaller discount operators such as Lidl and Aldi have sales densities below £5,000 per square metre. Therefore, the sales density figure for new convenience and comparison goods retail floorspace should only be used as a guide and reference should also be made to the residual expenditure figures when the Council is faced with individual planning application proposals.

Weston-super-Mare

5.39 Table 15a at Appendix C indicates that stores in Weston-super-Mare currently attract £196m of convenience goods expenditure from the study area. This represents, at 2010, a market share of 42.6% in the study area. Study area derived expenditure is boosted by a further £14.7m of convenience goods spending from tourists and visitors to the area, providing a total turnover of £211m at 2010.

5.40 In the 2006 Donaldsons retail study, convenience stores in Weston-super-Mare were predicted to be attracting £183.6m at 2005, rising to £204m in 2011. Our current analysis indicates a slightly higher turnover for Weston stores although this is partly explained by the decision of Donaldsons not to make an allowance for tourist/visitor spending in out of centre convenience stores in Weston.

5.41 When compared to the benchmark turnover of existing convenience stores (£181m), Table 15a indicates that there is currently a theoretical quantitative capacity of £30m. Based on the indicative convenience goods sales density of £10,000/sq m, this surplus expenditure capacity equates to 2996sq m of net sales floorspace.

5.42 Based upon existing shopping patterns continuing in the future, and taking into account the levels of population growth for Weston-super-Mare outlined earlier in this section, Table 15a indicates that surplus expenditure will grow to £47.6m in 2015, £65m in 2021 and £81m in 2026. The growth in surplus expenditure is in part boosted by level of population growth in Weston and the concentration of housing development in this area. This is shown by the rising market share of convenience stores from 42.6% in 2010 to 43.3% in 2015, 44.4% in 2021 and 45% in 2026.

5.43 Table 15a translates these surplus expenditure figures into indicative floorspace capacity levels, comprising 4,739sq m net at 2015, 6,351sq m net at 2021 and 7,689sq m net at 2026. Clearly, these figures are based upon a continuation of existing shopping patterns in the future although these capacity levels are significant with the level of convenience floorspace capacity at 2010 equivalent to the size of the Tesco store in the town centre or the Sainsburys store at Worle. Compared with the 2006 Donaldsons retail study predictions our 2010 capacity levels are similar to those predicted by Donaldsons for 2011, although our capacity level at 2021 (6,351sq m net) is lower than the Donaldsons estimate of circa 8,000sq m net. This is in part due to the lower forecast growth for convenience goods spending used by our latest analysis.

5.44 Turning to comparison goods retail capacity, our analysis is contained at Table 16a at Appendix C. Table 16a indicates that some £337m of comparison goods expenditure generated by study area residents is flowing to stores across Weston. This is equivalent to a 45% market share across the study area. The previous 2006 retail study predicted a 2005 study area derived turnover for Weston of £310m and £409m at 2011. Based on pro-rata growth across 2005-2011 this would provide a 2010 turnover figure from the 2006 retail study of £392m which is noticeably higher than our current prediction. However, the difference is understandable given the recent economic downturn and the lower comparison goods expenditure growth rates being used by this latest study.

5.45 However, in terms of total comparison goods expenditure our latest estimates are closer to the previous (2006) retail study figures due to our higher allowance on visitor/tourism spending which is based on more recent 2008 South West Tourism figures and also due to decision of Donaldsons to allow only £10m of visitor/tourism expenditure to contribute to the town centre economy and exclude any visitor/tourism expenditure from out of centre facilities. Our Table 16a predicts total turnover of £368m for comparison goods floorspace in Weston whilst the 2006 Donaldsons study predicted £405m at 2010.

5.46 When comparing the current total level of expenditure flowing to comparison goods stores in Weston against benchmark turnover levels, we have adopted the benchmark turnover level adopted by the 2006 retail study, brought forward to 2010 levels and including any commitments which have been implemented between 2006 and 2010. This comparison indicates that current turnover levels in Weston are very similar to the benchmark performance levels established by the previous 2006 retail study (brought forward to 2010). Therefore, at the current year (2010) comparison retail facilities are in broad equilibrium with capacity for additional floorspace only arising in future years.

5.47 Table 16a indicates that by 2015 there will be surplus capacity for £52.9m, which is based on a continuation of existing shopping patterns applied to the residential growth levels outlined earlier in this section. Based on an indicative sales density for new comparison goods floorspace, this equates to 9,915sq m of new net retail sales area. Moving forwards to 2021, surplus expenditure capacity will increase to £125.7m, which is equivalent to 21,217sq m net. By 2026, surplus expenditure will be £212.7m, which is equivalent to 32,519sq m net.

5.48 Our 2026 capacity prediction (32,519sq m net) is much lower that the previous 2006 retail study capacity prediction for the same year which was 57,850sq m net. This is primarily due to a lower forecast growth in per capita retail spending on comparison goods.

Clevedon

5.49 Table 15b outlines the capacity assessment for convenience goods floorspace in Clevedon. The table notes that existing convenience stores in Clevedon attract around £63m of convenience goods expenditure, which is equivalent to a market share of 13.7% in the study area. This is supplemented by a small level (£2.5m) of expenditure inflow from beyond the study area to provide a total turnover level for convenience stores of £65.5m. When compared against the 2010 benchmark level for existing convenience goods floorspace (£50.7m) this provides a theoretical surplus of £14.8m.

5.50 This indicates that existing convenience stores are collectively overtrading and a comparison between the turnover data in Tables 5a and 5b with the company benchmark data in Table 14 indicates that the Morrisons, Tesco and Lidl stores are all trading above company average levels. If the surplus expenditure level at 2010 is turned into an indicate floorspace capacity level, using an indicative sales density representative of the larger national grocery retailers (£10,000/sq m), then there is potential for a current floorspace capacity of 1,480sq m net.

5.51 However, it should be noted that the implementation of the two new foodstores in Portishead(Lidl and Sainsburys) are likely to reduce the amount of convenience goods expenditure which flows to convenience stores in Clevedon. Our quantitative analysis indicates that significant levels of convenience retail expenditure flow from areas close to Portishead to stores in Clevedon. This situation is likely to change once the Sainsburys and Lidl stores in Portishead are trading and therefore Table 15b reflects this within the 2015, 2021 and 2026 columns. It will be noted that the 2010 market share of 13.7% drops to 11.8% in 2015 as a result of the introduction of the Portishead commitments and this reduces available capacity to £9.5m in 2015. This is equivalent to a floorspace capacity of 949sq m net at 2015. Moving forwards to 2021, surplus expenditure capacity rises to £11.1m and then £12.3m in 2026. This provides for 1,082sq m net and 1,168sq m net of additional capacity respectively.

5.52 These levels of surplus expenditure are relatively modest and are not sufficient to accommodate a new supermarket facility in Clevedon although they are able to support expansion of existing facilities or modest additional provision in the town centre. However, they are higher than the capacity estimates in the 2006 retail study which indicated no quantitative need for additional convenience goods floorspace up to 2021.

5.53 The comparison goods floorspace capacity assessment for Clevedon is contained at table 16b1 and 16b2. These tables indicates that comparison goods stores in Clevedon attract £24.9m of expenditure from the study area which represents a market share of 3.3%. The £24.9m of study area derived expenditure is boosted by a further £2m of expenditure from visitors/tourists which flows from outside of the study area to provide a total comparison goods turnover level for Clevedon of £26.9m. In line with the Weston assessment, we have, in Table 16b1, compared the total turnover of existing stores against the benchmark level established by the 2006 retail study (updated to a 2010 base). This suggests that there would not be any surplus expenditure at 2010 to support additional floorspace within Clevedon. Moving across the assessment period (2015, 2021 & 2026) in Table 16b1 use of the updated 2006 retail study benchmark indicates that there will not be any future surplus expenditure capacity for additional comparison goods floorspace in Clevedon.

5.54 It should noted that the benchmark adopted by the 2006 retail study used a reasonably high sales density for existing comparison floorspace (£5,238/sq m) which may over-estimate the actual benchmark of existing facilities. Therefore, we have conducted a sensitivity test whereby the benchmark sales density for existing comparison goods floorspace in Clevedon is lowered to £5,000/sq m. This is alternative benchmark is used in Table 16b2 and shows a smaller expenditure deficit at 2010 (minus £5.7m rather than minus £10m) although the table also shows that even with a lower benchmark turnover, there remains no surplus expenditure capacity in Clevedon until the period between 2021-2026.

Portishead

5.55 The convenience goods floorspace capacity assessment for Portishead is contained at Table 15c at Appendix C. The analysis indicates that existing convenience stores in Portishead attract around £37.1m of convenience goods expenditure from the study area boosted by £2.6m of expenditure flowing into the study area from beyond.

5.56 In order to assess current and future capacity, we have included the benchmark turnover associated with the Sainsburys and Lidl commitments and also, from 2015 onwards, adjusted the turnover that existing and committed stores receive from the study area and also the market share of Portishead stores to reflect the impact of the committed stores on shopping patterns. Table 15c indicates that the market share of Portishead stores will rise from 8% to 11.3% between 2010 and 2015 and by 2015 convenience stores in Portishead will attract £55.5m of expenditure from study area residents. However, even with the noticeable increase in market share, the scale of committed floorspace will mean that there will not be sufficient surplus expenditure capacity to support new convenience floorspace in Portishead between 2010 and 2026.

5.57 Turning to comparison goods retailing in Portishead, Table 16c at Appendix C provides a capacity assessment between 2010 and 2026. The table indicates that comparison goods stores in Portishead attract around £25.7m of expenditure from the study area, which is boosted by an expenditure inflow of £2.1m to provide a total turnover for stores of £27.7m. This is a similar levels of turnover as found by the 2006 Donaldsons retail study although this was for 2005 which suggests that there may not have been significant expenditure growth in Portishead over the past 5/6 years.

5.58 We have adopted the benchmark turnover level used by the 2006 retail study and brought this up to a 2010 base and also included additional floorspace which has been added since the previous study (Homebase & Argos) and also the comparison goods floorspace associated with the Arthur Llewellyn Jenkins, Lidl and Sainsburys commitments. When compared with existing total turnover levels this unsurprisingly provides a deficit in available expenditure, although from 2015 onwards we have included an allowance for the impact of all the current commitments on the market share of Portishead. This indicates that the town's comparison goods shopping market share will rise from 3.4% in 2010 to 4.3% in 2015.

5.59 Taking into account the increase in market share plus the contribution of commitments to the benchmark performance of stores in Portishead, Table 16c indicates that there will be a smaller level of surplus capacity at 2015 (£2.3m) which will rise to £7m by 2021 and £12.7m by 2026.

Using an indicative sales density for new comparison goods floorspace, Table 16c indicates that there will be capacity for 424sq m net at 2015, rising to 1,186sq m net at 2021 and 1,940sq m net at 2026. These levels of unsurprisingly lower that the previous 2006 retail study estimates given the impact of recent commitments and also lower levels of forecast comparison goods expenditure growth.

Nailsea

5.60 Compared with the previous 2006 retail study, our current analysis suggests that convenience retail facilities in Nailsea have managed to increase the level of expenditure which they attract. In the 2006 retail study, it was predicted that convenience stores in Nailsea would be attracting £28.8m of convenience goods expenditure, however our analysis indicates that, at 2010, stores were attracting £42.4m boosted by £2.5m of expenditure inflow.

5.61 Whilst this is a significant increase over previously assessed levels, this has not translated itself into a surplus level of expenditure capacity. Whilst the minus £12m deficit at 2011 predicted by the 2006 retail study has been narrowed, there remains a deficit due to an increase in the benchmark turnover levels of existing stores (primarily the change from Somerfield to Waitrose). Therefore, Table 15d indicates that there will not be any surplus convenience goods expenditure to support additional convenience floorspace in Nailsea over the period 2010-2026, which is a conclusion consistent with the previous 2006 retail study.

5.62 Within the comparison goods capacity analysis, it has already been noted that our forecast turnover for comparison goods stores in Nailsea is much lower than the estimate given in the 2006 retail study. The previous study suggested a study area derived turnover of £50.8m at 2005. Our latest analysis is predicting a study area derived turnover of £13.5m, boosted by expenditure inflow of £2m. This is a significant difference and requires explanation and it would appear to us that there may be a number of factors contributing to this difference:

- **Difference in market share levels**. A comparison between the market share levels for different types of comparison goods shopping trips to Nailsea obtained by the 2006 household survey indicates considerably higher market shares than the more recent 2010 household survey. For example, the 2006 survey indicated a market share of 40% for clothes and shoes shopping for Nailsea in the local area (Zone 3), whilst the 2010 survey indicates a market share of 8%. A separate survey conducted for the Sainsburys proposal in Portishead, but which used the survey zones, also indicates a market share of 8% for Zone 3. The following figures are shopping in Nailsea from Zone 3 for all surveys. The 2006 survey indicates a market share of 36% for furniture/carpets shopping, our survey indicates a

4% market share. The 2006 survey indicates a 46% market share for household appliances, whilst the2010 survey indicates a 5% market share which is also the market share suggested by the 2009 Sainsburys survey. The 2006 survey indicates a 44% market share for audio-visual equipment, the 2010 survey suggests a 13% market share. For DIY and hardware goods, the 2009 and 2010 surveys suggest a 7% market share for Nailsea, whilst the 2006 survey suggests 48%. It is not possible to compare the other survey categories from the 2006 and 2010 although there are also significant differences between the survey results.

- **Comparison with other centres**. Whilst there can never be a direct comparison between difference centres, given that they are different sizes and accommodate a varying land use mix, it is noticeable that comparison goods floorspace in Nailsea is not too dissimilar to Clevedon which had much lower market shares in 2006 and also has a comparison goods turnover which is much lower than the estimate for Nailsea in 2006.
- **Amount of comparison goods retailers**. Information obtained from GOAD indicates that the proportion of comparison goods retailers has reduced by 5% since 2006, which is a noticeable reduction and will have contributed to the lower attractiveness of the centre for comparison goods trips.

5.63 Overall, we have some concerns that the total comparison goods turnover for Nailsea shown in the 2006 retail study is too high and, as a consequence, the corresponding benchmark turnover of £50.9m at 2005 was also too high. This is reinforced by the prediction of the 2006 retail study that Nailsea town centre has a comparison goods floorspace of 8,555sq m net in 2005. Based on data obtained from GOAD this is a over-estimate and is closer to the gross comparison goods floorspace in the town centre.

5.64 As a consequence, we have estimated our own benchmark turnover level for 2010 which is based upon a 4,510sq m net comparison goods floorspace in the town and a £5,000/sq m sales density. This provides a £22.6m benchmark turnover level at 2010 and compares to a total turnover for the town of £15.6m, indicating a negative capacity level at 2010. If this allowance for spare capacity within the existing floorspace stock is taken forwards over the assessment period, Table 16d indicates that there will be no surplus expenditure capacity between 2010-2026. This approach appears logical to us given the high level of vacancies in the town centre and, given the current modest performance of existing retailers, focuses attention on replacement floorspace and improving the existing retail stock rather than the provision of new additional comparison goods floorspace.

5.65 These initial capacity predictions for each of the four centres are now taken forwards in the next section of this report as part of our policy options analysis.

Qualitative Need

5.66 In terms of the overall assessment of need, the consideration of qualitative factors provides an important contributory element and since the completion of the 2006 Donaldsons retail study its lower status below quantitative indicators of need has been removed by PPS4. Indeed, whilst an assessment of the growth in retail expenditure in the study area can show the levels of expenditure available to support additional retail floorspace in North Somerset, the case for additional provision also relates to removing deficiencies or gaps in provision, providing for consumer choice and competition, identifying and removing overtrading, congestion and overcrowding in stores, improving the quality of provision and meeting any location-specific needs. These issues are analysed below in relation to the convenience and comparison retail sectors in each of the four main settlements in North Somerset.

Weston-super-Mare

5.67 Within the 2006 retail study, it was noted that Weston struggled to complete with Bristol city centre and Cribbs Causeway outside of its core catchment area. It was also noted that the most pressing need was to increase the range and quality of retailers present, including the need for larger modern retail units and the suggestion that the centre suffered from only one department store (TJ Hughes). We support these observations and would note that little has changed in terms of qualitative aspects of the town centre since 2006. Indeed, the proportion of comparison goods retailers within Weston town centre is well below the national average which, even though the coastal/tourism function of the town will lead to a higher number of service uses, is a clear area for improvement.

5.68 Those comparison goods retailers which are present include Marks & Spencer, Top Shop, New Look, Boots, Dorothy Perkins, WH Smith, BHS and Wilkinsons. The health check section of this report also records that there remain a number of requirements for Weston including a number of national high street clothing and department store retailers (Debenhams, TK Maxx, Primark, River Island, H&M and Brantano) which indicate there is commercial pressure to improve the qualitative aspects of provision. Indeed, these requirements are present even where there is a high and growing vacancy rate within the town centre suggesting that the vacancies which are within primary and secondary locations in the town centre are not suitable for modern retail standards and therefore there is a need to redevelopment existing space in order to accommodate commercial demand.

5.69 In terms of its overall ranking (as shown in the VenueScore data shown in Section 4 of this report), Weston has shown an improvement since 2007 and is positioned below Taunton and Bristol, but above Bridgwater in the sub-region. In terms of comparable seaside towns across the country, the data in Section 4 of this report indicates that Weston has a reasonable rental performance but a comparatively poorer investor confidence level. Weston also attracts a higher (i.e. poorer) VenueScore ranking than a number of the other comparable seaside towns.

5.70 Having regard to existing shopping patterns, the household survey results and our quantitative need assessment provide the following data:

- **Clothes / Shoes**. Between two-thirds and three quarters of clothes and shoes shopping trips from local Weston residents (Zones 5-7) remain within Weston. The town is also able to attract one third of shopping trips from Clevedon, half of shopping trips from areas to the immediate east (Zone 8) and one third of trips from the eastern part of the study area (Zone 9). Weston also attracts one third of shopping trips from areas to the south (Zones 10 and 11) including the Burnham / Highbridge area.
- **Furniture / Floorcoverings** / Textiles. Weston retains around three quarters of its shopping trips on furniture, floorcoverings and textiles. It also draws one quarter of shopping trips from Clevedon, 12% of trips from Nailsea, between 40%-50% if trips from areas to the east and 45% of shopping trips from the Burnham/Highbridge area.
- **DIY goods**. Over 90% of shopping trips for DIY and hardware goods are retained within the Weston area. it also attracts two thirds of trips from areas to the east, almost 90% from areas to the immediate south, 50% of trips from the Burnham / Highbridge area and 16% of trips from the Burnham area.
- **Domestic appliances**. Weston retains around 90% of local shopping trips on large domestic appliances. It also attracts three-quarters of trips from areas immediately to the east and one third of trips from rural areas to the south, including Burnham and Highbridge. One third of trips are also attracted from Clevedon.
- **Smaller electrical goods**. Weston retains between 80%-90% of shopping trips on smaller electrical goods. One quarter of trips from Clevedon residents are also attracted to Weston, whilst areas to the east contribute between one half and two thirds of their shopping trips towards facilities in Weston.
- **Personal and luxury goods.** Around 80% of trips associated with personal and luxury goods generated by Weston residents. This is boosted by 50% of trips from Zone 8 residents and one third of trips from Zone 9 residents. Zone 10 residents also contribute one

half of their personal and luxury shopping trips to Weston and one quarter of trips also flow from Zones 11 and 12.

- **Recreational goods.** Between 70%-80% of Weston residents remain in the town for their shopping on recreational goods. A small amount of trips (18%) flow from Clevedon, whilst 60% of trips flow from Zone 8, one third of trips from Zones 9 and 10 and 40%-45% of trips from Zones 11 and 12.

5.71 Outside of the town centre, Weston has a significant amount of retail warehousing, the majority of which lies on Marchfield Way and Winterstoke Road. The scale of floorspace which is present allows for a wide range of bulky goods retail operators to be represented in Weston, although non-bulky goods retailers such as Argos, TK Maxx, Boots and Next have occupied floorspace in recent years. We do not consider that there is a deficiency in the bulky goods retail warehouse or bulky comparison retail offer in Weston which is reflected in the market shares for these types of goods.

5.72 Overall, we do not consider that Weston exhibits any significant qualitative deficiencies in relation to its comparison goods offer. The town centre has a large amount of floorspace, which is supplemented by a large out of centre retail warehouse offer. However, there are areas where qualitative improvements can be made and these relate to the quality of existing provision and the ability to enhance consumer choice and competition. In particular, it is noticeable that there is a slightly higher level of leakage for shopping trips associated with higher order goods such as clothes, shoes and luxury goods which is an area where Weston encounters much more competition with facilities in Bristol. This suggests that the quality and choice of existing provision can be improved in order to retain more local people within the town. This is reinforced by the quality of existing floorspace within the town centre which has not seen significant improvement or expansion for a number of years and which is likely to be struggling to match retailer requirements.

5.73 In relation to convenience retailing, Weston also has the largest amount of floorspace in North Somerset, with each of the five main national grocery retailers (ASDA, Morrisons, Tesco, Waitrose and Sainsburys) present and supplemented by three discount foodstores (two Lidl stores and an Aldi stores) and Co-op foodstores. These stores provide a range of convenience shopping functions with good choice of main/bulk food shopping destinations and top-up food shopping facilities. The main foodstores are dispersed across the urban area of Weston although all, apart from Tesco, are located outside of the town centre, with the Sainsburys, Morrisons and ASDA stores forming the anchor store for district and local centres within the town's suburban areas. This provides a good level of accessibility for the various communities across Weston although it does result in the town centre Tesco facing strong competition which could have an impact upon its ability to attract large number of people to the town centre.

5.74 Overall, we do not consider that there is currently a town-wide qualitative deficiency in convenience retail floorspace. The range and choice of facilities is good and they are easily accessible for existing communities. This is demonstrated by the shopping patterns information provided by the 2010 North Somerset household survey. It indicates that within Zones 5, 6 and 7, which cover the existing Weston urban area and the proposed urban expansion areas, there is a retention rate of main food shopping trips between 97%-100% whilst the retention of top-up food shopping trips is between 95%-98%. Convenience stores in Weston also attract significant levels of main food shopping trips from Zones 8, 9, 10 and 12.

5.75 The quantitative assessment suggests that convenience retail facilities in Weston are collectively overtrading. Our visits to the main stores in the town confirms that they are popular although, given the range of facilities available, they do not appear to be noticeably congested or overcrowded. In our view, the opportunities for short term qualitative improvements to the convenience retail sector in Weston lie with the improvement and expansion of the town centre Tesco store. The store, whilst one of the largest supermarkets in Weston, has been earmarked for improvement by Tesco which has resulted in an allocation in the Weston AAP. The store provides an important attractor to the town centre and is the sole main/bulk food shopping destination. As such it will be important to allow for opportunities to improve the quality of this facility when contributes to the overall health and attractiveness of the town centre.

5.76 Elsewhere in Weston we can find no significant and/or immediate qualitative deficiency in provision. It is likely that the existing supermarkets, a number of which form the focus for defined centres, will be able to continue to successfully serve the needs of their local communities. However, in the future, there is likely to be a location-specific need for new retail provision to serve the large communities within the Weston Villages area and this is discussed in the next chapter of this report.

Clevedon

5.77 Convenience retail provision in Clevedon benefits from two supermarkets, plus a modest sized Lidl discount foodstore and a selection of smaller local independent niche food retailers and convenience stores. The two supermarkets in Clevedon are not as large as the supermarkets in Weston although they provide a wide range of products and are clearly able to accommodate main/bulk food shopping trips from local residents. The retail offer of the Lidl store and other town centre retailers widens the range and choice of local food facilities.

5.78 The household survey also confirms that these stores are, collectively, popular with local residents and the surrounding rural hinterland. Over 90% of main food and top-up food shopping trips from local residents remain within Clevedon, with the Tesco and Morrisons stores attracting similar levels of custom. Clevedon also attracts a significant amount of convenience shopping trips from zone 8 (Yatton / Congresbury) which is notable given that it lies midway between Clevedon and Weston-super-Mare. These trips are mainly main/bulk food shopping trips with 48% of trips attracted from zone 8.

5.79 Compared with the findings of the 2006 Donaldsons retail study, the ability of foodstores in Clevedon to retain main food and top-up food shopping trips from the local area (zone 4) is much improved, given that only 71% of main food shopping trips and 48% of top-up food shopping trips were predicted to be retained by Clevedon stores. Moreover, the 2006 household survey suggested only 17% of main food shopping trips from zone 8 (Yatton / Congresbury) were flowing to Clevedon whilst, as noted above, the 2010 survey suggests that 48% of zone 8 residents are now using stores in Clevedon for their main food shopping.

5.80 Overall, we do not consider that Clevedon has a qualitative deficiency in convenience goods floorspace. There is a good choice of facilities including two supermarkets and a discount foodstore. The Morrisons and Lidl stores lie close to the core retail area in the town centre and contribute to its attractiveness and overall health. The quantitative analysis suggests that existing stores may be collectively trading well above company average performance levels and the household survey results suggest that stores in Clevedon have improved their attractiveness to both local residents and rural areas to the south-east. This suggests that further modest improvements and expansion to existing facilities may be appropriate (subject to retail impact and sequential test criteria), although not to the extent that a new store is needed.

5.81 In relation to retail facilities for non-food goods within Clevedon, the household survey indicates a wide variation in the ability of retail facilities in the town to retain shopping trips. The results are summarised below:

- Only 2% of clothes and shoes shopping trips from Clevedon residents remain within the town, with 37% trips leaking to Weston and the majority of the remaining 60% leakage flowing to Bristol.

- 18% of local shopping trips on furniture, floorcoverings and household textiles remain within Clevedon.
- 72% of local shopping trips on DIY and hardware goods remain within Clevedon. This is a significant rate of retention and is the best performing category within Clevedon. This Focus DIY store makes a significant contribution towards this market share.
- Retention of shopping trips on domestic appliances and small electrical goods is relatively low, at 14% and 3% respectively.
- Stores in Clevedon attract 44% of shopping trips on personal and luxury goods, whilst 28% of recreational goods shopping trips are retained.

5.82 These shopping patterns suggest that Clevedon is unsurprisingly unable to retain a significant amount of comparison goods shopping trips within its urban area. With Bristol and Weston-super-Mare similar distances from the town, existing comparison goods stores face significant competition and this is reflected in the range of operators present.

5.83 For a town of its size, Clevedon has a reasonable range of comparison goods retailers. It has been able to attract and retain operators such as Boots, New Look, Superdrug, WH Smith and Clinton Cards. These retailers clearly help the town to retain some of its comparison goods shopping trips and given the competition posed by Bristol and Weston it is unsurprising and unavoidable that leakage will occur. The town centre is also supplemented by further retail uses along Hill Road which add to the town’s overall offer. Overall, we do not consider that, given its circumstances, Clevedon has a significant qualitative deficiency in its comparison retail offer. A reasonable range of retailers are present and we consider that the future focus for maintaining and improving the retail offer in Clevedon should be on ensuring that the existing floorspace stock remains attractive to retailers and other businesses. This is likely to include improvements to a number of properties throughout the town centre.

Portishead

5.84 Within Portishead the convenience retail sector was dominated by the Co-op store on Wyndham Way until 2003 when the Waitrose store opened. These stores are currently the largest convenience shopping facilities in Portishead and are supplemented by smaller Iceland, Co-op and Tesco Express stores and other niche independent retailers in the town centre. The Waitrose store is by far the largest store with a net sales area of 2,500sq m and is capable of performing a main/bulk food shopping function. It attracts around one third of all main food shopping trips in the local area and one third of top-up food shopping trips. The Co-op store on Wyndham Way is around half the size of the Waitrose store but attracts a similar amount of main and top-up food shopping trips (30%).

5.85 None of the other foodstores in Portishead are able to a significant amount of main food shopping trips and therefore the retention rate for this type of shopping in the local area is around two thirds, with one third of shopping trips leaking to surrounding settlements such as Bristol. The retention of top-up food shopping trips in the Portishead area is higher at 87% with the Iceland and other local stores also attracting a proportion of trips. Stores in Portishead also attract around 20% of main and top-up food shopping trips from Zone 1 (area to the east of Portishead and west of Bristol urban area).

5.86 Overall, despite the town having two relatively large supermarkets Portishead is not currently retaining a particularly high level of shopping trips. Whilst the level of leakage is not overly significant the loss of around one third of main food trips is noteworthy and leads to the need for a better range of provision within the town. The level of leakage is likely to be due to the style of retail offer of the Waitrose store and the size of the Co-op which is modest by modern supermarket standards.

5.87 The need for a qualitative improvement in the range and choice of facilities available in Portishead has been considered in detail recently by the Council as it has been faced with two planning applications for foodstores: a Sainsburys store at Serbert Way and a Lidl discount foodstore located on Gordano Gate. The Council has resolved to grant planning permission for both new stores and they will provide a wider range of foodstores in Portishead, eliminating any qualitative and quantitative needs which have arisen in the town.

5.88 Having regard to its comparison goods retail sector, Portishead town centre has historically has a relatively modest level of provision although a number of national multiples are present. However, in recent years a number of retail warehouses have been built which have significantly expanded the comparison goods retail offer of the town, including both bulky and non-bulky goods operators. The proposed Sainsburys supermarket (which will have a modest non-food offer) and the committed Arthur Llewellyn Jenkins furniture store will add further variety and choice.

5.89 The household survey of shopping patterns commissioned to inform this study indicates a mixed pattern of market share for Portishead's comparison goods retail sector:

- Retention of only 3% of clothers / shoes shopping trips, with significant leakage to Bristol.

- Retention of 11% of local furniture / floorcoverings / textiles shopping trips, with further trips attracted from Zones 1 & 3.
- Portishead manages to retain 57% of DIY shopping trips from the local area and is also able to attract 27% of trips from Zone 1 to the east of the town.
- Retention of 13% of local shopping trips associated with large domestic appliances and 35% of shopping trips for smaller electrical items.
- 23% of local shopping trips associated with personal and luxury goods and 28% of recreational goods shopping trips are retained in the local area.

5.90 The above levels of market penetration for facilities in Portishead are not surprising given the proximity of Bristol and existing levels, particularly in the furniture good sector, have the potential to increase as a result of the Arthur Llewellyn Jenkins retail warehouse commitment. Overall, for a town of its size, plus its geographical location, we do not consider that there is an urgent qualitative deficiency with Portishead's comparison goods sector. The town's overall offer will always be constrained by commercial market demand which naturally looks towards Bristol and therefore any improvements are likely to the smaller scale.

Nailsea

5.91 Nailsea's convenience retail sector is dominated by Tesco and Waitrose foodstores. Both stores are relatively large shopping facilities' capable of performing both main and top-up food shopping functions. The Tesco is the larger of the two stores and our 2010 household survey indicates that it is the most popular main food and top-up shopping destination in Nailsea by some considerable margin. It attracts 62% of main food shopping trips from the local area (Zone 3) and 35% of all top-up food shopping trips. The next most popular store is the Waitrose which attracts 22% of main food trips and 13% of top-up trips. Whilst it may be expected that the Waitrose store will have a smaller market share, given its smaller size and type of retail offer, we consider that this is relatively low and a reflection of the recent change in this unit from Somerfield.

5.92 Overall, Nailsea retains 90% of local main/bulk food shopping trips and 80% of top-up food shopping trips, which is considered to be a good level of retention for a settlement of this size and a reflection of the range of existing facilities. As a consequence, given the quality of existing provision, we do not consider that there is a need, from a qualitative perspective, to provide significant new convenience goods retail floorspace within Nailsea.

5.93 Within the comparison goods retail sector, Nailsea has relatively low market share levels across all types of goods except the personal & luxury good sector. The town's market share for clothes and footwear shopping in the local area is 8%, whilst the furniture/floorcoverings/textiles market share is 14%. The DIY market share is only 7% and low market shares are also recorded for domestic appliances (5%), small electrical goods (13%) and recreation goods (17%). Compared to Clevedon, which has a similar scale of comparison goods floorspace, Nailsea has a lower overall market share of financial performance, which will, in part, be influenced by its proximity to the Bristol urban area. Our land use survey of the town centre also records a lower than average proportion of comparison retail units and a high number of vacancies, suggesting that qualitative aspects of provision can be improved via refurbishment and redevelopment of the existing retail stock and an increase in the market share of the town in order to claw back lost shopping trips.

6. POLICY OPTIONS FOR RETAILING IN NORTH SOMERSET

Introduction

6.1 One of the main purposes of this retail study is to support the ongoing preparation of, and the retail strategy within, the North Somerset LDF Core Strategy and the Weston AAP. To be appropriate and deliverable, the strategy needs to be based on sound evidence, which demonstrates an understanding of the existing situation, and the potential and opportunities for change. Building on the assessment of need for retail uses, four common steps can be identified:

- An audit of existing centres, to identify their current role, their vitality and viability, and their potential to accommodate new development and/or change, having regard to identified needs.
- Consideration of alternative centres and/or sites and development opportunities to accommodate new development (in existing centres or in new/expanded centres) and to consider the potential role of difference centres.
- Based on the above, an evaluation of alternative policy options to accommodate growth and/or plan for change.
- Developing the strategy and policy formulation through the Local Development Framework.

6.2 Section 4 of this report has provided an up-to-date review of the health of the main town centres in North Somerset, whilst Section 5 provides an assessment of the quantitative and qualitative need for additional retail floorspace within these centres. Accordingly, this section considers the outputs from the town centre health, quantitative and qualitative analyses to help define the potential options for retail development. In turn, it will assist the Council in agreeing an area-specific vision, defining key objectives for the AAP and other SPD documents, plus the definition of a spatial strategy which is consistent with other parts of local planning policy.

6.3 In light of the foregoing, the remainder of this section is split into two distinct sections to recognise the steps outlined above. The first analyses the potential suitability of sites for retail development in the main towns, paying particular attention to the content of the Weston Town

Centre AAP. The second provides an analysis of the alternative policy options to accommodate growth and/or plan for change. Each is discussed in turn below.

Review of Potential Retail Development Opportunities

6.4 A key component of a proactive approach to meeting town centre needs is the identification of appropriate sites together with policies to bring forward new development. Where local authorities have identified a quantitative and/or qualitative need for retail uses, PPS4 indicates that they should actively examine existing and potential sites within centres, or on the edge of defined town centres. Also, they should consider the scope to expand existing centres and promote new ones.

6.5 Policy EC5.1 of PPS4 indicates that local planning authorities should identify an appropriate range of sites to accommodate the identified need, ensuring that the scale of development is identified and that is in keeping with the role and function of the centre within the wider hierarchy of centres. PPS4 requires that sites for retail uses should be identified through the sequential approach to site selection with local planning authorities identifying sites that are suitable, available and viable in the following order:

- Locations in appropriate existing centres where sites or buildings for conversion are, or are likely to become, available within the plan period
- Edge of centre locations, with preference given to sites that are or will be well-connected to the centre
- Out of centre sites, with preference given to sites which are or will be well served by a choice of means of transport and which are closest to the centre and have higher likelihood of forming links with the centre

6.6 Taking into account the town centre first approach advocated by PPS4, the Weston Town Centre AAP identifies a number of potential town centre and edge of centre development opportunities. Following discussions with NSC officers, it has been agreed that the focus of the locational assessment in this study should be on the following sites which fall within the ‘Retail Core’ area outlined in Section 7.2 or the Preferred Options AAP consultation document dated July 2009:

- Victoria Square
- Dolphin Square

- Tesco
- NCP Car Park

6.7 In addition, and in line with the contents of another report prepared by GVA for NSC relating to the viability and delivery aspects of the sites identified in the Weston Town Centre AAP Preferred Options consultation (July 2009), we have also assessed the Town Square area in Weston town centre which lies immediately to the north of the Sovereign Centre.

6.8 The assessment of each of these locations is contained within site assessment proforma sheets at Appendix D. A standardised proforma format is provided which outlines the key characteristics of each location, including:

- Description of site and surrounding area
- Planning policy context
- Accessibility
- Constraints to development
- Development characteristics and implementation

6.9 Through the assessment of the above characteristics, our assessment is able to understand how each location can perform against the national policy tests of suitability, availability and viability:

- **Availability** – whether sites are available now or are likely to become available for development within a reasonable period of time for retail development (determined on the merits of a particular case, having regard to inter alia, the urgency of the need).
- **Suitability** – with due regard to the national policy requirement to demonstrate flexibility, whether potential development sites are suitable to accommodate the need or demand which has been identified.
- **Viability** – whether there is a reasonable prospect that development will occur on the site at a particular point in time. Again the importance of assessing viability can depend in part on the nature of the need or demand which has been identified and the timescale over which it is to be met.

6.10 With regards to the other three main settlements in North Somerset, our assessment of need for additional retail floorspace has made the following conclusions:

- Clevedon. Within Clevedon's comparison retail sector, we have not found a significant short to medium term quantitative need for additional floorspace. In terms of qualitative aspects of provision, a significant deficiency has not been found and, whilst improvements can and should be made, these are likely to be modest in scale and will focus upon improving the performance of existing floorspace.
- Nailsea. There is not a quantitative need for additional convenience and/or comparison goods floorspace in Nailsea, whilst our qualitative assessment of need has also found no need for additional convenience floorspace. In relation to the comparison retail sector, we have found that there is qualitative need for improvement although given the lack of quantitative need, qualitative improvements are likely to focus upon refurbishment and redevelopment of the existing floorspace stock.
- Portishead. The commitments for the new Lidl and Sainsburys stores, plus the new Arthur Llewellyn Jenkins furniture retail warehouse, will meet short to medium term quantitative and qualitative need within Portishead. Whilst our quantitative assessment indicates that expenditure capacity could arise for additional comparison goods floorspace within Portishead, this will be over the medium to longer term. Therefore, given the potential trading impacts of the three committed schemes, we do not consider that there is an immediate need for plan for this additional medium to longer term need at present.

6.11 Therefore, in light of the above findings, our assessment of sites to accommodate additional retail development has not been extended to cover sites in Clevedon, Nailsea and Portishead.

Weston-super-Mare Town Centre

6.12 The July 2009 Preferred Options AAP document outlines the potential for a significant expansion of retail floorspace within the town centre. In relation to the potential for additional comparison goods floorspace, three sites are identified: NCP car park, Dolphin Square and Victoria Square. All three sites lie within the Local Plan's town centre boundary, whilst the NCP car park also lies within the primary shopping frontages area.

6.13 In relation to the NCP car park site, it is located close to the shopping core area of the town centre and accommodates important retail uses in the centre, along with one of the larger car parking facilities. Because of these attributes, redevelopment of the site in the short term may not prove viable which will constrain delivery. The site has a poor visual appearance and redevelopment could significantly improve the attractiveness of this part of the town centre. Moreover, the site in totality, as identified by the July 2009 draft AAP is large enough to accommodate a significant amount of retail floorspace, albeit this would involve the removal of existing retail floorspace and the potential need to find new locations for existing retail and service businesses. However, given that the site is in multiple ownerships (which is acknowledged as a constraint by the July 2009 draft AAP), coupled with the aforementioned viability issues, indicates that a redevelopment scheme is likely to be a medium to longer term aspiration and should be acknowledged as such by the next version of the AAP.

6.14 Our analysis of the Victoria Square proposal indicates that, whilst it has the potential to provide an extension to the Sovereign Centre, it provides a highly complex and potentially unviable proposition. Extension of the Sovereign Centre can, in principle, provide an important positive contribution to the health and attractiveness of the town centre and, as noted in the July 2009 draft AAP, can provide a link between the core retail area and the seafront. This is one of the potential benefits of redeveloping this area.

6.15 However, there are a number of constraints associated with Victoria Square which will influence whether this site can be brought forward for redevelopment. First, the identified area encompasses a large number of different ownerships with, we understand, no agreement in place for site acquisition. Whilst this in itself may not mean that the site should be discounted, the need for CPO proceedings will may further costs to what is already likely to be an unviable development proposal. Second, a westward extension of the Sovereign Centre is constrained by the need to remove existing highways and potentially demolish buildings which have been recognised as offering a contribution to the Conservation Area.

6.16 Overall, we consider that redevelopment of the whole area identified by the July 2009 draft AAP provides a very challenging proposition. Site acquisition of the whole area envisaged by the draft AAP could result in the need for CPO powers and could be constrained by viability issues. Any scaled-down scheme, which concentrates on the crazy golf area may avoid the need to remove buildings with architectural character and costly land acquisition but may not provide a large enough area to accommodate a commercially viable and attractive extension to the Sovereign Centre. Therefore, whilst from a land use and spatial planning perspective the Victoria Square site should remain a potential development opportunity and is a sequentially preferable retail development site, we do not consider that that this site cannot be relied upon to provide a short term expansion of the primary retail area in the town centre.

6.17 Whilst not part of the draft AAP proposals, we have also examined Town Square as another potential extension to the Sovereign Centre. This option would provide a northern extension to the Sovereign Centre and would accommodate a similar scale of development as the Victoria Square proposal. The potential to develop Town Square for retail uses provides, in our opinion, a more straightforward proposition that Victoria Square with less constraints in terms of existing occupiers and land ownership. It also provides a commercially attractive proposition and a retail development scheme is likely to secure retailer interest. However, the main reason why this site has not been taken forward from the AAP Issues and Options consultation is due to concern over the loss of open space. Should these significant concerns remain, then Town Square cannot be included in any future versions of the Core Strategy and AAP as a key retail development site.

6.18 Turning to Dolphin Square, it is noted that this area has received the most land use planning interest in recent years with an adopted SPD. It is identified for a significant amount of retail uses, plus leisure and residential uses. The proposed AAP allocation includes a net increase of 4,000sq m of retail space, plus 1,500-2,200sq m of food and drink uses. Dolphin Square currently performs a secondary retail role in the town centre and is in need of significant improvement as it has a poor visual attractiveness. Redevelopment is not a straightforward proposition, given the large number of occupiers across this site, although we understand that McLaren Life has recently acquired the long leasehold/part freehold interest and are promoting a retail-led mixed use scheme which also includes a cinema and a hotel. Such a scenario is to be welcomed given the qualitative need to improve the comparison retail offer in the town centre and to accommodate the identified quantitative need.

6.19 In order for a retail scheme to succeed on this site, better integration with the core retail area including better linkages along High Street will be required. At present, the Dolphin Square area feels separated from Regent Street and the northern part of High Street. This will need to be improved in order to maintain and enhance commercial interest in the proposed redevelopment scheme. In addition, in order that parking provision is not unduly affected and commercial interest in the site is encouraged, the existing car parking area to the south of Carlton Street is also likely to be needed as part of any redevelopment scheme.

6.20 Overall, it would appear that the Dolphin Square area may have some potential in terms of providing a short to medium term large scale retail development opportunity in Weston town centre. It is potentially the site with the least constraints, although of the four sites examined it is the furthest away from the primary retail area. The separate viability and deliverability advice provided by GVA to NSC has questioned the ability of this location to attract quality retailers although given the current interest shown in the site should be given an opportunity to develop and should be market tested to clarify whether there is sufficient retailer demand to allow the proposal to succeed.

6.21 The final town centre site which has been examined is the existing Tesco store, its car parking area and adjacent properties along Walliscote Road. The July 2009 draft AAP identifies this area for a significant expansion of the Tesco store, remodelled car parking area and potential new development on the eastern part of the car parking area. In principle, we support this proposal and consider that it should be retained in within the Core Strategy and AAP as it provide an important contribution to the ongoing health and attractiveness of the town centre. In particular, the Tesco store is one of the most popular food shopping destinations in Weston and attracts a large amount of customers, around half of which link their shopping trips with other parts of the town centre (source: household shopping survey). Therefore, expansion of the store, in order to rectify any qualitative deficiencies and allow it to compete successfully with other large stores in Weston, should be encouraged as a key priority for convenience retailing.

6.22 The ability to enlarge the Tesco store will be constrained by the residential uses above the existing store and also the physical size of the site, and it is possible that enlargement of the net sales area of the store can only be achieved by providing decked car parking in the eastern part of the site. Moreover, this could also stop other land uses being introduced within the eastern part of the site. However, these constraints will need to be considered carefully and overcome as we do not consider that any of the other potential development sites in and around the town centre are able to accommodate a enlarged Tesco store and loss of Tesco to another location further away from the town centre would, in our opinion, provide a damaging effect on the health of the town centre. As part of any redevelopment scheme we would also recommend that a new entrance to the store be provided on Alexandra Parade with would encourage more linked trips with the town centre and remove the current arrangement which allows the store to turn its back on the town centre.

Retail provision elsewhere in Weston-super-Mare

6.23 Within the November 2009 version of the draft Core Strategy, provision was made for three new district centres within the Weston urban extension area. Following the actions taken by the Coalition Government to revoke Regional Strategies, the Key Changes consultation exercise which commenced in October 2010 proposed two local centres which would form the focus of the separate Winterstoke and Parklands villages.

6.24 Whilst it is not the purpose of this retail study to chose the exact location of these two new planned local centres, we would support the approach of the October 2010 Key Changes consultation document to plan for one new centre within each of the urban extension villages. Each area requires a commercial focus where appropriately sized retail, service and other commercial uses can be accommodated and it will be important that the proper planning of each new centre provides for a range of town centre style uses which allow it to conform to the PPS4 definition of district/local centres.

Different Approaches to Retail Development in North Somerset: The Options

Introduction

6.25 Having identified the expenditure capacity/demand which exists within the area or centre in question, considered qualitative needs, and reviewed current and potential sites, the next stage of assessing the retail strategy is to identify the policy options for development. This will involve identifying different centre's characteristics. The outcome of this exercise will be to identify what scale and form of development is likely to be supportable in different locations, including the scope to enhance the role of existing centres and the potential to expand or create new centres.

6.26 A key element of developing and evaluating policy options is to understand the implications of alternative policy choices. The potential alternatives are driven by our assessment of need and the potential retail development site analysis and it is important to consider whether they allow sufficient expenditure capacity to support development of the identified opportunities, and also whether they support the wider objectives for the ongoing health of town centres and other Core Strategy / AAP objectives.

6.27 The alternative policy choices may come in different forms. For example, for a particular centre, there may be potential to expand its role and seek to increase its market share and reduce leakage of expenditure. Alternatively, the policy choices may not be driven by a town's particular market share but more by the development potential of different sites and the geographical distribution of retail provision across its urban area.

Weston-super-Mare

6.28 In relation to convenience retail provision, and as a starting point, it is important to consider whether there is any desirability to plan for a change in Weston's market share. This could consist of either upwards or downwards movement in market share. However, our analysis has found that the potential to increase the market share of convenience retail facilities in Weston is not supported by key retail policy tests and would have little benefit in terms of the future retail performance of the town. In particular, Weston-super-Mare has a good overall quality and range of existing provision, distributed throughout the town and there is also significant quantitative capacity to improve provision without the need to plan for an increase in the town's market share.

6.29 Turning to the potential desirability of lowering the convenience shopping market share of Weston in order to benefit other settlements in North Somerset, we have taken into account the shopping patterns shown by the 2010 household survey and the qualitative aspects of provision in Nailsea, Clevedon and Portishead. In relation to the qualitative aspects of provision, we have not found any significant deficiencies in any of these three other towns which prompts us to divert shopping trips away from Weston. In addition, the household survey indicates that there is very little leakage of convenience goods expenditure from Nailsea, Clevedon and Portishead to stores in Weston and therefore lowering Weston's convenience shopping market share would contribute towards stopping lengthy shopping trips.

6.30 Also, when reaching these conclusions, it should be acknowledged that Weston will in the future receive the majority of residential growth in North Somerset and therefore it is logical that additional provision should be provided in Weston.

6.31 Overall, we consider that there is not a strong case to plan for a change in Weston's convenience shopping market share over the lifetime of the Core Strategy and AAP. Therefore, we recommend that these documents should plan to accommodate the retail capacity levels outlined in Table Q below.

Table Q: Weston convenience goods floorspace capacity 2010-2026

	2010	2015	2021	2026
Weston convenience goods floorspace capacity (sq m net)	2,996	4,739	6,351	7,689

6.32 Having regard to the locations in Weston which should accommodate the identified need, the town centre first approach advocated by PPS4 suggests that Weston town centre should be the beneficiary. This would support the plans to expand the Tesco store in the eastern part of the town centre plus any further smaller scale convenience goods retail provision within a wider town centre mixed use development scheme (e.g. Dolphin Square). However, there are two reasons why we do not consider that the town centre can or should accommodate all of the identified quantitative and quality need for convenience goods floorspace in Weston:

- First, we do not consider that there is sufficient physical capacity available within the potential town centre development sites to accommodate the remainder of the identified need after the expansion of the Tesco store has been taken into account. In the short term, it is likely that only one of the town centre development sites within the retail core will come forwards and the development scheme will comprise a mix of uses, including comparison goods floorspace, food and drink and leisure uses. Any convenience provision is likely to be smaller scale and there is also a pressing need for the town centre development sites to accommodate comparison goods floorspace which is a key aspect of qualitative improvement for the town centre.

- Second, our qualitative assessment of need suggests that there are location specific needs associated with the Weston Villages area. The planned residential growth in this area will create significant new communities for Weston and, given that they are separated from existing residential areas and retail provision, they will require convenient and easy accessible retail facilities. It is our view that part of the identified need for additional convenience goods floorspace should be provided within the Weston Villages area and this is discussed in more detail later in this section.

6.33 Therefore, we recommend that the convenience retail strategy for Weston comprises two elements. First, part of the short term need between 2010 and 2015 to be assigned to the proposed expansion of the Tesco store within Weston town centre along with any further smaller scale provision which can be accommodated within other town centre redevelopment schemes. Second, a significant part of the remaining identified need should be assigned to the Weston Villages area in order that it can be provided within a defined new centre (or centres) to allow the significant new residential population created by these developments to have easy and convenient access to convenience goods retail provision.

6.34 Turning to comparison goods retailing, we have considered from the outset whether the Core Strategy and AAP should seek to plan for an amended market share for Weston, or whether existing shopping patterns should be allowed to continue and guide the scale of comparison goods floorspace in the town.

6.35 Having considered this matter in detail, our options analysis has concluded that there is not a significant need for a revised market share for comparison goods retailing in Weston in the Core Strategy and AAP. This matches the approach contained within the 2006 Donaldsons retail study. We have reached this conclusion on the basis of four factors:

- Whilst our updated quantitative need analysis suggests that there is not any significant surplus in comparison goods expenditure within Weston at the present year, the analysis indicates that there will be significant surplus expenditure within the next five years. The analysis indicates that there will be quantitative capacity for up to 10,000sq m net new floorsapce by 2015. This is sufficient to allow the Council to identify and allocate a strategic town centre redevelopment opportunity, which can be delivered in the short term. Indeed, this level of expenditure capacity is sufficient to accommodate the amount of retail floorspace which will be included within the proposed Dolphin Square redevelopment scheme.

- Given the size of Weston town centre, along with current market conditions, it is likely that only one significant comparison floorspace led town centre redevelopment scheme will be brought forward in the short to medium term. Continuation of existing market shares generates sufficient short term capacity to accommodate such a scheme. As a consequence, any potential increase in the town's comparison goods market share would generate further capacity which could not be accommodated in the town centre, thereby leading to pressure to provide this floorspace in out of centre locations in Weston.
- Beyond the short term capacity up to 2015, which is sufficient to accommodate a significant new town centre scheme in Weston town centre, our capacity analysis indicates that there will be further growth in available expenditure which will be able to support further town centre schemes such as the NCP car park and Victoria Square in the medium to longer term, which is the anticipated timetable for their delivery. Whilst the need assessment should be subject to regular reviews, particularly after any significant levels of new town centre retail development is provided, further growth in comparison goods floorspace can be used to support these further town centre sites along with new comparison floorspace of an appropriate scale within the planned new centres within the Weston Villages area.
- Finally, a potential reason for increasing the comparison goods shopping market share of Weston would be where the town is unable to retain sufficiently adequate levels of shopping trips from its local residents and core catchment area. In this instance, Weston is able to retain the majority of shopping trips across all comparison goods sectors and whilst some leakage does occur it is not significant enough to warren concerns over the sustainability of shopping trips in the local area. It can also be noted that Weston's catchment area extends across the North Somerset area and whilst it faces significant competition from Bristol in areas to the east and north, it remains a popular shopping destination. Therefore, whilst there remains modest opportunities to improve Weston's market share, an effort to significantly increase the attractiveness of the town is likely to concentrate itself upon the other main settlements in the District such as Nailsea, Clevedon and Portishead with the effect that shopping trips to those centres come under pressure. Therefore, with ample surplus expenditure capacity to accommodate a significant comparison goods retail

development in the short term, followed by additional capacity to support medium to longer term town centre schemes and also appropriately sized comparison floorspace provision within the Weston Villages area, there appears to us to be no forceful need to immediately raise the market share of Weston.

6.36 Overall, we consider that there is not a strong case to plan for a change in Weston's comparison shopping market share over the lifetime of the Core Strategy and AAP, as there is sufficient quantitative and qualitative need to support a significant new town centre scheme along with appropriately sized provision within the new defined centres in the Weston Villages area. In any event, provision of a significant amount of new comparison floorspace within Weston town centre could naturally increase the market share of Weston within the wider area and this should be assessed as part of any refresh of this study after the town centre development is complete and has reached a settled trading pattern. Therefore, we recommend that these documents should plan to accommodate the retail capacity levels outlined in Table R below.

Table R: Weston comparison goods floorspace capacity 2010-2026

	2010	2015	2021	2026
Weston comparison goods floorspace capacity (sq m net)	-	9,915	21,217	32,518

6.37 It should be noted that unlike the previous 2006 retail study, separate retail floorspace capacity figures for new additional in-centre and out-of-centre retail floorspace are not provided by this study. One global retail capacity figure for the whole of Weston is provided with the focus on providing the majority of additional floorspace capacity within Weston town centre along with complementary provision as part of the planned new centres in the Weston Villages area plus, where the need arises, complementary and appropriately sized additional provision in the other defined centres in Weston.

Retail provision in the Weston Villages area

6.38 With regard to the provision of retail floorspace within the two proposed Weston Villages area which will form urban extensions to the existing Weston urban area, we have already concluded that there is sufficient policy justification to support the in principle provision of a new local centre within each of the village areas. With regard to the policy options for these areas, it has already been concluded that part or all of the identified short term need for additional convenience goods floorspace provision within Weston should go towards the expansion of the existing Tesco store in the town centre plus further smaller scale improvements to the convenience offer of the town centre. It has also been recommended that, due to the reasonable level of provision elsewhere in the majority of the Weston urban area that the medium to longer term need for additional convenience goods retail floorspace should be concentrated upon the Weston Villages area.

6.39 In terms of how this provision should be distributed across the two proposed village areas, we note that both urban extension areas are sizable with the Airfield area likely to extend to 2,400 units and the Locking Parklands area likely to extend to 2,800-3,600 units. In addition to the Locking Parklands area being the larger of the two areas, it is also likely to be the more remote of the two village areas in terms of proximity to existing district centres and supermarkets in the Weston urban area. This is likely to be measured via walking distances and drive-times. Furthermore, retail provision in the Locking Parklands area also has the potential to serve the day-to-day needs of residents of the existing village at Locking to the immediate south of the proposed development area. In contrast, residential accommodation within the Airfield area lies in closer proximity to existing retail provision around the Winterstoke Road / Herluin Way / Marchfields Way area (although accessibility improvements will be required).

6.40 Therefore, from a retail policy perspective, we support the provision of two new centres in the Airfield and Locking area, although the Locking area is likely to have the stronger case for a more comprehensive local centre in terms of the range and scale of facilities. Clearly, further work will be required in relation to the scale, form and location of the proposed new local centres through the ongoing masterplanning process and through the development of the Weston Villages SPD. However, when planning for new retail provision within these areas, regard will need to be had to, amongst other things, the following:

- Walk-in catchments. It is very important that new residential development in Weston's urban extensions has east and convenience access to retail facilities, especially convenience retail provision. Walking distances of 500 metres to 1km can be modelled to show areas which have good / poor accessibility.
- Drive-time catchments. Given the dominance of car borne journeys, particularly for bulk/main food shopping trips, it will be important to model 5 minute drive time catchments from existing stores and centres.
- Public transport accessibility. The walk-in and drive time catchments should also be accompanied by an analysis of public transport routes which can establish the proximity of residential areas to existing and new public transport routes which can serve retail provision.

6.41 We would recommend that further work is undertaken as part of the masterplanning of the two Weston Villages areas and as part of the development of the Weston Villages SPD in order to set an appropriate context for the planned new centres.

Clevedon

6.42 Within Clevedon we have found that there is not a significant qualitative need for additional convenience retail provision whilst, if existing shopping patterns continue (taking into account the effect of the committed Portishead foodstores), there will be modest levels of surplus expenditure capacity. On the basis of these findings there will not be need to plan for a new foodstore within Clevedon, with existing provision sufficient to cope with existing and future demand (subject to small increases in provision, via expansion of existing facilities or small scale new stores, as prompted by the quantitative assessment).

6.43 The alternative policy approach for convenience shopping in Clevedon would be to plan for additional foodstore. This would require an increase in the market share of convenience floorspace within the town and, given that the town already retains the vast majority of locally-generated food shopping trips, this would require Clevedon to attract more shopping trips from across the North Somerset area. There is, in our opinion, is not supported by any qualitative need justification and is likely to place unnecessary pressure on existing stores in Clevedon town centre and other provision across the District. Moreover, there are no obvious potential development sites for new foodstores within or abutting Clevedon town centre, suggesting that any new facility would need to be provided outside the town centre leading to further pressure on existing stores.

6.44 Within the comparison retail sector, we have found that there is, based upon a constant market share in the future, no need surplus expenditure for new provision. In addition, we do not consider that, for a town of its size and existing provision, there is a significant qualitative deficiency. There are opportunities for improvement in Clevedon's provision and the options which do exist include identification of new development sites for an expanded retail offer beyond the existing floorspace stock or concentrating, in the first instance, on improving and expanding the existing retail floorspace stock. The latter option appears to us to offer the most logical route, given the modest performance of existing retailers.

Portishead

6.45 Within recent years, North Somerset Council has, through its development management function, been considering the costs and benefits of planning for an increased market share in convenience and comparison goods shopping in Portishead. The decision to approve a large new furniture retail warehouse unit, a new large Sainsburys store and a Lidl discount foodstore indicates that the Council supports the ability to improve the retention rate of shopping trips in the Portishead area and stop leakage to nearby Bristol. The support for these schemes have removed any residual qualitative and quantitative need in the town and quantitative need for additional comparison goods floorspace has also been reduced.

6.46 These commitments have removed the need to identify any additional sites for retail development in Portishead and we consider that the retail strategy for the town should concentrate upon supporting existing provision over the period when the new commitments are implemented. One area which should be monitored by the Council is the potential for the two new foodstores to lead to the closure of existing facilities, particularly to the Co-op store. Whilst this has been ruled out as part of the Council's determination of the recent Sainsburys and Lidl applications, should circumstances change in the future and the store close then this area will become a prime retail development site and presents an obvious opportunity to provide improved retail, service and other commercial uses close to the core shopping area in Portishead town centre.

Nailsea

6.47 The policy options for Nailsea appear to us to be very similar to those found within Clevedon. The town's comparison retail sector has modest performance levels and this leads to a lack of quantitative need for additional comparison floorspace over the LDF period. There is an argument to support qualitative improvements to comparison retail provision within Nailsea although the need for improvement is not so great as to require the allocation of sites for additional development given that there is a large vacancy rate within the existing floorspace stock. Within the convenience retail sector there is, like Clevedon, no obvious qualitative deficiency in existing provision and there is also no quantitative need for additional floorspace based upon surplus expenditure levels. Therefore, when choosing between a option which seeks to raise the market share of retail performance of Nailsea through the allocation of new sites for additional retail development and an alternative where the focus is on improving and recycling existing floorspace in order to make it more attractive to retailers and other businesses, we would recommend the latter approach.

Recommendations for retailing and town centre policies in the Core Strategy and Area Action Plan documents

6.48 In light of the findings and recommendations in this study, a number of refinements will need to be made to the content of the North Somerset Core Strategy and AAP documents as they move forward. In relation to the Core Strategy, we recommend that the following amendments are considered by the Council:

- The criteria, within Policy CS21, for assessing new or extended town centre use proposals outside of existing should be amended to remove reference to the test of 'need' whilst retaining reference to the tests of impact and the sequential approach to site selection.
- Policy EC3.1 (d) of PPS4 invites local planning authorities to consider setting floorspace thresholds for the scale of edge of centre and out of centre development which should be subject to an impact assessment under Policy EC16.1 of PPS4 and also specify the geographic areas these thresholds will apply to. In response, we note that the November 2009 version of the Core Strategy provided a 200sq m although we consider that threats to the ongoing health and future investment of Weston town centre and the other main town centres in the District come from not only new floorspace but also changes in the use of existing retail floorspace including widening the ranges of goods which can be sold. Therefore, we recommend that the minimum floorspace threshold is removed from Policy CS21.
- The floorspace capacity table within the supporting text to Policy CS21 will require updating to reflect the contents of this report, whilst we also recommend that the Council re-consider the contents of the 'definition' column in the table after paragraph 3.320 as the definitions of district and local centres do not appear to fully match PPS4 definitions. It may be more appropriate to rely on PPS4 definitions.
- Policy CS21 should be amended to make reference to the planned new Local Centres within the Weston Villages area.
- The 'Retail Core' section of Policy CS29 will require amendment in relation to the contents of this study, and the separate GVA study on town centre viability and deliverability, for the key retail development sites in Weston, including the short to medium term opportunities presented by Dolphin Square and the Tesco site, along with the longer term opportunities at Victoria Square and the NCP car park.
- Policies CS29 (Weston town centre) and CS30 (urban extension area) should move away from the approach advocated by the 2006 Donaldsons retail study which separated retail

floorspace capacity into town centre capacity and out of centre capacity. This is contrary to the sequential approach to site selection and the retail strategy within CS29 and CS30 should the recommendations of this report regarding directing the majority of comparison goods floorspace need to Weston town centre whilst providing a balanced distribution of new convenience goods floorspace which, in the first instance, allows for the expansion of the town centre Tesco store and then allows for new provision within the planned new centres in the Weston Villages area.

- The Council will, in any event, be amending Policy CS30 in light of changes at the strategic planning level. From a retail strategic perspective, these changes will need to include the provision of two new local centres along with the scale and function of these centres, plus the distribution of retail floorspace between the two new urban extension areas.

6.49 In addition, we note that the November 2009 version of the Core Strategy proposes to allocate the area around the ASDA store on Phillips Road in Weston as a District Centre. Having regard to the existing range of uses in this area alongside the definition of District Centres in PPS4, we would suggest that this area does not currently meet current requirements. Moreover, this area can be characterised as a retail warehouse style location with a poor relationship to surrounding residential areas. Therefore, we would recommend that the Council re-consider this proposal and remove the Phillips Road area from the District Centre in the retail hierarchy in Weston. This is reinforced by the plans to provide two new centres within the Weston Villages urban extension areas which are, in our opinion, more important in terms of the spatial distribution of retail and service provision across Weston.

6.50 In relation to the evolution of the retail strategy for Weston town centre (contained in July 2009 draft AAP) into future development plan documents, we would recommend the following:

- Any updated version of Figure 17 (page 85) to be amended to reflect the retail capacity recommendations in this report.
- With regards to the Priory Sites within the Retail Core, we make the following recommendations:

  a. RC2 Victoria Square. We consider that this site should remain as part of the priority sites in the retail core given the important role it has to play in connecting the core shopping area with the seafront. However, the policy should recognise that, due to multiple ownerships and development viability concerns, plus the potential for Dolphin Square to deliver short term retail development, this may be medium to longer term mixed use development aspiration. Moreover, due to ownership constraints, flexibility may need to be maintained in relation to the quantum of development which can be achieved in this location.

b. RC3 Dolphin Square. The current commercial development interest shown in this site indicates that Dolphin Square should remain a key priority site for retail development. It is recommended that the Council works with the scheme promoter to establish whether there is a realistic prospect of a deliverable retail / mixed use scheme which is also able to integrate fully with the remainder of the town centre.

c. RC4 Tesco Site. We consider that little amendment needs to be made to the Tesco site allocation, although one area where adjustment can be made is in relation to the floorspace level references. The scale of expansion which can be achieved will depend in part of the physical constraints of the site and therefore, whilst this site should be the primary candidate for new convenience goods floorspace within Weston, setting a minimum threshold of 2,250sq m net new convenience goods floorspace may be unduly restrictive. We recommend that in updating this policy the Council works with Tesco to determine the optimum solution for this site.

d. RC5 NCP Car Park Site. We agree that this site should be identified as a potential area for improvement within the town centre, given its current appearance, the opportunities for additional retail floorspace and also to provide a better environment along the southern part of High Street in order to provide better connections with the Dolphin Square area. The AAP correctly identifies it as a longer term objective, although we do not consider that it can form a priority site unless a strategy is put in place to ensure delivery of this area.

e. RC6 St James Street Area. Whilst this site did not feature as part of our site assessment analysis, we support the objectives of Policy RC6 to improve the appearance and function of this area. The need for improvements to take place will be reinforced if the proposed Dolphin Square development proposals come forward. As a consequence, we consider that there is merit in extending the geographical area covered by RC6 eastwards to High Street, as improvements to High Street are likely to be very important in integrating Dolphin Square with the core retail area in Weston town centre.

7. SUMMARY AND CONCLUSIONS

7.1 This report has been prepared by GVA Grimley Ltd in response to an instruction by North Somerset Council ('NSC'), dated September 2010, to prepare a Retail Study for North Somerset. This study will provide essential background information to assist NSC in the production of its Local Development Framework, including a Core Strategy for the whole of the District, the identification of key town centre development sites in Weston-super-Mare town centre and supplementary planning guidance for the Weston Villages urban extension areas.

7.2 This study provides an update to a retail and leisure study for North Somerset undertaken by Donaldsons in 2006 ('the 2006 retail study') as part of the preparations for the Core Strategy and other LDF documents. Given the change in the economic climate since the 2006 retail study was completed, along with the further work which has been undertaken on the LDF in the interim, a refresh of the 2006 retail study is now required for the whole District with an emphasis on Weston.

7.3 The objectives of this study, as identified by NSC's study brief in August 2010, are as follows:

- identify existing patterns of shopping including the outflow of expenditure to nearby centres (or inflow from nearby centres);
- undertake health checks of the four main centres (Weston, Nailsea, Clevedon and Portishead) in accordance with guidance in PPS4
- provide expenditure-based forecasts of requirements for additional convenience and comparison floorspace taking into account any planned increase/decrease in market share forecasts and current market viability;
- identify any deficiencies in retail provision in the four main centres;
- specify the demand from the main operators for additional retail and commercial leisure facilities;
- assess the capacity of the town centres to accommodate future growth and where appropriate identify or confirm locations for additional retail and leisure development in all the four town centres and the Weston Urban Extension (now called Weston Villages).

7.4 Our main findings and conclusions for each of the main settlements in North Somerset are outlined in turn below.

Weston-super-Mare

7.5 Weston-super-Mare is the main centre within the District and is identified as a Sub-Regional Centre in the retail hierarchy set out within the Joint Replacement Structure Plan. The town benefits from a highly accessible location both in terms of the road network and public transport links. When driving into the town centre, congestion is experienced along the A370 which is the main connection to Junction 21 of the M5 and further onto Bristol. The predominant asset of the town centre is its seafront location and a number of existing planning policy documents aspire to enhance the connectivity between the High Street and the seafront. The town centre also has a number of historic and prominent buildings. However, these are currently undermined in places by dated post-war developments and high vacancy rates around the periphery of the centre which leads to the centre exhibiting higher than average vacant unit and floorspace levels.

7.6 Whilst Weston town centre is able to attract a significant proportion of expenditure from the local area, the proportion of comparison uses within the town centre is lower than average and there has been little additions to the retail floorspace stock in recent years. There are, however, a number of requirements from comparison goods retailers for additional floorspace which, despite the current economic downturn, indicates that there remains interest in the town centre which should be capitalised upon when planning for the future growth in the town centre. The town centre also benefits from a large Tesco store on its eastern edge which contributes to the overall attractiveness of the town centre.

7.7 Our assessment of the need for additional retail floorspace within Weston indicates that there is an immediate quantitative need for around 3,000sq m of additional convenience (food) goods floorspace, which will rise to 4,700sq m net in 2015, 6,350sq m net in 2021 and 7,700sq m net by 2026. In terms of the qualitative aspects of convenience retail provision in Weston, there are no significant qualitative deficiencies although an improvement to the Tesco store within the town centre will boost the attractiveness of the centre and provide more opportunities for linked trips with other parts of the centre. This should be a short to medium term aspiration for the Core Strategy. In addition, there are likely to be future medium to longer term location-specific needs arising out of the two planned urban extension areas at Weston Airfield and Locking Parklands which should accommodate part of the identified quantitative need.

7.8 Turning to the comparison goods retail sector, we have found both a quantitative and qualitative need for additional facilities to be provided within Weston. Whilst there is little immediate quantitative capacity for additional comparison goods floorspace (based on an update of the previous 2006 retail study figures) there will be quantitative capacity for an additional 10,000sq m net new floorspace by 2015, rising to 21,200sq m net by 2021 and 32,500sq m net by 2026. In terms of qualitative aspects of provision, whilst Weston is successful in retaining the majority of its locally generated shopping trips, some expenditure does leak away from the town and there is a need to improve the range of choice of non-food shopping facilities. The identified short term capacity (by 2015) allows for the provision of one significant new town centre shopping development and, given current market interest, the potential of the Dolphin Square area should be pursued by the Council. Opportunities presented by Victoria Square and the NCP car park are more complex medium to longer term schemes which currently face viability and site ownership constraints.

7.9 Elsewhere in Weston, we have already noted that part of the future need for convenience floorspace should be met within the two urban extension areas and we support the principle of planning for one new local centre in each area. These new centres should be designed to meet the day to day needs of the local population and, through a minimal level of comparison goods floorspace, be complementary to the non-food shopping function of Weston town centre.

Portishead

7.10 The location of Portishead and its proximity to the Bristol urban area suggests that the health and overall function of the town centre will remain constrained. This is shown by shopping patterns which indicates of leakage of convenience and comparison shopping trips outside of Portishead. However, Portishead is assessed to be a healthy centre, with a reasonable range of retail and service provision which is able to cater for some of the needs of the town's expanding population. The town has two supermarkets (Co-op and Waitrose) which will be shortly be supplemented by new Sainsburys and Lidl stores and there is also a commitment for a new large retail warehouse selling furniture goods. Vacancies are also at a lower than average level and have fallen since 2009. However, the scale of the three retail commitments in Portishead suggests that the Council should pay close to attention to the health of the town centre in the coming years and should monitor the relationship of these new stores with visitation rates and changes in the land use sector in the town centre.

7.11 As a result of these three commitments, the need for additional convenience floorspace within Portishead over the Core Strategy period has been eliminated whilst quantitative capacity for additional comparison goods floorspace is only likely to arise in the medium to longer term. As a consequence, there is no need to identify sites for new retail development within Portishead and the priority for the Council should to maintain and enhance the health and attractiveness of the core shopping area in the town centre.

Clevedon

7.12 Clevedon town centre is assessed to be a reasonably healthy town centre which has a range of convenience, comparison and service uses. The Morrisons supermarket performs an anchor retail function, attracting a large amount of main and top-up food shopping trips and also benefitting the centre in terms of linked trips. This is supplemented by a Lidl store on the western edge of the centre. For a town of this size, Clevedon also has a reasonable range of comparison retailers and vacancies within the centre have fallen over the past year. Overall, Clevedon town centre functions as a day to day shopping and service destination, with a number of higher order trips likely to be lost to surrounding larger town centres.

7.13 Within Clevedon we have found that there is not a significant qualitative need for additional convenience retail provision whilst, if existing shopping patterns continue (taking into account the effect of the committed Portishead foodstores), there will be modest levels of surplus expenditure capacity. By 2015, capacity will be around 950sq m net, rising slowly to 1,080sq m net by 2021 and 1,170sq m net by 2026. On the basis of these findings there will not be need to plan for a new foodstore within Clevedon, with existing provision sufficient to cope with existing and future demand (subject to small increases in provision, via expansion of existing facilities or small scale new stores, as prompted by the quantitative assessment).

7.14 Within the comparison retail sector, we have found that there is, based upon a constant market share in the future, need surplus expenditure for new provision. In addition, we do not consider that, for a town of its size and existing provision, there is a significant qualitative deficiency. There are opportunities for improvement in Clevedon’s provision and the options which do exist include identification of new development sites for an expanded retail offer beyond the existing floorspace stock or concentrating, in the first instance, on improving and expanding the existing retail floorspace stock. The latter option appears to us to offer the most logical route, given the modest performance of existing retailers.

Nailsea

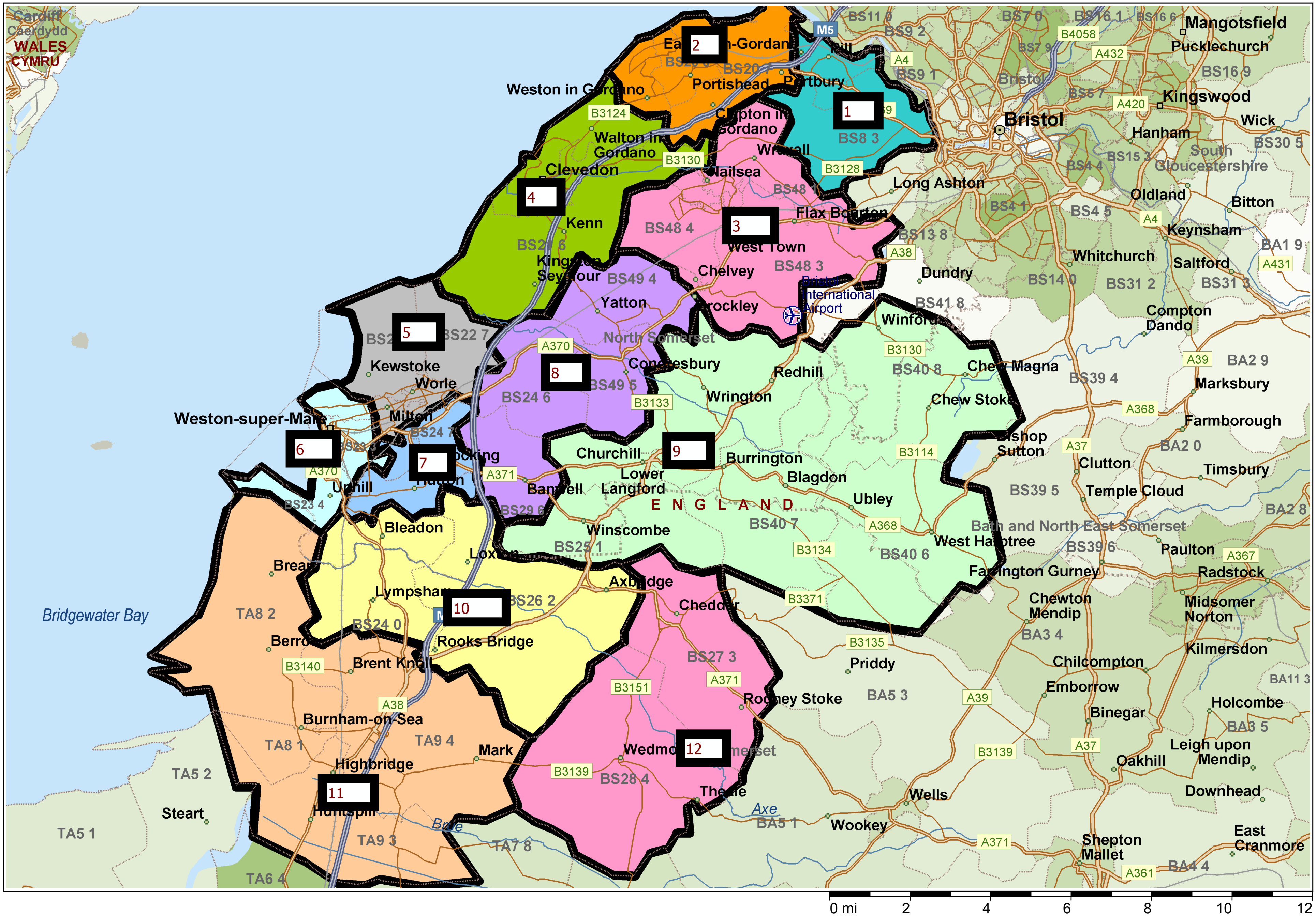
7.15 Whilst its town centre benefits from two large supermarkets (Waitrose and Tesco), which are likely to attract a large number of trips to the town centre, and also have the potential to benefit the town centre through linked trips. However, Nailsea town centre continues to suffer from a higher than average vacancy rate. Indeed, the proportions of comparison retail (lower than average) and service uses (higher than average) suggest that Nailsea is currently performing the role of a day-to-day shopping and service centre, which may be unable to retain a significant amount of higher order non-food shopping trips. There is also a need to focus upon the appearance of the town centre and the ability of retail units to continue to attract/retain retailers and other commercial businesses.

7.16 The recommended retail strategy for Nailsea follows a similar approach to that recommended for Clevedon. Nailsea's comparison retail sector has modest performance levels and this leads to a lack of quantitative need for additional comparison floorspace over the LDF period. There is an argument to support qualitative improvements to comparison retail provision within Nailsea although the need for improvement is not so great as to require the allocation of sites for additional development given that there is a large vacancy rate within the existing floorspace stock. Within the convenience retail sector there is, like Clevedon, no obvious qualitative deficiency in existing provision and there is also no quantitative need for additional floorspace based upon surplus expenditure levels. Therefore, when choosing between a option which seeks to raise the market share of retail performance of Nailsea through the allocation of new sites for additional retail development and an alternative where the focus is on improving and recycling existing floorspace in order to make it more attractive to retailers and other businesses, we would recommend the latter approach.

A:

Study Area Plan

North Somerset Retail Study - Study Area



B:

Household Survey Results

Q1. In which shop or shopping centre do you do most of your households main food shopping?

	Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	1202	100.0%	80	100.0%	101	100.0%	120	100.0%	120	100.0%
Asda, Philips Road, WESTON-SUPER-MARE	127	11.5%	0	.0%	0	.0%	1	.9%	1	.8%
Tesco, Station Road, WESTON-SUPER-MARE	104	9.4%	0	.0%	0	.0%	0	.0%	0	.0%
Tesco, Stock Way North, NAILSEA	90	8.2%	5	7.6%	3	3.0%	73	62.4%	2	1.7%
Tesco, Kenn Road, CLEVEDON	87	7.9%	4	6.1%	13	12.9%	2	1.7%	41	34.7%
Sainsbury's, North Worle District Centre, WESTON-SUPER-MARE	84	7.6%	1	1.5%	0	.0%	0	.0%	1	.8%
Morrisons, Worle, WESTON-SUPER-MARE	78	7.1%	0	.0%	0	.0%	1	.9%	0	.0%
Morrisons, Kenn Road, CLEVEDON	60	5.4%	1	1.5%	2	2.0%	2	1.7%	49	41.5%
Tesco, Ben Travers Way, BURNHAM ON SEA	45	4.1%	0	.0%	0	.0%	0	.0%	0	.0%
Internet / Home Delivery	39	3.5%	2	3.0%	5	5.0%	2	1.7%	3	2.5%
Waitrose, Harbour Road, PORTISHEAD	37	3.4%	10	15.2%	27	26.7%	0	.0%	0	.0%
Co-op, Wyndham Way, PORTISHEAD	35	3.2%	5	7.6%	29	28.7%	0	.0%	0	.0%
Sainsbury's, Winterstoke Road, BRISTOL	34	3.1%	18	27.3%	0	.0%	2	1.7%	1	.8%
Waitrose, Philps Road, WESTON-SUPER-MARE	32	2.9%	0	.0%	0	.0%	0	.0%	0	.0%
Waitrose, High Street (formerly Somerfield), NAILSEA	29	2.6%	1	1.5%	0	.0%	26	22.2%	1	.8%
Tesco, Tucker Street, WELLS	29	2.6%	0	.0%	0	.0%	0	.0%	0	.0%
Tesco (one-stop), Bellevue Road, CLEVEDON	24	2.2%	2	3.0%	0	.0%	0	.0%	14	11.9%
Asda, Cribbs Causeway, BRISTOL	18	1.6%	6	9.1%	11	10.9%	0	.0%	0	.0%
Budgens, Church Street, CHEDDAR	14	1.3%	0	.0%	0	.0%	0	.0%	0	.0%
Morrisons, Pier Street, BURNHAM ON SEA	13	1.2%	0	.0%	0	.0%	0	.0%	0	.0%
Aldi, Hildesheim Bridge, WESTON-SUPER-MARE	9	.8%	0	.0%	0	.0%	0	.0%	0	.0%
Somerfield, YATTON	8	.7%	0	.0%	0	.0%	0	.0%	0	.0%
Lidl, Old Church Road, CLEVEDON	8	.7%	0	.0%	3	3.0%	1	.9%	4	3.4%
Asda, Bedminster, BRISTOL	8	.7%	5	7.6%	0	.0%	1	.9%	0	.0%
Morrisons, Cribbs Causeway, BRISTOL	6	.5%	2	3.0%	3	3.0%	0	.0%	0	.0%
Lidl, Oxford Street, BURNHAM ON SEA	6	.5%	0	.0%	0	.0%	0	.0%	0	.0%
Co-op, Old Street, CLEVEDON	6	.5%	0	.0%	0	.0%	0	.0%	0	.0%
Asda, East Quay, BRIDGWATER	6	.5%	0	.0%	1	1.0%	0	.0%	0	.0%
Tesco Express, Locking Castle, WESTON-SUPER-MARE	5	.5%	0	.0%	0	.0%	0	.0%	0	.0%

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Q1. In which shop or shopping centre do you do most of your households main food shopping?

	Zone									
	5		6		7		8		9	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	140	100.0%	110	100.0%	100	100.0%	90	100.0%	91	100.0%
Asda, Philips Road, WESTON-SUPER-MARE	28	21.9%	25	22.7%	39	39.0%	8	9.3%	10	12.5%
Tesco, Station Road, WESTON-SUPER-MARE	13	10.2%	48	43.6%	19	19.0%	1	1.2%	11	13.8%
Tesco, Stock Way North, NAILSEA	0	.0%	0	.0%	0	.0%	4	4.7%	3	3.8%
Tesco, Kenn Road, CLEVEDON	0	.0%	0	.0%	0	.0%	24	27.9%	3	3.8%
Sainsbury's, North Worle District Centre, WESTON-SUPER-MARE	38	29.7%	3	2.7%	8	8.0%	10	11.6%	11	13.8%
Morrisons, Worle, WESTON-SUPER-MARE	28	21.9%	4	3.6%	24	24.0%	7	8.1%	5	6.3%
Morrisons, Kenn Road, CLEVEDON	0	.0%	0	.0%	0	.0%	5	5.8%	1	1.3%
Tesco, Ben Travers Way, BURNHAM ON SEA	0	.0%	0	.0%	0	.0%	0	.0%	2	2.5%
Internet / Home Delivery	4	3.1%	4	3.6%	1	1.0%	1	1.2%	7	8.8%
Waitrose, Harbour Road, PORTISHEAD	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Co-op, Wyndham Way, PORTISHEAD	1	.8%	0	.0%	0	.0%	0	.0%	0	.0%
Sainsbury's, Winterstoke Road, BRISTOL	1	.8%	0	.0%	0	.0%	0	.0%	11	13.8%
Waitrose, Philps Road, WESTON-SUPER-MARE	3	2.3%	12	10.9%	4	4.0%	2	2.3%	2	2.5%
Waitrose, High Street (formerly Somerfield), NAILSEA	0	.0%	0	.0%	0	.0%	1	1.2%	0	.0%
Tesco, Tucker Street, WELLS	0	.0%	0	.0%	0	.0%	0	.0%	5	6.3%
Tesco (one-stop), Bellevue Road, CLEVEDON	0	.0%	0	.0%	0	.0%	8	9.3%	0	.0%
Asda, Cribbs Causeway, BRISTOL	1	.8%	0	.0%	0	.0%	0	.0%	0	.0%
Budgens, Church Street, CHEDDAR	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Morrisons, Pier Street, BURNHAM ON SEA	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Aldi, Hildesheim Bridge, WESTON-SUPER-MARE	2	1.6%	3	2.7%	0	.0%	1	1.2%	0	.0%
Somerfield, YATTON	0	.0%	0	.0%	0	.0%	8	9.3%	0	.0%
Lidl, Old Church Road, CLEVEDON	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Asda, Bedminster, BRISTOL	0	.0%	0	.0%	0	.0%	0	.0%	2	2.5%
Morrisons, Cribbs Causeway, BRISTOL	0	.0%	1	.9%	0	.0%	0	.0%	0	.0%
Lidl, Oxford Street, BURNHAM ON SEA	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Co-op, Old Street, CLEVEDON	0	.0%	0	.0%	0	.0%	6	7.0%	0	.0%
Asda, East Quay, BRIDGWATER	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Tesco Express, Locking Castle, WESTON-SUPER-MARE	1	.8%	3	2.7%	0	.0%	0	.0%	1	1.3%

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Q1. In which shop or shopping centre do you do most of your households main food shopping?

	Zone					
	10		11		12	
	Num	%	Num	%	Num	%
Base: All respondents	80	100.0%	90	100.0%	80	100.0%
Asda, Philips Road, WESTON-SUPER-MARE	8	12.9%	0	.0%	7	9.6%
Tesco, Station Road, WESTON-SUPER-MARE	5	8.1%	3	5.0%	4	5.5%
Tesco, Stock Way North, NAILSEA	0	.0%	0	.0%	0	.0%
Tesco, Kenn Road, CLEVEDON	0	.0%	0	.0%	0	.0%
Sainsbury's, North Worle District Centre, WESTON-SUPER-MARE	9	14.5%	0	.0%	3	4.1%
Morrisons, Worle, WESTON-SUPER-MARE	5	8.1%	2	3.3%	2	2.7%
Morrisons, Kenn Road, CLEVEDON	0	.0%	0	.0%	0	.0%
Tesco, Ben Travers Way, BURNHAM ON SEA	12	19.4%	29	48.3%	2	2.7%
Internet / Home Delivery	2	3.2%	1	1.7%	7	9.6%
Waitrose, Harbour Road, PORTISHEAD	0	.0%	0	.0%	0	.0%
Co-op, Wyndham Way, PORTISHEAD	0	.0%	0	.0%	0	.0%
Sainsbury's, Winterstoke Road, BRISTOL	0	.0%	1	1.7%	0	.0%
Waitrose, Philps Road, WESTON-SUPER-MARE	6	9.7%	0	.0%	3	4.1%
Waitrose, High Street (formerly Somerfield), NAILSEA	0	.0%	0	.0%	0	.0%
Tesco, Tucker Street, WELLS	4	6.5%	0	.0%	20	27.4%
Tesco (one-stop), Bellevue Road, CLEVEDON	0	.0%	0	.0%	0	.0%
Asda, Cribbs Causeway, BRISTOL	0	.0%	0	.0%	0	.0%
Budgens, Church Street, CHEDDAR	2	3.2%	0	.0%	12	16.4%
Morrisons, Pier Street, BURNHAM ON SEA	1	1.6%	12	20.0%	0	.0%
Aldi, Hildesheim Bridge, WESTON-SUPER-MARE	2	3.2%	0	.0%	1	1.4%
Somerfield, YATTON	0	.0%	0	.0%	0	.0%
Lidl, Old Church Road, CLEVEDON	0	.0%	0	.0%	0	.0%
Asda, Bedminster, BRISTOL	0	.0%	0	.0%	0	.0%
Morrisons, Cribbs Causeway, BRISTOL	0	.0%	0	.0%	0	.0%
Lidl, Oxford Street, BURNHAM ON SEA	2	3.2%	4	6.7%	0	.0%
Co-op, Old Street, CLEVEDON	0	.0%	0	.0%	0	.0%
Asda, East Quay, BRIDGWATER	1	1.6%	4	6.7%	0	.0%
Tesco Express, Locking Castle, WESTON-SUPER-MARE	0	.0%	0	.0%	0	.0%

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Q1. In which shop or shopping centre do you do most of your households main food shopping?

	Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
	Num	%	Num	%	Num	%	Num	%	Num	%
Tesco Express, Broadway, WESTON-SUPER-MARE	5	.5%	0	.0%	0	.0%	0	.0%	0	.0%
Tesco Express, Boulevard, WESTON-SUPER-MARE	5	.5%	0	.0%	0	.0%	0	.0%	0	.0%
Iceland, The Precinct, PORTISHEAD	5	.5%	2	3.0%	3	3.0%	0	.0%	0	.0%
Sainsbury's, The Clink, BRIDGWATER	4	.4%	0	.0%	0	.0%	0	.0%	0	.0%
Morrisons, Street Road, GLASTONBURY	4	.4%	0	.0%	0	.0%	0	.0%	0	.0%
Lidl, New Bristol Road, WESTON-SUPER-MARE	4	.4%	0	.0%	0	.0%	0	.0%	0	.0%
Tesco Express, Station Road, CHEDDAR	3	.3%	0	.0%	0	.0%	0	.0%	0	.0%
Sainsbury's, Gravenham Way, STREET	3	.3%	0	.0%	0	.0%	0	.0%	0	.0%
Other foodstores in WESTON-SUPER-MARE	3	.3%	0	.0%	0	.0%	0	.0%	0	.0%
Lidl, Winterstoke Road, WESTON-SUPER-MARE	3	.3%	0	.0%	0	.0%	0	.0%	0	.0%
Asda, Whitchurch, BRISTOL	3	.3%	1	1.5%	0	.0%	0	.0%	0	.0%
Other foodsotres in Nailsea	2	.2%	0	.0%	0	.0%	2	1.7%	0	.0%
Marks and Spencers, High Street, WESON-SUPER-MARE	2	.2%	0	.0%	0	.0%	0	.0%	0	.0%
Lidl, Strawberry Way South, WELLS	2	.2%	0	.0%	0	.0%	0	.0%	0	.0%
Iceland, Crown Glass Place, NAILSEA	2	.2%	0	.0%	0	.0%	2	1.7%	0	.0%
Farmfoods, Locking Road, WESTON-SUPER-MARE	2	.2%	0	.0%	0	.0%	0	.0%	0	.0%
Aldi, Bedminster, BRISTOL	2	.2%	1	1.5%	0	.0%	1	.9%	0	.0%
Tesco, Townsend Shopping Park, SHEPTON MALLET	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
Tesco Express, Whitecross Road, WESTON-SUPER-MARE	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
Other foodstores in CLEVEDON	1	.1%	0	.0%	0	.0%	0	.0%	1	.8%
Morrisons, The Broadway, BRIDGWATER	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
Budgens, Wraxhall, NAILSEA	1	.1%	0	.0%	0	.0%	1	.9%	0	.0%
Budgens, 60 High Street, PORTISHEAD	1	.1%	0	.0%	1	1.0%	0	.0%	0	.0%

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Q1. In which shop or shopping centre do you do most of your households main food shopping?

	Zone									
	5		6		7		8		9	
	Num	%	Num	%	Num	%	Num	%	Num	%
Tesco Express, Broadway, WESTON-SUPER-MARE	0	.0%	2	1.8%	2	2.0%	0	.0%	0	.0%
Tesco Express, Boulevard, WESTON-SUPER-MARE	2	1.6%	2	1.8%	0	.0%	0	.0%	0	.0%
Iceland, The Precinct, PORTISHEAD	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Sainsbury's, The Clink, BRIDGWATER	0	.0%	0	.0%	0	.0%	0	.0%	1	1.3%
Morrisons, Street Road, GLASTONBURY	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Lidl, New Bristol Road, WESTON-SUPER-MARE	3	2.3%	1	.9%	0	.0%	0	.0%	0	.0%
Tesco Express, Station Road, CHEDDAR	0	.0%	1	.9%	0	.0%	0	.0%	1	1.3%
Sainsbury's, Gravenham Way, STREET	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Other foodstores in WESTON-SUPER-MARE	1	.8%	1	.9%	0	.0%	0	.0%	0	.0%
Lidl, Winterstoke Road, WESTON-SUPER-MARE	1	.8%	0	.0%	0	.0%	0	.0%	2	2.5%
Asda, Whitchurch, BRISTOL	0	.0%	0	.0%	0	.0%	0	.0%	1	1.3%
Other foodsotres in Nailsea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Marks and Spencers, High Street, WESON-SUPER-MARE	0	.0%	0	.0%	2	2.0%	0	.0%	0	.0%
Lidl, Strawberry Way South, WELLS	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Iceland, Crown Glass Place, NAILSEA	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Farmfoods, Locking Road, WESTON-SUPER-MARE	0	.0%	0	.0%	1	1.0%	0	.0%	0	.0%
Aldi, Bedminster, BRISTOL	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Tesco, Townsend Shopping Park, SHEPTON MALLET	1	.8%	0	.0%	0	.0%	0	.0%	0	.0%
Tesco Express, Whitecross Road, WESTON-SUPER-MARE	0	.0%	0	.0%	0	.0%	0	.0%	1	1.3%
Other foodstores in CLEVEDON	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Morrisons, The Broadway, BRIDGWATER	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Budgens, Wraxhall, NAILSEA	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Budgens, 60 High Street, PORTISHEAD	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q1. In which shop or shopping centre do you do most of your households main food shopping?

	Zone					
	10		11		12	
	Num	%	Num	%	Num	%
Tesco Express, Broadway, WESTON-SUPER-MARE	1	1.6%	0	.0%	0	.0%
Tesco Express, Boulevard, WESTON-SUPER-MARE	1	1.6%	0	.0%	0	.0%
Iceland, The Precinct, PORTISHEAD	0	.0%	0	.0%	0	.0%
Sainsbury's, The Clink, BRIDGWATER	0	.0%	2	3.3%	1	1.4%
Morrisons, Street Road, GLASTONBURY	0	.0%	0	.0%	4	5.5%
Lidl, New Bristol Road, WESTON-SUPER-MARE	0	.0%	0	.0%	0	.0%
Tesco Express, Station Road, CHEDDAR	0	.0%	0	.0%	1	1.4%
Sainsbury's, Gravenham Way, STREET	0	.0%	0	.0%	3	4.1%
Other foodstores in WESTON-SUPER-MARE	0	.0%	0	.0%	1	1.4%
Lidl, Winterstoke Road, WESTON-SUPER-MARE	0	.0%	0	.0%	0	.0%
Asda, Whitchurch, BRISTOL	0	.0%	1	1.7%	0	.0%
Other foodsotres in Nailsea	0	.0%	0	.0%	0	.0%
Marks and Spencers, High Street, WESON-SUPER-MARE	0	.0%	0	.0%	0	.0%
Lidl, Strawberry Way South, WELLS	1	1.6%	0	.0%	1	1.4%
Iceland, Crown Glass Place, NAILSEA	0	.0%	0	.0%	0	.0%
Farmfoods, Locking Road, WESTON-SUPER-MARE	0	.0%	0	.0%	1	1.4%
Aldi, Bedminster, BRISTOL	0	.0%	0	.0%	0	.0%
Tesco, Townsend Shopping Park, SHEPTON MALLET	0	.0%	0	.0%	0	.0%
Tesco Express, Whitecross Road, WESTON-SUPER-MARE	0	.0%	0	.0%	0	.0%
Other foodstores in CLEVEDON	0	.0%	0	.0%	0	.0%
Morrisons, The Broadway, BRIDGWATER	0	.0%	1	1.7%	0	.0%
Budgens, Wraxhall, NAILSEA	0	.0%	0	.0%	0	.0%
Budgens, 60 High Street, PORTISHEAD	0	.0%	0	.0%	0	.0%

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Q1. In which shop or shopping centre do you do most of your households main food shopping?

		Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Asda, Caxton Road, Highbridge	38	37.6%	0	.0%	0	.0%	0	.0%	0	.0%
	Co-op, High Street, Worle	6	5.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Co-op, The Square, Axbridge	5	5.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Lidl, Summer Lane, Worle	4	4.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Co-op, Coronation House, Upper Myrtle Hill, Pill	4	4.0%	4	28.6%	0	.0%	0	.0%	0	.0%
	Local stores, Wedmore	3	3.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Congresbury	3	3.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Co-op, Southwell Crescent, Highbridge	3	3.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Tesco, Regent Street, Clifton, Bristol	2	2.0%	2	14.3%	0	.0%	0	.0%	0	.0%
	Tesco, Callington Road, Bristol	2	2.0%	0	.0%	0	.0%	1	33.3%	0	.0%
	Sainsbury's, Billet Street, Taunton	2	2.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Other foodstores in Bristol	2	2.0%	1	7.1%	0	.0%	0	.0%	0	.0%
	Morrisons, Triangle Centre, Clevedon	2	2.0%	0	.0%	0	.0%	0	.0%	2	100.0%
	Local stores, Nailsea	2	2.0%	0	.0%	0	.0%	2	66.7%	0	.0%
	Co-op, Woodborough Road, Winscombe	2	2.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Co-op, Harford Square, Chew Magna	2	2.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Waitrose, Northumbria Drive, Henleaze	1	1.0%	1	7.1%	0	.0%	0	.0%	0	.0%
	Tesco, Broadmead, Bristol	1	1.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Somerfield, Market Walk, Newton Abbot	1	1.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Sainbury's, Whiteladies Road, Bristol	1	1.0%	1	7.1%	0	.0%	0	.0%	0	.0%
	Nisa Fresh Foods, Baltic place, Pill	1	1.0%	1	7.1%	0	.0%	0	.0%	0	.0%
	Marks & Spencer, High Street, Weston-super-Mare	1	1.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Marks & Spencer, Cribbs Causeway, Bristol	1	1.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Marks & Spencer, Broadmead, Bristol	1	1.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Worle	1	1.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Shipham	1	1.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Clifton	1	1.0%	1	7.1%	0	.0%	0	.0%	0	.0%
	Lidl, Gravenchon Way, Street	1	1.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Other foodstores in Bath	1	1.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Failand Post Office, Clevedon Road, Failand	1	1.0%	1	7.1%	0	.0%	0	.0%	0	.0%
	Cribbs Causeway Regional Shopping Centre, Patchway	1	1.0%	1	7.1%	0	.0%	0	.0%	0	.0%
	Costcutters, Precinct, Bristol	1	1.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q1. In which shop or shopping centre do you do most of your households main food shopping?

		Zone									
		5		6		7		8		9	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Asda, Caxton Road, Highbridge	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Co-op, High Street, Worle	6	50.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Co-op, The Square, Axbridge	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Lidl, Summer Lane, Worle	4	33.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Co-op, Coronation House, Upper Myrtle Hill, Pill	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Wedmore	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Congresbury	0	.0%	0	.0%	0	.0%	2	50.0%	1	9.1%
	Co-op, Southwell Crescent, Highbridge	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Tesco, Regent Street, Clifton, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Tesco, Callington Road, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	1	9.1%
	Sainsbury's, Billet Street, Taunton	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Other foodstores in Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Morrisons, Triangle Centre, Clevedon	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Nailsea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Co-op, Woodborough Road, Winscombe	0	.0%	0	.0%	0	.0%	0	.0%	2	18.2%
	Co-op, Harford Square, Chew Magna	0	.0%	0	.0%	0	.0%	0	.0%	2	18.2%
	Waitrose, Northumbria Drive, Henleaze	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Tesco, Broadmead, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	1	9.1%
	Somerfield, Market Walk, Newton Abbot	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Sainbury's, Whiteladies Road, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Nisa Fresh Foods, Baltic place, Pill	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Marks & Spencer, High Street, Weston-super-Mare	1	8.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Marks & Spencer, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Marks & Spencer, Broadmead, Bristol	0	.0%	0	.0%	0	.0%	1	25.0%	0	.0%
	Local stores, Worle	1	8.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Shipham	0	.0%	0	.0%	0	.0%	0	.0%	1	9.1%
	Local stores, Clifton	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Lidl, Gravenchon Way, Street	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Other foodstores in Bath	0	.0%	0	.0%	0	.0%	0	.0%	1	9.1%
	Failand Post Office, Clevedon Road, Failand	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Cribbs Causeway Regional Shopping Centre, Patchway	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Costcutters, Precinct, Bristol	0	.0%	0	.0%	0	.0%	1	25.0%	0	.0%

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Q1. In which shop or shopping centre do you do most of your households main food shopping?

		Zone					
		10		11		12	
		Num	%	Num	%	Num	%
Other	Asda, Caxton Road, Highbridge	11	61.1%	26	86.7%	1	14.3%
	Co-op, High Street, Worle	0	.0%	0	.0%	0	.0%
	Co-op, The Square, Axbridge	5	27.8%	0	.0%	0	.0%
	Lidl, Summer Lane, Worle	0	.0%	0	.0%	0	.0%
	Co-op, Coronation House, Upper Myrtle Hill, Pill	0	.0%	0	.0%	0	.0%
	Local stores, Wedmore	0	.0%	0	.0%	3	42.9%
	Local stores, Congresbury	0	.0%	0	.0%	0	.0%
	Co-op, Southwell Crescent, Highbridge	0	.0%	3	10.0%	0	.0%
	Tesco, Regent Street, Clifton, Bristol	0	.0%	0	.0%	0	.0%
	Tesco, Callington Road, Bristol	0	.0%	0	.0%	0	.0%
	Sainsbury's, Billet Street, Taunton	1	5.6%	0	.0%	1	14.3%
	Other foodstores in Bristol	0	.0%	0	.0%	1	14.3%
	Morrisons, Triangle Centre, Clevedon	0	.0%	0	.0%	0	.0%
	Local stores, Nailsea	0	.0%	0	.0%	0	.0%
	Co-op, Woodborough Road, Winscombe	0	.0%	0	.0%	0	.0%
	Co-op, Harford Square, Chew Magna	0	.0%	0	.0%	0	.0%
	Waitrose, Northumbria Drive, Henleaze	0	.0%	0	.0%	0	.0%
	Tesco, Broadmead, Bristol	0	.0%	0	.0%	0	.0%
	Somerfield, Market Walk, Newton Abbot	0	.0%	1	3.3%	0	.0%
	Sainbury's, Whiteladies Road, Bristol	0	.0%	0	.0%	0	.0%
	Nisa Fresh Foods, Baltic place, Pill	0	.0%	0	.0%	0	.0%
	Marks & Spencer, High Street, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Marks & Spencer, Cribbs Causeway, Bristol	1	5.6%	0	.0%	0	.0%
	Marks & Spencer, Broadmead, Bristol	0	.0%	0	.0%	0	.0%
	Local stores, Worle	0	.0%	0	.0%	0	.0%
	Local stores, Shipham	0	.0%	0	.0%	0	.0%
	Local stores, Clifton	0	.0%	0	.0%	0	.0%
	Lidl, Gravenchon Way, Street	0	.0%	0	.0%	1	14.3%
	Other foodstores in Bath	0	.0%	0	.0%	0	.0%
	Failand Post Office, Clevedon Road, Failand	0	.0%	0	.0%	0	.0%
	Cribbs Causeway Regional Shopping Centre, Patchway	0	.0%	0	.0%	0	.0%
	Costcutters, Precinct, Bristol	0	.0%	0	.0%	0	.0%

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Q1. In which shop or shopping centre do you do most of your households main food shopping?

		Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Co-op, Queens Road, Clifton, Bristol	1	1.0%	1	7.1%	0	.0%	0	.0%	0	.0%
	Budgens, Bye Pass, Langford	1	1.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Alvis Brothers Farm Shop, Lye Cross Farm, Redhill	1	1.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q1. In which shop or shopping centre do you do most of your households main food shopping?

		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Co-op, Queens Road, Clifton, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Budgens, Bye Pass, Langford	0	.0%	0	.0%	0	.0%	0	.0%	1	9.1%
	Alvis Brothers Farm Shop, Lye Cross Farm, Redhill	0	.0%	0	.0%	0	.0%	0	.0%	1	9.1%

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Q1. In which shop or shopping centre do you do most of your households main food shopping?

		Zone 10		Zone 11		Zone 12	
		Num	%	Num	%	Num	%
Other	Co-op, Queens Road, Clifton, Bristol	0	.0%	0	.0%	0	.0%
	Budgens, Bye Pass, Langford	0	.0%	0	.0%	0	.0%
	Alvis Brothers Farm Shop, Lye Cross Farm, Redhill	0	.0%	0	.0%	0	.0%

Q2. How does your household normally travel to Q1?

		Base: All respondents (excluding internet)	
		Num	%
	Base: All respondents (excluding internet)	1163	100.0%
	Car / van (as driver)	811	70.3%
	Car / van (as passenger)	175	15.2%
	Walk	112	9.7%
	Bus	44	3.8%
	Bicycle	6	.5%
	Taxi	5	.4%
	Motorcycle	1	.1%
Other	Goods delivered	8	88.9%
	Mobility scooter	1	11.1%

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Q2. How does your household normally travel to Q1?

		Zone									
		1		2		3		4		5	
		Num	%	Num	%	Num	%	Num	%	Num	%
	Base: All respondents (excluding internet)	78	100.0%	96	100.0%	118	100.0%	117	100.0%	136	100.0%
	Car / van (as driver)	55	70.5%	63	67.0%	74	63.2%	79	67.5%	98	72.1%
	Car / van (as passenger)	11	14.1%	17	18.1%	17	14.5%	17	14.5%	20	14.7%
	Walk	10	12.8%	11	11.7%	22	18.8%	14	12.0%	9	6.6%
	Bus	2	2.6%	3	3.2%	3	2.6%	4	3.4%	7	5.1%
	Bicycle	0	.0%	0	.0%	1	.9%	2	1.7%	1	.7%
	Taxi	0	.0%	0	.0%	0	.0%	0	.0%	1	.7%
	Motorcycle	0	.0%	0	.0%	0	.0%	1	.9%	0	.0%
Other	Goods delivered	0	.0%	2	100.0%	1	100.0%	0	.0%	0	.0%
	Mobility scooter	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q2. How does your household normally travel to Q1?

		Zone									
		6		7		8		9		10	
		Num	%	Num	%	Num	%	Num	%	Num	%
	Base: All respondents (excluding internet)	106	100.0%	99	100.0%	89	100.0%	84	100.0%	78	100.0%
	Car / van (as driver)	61	58.1%	76	77.6%	64	72.7%	70	83.3%	61	79.2%
	Car / van (as passenger)	19	18.1%	16	16.3%	12	13.6%	10	11.9%	10	13.0%
	Walk	10	9.5%	2	2.0%	9	10.2%	2	2.4%	4	5.2%
	Bus	11	10.5%	4	4.1%	3	3.4%	2	2.4%	1	1.3%
	Bicycle	0	.0%	0	.0%	0	.0%	0	.0%	1	1.3%
	Taxi	4	3.8%	0	.0%	0	.0%	0	.0%	0	.0%
	Motorcycle	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Other	Goods delivered	1	100.0%	1	100.0%	1	100.0%	0	.0%	1	100.0%
	Mobility scooter	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q2. How does your household normally travel to Q1?

		Zone			
		11		12	
		Num	%	Num	%
	Base: All respondents (excluding internet)	89	100.0%	73	100.0%
	Car / van (as driver)	58	65.9%	52	72.2%
	Car / van (as passenger)	12	13.6%	14	19.4%
	Walk	13	14.8%	6	8.3%
	Bus	4	4.5%	0	.0%
	Bicycle	1	1.1%	0	.0%
	Taxi	0	.0%	0	.0%
	Motorcycle	0	.0%	0	.0%
Other	Goods delivered	0	.0%	1	100.0%
	Mobility scooter	1	100.0%	0	.0%

Q3. When your household undertakes its main food shopping at Q1, does it also normally visit OTHER shops or services on the same shopping trip?

		Base: All respondents (excluding internet)	
		Num	%
	Base: All respondents (excluding internet)	1163	100.0%
	Always	98	8.4%
	Normally	164	14.1%
	Sometimes	307	26.4%
	Rarely	174	15.0%
	Never	420	36.1%

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Q3. When your household undertakes its main food shopping at Q1, does it also normally visit OTHER shops or services on the same shopping trip?

		Zone									
		1		2		3		4		5	
		Num	%	Num	%	Num	%	Num	%	Num	%
	Base: All respondents (excluding internet)	78	100.0%	96	100.0%	118	100.0%	117	100.0%	136	100.0%
	Always	8	10.3%	9	9.4%	17	14.4%	12	10.3%	6	4.4%
	Normally	17	21.8%	19	19.8%	19	16.1%	19	16.2%	14	10.3%
	Sometimes	18	23.1%	28	29.2%	33	28.0%	31	26.5%	32	23.5%
	Rarely	17	21.8%	12	12.5%	14	11.9%	12	10.3%	22	16.2%
	Never	18	23.1%	28	29.2%	35	29.7%	43	36.8%	62	45.6%

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Q3. When your household undertakes its main food shopping at Q1, does it also normally visit OTHER shops or services on the same shopping trip?

	Zone									
	6		7		8		9		10	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents (excluding internet)	106	100.0%	99	100.0%	89	100.0%	84	100.0%	78	100.0%
Always	4	3.8%	7	7.1%	8	9.0%	13	15.5%	2	2.6%
Normally	9	8.5%	11	11.1%	15	16.9%	12	14.3%	8	10.3%
Sometimes	33	31.1%	22	22.2%	30	33.7%	13	15.5%	21	26.9%
Rarely	17	16.0%	18	18.2%	11	12.4%	19	22.6%	14	17.9%
Never	43	40.6%	41	41.4%	25	28.1%	27	32.1%	33	42.3%

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Q3. When your household undertakes its main food shopping at Q1, does it also normally visit OTHER shops or services on the same shopping trip?

	Zone			
	11		12	
	Num	%	Num	%
Base: All respondents (excluding internet)	89	100.0%	73	100.0%
Always	4	4.5%	8	11.0%
Normally	11	12.4%	10	13.7%
Sometimes	22	24.7%	24	32.9%
Rarely	13	14.6%	5	6.8%
Never	39	43.8%	26	35.6%

Q4. Which town centre, freestanding store, or retail / leisure park does your household visit most often when it undertakes the linked trip to OTHER shops, leisure or service outlets?

	Base: Those visiting other shops/services	
	Num	%
Base: Those visiting other shops/services	569	100.0%

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Q4. Which town centre, freestanding store, or retail / leisure park does your household visit most often when it undertakes the linked trip to OTHER shops, leisure or service outlets?

	Zone									
	1		2		3		4		5	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: Those visiting other shops/services	43	100.0%	56	100.0%	69	100.0%	62	100.0%	52	100.0%

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Q4. Which town centre, freestanding store, or retail / leisure park does your household visit most often when it undertakes the linked trip to OTHER shops, leisure or service outlets?

	Zone									
	6		7		8		9		10	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: Those visiting other shops/services	46	100.0%	40	100.0%	53	100.0%	38	100.0%	31	100.0%

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Q4. Which town centre, freestanding store, or retail / leisure park does your household visit most often when it undertakes the linked trip to OTHER shops, leisure or service outlets?

	Zone			
	11		12	
	Num	%	Num	%
Base: Those visiting other shops/services	37	100.0%	42	100.0%

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Q4. Which town centre, freestanding store, or retail / leisure park does your household visit most often when it undertakes the linked trip to OTHER shops, leisure or service outlets?

	Base: Those visiting other shops/services	
	Num	%
Weston-super-Mare Town Centre	152	33.6%
Clevedon Town Centre	80	17.7%
Nailsea Town Centre	64	14.1%
Portishead Town Centre	39	8.6%
Cribbs Causeway / The Mall, BRISTOL	27	6.0%
Burnham-on-Sea Town Centre	25	5.5%
Bristol - Cabot Circus Town Centre	14	3.1%
Cheddar Town Centre	9	2.0%
B&Q Retail Park / Flower Down Retail Park, WESTON-SUPER-MARE	7	1.5%
Winterstoke Road, BRISTOL	6	1.3%
Retail Parks at Marchfields Way, WESTON-SUPER-MARE	5	1.1%
Queensway / St Georges Retail Park, WESTON-SUPER-MARE	5	1.1%
Taunton Town Centre	5	1.1%
Bridgwater Retail Park, BRIDGWATER	3	.7%
Warminster Town Centre	3	.7%
Bridgwater Town Centre	3	.7%
Street Town Centre	2	.4%
Bath Town Centre	2	.4%
Clarks Village, STREET	1	.2%
Glastonbury Town Centre	1	.2%

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Q4. Which town centre, freestanding store, or retail / leisure park does your household visit most often when it undertakes the linked trip to OTHER shops, leisure or service outlets?

	Zone									
	1		2		3		4		5	
	Num	%	Num	%	Num	%	Num	%	Num	%
Weston-super-Mare Town Centre	0	.0%	0	.0%	0	.0%	4	7.0%	28	82.4%
Clevedon Town Centre	6	18.8%	10	20.0%	4	6.5%	47	82.5%	0	.0%
Nailsea Town Centre	3	9.4%	1	2.0%	53	85.5%	3	5.3%	1	2.9%
Portishead Town Centre	10	31.3%	28	56.0%	1	1.6%	0	.0%	0	.0%
Cribbs Causeway / The Mall, BRISTOL	4	12.5%	8	16.0%	3	4.8%	2	3.5%	2	5.9%
Burnham-on-Sea Town Centre	1	3.1%	0	.0%	0	.0%	0	.0%	0	.0%
Bristol - Cabot Circus Town Centre	4	12.5%	3	6.0%	1	1.6%	0	.0%	0	.0%
Cheddar Town Centre	0	.0%	0	.0%	0	.0%	1	1.8%	0	.0%
B&Q Retail Park / Flower Down Retail Park, WESTON-SUPER-MARE	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Winterstoke Road, BRISTOL	4	12.5%	0	.0%	0	.0%	0	.0%	1	2.9%
Retail Parks at Marchfields Way, WESTON-SUPER-MARE	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Queensway / St Georges Retail Park, WESTON-SUPER-MARE	0	.0%	0	.0%	0	.0%	0	.0%	2	5.9%
Taunton Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Bridgwater Retail Park, BRIDGWATER	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Warminster Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Bridgwater Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Street Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Bath Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Clarks Village, STREET	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Glastonbury Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q4. Which town centre, freestanding store, or retail / leisure park does your household visit most often when it undertakes the linked trip to OTHER shops, leisure or service outlets?

	Zone									
	6		7		8		9		10	
	Num	%	Num	%	Num	%	Num	%	Num	%
Weston-super-Mare Town Centre	35	92.1%	30	88.2%	15	41.7%	12	44.4%	13	50.0%
Clevedon Town Centre	0	.0%	0	.0%	12	33.3%	1	3.7%	0	.0%
Nailsea Town Centre	0	.0%	0	.0%	3	8.3%	0	.0%	0	.0%
Portishead Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Cribbs Causeway / The Mall, BRISTOL	2	5.3%	1	2.9%	0	.0%	1	3.7%	1	3.8%
Burnham-on-Sea Town Centre	0	.0%	0	.0%	0	.0%	1	3.7%	8	30.8%
Bristol - Cabot Circus Town Centre	0	.0%	0	.0%	1	2.8%	4	14.8%	0	.0%
Cheddar Town Centre	0	.0%	0	.0%	0	.0%	1	3.7%	0	.0%
B&Q Retail Park / Flower Down Retail Park, WESTON-SUPER-MARE	1	2.6%	1	2.9%	1	2.8%	3	11.1%	1	3.8%
Winterstoke Road, BRISTOL	0	.0%	0	.0%	0	.0%	1	3.7%	0	.0%
Retail Parks at Marchfields Way, WESTON-SUPER-MARE	0	.0%	0	.0%	1	2.8%	1	3.7%	1	3.8%
Queensway / St Georges Retail Park, WESTON-SUPER-MARE	0	.0%	1	2.9%	1	2.8%	0	.0%	0	.0%
Taunton Town Centre	0	.0%	0	.0%	1	2.8%	0	.0%	2	7.7%
Bridgwater Retail Park, BRIDGWATER	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Warminster Town Centre	0	.0%	1	2.9%	1	2.8%	0	.0%	0	.0%
Bridgwater Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Street Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Bath Town Centre	0	.0%	0	.0%	0	.0%	2	7.4%	0	.0%
Clarks Village, STREET	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Glastonbury Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q4. Which town centre, freestanding store, or retail / leisure park does your household visit most often when it undertakes the linked trip to OTHER shops, leisure or service outlets?

	Zone			
	11		12	
	Num	%	Num	%
Weston-super-Mare Town Centre	4	13.8%	11	39.3%
Clevedon Town Centre	0	.0%	0	.0%
Nailsea Town Centre	0	.0%	0	.0%
Portishead Town Centre	0	.0%	0	.0%
Cribbs Causeway / The Mall, BRISTOL	2	6.9%	1	3.6%
Burnham-on-Sea Town Centre	14	48.3%	1	3.6%
Bristol - Cabot Circus Town Centre	1	3.4%	0	.0%
Cheddar Town Centre	0	.0%	7	25.0%
B&Q Retail Park / Flower Down Retail Park, WESTON-SUPER-MARE	0	.0%	0	.0%
Winterstoke Road, BRISTOL	0	.0%	0	.0%
Retail Parks at Marchfields Way, WESTON-SUPER-MARE	0	.0%	2	7.1%
Queensway / St Georges Retail Park, WESTON-SUPER-MARE	1	3.4%	0	.0%
Taunton Town Centre	1	3.4%	1	3.6%
Bridgwater Retail Park, BRIDGWATER	3	10.3%	0	.0%
Warminster Town Centre	0	.0%	1	3.6%
Bridgwater Town Centre	3	10.3%	0	.0%
Street Town Centre	0	.0%	2	7.1%
Bath Town Centre	0	.0%	0	.0%
Clarks Village, STREET	0	.0%	1	3.6%
Glastonbury Town Centre	0	.0%	1	3.6%

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Q4. Which town centre, freestanding store, or retail / leisure park does your household visit most often when it undertakes the linked trip to OTHER shops, leisure or service outlets?

		Base: Those visiting other shops/services	
		Num	%
Other	Worle	23	19.8%
	Wells	11	9.5%
	Yatton	6	5.2%
	Varies	6	5.2%
	Bank	5	4.3%
	Morrisons, Worle, Weston-super-Mare	4	3.4%
	Portishead	3	2.6%
	Highbridge	3	2.6%
	Congresbury	3	2.6%
	Waitrose, Phillips Road, Weston-super-Mare	2	1.7%
	Tesco, Stock Way North, Nailsea	2	1.7%
	Tesco, Kenn Road, Clevedon	2	1.7%
	Lidl, Summer Lane, Worle, Weston-super-Mare	2	1.7%
	Lidl, Great Western Road, Clevedon	2	1.7%
	Co-op, Harford Square, Chew Magna	2	1.7%
	Clifton	2	1.7%
	Broadmead	2	1.7%
	Bristol	2	1.7%
	Yate	1	.9%
	Worle Retail Park	1	.9%
	Wilkinsons, Sovereign Centre, Weston-super-Mare	1	.9%
	Weston Golf Club	1	.9%
	Western Retail Park, Marchfield Way, Weston-super-Mare	1	.9%
	Waitrose, High Street, Nailsea	1	.9%
	The Sovereign Centre, High Street, Weston-super-Mare	1	.9%
	Tesco, Station Road, Cheddar	1	.9%
	Tesco, Cribbs Causeway, Bristol	1	.9%
	Staples, South Bristol Retail Park, Winterstoke Road, Bristol	1	.9%
	Screwfix, Western Industrial Estate, Lynx Crescent, Weston-super-Mare	1	.9%
	Sainsbury's, Winterstoke Road, Ashton, Bristol	1	.9%
	Sainsbury's, North Worle District Centre, Weston-super-Mare	1	.9%
	Pill	1	.9%
	Newton Abbot	1	.9%

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Q4. Which town centre, freestanding store, or retail / leisure park does your household visit most often when it undertakes the linked trip to OTHER shops, leisure or service outlets?

		Zone									
		1		2		3		4		5	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Worle	0	.0%	0	.0%	0	.0%	0	.0%	9	50.0%
	Wells	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Yatton	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Varies	1	9.1%	0	.0%	0	.0%	2	40.0%	2	11.1%
	Bank	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Morrisons, Worle, Weston-super-Mare	0	.0%	0	.0%	1	14.3%	0	.0%	1	5.6%
	Portishead	0	.0%	3	50.0%	0	.0%	0	.0%	0	.0%
	Highbridge	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Congresbury	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Waitrose, Phillips Road, Weston-super-Mare	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Tesco, Stock Way North, Nailsea	0	.0%	0	.0%	2	28.6%	0	.0%	0	.0%
	Tesco, Kenn Road, Clevedon	0	.0%	1	16.7%	0	.0%	1	20.0%	0	.0%
	Lidl, Summer Lane, Worle, Weston-super-Mare	0	.0%	0	.0%	0	.0%	0	.0%	1	5.6%
	Lidl, Great Western Road, Clevedon	1	9.1%	0	.0%	0	.0%	1	20.0%	0	.0%
	Co-op, Harford Square, Chew Magna	0	.0%	1	16.7%	0	.0%	0	.0%	0	.0%
	Clifton	2	18.2%	0	.0%	0	.0%	0	.0%	0	.0%
	Broadmead	0	.0%	1	16.7%	1	14.3%	0	.0%	0	.0%
	Bristol	1	9.1%	0	.0%	0	.0%	0	.0%	0	.0%
	Yate	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Worle Retail Park	0	.0%	0	.0%	0	.0%	0	.0%	1	5.6%
	Wilkinsons, Sovereign Centre, Weston-super-Mare	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Weston Golf Club	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Western Retail Park, Marchfield Way, Weston-super-Mare	0	.0%	0	.0%	0	.0%	0	.0%	1	5.6%
	Waitrose, High Street, Nailsea	0	.0%	0	.0%	1	14.3%	0	.0%	0	.0%
	The Sovereign Centre, High Street, Weston-super-Mare	0	.0%	0	.0%	0	.0%	0	.0%	1	5.6%
	Tesco, Station Road, Cheddar	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Tesco, Cribbs Causeway, Bristol	1	9.1%	0	.0%	0	.0%	0	.0%	0	.0%
	Staples, South Bristol Retail Park, Winterstoke Road, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Screwfix, Western Industrial Estate, Lynx Crescent, Weston-super-Mare	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Sainsbury's, Winterstoke Road, Ashton, Bristol	1	9.1%	0	.0%	0	.0%	0	.0%	0	.0%
	Sainsbury's, North Worle District Centre, Weston-super-Mare	0	.0%	0	.0%	0	.0%	0	.0%	1	5.6%
	Pill	1	9.1%	0	.0%	0	.0%	0	.0%	0	.0%
	Newton Abbot	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q4. Which town centre, freestanding store, or retail / leisure park does your household visit most often when it undertakes the linked trip to OTHER shops, leisure or service outlets?

		Zone									
		6		7		8		9		10	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Worle	1	12.5%	3	50.0%	4	23.5%	2	18.2%	3	60.0%
	Wells	0	.0%	0	.0%	0	.0%	2	18.2%	1	20.0%
	Yatton	0	.0%	0	.0%	6	35.3%	0	.0%	0	.0%
	Varies	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Bank	1	12.5%	1	16.7%	2	11.8%	0	.0%	0	.0%
	Morrisons, Worle, Weston-super-Mare	0	.0%	1	16.7%	0	.0%	1	9.1%	0	.0%
	Portishead	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Highbridge	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Congresbury	0	.0%	0	.0%	2	11.8%	1	9.1%	0	.0%
	Waitrose, Phillips Road, Weston-super-Mare	1	12.5%	0	.0%	0	.0%	1	9.1%	0	.0%
	Tesco, Stock Way North, Nailsea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Tesco, Kenn Road, Clevedon	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Lidl, Summer Lane, Worle, Weston-super-Mare	1	12.5%	0	.0%	0	.0%	0	.0%	0	.0%
	Lidl, Great Western Road, Clevedon	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Co-op, Harford Square, Chew Magna	0	.0%	0	.0%	0	.0%	1	9.1%	0	.0%
	Clifton	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Broadmead	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Bristol	0	.0%	0	.0%	1	5.9%	0	.0%	0	.0%
	Yate	0	.0%	0	.0%	0	.0%	1	9.1%	0	.0%
	Worle Retail Park	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Wilkinsons, Sovereign Centre, Weston-super-Mare	1	12.5%	0	.0%	0	.0%	0	.0%	0	.0%
	Weston Golf Club	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Western Retail Park, Marchfield Way, Weston-super-Mare	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Waitrose, High Street, Nailsea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	The Sovereign Centre, High Street, Weston-super-Mare	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Tesco, Station Road, Cheddar	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Tesco, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Staples, South Bristol Retail Park, Winterstoke Road, Bristol	0	.0%	0	.0%	0	.0%	1	9.1%	0	.0%
	Screwfix, Western Industrial Estate, Lynx Crescent, Weston-super-Mare	1	12.5%	0	.0%	0	.0%	0	.0%	0	.0%
	Sainsbury's, Winterstoke Road, Ashton, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Sainsbury's, North Worle District Centre, Weston-super-Mare	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Pill	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Newton Abbot	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q4. Which town centre, freestanding store, or retail / leisure park does your household visit most often when it undertakes the linked trip to OTHER shops, leisure or service outlets?

		Zone			
		11		12	
		Num	%	Num	%
Other	Worle	0	.0%	1	7.1%
	Wells	0	.0%	8	57.1%
	Yatton	0	.0%	0	.0%
	Varies	1	12.5%	0	.0%
	Bank	0	.0%	1	7.1%
	Morrisons, Worle, Weston-super-Mare	0	.0%	0	.0%
	Portishead	0	.0%	0	.0%
	Highbridge	3	37.5%	0	.0%
	Congresbury	0	.0%	0	.0%
	Waitrose, Phillips Road, Weston-super-Mare	0	.0%	0	.0%
	Tesco, Stock Way North, Nailsea	0	.0%	0	.0%
	Tesco, Kenn Road, Clevedon	0	.0%	0	.0%
	Lidl, Summer Lane, Worle, Weston-super-Mare	0	.0%	0	.0%
	Lidl, Great Western Road, Clevedon	0	.0%	0	.0%
	Co-op, Harford Square, Chew Magna	0	.0%	0	.0%
	Clifton	0	.0%	0	.0%
	Broadmead	0	.0%	0	.0%
	Bristol	0	.0%	0	.0%
	Yate	0	.0%	0	.0%
	Worle Retail Park	0	.0%	0	.0%
	Wilkinsons, Sovereign Centre, Weston-super-Mare	0	.0%	0	.0%
	Weston Golf Club	0	.0%	1	7.1%
	Western Retail Park, Marchfield Way, Weston-super-Mare	0	.0%	0	.0%
	Waitrose, High Street, Nailsea	0	.0%	0	.0%
	The Sovereign Centre, High Street, Weston-super-Mare	0	.0%	0	.0%
	Tesco, Station Road, Cheddar	0	.0%	1	7.1%
	Tesco, Cribbs Causeway, Bristol	0	.0%	0	.0%
	Staples, South Bristol Retail Park, Winterstoke Road, Bristol	0	.0%	0	.0%
	Screwfix, Western Industrial Estate, Lynx Crescent, Weston-super-Mare	0	.0%	0	.0%
	Sainsbury's, Winterstoke Road, Ashton, Bristol	0	.0%	0	.0%
	Sainsbury's, North Worle District Centre, Weston-super-Mare	0	.0%	0	.0%
	Pill	0	.0%	0	.0%
	Newton Abbot	1	12.5%	0	.0%

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Q4. Which town centre, freestanding store, or retail / leisure park does your household visit most often when it undertakes the linked trip to OTHER shops, leisure or service outlets?

		Base: Those visiting other shops/services	
		Num	%
Other	Morrisons, Clevedon Triangle Centre, Clevedon	1	.9%
	Local stores, Wedmore	1	.9%
	Local stores, Burnham	1	.9%
	Lidl, Sheene Lane, Bedminster	1	.9%
	Lidl, Oxford Street, Burnham-on-Sea	1	.9%
	Iceland, Nailsea	1	.9%
	Homebase, Winterstoke Road, Weston-super-Mare	1	.9%
	Holland and Barrett, Station Road, Clevedon	1	.9%
	Focus, Clevedon	1	.9%
	Farm Foods, Locking Road, Weston-super-Mare	1	.9%
	Chew Magna	1	.9%
	Budgens, Church Street, Cheddar	1	.9%
	Boots, Nailsea	1	.9%
	Boots, Castle District Centre, Weston-super-Mare	1	.9%
	Bedminster, Bristol	1	.9%
	Axbridge	1	.9%
	Asda, Phillips Road, Weston-super-Mare	1	.9%
	Asda, Caxton Road, Highbridge	1	.9%
	Asda, Bedminster, Bristol	1	.9%

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Q4. Which town centre, freestanding store, or retail / leisure park does your household visit most often when it undertakes the linked trip to OTHER shops, leisure or service outlets?

		Zone									
		1		2		3		4		5	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Morrisons, Clevedon Triangle Centre, Clevedon	0	.0%	0	.0%	0	.0%	1	20.0%	0	.0%
	Local stores, Wedmore	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Burnham	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Lidl, Sheene Lane, Bedminster	1	9.1%	0	.0%	0	.0%	0	.0%	0	.0%
	Lidl, Oxford Street, Burnham-on-Sea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Iceland, Nailsea	0	.0%	0	.0%	1	14.3%	0	.0%	0	.0%
	Homebase, Winterstoke Road, Weston-super-Mare	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Holland and Barrett, Station Road, Clevedon	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Focus, Clevedon	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Farm Foods, Locking Road, Weston-super-Mare	0	.0%	0	.0%	0	.0%	0	.0%	1	5.6%
	Chew Magna	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Budgens, Church Street, Cheddar	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Boots, Nailsea	0	.0%	0	.0%	1	14.3%	0	.0%	0	.0%
	Boots, Castle District Centre, Weston-super-Mare	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Bedminster, Bristol	1	9.1%	0	.0%	0	.0%	0	.0%	0	.0%
	Axbridge	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Asda, Phillips Road, Weston-super-Mare	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Asda, Caxton Road, Highbridge	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Asda, Bedminster, Bristol	1	9.1%	0	.0%	0	.0%	0	.0%	0	.0%

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Q4. Which town centre, freestanding store, or retail / leisure park does your household visit most often when it undertakes the linked trip to OTHER shops, leisure or service outlets?

		Zone									
		6		7		8		9		10	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Morrisons, Clevedon Triangle Centre, Clevedon	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Wedmore	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Burnham	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Lidl, Sheene Lane, Bedminster	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Lidl, Oxford Street, Burnham-on-Sea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Iceland, Nailsea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Homebase, Winterstoke Road, Weston-super-Mare	1	12.5%	0	.0%	0	.0%	0	.0%	0	.0%
	Holland and Barrett, Station Road, Clevedon	0	.0%	0	.0%	1	5.9%	0	.0%	0	.0%
	Focus, Clevedon	0	.0%	0	.0%	1	5.9%	0	.0%	0	.0%
	Farm Foods, Locking Road, Weston-super-Mare	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Chew Magna	0	.0%	0	.0%	0	.0%	1	9.1%	0	.0%
	Budgens, Church Street, Cheddar	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Boots, Nailsea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Boots, Castle District Centre, Weston-super-Mare	0	.0%	1	16.7%	0	.0%	0	.0%	0	.0%
	Bedminster, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Axbridge	0	.0%	0	.0%	0	.0%	0	.0%	1	20.0%
	Asda, Phillips Road, Weston-super-Mare	1	12.5%	0	.0%	0	.0%	0	.0%	0	.0%
	Asda, Caxton Road, Highbridge	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Asda, Bedminster, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q4. Which town centre, freestanding store, or retail / leisure park does your household visit most often when it undertakes the linked trip to OTHER shops, leisure or service outlets?

		Zone			
		11		12	
		Num	%	Num	%
Other	Morrisons, Clevedon Triangle Centre, Clevedon	0	.0%	0	.0%
	Local stores, Wedmore	0	.0%	1	7.1%
	Local stores, Burnham	1	12.5%	0	.0%
	Lidl, Sheene Lane, Bedminster	0	.0%	0	.0%
	Lidl, Oxford Street, Burnham-on-Sea	1	12.5%	0	.0%
	Iceland, Nailsea	0	.0%	0	.0%
	Homebase, Winterstoke Road, Weston-super-Mare	0	.0%	0	.0%
	Holland and Barrett, Station Road, Clevedon	0	.0%	0	.0%
	Focus, Clevedon	0	.0%	0	.0%
	Farm Foods, Locking Road, Weston-super-Mare	0	.0%	0	.0%
	Chew Magna	0	.0%	0	.0%
	Budgens, Church Street, Cheddar	0	.0%	1	7.1%
	Boots, Nailsea	0	.0%	0	.0%
	Boots, Castle District Centre, Weston-super-Mare	0	.0%	0	.0%
	Bedminster, Bristol	0	.0%	0	.0%
	Axbridge	0	.0%	0	.0%
	Asda, Phillips Road, Weston-super-Mare	0	.0%	0	.0%
	Asda, Caxton Road, Highbridge	1	12.5%	0	.0%
	Asda, Bedminster, Bristol	0	.0%	0	.0%

Q5. Thinking about your household's total expenditure on food and groceries (including milk deliveries, newspapers, cigarettes, etc) about what proportion do you usually spend at Q1?

			Zone									
	Base: All respondents		1		2		3		4		5	
	Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	1202	100.0%	80	100.0%	101	100.0%	120	100.0%	120	100.0%	140	100.0%

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Q5. Thinking about your household's total expenditure on food and groceries (including milk deliveries, newspapers, cigarettes, etc) about what proportion do you usually spend at Q1?

	Zone										
	6		7		8		9		10		11
	Num	%	Num	%	Num	%	Num	%	Num	%	Num
Base: All respondents	110	100.0%	100	100.0%	90	100.0%	91	100.0%	80	100.0%	90

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Q5. Thinking about your household's total expenditure on food and groceries (including milk deliveries, newspapers, cigarettes, etc) about what proportion do you usually spend at Q1?

	Zone		
	11	12	
	%	Num	%
Base: All respondents	100.0%	80	100.0%

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Q5. Thinking about your household's total expenditure on food and groceries (including milk deliveries, newspapers, cigarettes, etc) about what proportion do you usually spend at Q1?

			Zone									
	Base: All respondents		1		2		3		4		5	
	Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
0 - 10%	15	1.2%	4	5.0%	2	2.0%	0	.0%	3	2.5%	1	.7%
11 - 20%	21	1.7%	1	1.3%	0	.0%	2	1.7%	4	3.3%	2	1.4%
21 - 30%	41	3.4%	2	2.5%	5	5.0%	3	2.5%	4	3.3%	5	3.6%
31 - 40%	26	2.2%	4	5.0%	2	2.0%	5	4.2%	1	.8%	5	3.6%
41 - 50%	100	8.3%	7	8.8%	9	8.9%	12	10.0%	11	9.2%	11	7.9%
51 - 60%	104	8.7%	12	15.0%	12	11.9%	8	6.7%	9	7.5%	14	10.0%
61 - 70%	119	9.9%	5	6.3%	13	12.9%	14	11.7%	15	12.5%	9	6.4%
71 - 80%	266	22.1%	18	22.5%	18	17.8%	31	25.8%	28	23.3%	31	22.1%
81 - 90%	160	13.3%	6	7.5%	15	14.9%	12	10.0%	21	17.5%	23	16.4%
91 - 100%	167	13.9%	8	10.0%	7	6.9%	18	15.0%	11	9.2%	15	10.7%
Don't know/ varies	177	14.7%	13	16.3%	17	16.8%	15	12.5%	13	10.8%	23	16.4%
Refused	6	.5%	0	.0%	1	1.0%	0	.0%	0	.0%	1	.7%

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Q5. Thinking about your household's total expenditure on food and groceries (including milk deliveries, newspapers, cigarettes, etc) about what proportion do you usually spend at Q1?

	Zone										
	6		7		8		9		10		11
	Num	%	Num	%	Num	%	Num	%	Num	%	Num
0 - 10%	1	.9%	1	1.0%	0	.0%	1	1.1%	0	.0%	1
11 - 20%	2	1.8%	0	.0%	2	2.2%	4	4.4%	1	1.3%	0
21 - 30%	1	.9%	4	4.0%	4	4.4%	4	4.4%	2	2.5%	5
31 - 40%	0	.0%	2	2.0%	3	3.3%	2	2.2%	0	.0%	1
41 - 50%	15	13.6%	8	8.0%	6	6.7%	5	5.5%	3	3.8%	6
51 - 60%	7	6.4%	7	7.0%	8	8.9%	4	4.4%	11	13.8%	6
61 - 70%	9	8.2%	8	8.0%	6	6.7%	8	8.8%	14	17.5%	9
71 - 80%	28	25.5%	23	23.0%	20	22.2%	20	22.0%	18	22.5%	15
81 - 90%	18	16.4%	11	11.0%	9	10.0%	20	22.0%	8	10.0%	9
91 - 100%	17	15.5%	22	22.0%	16	17.8%	7	7.7%	12	15.0%	22
Don't know/ varies	12	10.9%	13	13.0%	15	16.7%	16	17.6%	10	12.5%	16
Refused	0	.0%	1	1.0%	1	1.1%	0	.0%	1	1.3%	0

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Q5. Thinking about your household's total expenditure on food and groceries (including milk deliveries, newspapers, cigarettes, etc) about what proportion do you usually spend at Q1?

	Zone		
	11	12	
	%	Num	%
0 - 10%	1.1%	1	1.3%
11 - 20%	.0%	3	3.8%
21 - 30%	5.6%	2	2.5%
31 - 40%	1.1%	1	1.3%
41 - 50%	6.7%	7	8.8%
51 - 60%	6.7%	6	7.5%
61 - 70%	10.0%	9	11.3%
71 - 80%	16.7%	16	20.0%
81 - 90%	10.0%	8	10.0%
91 - 100%	24.4%	12	15.0%
Don't know/ varies	17.8%	14	17.5%
Refused	.0%	1	1.3%

Q6. Where do you do most of your household's shopping for small scale 'top-up' food shopping?

			Zone							
	Base: All respondents		1		2		3		4	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	1202	100.0%	80	100.0%	101	100.0%	120	100.0%	120	100.0%

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Q6. Where do you do most of your household's shopping for small scale 'top-up' food shopping?

	Zone									
	5		6		7		8		9	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	140	100.0%	110	100.0%	100	100.0%	90	100.0%	91	100.0%

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Q6. Where do you do most of your household's shopping for small scale 'top-up' food shopping?

	Zone					
	10		11		12	
	Num	%	Num	%	Num	%
Base: All respondents	80	100.0%	90	100.0%	80	100.0%

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Q6. Where do you do most of your household's shopping for small scale 'top-up' food shopping?

	Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
	Num	%	Num	%	Num	%	Num	%	Num	%
Don't do top-up shopping	134	15.7%	5	16.1%	8	8.9%	9	9.8%	13	12.1%
Don't know/ varies	43	5.0%	3	9.7%	1	1.1%	6	6.5%	5	4.7%
Budgens, Church Street, CHEDDAR	43	5.0%	0	.0%	0	.0%	0	.0%	0	.0%
Tesco, Stock Way North, NAILSEA	41	4.8%	2	6.5%	0	.0%	37	40.2%	1	.9%
Tesco, Station Road, WESTON-SUPER-MARE	40	4.7%	0	.0%	0	.0%	2	2.2%	0	.0%
Morrisons, Worle, WESTON-SUPER-MARE	40	4.7%	0	.0%	0	.0%	0	.0%	0	.0%
Morrisons, Kenn Road, CLEVEDON	40	4.7%	0	.0%	1	1.1%	2	2.2%	36	33.6%
Other foodstores in WESTON-SUPER-MARE	38	4.4%	0	.0%	0	.0%	0	.0%	0	.0%
Waitrose, Harbour Road, PORTISHEAD	36	4.2%	6	19.4%	28	31.1%	1	1.1%	1	.9%
Asda, Philips Road, WESTON-SUPER-MARE	35	4.1%	0	.0%	1	1.1%	0	.0%	0	.0%
Co-op, Wyndham Way, PORTISHEAD	34	4.0%	4	12.9%	29	32.2%	0	.0%	0	.0%
Sainsbury's, North Worle District Centre, Queensway, WESTON	30	3.5%	0	.0%	0	.0%	0	.0%	1	.9%
Tesco, Kenn Road, CLEVEDON	23	2.7%	0	.0%	1	1.1%	0	.0%	18	16.8%
Waitrose, High Street (formerly Somerfield), NAILSEA	21	2.5%	3	9.7%	1	1.1%	14	15.2%	1	.9%
Somerfield, YATTON	20	2.3%	0	.0%	0	.0%	0	.0%	0	.0%
Tesco, Ben Travers Way, BURNHAM ON SEA	19	2.2%	0	.0%	0	.0%	0	.0%	0	.0%
Waitrose, Philps Road, WESTON-SUPER-MARE	17	2.0%	0	.0%	1	1.1%	1	1.1%	0	.0%
Other foodstores in CLEVEDON	16	1.9%	1	3.2%	1	1.1%	0	.0%	8	7.5%
Tesco Express, Broadway, WESTON-SUPER-MARE	14	1.6%	0	.0%	0	.0%	0	.0%	0	.0%
Tesco (One-Stop), Bellevue Road, CLEVEDON	12	1.4%	0	.0%	0	.0%	1	1.1%	10	9.3%
Farmfoods, Locking Road, WESTON-SUPER-MARE	12	1.4%	0	.0%	0	.0%	0	.0%	0	.0%
Iceland, Crown Glass Place, NAILSEA	11	1.3%	0	.0%	0	.0%	10	10.9%	1	.9%
Lidl, Winterstoke Road, WESTON-SUPER-MARE	10	1.2%	0	.0%	0	.0%	0	.0%	0	.0%
Morrisons, Pier Street, BURNHAM ON SEA	9	1.1%	0	.0%	0	.0%	0	.0%	0	.0%
Lidl, Old Church Road, CLEVEDON	9	1.1%	1	3.2%	1	1.1%	1	1.1%	6	5.6%
Iceland, The Precinct, PORTISHEAD	8	.9%	1	3.2%	7	7.8%	0	.0%	0	.0%
Co-op, Severn Road, WESTON-SUPER-MARE	8	.9%	0	.0%	0	.0%	1	1.1%	0	.0%
Tesco Express, Station Road, CHEDDAR	7	.8%	0	.0%	0	.0%	0	.0%	0	.0%
Tesco Express, Boulevard, WESTON-SUPER-MARE	6	.7%	0	.0%	0	.0%	0	.0%	0	.0%

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Q6. Where do you do most of your household's shopping for small scale 'top-up' food shopping?

	Zone									
	5		6		7		8		9	
	Num	%	Num	%	Num	%	Num	%	Num	%
Don't do top-up shopping	18	17.5%	16	18.0%	10	11.0%	11	21.6%	6	13.0%
Don't know/ varies	6	5.8%	4	4.5%	5	5.5%	4	7.8%	6	13.0%
Budgens, Church Street, CHEDDAR	0	.0%	0	.0%	0	.0%	0	.0%	3	6.5%
Tesco, Stock Way North, NAILSEA	0	.0%	0	.0%	0	.0%	0	.0%	1	2.2%
Tesco, Station Road, WESTON-SUPER-MARE	7	6.8%	15	16.9%	11	12.1%	2	3.9%	1	2.2%
Morrisons, Worle, WESTON-SUPER-MARE	12	11.7%	5	5.6%	17	18.7%	3	5.9%	1	2.2%
Morrisons, Kenn Road, CLEVEDON	0	.0%	0	.0%	0	.0%	0	.0%	1	2.2%
Other foodstores in WESTON-SUPER-MARE	5	4.9%	12	13.5%	13	14.3%	1	2.0%	1	2.2%
Waitrose, Harbour Road, PORTISHEAD	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Asda, Philips Road, WESTON-SUPER-MARE	3	2.9%	8	9.0%	16	17.6%	1	2.0%	2	4.3%
Co-op, Wyndham Way, PORTISHEAD	0	.0%	0	.0%	0	.0%	1	2.0%	0	.0%
Sainsbury's, North Worle District Centre, Queensway, WESTON	22	21.4%	0	.0%	2	2.2%	2	3.9%	2	4.3%
Tesco, Kenn Road, CLEVEDON	0	.0%	0	.0%	0	.0%	3	5.9%	1	2.2%
Waitrose, High Street (formerly Somerfield), NAILSEA	0	.0%	0	.0%	0	.0%	1	2.0%	1	2.2%
Somerfield, YATTON	0	.0%	0	.0%	0	.0%	18	35.3%	2	4.3%
Tesco, Ben Travers Way, BURNHAM ON SEA	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Waitrose, Philps Road, WESTON-SUPER-MARE	3	2.9%	5	5.6%	4	4.4%	0	.0%	0	.0%
Other foodstores in CLEVEDON	0	.0%	0	.0%	0	.0%	0	.0%	1	2.2%
Tesco Express, Broadway, WESTON-SUPER-MARE	4	3.9%	2	2.2%	8	8.8%	0	.0%	0	.0%
Tesco (One-Stop), Bellevue Road, CLEVEDON	1	1.0%	0	.0%	0	.0%	0	.0%	0	.0%
Farmfoods, Locking Road, WESTON-SUPER-MARE	7	6.8%	4	4.5%	1	1.1%	0	.0%	0	.0%
Iceland, Crown Glass Place, NAILSEA	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Lidl, Winterstoke Road, WESTON-SUPER-MARE	5	4.9%	2	2.2%	2	2.2%	1	2.0%	0	.0%
Morrisons, Pier Street, BURNHAM ON SEA	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Lidl, Old Church Road, CLEVEDON	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Iceland, The Precinct, PORTISHEAD	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Co-op, Severn Road, WESTON-SUPER-MARE	0	.0%	7	7.9%	0	.0%	0	.0%	0	.0%
Tesco Express, Station Road, CHEDDAR	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Tesco Express, Boulevard, WESTON-SUPER-MARE	1	1.0%	4	4.5%	1	1.1%	0	.0%	0	.0%

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Q6. Where do you do most of your household's shopping for small scale 'top-up' food shopping?

	Zone					
	10		11		12	
	Num	%	Num	%	Num	%
Don't do top-up shopping	10	23.8%	16	31.4%	12	19.4%
Don't know/ varies	2	4.8%	0	.0%	1	1.6%
Budgens, Church Street, CHEDDAR	7	16.7%	0	.0%	33	53.2%
Tesco, Stock Way North, NAILSEA	0	.0%	0	.0%	0	.0%
Tesco, Station Road, WESTON-SUPER-MARE	2	4.8%	0	.0%	0	.0%
Morrisons, Worle, WESTON-SUPER-MARE	1	2.4%	1	2.0%	0	.0%
Morrisons, Kenn Road, CLEVEDON	0	.0%	0	.0%	0	.0%
Other foodstores in WESTON-SUPER-MARE	6	14.3%	0	.0%	0	.0%
Waitrose, Harbour Road, PORTISHEAD	0	.0%	0	.0%	0	.0%
Asda, Philips Road, WESTON-SUPER-MARE	2	4.8%	1	2.0%	1	1.6%
Co-op, Wyndham Way, PORTISHEAD	0	.0%	0	.0%	0	.0%
Sainsbury's, North Worle District Centre, Queensway, WESTON	1	2.4%	0	.0%	0	.0%
Tesco, Kenn Road, CLEVEDON	0	.0%	0	.0%	0	.0%
Waitrose, High Street (formerly Somerfield), NAILSEA	0	.0%	0	.0%	0	.0%
Somerfield, YATTON	0	.0%	0	.0%	0	.0%
Tesco, Ben Travers Way, BURNHAM ON SEA	3	7.1%	16	31.4%	0	.0%
Waitrose, Philps Road, WESTON-SUPER-MARE	3	7.1%	0	.0%	0	.0%
Other foodstores in CLEVEDON	2	4.8%	0	.0%	3	4.8%
Tesco Express, Broadway, WESTON-SUPER-MARE	0	.0%	0	.0%	0	.0%
Tesco (One-Stop), Bellevue Road, CLEVEDON	0	.0%	0	.0%	0	.0%
Farmfoods, Locking Road, WESTON-SUPER-MARE	0	.0%	0	.0%	0	.0%
Iceland, Crown Glass Place, NAILSEA	0	.0%	0	.0%	0	.0%
Lidl, Winterstoke Road, WESTON-SUPER-MARE	0	.0%	0	.0%	0	.0%
Morrisons, Pier Street, BURNHAM ON SEA	0	.0%	9	17.6%	0	.0%
Lidl, Old Church Road, CLEVEDON	0	.0%	0	.0%	0	.0%
Iceland, The Precinct, PORTISHEAD	0	.0%	0	.0%	0	.0%
Co-op, Severn Road, WESTON-SUPER-MARE	0	.0%	0	.0%	0	.0%
Tesco Express, Station Road, CHEDDAR	0	.0%	0	.0%	7	11.3%
Tesco Express, Boulevard, WESTON-SUPER-MARE	0	.0%	0	.0%	0	.0%

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Q6. Where do you do most of your household's shopping for small scale 'top-up' food shopping?

	Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
	Num	%	Num	%	Num	%	Num	%	Num	%
Co-op, Woodborough Road, WINSCOMBE	6	.7%	0	.0%	0	.0%	0	.0%	0	.0%
Budgens, CHURCHILL	6	.7%	0	.0%	0	.0%	0	.0%	0	.0%
Sainsbury's, Winterstoke Road, BRISTOL	5	.6%	1	3.2%	0	.0%	1	1.1%	0	.0%
Lidl, Oxford Street, BURNHAM-ON-SEA	5	.6%	0	.0%	0	.0%	0	.0%	0	.0%
Costcutter, Avon Way, PORTISHEAD	5	.6%	0	.0%	5	5.6%	0	.0%	0	.0%
Spar, Old Church Road, CLEVEDON	4	.5%	0	.0%	0	.0%	0	.0%	4	3.7%
Other foodstores in PORTISHEAD	4	.5%	2	6.5%	2	2.2%	0	.0%	0	.0%
Co-op, Old Street, CLEVEDON	4	.5%	0	.0%	0	.0%	0	.0%	2	1.9%
Co-op, High Street, WESTON-SUPER-MARE	4	.5%	0	.0%	0	.0%	0	.0%	0	.0%
Budgens (Shell Garage), NAILSEA	4	.5%	0	.0%	0	.0%	4	4.3%	0	.0%
Spar, Loxton Road, WESTON-SUPER-MARE	3	.4%	0	.0%	0	.0%	0	.0%	0	.0%
Aldi, Hildesheim Bridge, WESTON-SUPER-MARE	3	.4%	0	.0%	0	.0%	0	.0%	0	.0%
Internet	2	.2%	0	.0%	0	.0%	0	.0%	0	.0%
Tesco, Tucker Street, WELLS	2	.2%	0	.0%	0	.0%	0	.0%	0	.0%
Tesco, Townsend Shopping Park, SHEPTON MALLET	2	.2%	0	.0%	0	.0%	0	.0%	0	.0%
Somerfield, High Street, WESTON-SUPER-MARE	2	.2%	0	.0%	0	.0%	0	.0%	0	.0%
Sainsbury's, The Clink, BRIDGWATER	2	.2%	0	.0%	0	.0%	0	.0%	0	.0%
Co-op, Bedminster, BRISTOL	2	.2%	0	.0%	0	.0%	0	.0%	0	.0%
Budgens, 60 High Street, PORTISHEAD	2	.2%	0	.0%	1	1.1%	0	.0%	0	.0%
Aldi, Bedminster, BRISTOL	2	.2%	0	.0%	0	.0%	1	1.1%	0	.0%
Tesco Metro, Crispin Centre, STREET	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
Sainsbury's, Gravenham Way, STREET	1	.1%	1	3.2%	0	.0%	0	.0%	0	.0%
Other foodstores in NAILSEA	1	.1%	0	.0%	0	.0%	1	1.1%	0	.0%
Morrisons, Street Road, GLASTONBURY	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
Morrisons, Cribbs Causeway, BRISTOL	1	.1%	0	.0%	1	1.1%	0	.0%	0	.0%
Marks and Spencer Simply Food, Victoria Road West, CLEVEDON	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
Lidl, Strawberry Way South, WELLS	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
Co-op, Long Ashton, BRISTOL	1	.1%	1	3.2%	0	.0%	0	.0%	0	.0%
Asda, East Quay, BRIDGWATER	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
Asda, Cribbs Causeway, BRISTOL	1	.1%	0	.0%	1	1.1%	0	.0%	0	.0%

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Q6. Where do you do most of your household's shopping for small scale 'top-up' food shopping?

	Zone									
	5		6		7		8		9	
	Num	%	Num	%	Num	%	Num	%	Num	%
Co-op, Woodborough Road, WINSCOMBE	0	.0%	0	.0%	0	.0%	0	.0%	5	10.9%
Budgens, CHURCHILL	0	.0%	0	.0%	0	.0%	0	.0%	6	13.0%
Sainsbury's, Winterstoke Road, BRISTOL	1	1.0%	0	.0%	0	.0%	0	.0%	2	4.3%
Lidl, Oxford Street, BURNHAM-ON-SEA	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Costcutter, Avon Way, PORTISHEAD	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Spar, Old Church Road, CLEVEDON	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Other foodstores in PORTISHEAD	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Co-op, Old Street, CLEVEDON	0	.0%	0	.0%	0	.0%	2	3.9%	0	.0%
Co-op, High Street, WESTON-SUPER-MARE	3	2.9%	0	.0%	0	.0%	0	.0%	0	.0%
Budgens (Shell Garage), NAILSEA	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Spar, Loxton Road, WESTON-SUPER-MARE	0	.0%	2	2.2%	0	.0%	1	2.0%	0	.0%
Aldi, Hildesheim Bridge, WESTON-SUPER-MARE	0	.0%	2	2.2%	1	1.1%	0	.0%	0	.0%
Internet	1	1.0%	0	.0%	0	.0%	0	.0%	1	2.2%
Tesco, Tucker Street, WELLS	0	.0%	0	.0%	0	.0%	0	.0%	1	2.2%
Tesco, Townsend Shopping Park, SHEPTON MALLET	2	1.9%	0	.0%	0	.0%	0	.0%	0	.0%
Somerfield, High Street, WESTON-SUPER-MARE	2	1.9%	0	.0%	0	.0%	0	.0%	0	.0%
Sainsbury's, The Clink, BRIDGWATER	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Co-op, Bedminster, BRISTOL	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Budgens, 60 High Street, PORTISHEAD	0	.0%	0	.0%	0	.0%	0	.0%	1	2.2%
Aldi, Bedminster, BRISTOL	0	.0%	0	.0%	0	.0%	0	.0%	1	2.2%
Tesco Metro, Crispin Centre, STREET	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Sainsbury's, Gravenham Way, STREET	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Other foodstores in NAILSEA	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Morrisons, Street Road, GLASTONBURY	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Morrisons, Cribbs Causeway, BRISTOL	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Marks and Spencer Simply Food, Victoria Road West, CLEVEDON	0	.0%	1	1.1%	0	.0%	0	.0%	0	.0%
Lidl, Strawberry Way South, WELLS	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Co-op, Long Ashton, BRISTOL	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Asda, East Quay, BRIDGWATER	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Asda, Cribbs Causeway, BRISTOL	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q6. Where do you do most of your household's shopping for small scale 'top-up' food shopping?

	Zone					
	10		11		12	
	Num	%	Num	%	Num	%
Co-op, Woodborough Road, WINSCOMBE	1	2.4%	0	.0%	0	.0%
Budgens, CHURCHILL	0	.0%	0	.0%	0	.0%
Sainsbury's, Winterstoke Road, BRISTOL	0	.0%	0	.0%	0	.0%
Lidl, Oxford Street, BURNHAM-ON-SEA	0	.0%	5	9.8%	0	.0%
Costcutter, Avon Way, PORTISHEAD	0	.0%	0	.0%	0	.0%
Spar, Old Church Road, CLEVEDON	0	.0%	0	.0%	0	.0%
Other foodstores in PORTISHEAD	0	.0%	0	.0%	0	.0%
Co-op, Old Street, CLEVEDON	0	.0%	0	.0%	0	.0%
Co-op, High Street, WESTON-SUPER-MARE	0	.0%	1	2.0%	0	.0%
Budgens (Shell Garage), NAILSEA	0	.0%	0	.0%	0	.0%
Spar, Loxton Road, WESTON-SUPER-MARE	0	.0%	0	.0%	0	.0%
Aldi, Hildesheim Bridge, WESTON-SUPER-MARE	0	.0%	0	.0%	0	.0%
Internet	0	.0%	0	.0%	0	.0%
Tesco, Tucker Street, WELLS	0	.0%	0	.0%	1	1.6%
Tesco, Townsend Shopping Park, SHEPTON MALLET	0	.0%	0	.0%	0	.0%
Somerfield, High Street, WESTON-SUPER-MARE	0	.0%	0	.0%	0	.0%
Sainsbury's, The Clink, BRIDGWATER	1	2.4%	1	2.0%	0	.0%
Co-op, Bedminster, BRISTOL	1	2.4%	0	.0%	1	1.6%
Budgens, 60 High Street, PORTISHEAD	0	.0%	0	.0%	0	.0%
Aldi, Bedminster, BRISTOL	0	.0%	0	.0%	0	.0%
Tesco Metro, Crispin Centre, STREET	0	.0%	0	.0%	1	1.6%
Sainsbury's, Gravenham Way, STREET	0	.0%	0	.0%	0	.0%
Other foodstores in NAILSEA	0	.0%	0	.0%	0	.0%
Morrisons, Street Road, GLASTONBURY	0	.0%	0	.0%	1	1.6%
Morrisons, Cribbs Causeway, BRISTOL	0	.0%	0	.0%	0	.0%
Marks and Spencer Simply Food, Victoria Road West, CLEVEDON	0	.0%	0	.0%	0	.0%
Lidl, Strawberry Way South, WELLS	0	.0%	0	.0%	1	1.6%
Co-op, Long Ashton, BRISTOL	0	.0%	0	.0%	0	.0%
Asda, East Quay, BRIDGWATER	0	.0%	1	2.0%	0	.0%
Asda, Cribbs Causeway, BRISTOL	0	.0%	0	.0%	0	.0%

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Q6. Where do you do most of your household's shopping for small scale 'top-up' food shopping?

		Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Asda, Caxton Road, Highbridge	21	6.1%	0	.0%	0	.0%	0	.0%	0	.0%
	Co-op, The Square, Axbridge	16	4.6%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Nailsea	15	4.3%	1	2.0%	0	.0%	14	50.0%	0	.0%
	Co-op, High Street, Yatton	14	4.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Portishead	12	3.5%	4	8.2%	8	72.7%	0	.0%	0	.0%
	Co-op, Coronation House, Station Road, Pill	12	3.5%	12	24.5%	0	.0%	0	.0%	0	.0%
	Nisa, Baltic Place, Pill	11	3.2%	11	22.4%	0	.0%	0	.0%	0	.0%
	Local stores, Congresbury	11	3.2%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Bristol	11	3.2%	4	8.2%	0	.0%	2	7.1%	0	.0%
	Marks & Spencer, High Street, Weston-super-Mare	10	2.9%	0	.0%	0	.0%	0	.0%	1	7.7%
	Local stores, Worle	10	2.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Burnham-on-Sea	10	2.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Budgens, Bye Pass, Langford	10	2.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Pill	8	2.3%	8	16.3%	0	.0%	0	.0%	0	.0%
	Local stores, Wedmore	8	2.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Co-op, High Street, Worle	8	2.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Yatton	7	2.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Winscombe	7	2.0%	0	.0%	0	.0%	1	3.6%	0	.0%
	Co-op, Harford Square, Chew Magna	7	2.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Cheddar	6	1.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Axbridge	6	1.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Co-op, Southwell Crescent, Highbridge	6	1.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Clevedon	5	1.4%	0	.0%	1	9.1%	0	.0%	4	30.8%
	Budgens, Cheddar	5	1.4%	0	.0%	0	.0%	0	.0%	0	.0%
	Tesco, Townsend Road, Weston-super-Mare	4	1.2%	0	.0%	0	.0%	0	.0%	0	.0%
	Spar, Rodney Road, Backwell	4	1.2%	0	.0%	0	.0%	3	10.7%	0	.0%
	Sainsbury's, Queensway, Worle	4	1.2%	0	.0%	0	.0%	0	.0%	0	.0%
	One Stop, Bellevue Road, Clevedon	4	1.2%	0	.0%	0	.0%	0	.0%	4	30.8%
	Waitrose, The Pavillion, Queens Road, Clifton	3	.9%	2	4.1%	0	.0%	0	.0%	0	.0%
	Spar, Loxton Road, Weston super Mare	3	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Goods delivered	3	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	McColls, Locking Road, Weston-super-Mare	3	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Blagdon	3	.9%	0	.0%	0	.0%	1	3.6%	0	.0%
	Lidl, New Bristol Road, Worle	3	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Costcutter, The Precinct, Brinsea Road, Congresbury	3	.9%	0	.0%	0	.0%	0	.0%	0	.0%

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Q6. Where do you do most of your household's shopping for small scale 'top-up' food shopping?

		Zone									
		5		6		7		8		9	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Asda, Caxton Road, Highbridge	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Co-op, The Square, Axbridge	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Nailsea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Co-op, High Street, Yatton	0	.0%	0	.0%	0	.0%	14	35.9%	0	.0%
	Local stores, Portishead	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Co-op, Coronation House, Station Road, Pill	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Nisa, Baltic Place, Pill	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Congresbury	0	.0%	0	.0%	0	.0%	10	25.6%	1	2.2%
	Local stores, Bristol	0	.0%	0	.0%	1	11.1%	1	2.6%	3	6.7%
	Marks & Spencer, High Street, Weston-super-Mare	0	.0%	5	23.8%	3	33.3%	0	.0%	1	2.2%
	Local stores, Worle	9	24.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Burnham-on-Sea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Budgens, Bye Pass, Langford	0	.0%	0	.0%	0	.0%	0	.0%	9	20.0%
	Local stores, Pill	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Wedmore	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Co-op, High Street, Worle	8	21.6%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Yatton	0	.0%	0	.0%	0	.0%	7	17.9%	0	.0%
	Local stores, Winscombe	0	.0%	0	.0%	0	.0%	0	.0%	6	13.3%
	Co-op, Harford Square, Chew Magna	0	.0%	0	.0%	0	.0%	0	.0%	7	15.6%
	Local stores, Cheddar	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Axbridge	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Co-op, Southwell Crescent, Highbridge	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Clevedon	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Budgens, Cheddar	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Tesco, Townsend Road, Weston-super-Mare	4	10.8%	0	.0%	0	.0%	0	.0%	0	.0%
	Spar, Rodney Road, Backwell	0	.0%	0	.0%	0	.0%	1	2.6%	0	.0%
	Sainsbury's, Queensway, Worle	3	8.1%	0	.0%	0	.0%	1	2.6%	0	.0%
	One Stop, Bellevue Road, Clevedon	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Waitrose, The Pavillion, Queens Road, Clifton	0	.0%	0	.0%	0	.0%	0	.0%	1	2.2%
	Spar, Loxton Road, Weston super Mare	0	.0%	3	14.3%	0	.0%	0	.0%	0	.0%
	Goods delivered	0	.0%	2	9.5%	0	.0%	0	.0%	0	.0%
	McColls, Locking Road, Weston-super-Mare	1	2.7%	2	9.5%	0	.0%	0	.0%	0	.0%
	Local stores, Blagdon	0	.0%	0	.0%	0	.0%	0	.0%	2	4.4%
	Lidl, New Bristol Road, Worle	3	8.1%	0	.0%	0	.0%	0	.0%	0	.0%
	Costcutter, The Precinct, Brinsea Road, Congresbury	0	.0%	0	.0%	0	.0%	2	5.1%	1	2.2%

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Q6. Where do you do most of your household's shopping for small scale 'top-up' food shopping?

		Zone					
		10		11		12	
		Num	%	Num	%	Num	%
Other	Asda, Caxton Road, Highbridge	1	2.6%	20	51.3%	0	.0%
	Co-op, The Square, Axbridge	16	42.1%	0	.0%	0	.0%
	Local stores, Nailsea	0	.0%	0	.0%	0	.0%
	Co-op, High Street, Yatton	0	.0%	0	.0%	0	.0%
	Local stores, Portishead	0	.0%	0	.0%	0	.0%
	Co-op, Coronation House, Station Road, Pill	0	.0%	0	.0%	0	.0%
	Nisa, Baltic Place, Pill	0	.0%	0	.0%	0	.0%
	Local stores, Congresbury	0	.0%	0	.0%	0	.0%
	Local stores, Bristol	0	.0%	0	.0%	0	.0%
	Marks & Spencer, High Street, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Local stores, Worle	1	2.6%	0	.0%	0	.0%
	Local stores, Burnham-on-Sea	2	5.3%	8	20.5%	0	.0%
	Budgens, Bye Pass, Langford	1	2.6%	0	.0%	0	.0%
	Local stores, Pill	0	.0%	0	.0%	0	.0%
	Local stores, Wedmore	2	5.3%	0	.0%	6	33.3%
	Co-op, High Street, Worle	0	.0%	0	.0%	0	.0%
	Local stores, Yatton	0	.0%	0	.0%	0	.0%
	Local stores, Winscombe	0	.0%	0	.0%	0	.0%
	Co-op, Harford Square, Chew Magna	0	.0%	0	.0%	0	.0%
	Local stores, Cheddar	1	2.6%	0	.0%	5	27.8%
	Local stores, Axbridge	6	15.8%	0	.0%	0	.0%
	Co-op, Southwell Crescent, Highbridge	0	.0%	6	15.4%	0	.0%
	Local stores, Clevedon	0	.0%	0	.0%	0	.0%
	Budgens, Cheddar	0	.0%	0	.0%	5	27.8%
	Tesco, Townsend Road, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Spar, Rodney Road, Backwell	0	.0%	0	.0%	0	.0%
	Sainsbury's, Queensway, Worle	0	.0%	0	.0%	0	.0%
	One Stop, Bellevue Road, Clevedon	0	.0%	0	.0%	0	.0%
	Waitrose, The Pavillion, Queens Road, Clifton	0	.0%	0	.0%	0	.0%
	Spar, Loxton Road, Weston super Mare	0	.0%	0	.0%	0	.0%
	Goods delivered	1	2.6%	0	.0%	0	.0%
	McColls, Locking Road, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Local stores, Blagdon	0	.0%	0	.0%	0	.0%
	Lidl, New Bristol Road, Worle	0	.0%	0	.0%	0	.0%
	Costcutter, The Precinct, Brinsea Road, Congresbury	0	.0%	0	.0%	0	.0%

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Q6. Where do you do most of your household's shopping for small scale 'top-up' food shopping?

		Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Astills of Worle, High Street, Worle, Weston-Super-Mare	3	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	White Cot Stores, St Peters Road, Portishead	2	.6%	0	.0%	2	18.2%	0	.0%	0	.0%
	The Farm Shop, Oxford Street, Weston-super-Mare	2	.6%	0	.0%	0	.0%	0	.0%	0	.0%
	Tesco, Regent Street, Clifton, Bristol	2	.6%	2	4.1%	0	.0%	0	.0%	0	.0%
	Tesco, Ben Travers Way, Town Centre, Burnham-on-Sea	2	.6%	0	.0%	0	.0%	0	.0%	0	.0%
	Tesco Extra, Callington Road, Brislington	2	.6%	0	.0%	0	.0%	0	.0%	0	.0%
	Sainsbury's, Whiteladies Road, Clifton Down, Bristol	2	.6%	1	2.0%	0	.0%	0	.0%	0	.0%
	S & R Burchill, Colliers Walk, Nailsea	2	.6%	0	.0%	0	.0%	1	3.6%	1	7.7%
	Local stores, Churchill	2	.6%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, East Harptree	2	.6%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Bleadon	2	.6%	0	.0%	0	.0%	0	.0%	0	.0%
	Co-op, Woodborough Road, Winscombe	2	.6%	0	.0%	0	.0%	0	.0%	0	.0%
	Co-op, Whitecross Road, Weston-super-Mare	2	.6%	0	.0%	0	.0%	0	.0%	0	.0%
	TJ Hughes, High Street, Weston-super-Mare	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	The Paper Shop, Church Street, Wedmore	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Sun Shine Stores, Upper Bristol Road, Weston-super-Mare	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Spar, High Street, Worle	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Sixways Post Office, Bellevue Road, Clevedon	1	.3%	0	.0%	0	.0%	0	.0%	1	7.7%
	Premier, St Andrews Parade, Weston-super-Mare	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Premier Stores, Loxton Square, Bristol	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Premier Stores, Hewden Road, Weston-super-Mare	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Poundland, High Street, Weston-super-Mare	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Post Office, Rooksbrigde	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Post Office, West Town Road, Backwell, Bristol	1	.3%	0	.0%	0	.0%	1	3.6%	0	.0%
	Post Office, Grenville Avenue, Locking, Weston-super-Mare	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	One Stop, Market Street, Highbridge	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	One Stop, Locking Road, Weston-super-Mare	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%

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Q6. Where do you do most of your household's shopping for small scale 'top-up' food shopping?

		Zone									
		5		6		7		8		9	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Astills of Worle, High Street, Worle, Weston-Super-Mare	1	2.7%	2	9.5%	0	.0%	0	.0%	0	.0%
	White Cot Stores, St Peters Road, Portishead	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	The Farm Shop, Oxford Street, Weston-super-Mare	1	2.7%	0	.0%	0	.0%	0	.0%	1	2.2%
	Tesco, Regent Street, Clifton, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Tesco, Ben Travers Way, Town Centre, Burnham-on-Sea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Tesco Extra, Callington Road, Brislington	0	.0%	0	.0%	0	.0%	0	.0%	2	4.4%
	Sainsbury's, Whiteladies Road, Clifton Down, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	S & R Burchill, Colliers Walk, Nailsea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Churchill	0	.0%	0	.0%	0	.0%	0	.0%	1	2.2%
	Local stores, East Harptree	0	.0%	0	.0%	0	.0%	0	.0%	2	4.4%
	Local stores, Bleadon	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Co-op, Woodborough Road, Winscombe	0	.0%	0	.0%	0	.0%	1	2.6%	1	2.2%
	Co-op, Whitecross Road, Weston-super-Mare	0	.0%	2	9.5%	0	.0%	0	.0%	0	.0%
	TJ Hughes, High Street, Weston-super-Mare	1	2.7%	0	.0%	0	.0%	0	.0%	0	.0%
	The Paper Shop, Church Street, Wedmore	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Sun Shine Stores, Upper Bristol Road, Weston-super-Mare	1	2.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Spar, High Street, Worle	1	2.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Sixways Post Office, Bellevue Road, Clevedon	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Premier, St Andrews Parade, Weston-super-Mare	0	.0%	1	4.8%	0	.0%	0	.0%	0	.0%
	Premier Stores, Loxton Square, Bristol	1	2.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Premier Stores, Hewden Road, Weston-super-Mare	0	.0%	1	4.8%	0	.0%	0	.0%	0	.0%
	Poundland, High Street, Weston-super-Mare	0	.0%	1	4.8%	0	.0%	0	.0%	0	.0%
	Post Office, Rooksbrigde	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Post Office, West Town Road, Backwell, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Post Office, Grenville Avenue, Locking, Weston-super-Mare	0	.0%	0	.0%	1	11.1%	0	.0%	0	.0%
	One Stop, Market Street, Highbridge	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	One Stop, Locking Road, Weston-super-Mare	0	.0%	1	4.8%	0	.0%	0	.0%	0	.0%

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Q6. Where do you do most of your household's shopping for small scale 'top-up' food shopping?

		Zone					
		10		11		12	
		Num	%	Num	%	Num	%
Other	Astills of Worle, High Street, Worle, Weston-Super-Mare	0	.0%	0	.0%	0	.0%
	White Cot Stores, St Peters Road, Portishead	0	.0%	0	.0%	0	.0%
	The Farm Shop, Oxford Street, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Tesco, Regent Street, Clifton, Bristol	0	.0%	0	.0%	0	.0%
	Tesco, Ben Travers Way, Town Centre, Burnham-on-Sea	0	.0%	2	5.1%	0	.0%
	Tesco Extra, Callington Road, Brislington	0	.0%	0	.0%	0	.0%
	Sainsbury's, Whiteladies Road, Clifton Down, Bristol	0	.0%	0	.0%	1	5.6%
	S & R Burchill, Colliers Walk, Nailsea	0	.0%	0	.0%	0	.0%
	Local stores, Churchill	1	2.6%	0	.0%	0	.0%
	Local stores, East Harptree	0	.0%	0	.0%	0	.0%
	Local stores, Bleadon	2	5.3%	0	.0%	0	.0%
	Co-op, Woodborough Road, Winscombe	0	.0%	0	.0%	0	.0%
	Co-op, Whitecross Road, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	TJ Hughes, High Street, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	The Paper Shop, Church Street, Wedmore	0	.0%	0	.0%	1	5.6%
	Sun Shine Stores, Upper Bristol Road, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Spar, High Street, Worle	0	.0%	0	.0%	0	.0%
	Sixways Post Office, Bellevue Road, Clevedon	0	.0%	0	.0%	0	.0%
	Premier, St Andrews Parade, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Premier Stores, Loxton Square, Bristol	0	.0%	0	.0%	0	.0%
	Premier Stores, Hewden Road, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Poundland, High Street, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Post Office, Rooksbrigde	1	2.6%	0	.0%	0	.0%
	Post Office, West Town Road, Backwell, Bristol	0	.0%	0	.0%	0	.0%
	Post Office, Grenville Avenue, Locking, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	One Stop, Market Street, Highbridge	0	.0%	1	2.6%	0	.0%
	One Stop, Locking Road, Weston-super-Mare	0	.0%	0	.0%	0	.0%

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Q6. Where do you do most of your household's shopping for small scale 'top-up' food shopping?

		Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Murrays of Clevedon, Hill Road, Clevedon	1	.3%	0	.0%	0	.0%	0	.0%	1	7.7%
	Morrisons, Triangle Centre, Clevedon	1	.3%	0	.0%	0	.0%	0	.0%	1	7.7%
	McColls, Aller Parade, Weston-super-Mare	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Martin McColls, Milton Road, Weston-super-Mare	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Marks & Spencer, Courtenay Street, Newton Abbot	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Marks & Spencer, Broadmead, Bristol	1	.3%	1	2.0%	0	.0%	0	.0%	0	.0%
	Marks & Spencer, Cribbs Causeway, Patchway, Bristol	1	.3%	1	2.0%	0	.0%	0	.0%	0	.0%
	Marks & Spencer, Stall Street, Bath	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Lympsham Village Shop, Lympsham Road, Lympsham	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Londis, St Andrews Parade, Weston-super-Mare	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Milton	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Long Ashton	1	.3%	0	.0%	0	.0%	1	3.6%	0	.0%
	Local stores, Highbridge	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Failand	1	.3%	1	2.0%	0	.0%	0	.0%	0	.0%
	Local stores, Brislington	1	.3%	0	.0%	0	.0%	1	3.6%	0	.0%
	Local stores, Banwell	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Winford	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, West Harptree	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Langford	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Backwell	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Chew Magna	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Litsters, Woodborough Road, Winscombe	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Iceland, Regent Street, Kingswood	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Hayers Preanes Green, Clovelly Road, Weston-super-Mare	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Hansford's Butchers, Orwell House, The Square, Shipham, Winscombe	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Greggs, Colliers Walk, Nailsea	1	.3%	0	.0%	0	.0%	1	3.6%	0	.0%
	East Harptree Village Shop, Village Hall, Whitecross Road, East Harptree, Bristol	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Costco, Saint Brendans Way, Avonmouth	1	.3%	1	2.0%	0	.0%	0	.0%	0	.0%
	Corner Stores, Kingshill, Nailsea	1	.3%	0	.0%	0	.0%	1	3.6%	0	.0%
	Co-op, Western Road, Long Ashton	1	.3%	0	.0%	0	.0%	1	3.6%	0	.0%

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Q6. Where do you do most of your household's shopping for small scale 'top-up' food shopping?

		Zone									
		5		6		7		8		9	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Murrays of Clevedon, Hill Road, Clevedon	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Morrisons, Triangle Centre, Clevedon	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	McColls, Aller Parade, Weston-super-Mare	0	.0%	0	.0%	1	11.1%	0	.0%	0	.0%
	Martin McColls, Milton Road, Weston-super-Mare	1	2.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Marks & Spencer, Courtenay Street, Newton Abbot	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Marks & Spencer, Broadmead, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Marks & Spencer, Cribbs Causeway, Patchway, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Marks & Spencer, Stall Street, Bath	0	.0%	0	.0%	1	11.1%	0	.0%	0	.0%
	Lympsham Village Shop, Lympsham Road, Lympsham	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Londis, St Andrews Parade, Weston-super-Mare	0	.0%	1	4.8%	0	.0%	0	.0%	0	.0%
	Local stores, Milton	1	2.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Long Ashton	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Highbridge	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Failand	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Brislington	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Local stores, Banwell	0	.0%	0	.0%	0	.0%	1	2.6%	0	.0%
	Local stores, Winford	0	.0%	0	.0%	0	.0%	0	.0%	1	2.2%
	Local stores, West Harptree	0	.0%	0	.0%	0	.0%	0	.0%	1	2.2%
	Local stores, Langford	0	.0%	0	.0%	1	11.1%	0	.0%	0	.0%
	Local stores, Backwell	0	.0%	0	.0%	0	.0%	0	.0%	1	2.2%
	Local stores, Chew Magna	0	.0%	0	.0%	0	.0%	0	.0%	1	2.2%
	Litsters, Woodborough Road, Winscombe	0	.0%	0	.0%	0	.0%	1	2.6%	0	.0%
	Iceland, Regent Street, Kingswood	1	2.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Hayers Preanes Green, Clovelly Road, Weston-super-Mare	0	.0%	0	.0%	1	11.1%	0	.0%	0	.0%
	Hansford's Butchers, Orwell House, The Square, Shipham, Winscombe	0	.0%	0	.0%	0	.0%	0	.0%	1	2.2%
	Greggs, Colliers Walk, Nailsea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	East Harptree Village Shop, Village Hall, Whitecross Road, East Harptree, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	1	2.2%
	Costco, Saint Brendans Way, Avonmouth	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Corner Stores, Kingshill, Nailsea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Co-op, Western Road, Long Ashton	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q6. Where do you do most of your household's shopping for small scale 'top-up' food shopping?

		Zone					
		10		11		12	
		Num	%	Num	%	Num	%
Other	Murrays of Clevedon, Hill Road, Clevedon	0	.0%	0	.0%	0	.0%
	Morrisons, Triangle Centre, Clevedon	0	.0%	0	.0%	0	.0%
	McColls, Aller Parade, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Martin McColls, Milton Road, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Marks & Spencer, Courtenay Street, Newton Abbot	0	.0%	1	2.6%	0	.0%
	Marks & Spencer, Broadmead, Bristol	0	.0%	0	.0%	0	.0%
	Marks & Spencer, Cribbs Causeway, Patchway, Bristol	0	.0%	0	.0%	0	.0%
	Marks & Spencer, Stall Street, Bath	0	.0%	0	.0%	0	.0%
	Lympsham Village Shop, Lympsham Road, Lympsham	1	2.6%	0	.0%	0	.0%
	Londis, St Andrews Parade, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Local stores, Milton	0	.0%	0	.0%	0	.0%
	Local stores, Long Ashton	0	.0%	0	.0%	0	.0%
	Local stores, Highbridge	0	.0%	1	2.6%	0	.0%
	Local stores, Failand	0	.0%	0	.0%	0	.0%
	Local stores, Brislington	0	.0%	0	.0%	0	.0%
	Local stores, Banwell	0	.0%	0	.0%	0	.0%
	Local stores, Winford	0	.0%	0	.0%	0	.0%
	Local stores, West Harptree	0	.0%	0	.0%	0	.0%
	Local stores, Langford	0	.0%	0	.0%	0	.0%
	Local stores, Backwell	0	.0%	0	.0%	0	.0%
	Local stores, Chew Magna	0	.0%	0	.0%	0	.0%
	Litsters, Woodborough Road, Winscombe	0	.0%	0	.0%	0	.0%
	Iceland, Regent Street, Kingswood	0	.0%	0	.0%	0	.0%
	Hayers Preanes Green, Clovelly Road, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Hansford's Butchers, Orwell House, The Square, Shipham, Winscombe	0	.0%	0	.0%	0	.0%
	Greggs, Colliers Walk, Nailsea	0	.0%	0	.0%	0	.0%
	East Harptree Village Shop, Village Hall, Whitecross Road, East Harptree, Bristol	0	.0%	0	.0%	0	.0%
	Costco, Saint Brendans Way, Avonmouth	0	.0%	0	.0%	0	.0%
	Corner Stores, Kingshill, Nailsea	0	.0%	0	.0%	0	.0%
	Co-op, Western Road, Long Ashton	0	.0%	0	.0%	0	.0%

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Q6. Where do you do most of your household's shopping for small scale 'top-up' food shopping?

		Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Bleadon PO and Country Store, Purn Way, Bleadon	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Axbridge Butchers, The Square, Axbridge	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Amor, Broad Street, Wrington	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%

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Q6. Where do you do most of your household's shopping for small scale 'top-up' food shopping?

		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Bleadon PO and Country Store, Purn Way, Bleadon	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Axbridge Butchers, The Square, Axbridge	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Amor, Broad Street, Wrington	0	.0%	0	.0%	0	.0%	0	.0%	1	2.2%

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Q6. Where do you do most of your household's shopping for small scale 'top-up' food shopping?

		Zone 10		Zone 11		Zone 12	
		Num	%	Num	%	Num	%
Other	Bleadon PO and Country Store, Purn Way, Bleadon	1	2.6%	0	.0%	0	.0%
	Axbridge Butchers, The Square, Axbridge	1	2.6%	0	.0%	0	.0%
	Amor, Broad Street, Wrington	0	.0%	0	.0%	0	.0%

Q7. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Clothes, footwear and other fashion goods?

	Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	1202	100.0%	80	100.0%	101	100.0%	120	100.0%	120	100.0%

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Q7. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Clothes, footwear and other fashion goods?

	Zone 5		Zone 6		Zone 7		Zone 8		Zone 9	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	140	100.0%	110	100.0%	100	100.0%	90	100.0%	91	100.0%

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Q7. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Clothes, footwear and other fashion goods?

	Zone					
	10		11		12	
	Num	%	Num	%	Num	%
Base: All respondents	80	100.0%	90	100.0%	80	100.0%

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Q7. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Clothes, footwear and other fashion goods?

			Zone							
	Base: All respondents		1		2		3		4	
	Num	%	Num	%	Num	%	Num	%	Num	%
Weston-super-Mare Town Centre	361	33.3%	0	.0%	9	9.6%	12	11.1%	37	32.7%
Cribbs Causeway / The Mall, BRISTOL	306	28.2%	46	63.9%	59	62.8%	34	31.5%	44	38.9%
Bristol - Cabot Circus Town Centre	169	15.6%	17	23.6%	11	11.7%	39	36.1%	16	14.2%
Don't know/ varies	40	3.7%	2	2.8%	2	2.1%	4	3.7%	2	1.8%
Taunton Town Centre	36	3.3%	0	.0%	0	.0%	0	.0%	0	.0%
Weston Retail Park, Winterstoke Road, WESTON-SUPER-MARE	29	2.7%	0	.0%	0	.0%	1	.9%	4	3.5%
Catalogue / mail order	25	2.3%	3	4.2%	4	4.3%	1	.9%	2	1.8%
Internet	24	2.2%	0	.0%	1	1.1%	3	2.8%	2	1.8%
Street Town Centre	22	2.0%	0	.0%	1	1.1%	0	.0%	0	.0%
Don't buy	18	1.7%	3	4.2%	2	2.1%	2	1.9%	1	.9%
Burnham-on-Sea Town Centre	12	1.1%	0	.0%	0	.0%	0	.0%	0	.0%
Nailsea Town Centre	10	.9%	0	.0%	0	.0%	8	7.4%	2	1.8%
Clevedon Town Centre	7	.6%	1	1.4%	2	2.1%	2	1.9%	2	1.8%
Bath Town Centre	7	.6%	0	.0%	0	.0%	1	.9%	0	.0%
Bridgwater Town Centre	5	.5%	0	.0%	0	.0%	0	.0%	1	.9%
Warminster Town Centre	4	.4%	0	.0%	0	.0%	0	.0%	0	.0%
Portishead Town Centre	3	.3%	0	.0%	3	3.2%	0	.0%	0	.0%
Cheddar Town Centre	3	.3%	0	.0%	0	.0%	0	.0%	0	.0%
Gallagher Retail Park, WESTON-SUPER-MARE	2	.2%	0	.0%	0	.0%	0	.0%	0	.0%
The Junction / Imperial Park, HARTCLIFFE	1	.1%	0	.0%	0	.0%	1	.9%	0	.0%
Glastonbury Town Centre	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%

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Q7. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Clothes, footwear and other fashion goods?

	Zone									
	5		6		7		8		9	
	Num	%	Num	%	Num	%	Num	%	Num	%
Weston-super-Mare Town Centre	66	51.2%	67	68.4%	53	57.0%	32	40.5%	17	22.1%
Cribbs Causeway / The Mall, BRISTOL	24	18.6%	12	12.2%	15	16.1%	19	24.1%	17	22.1%
Bristol - Cabot Circus Town Centre	15	11.6%	9	9.2%	12	12.9%	15	19.0%	17	22.1%
Don't know/ varies	5	3.9%	4	4.1%	4	4.3%	3	3.8%	7	9.1%
Taunton Town Centre	3	2.3%	1	1.0%	1	1.1%	0	.0%	1	1.3%
Weston Retail Park, Winterstoke Road, WESTON-SUPER-MARE	4	3.1%	1	1.0%	3	3.2%	2	2.5%	5	6.5%
Catalogue / mail order	3	2.3%	3	3.1%	0	.0%	0	.0%	2	2.6%
Internet	4	3.1%	1	1.0%	1	1.1%	3	3.8%	1	1.3%
Street Town Centre	0	.0%	0	.0%	1	1.1%	2	2.5%	3	3.9%
Don't buy	3	2.3%	0	.0%	2	2.2%	2	2.5%	2	2.6%
Burnham-on-Sea Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Nailsea Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Clevedon Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Bath Town Centre	0	.0%	0	.0%	1	1.1%	0	.0%	2	2.6%
Bridgwater Town Centre	1	.8%	0	.0%	0	.0%	1	1.3%	0	.0%
Warminster Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	1	1.3%
Portishead Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Cheddar Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	1	1.3%
Gallagher Retail Park, WESTON-SUPER-MARE	1	.8%	0	.0%	0	.0%	0	.0%	1	1.3%
The Junction / Imperial Park, HARTCLIFFE	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Glastonbury Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q7. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Clothes, footwear and other fashion goods?

	Zone					
	10		11		12	
	Num	%	Num	%	Num	%
Weston-super-Mare Town Centre	27	38.0%	22	25.9%	19	28.8%
Cribbs Causeway / The Mall, BRISTOL	18	25.4%	11	12.9%	7	10.6%
Bristol - Cabot Circus Town Centre	3	4.2%	5	5.9%	10	15.2%
Don't know/ varies	1	1.4%	4	4.7%	2	3.0%
Taunton Town Centre	7	9.9%	20	23.5%	3	4.5%
Weston Retail Park, Winterstoke Road, WESTON-SUPER-MARE	3	4.2%	1	1.2%	5	7.6%
Catalogue / mail order	2	2.8%	3	3.5%	2	3.0%
Internet	4	5.6%	2	2.4%	2	3.0%
Street Town Centre	3	4.2%	4	4.7%	8	12.1%
Don't buy	0	.0%	1	1.2%	0	.0%
Burnham-on-Sea Town Centre	2	2.8%	8	9.4%	2	3.0%
Nailsea Town Centre	0	.0%	0	.0%	0	.0%
Clevedon Town Centre	0	.0%	0	.0%	0	.0%
Bath Town Centre	1	1.4%	0	.0%	2	3.0%
Bridgwater Town Centre	0	.0%	2	2.4%	0	.0%
Warminster Town Centre	0	.0%	2	2.4%	1	1.5%
Portishead Town Centre	0	.0%	0	.0%	0	.0%
Cheddar Town Centre	0	.0%	0	.0%	2	3.0%
Gallagher Retail Park, WESTON-SUPER-MARE	0	.0%	0	.0%	0	.0%
The Junction / Imperial Park, HARTCLIFFE	0	.0%	0	.0%	0	.0%
Glastonbury Town Centre	0	.0%	0	.0%	1	1.5%

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Q7. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Clothes, footwear and other fashion goods?

		Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Broadmead	25	21.4%	3	37.5%	3	42.9%	9	75.0%	1	14.3%
	Marks & Spencer, High Street, Weston-super-Mare	10	8.5%	0	.0%	0	.0%	0	.0%	0	.0%
	Clarks Village, Farm Road, Street	8	6.8%	0	.0%	0	.0%	0	.0%	1	14.3%
	Worle	7	6.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Matalan, Locking Castle District, Weston-super-Mare	7	6.0%	0	.0%	0	.0%	0	.0%	1	14.3%
	Wells	6	5.1%	0	.0%	0	.0%	0	.0%	0	.0%
	Bristol	6	5.1%	2	25.0%	0	.0%	1	8.3%	0	.0%
	Asda, Philips Road, Weston-super-Mare	5	4.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Marks & Spencer, Cribbs Causeway, Bristol	4	3.4%	0	.0%	1	14.3%	0	.0%	1	14.3%
	London	3	2.6%	0	.0%	0	.0%	0	.0%	1	14.3%
	John Lewis, The Mall, Cribbs Causeway	3	2.6%	0	.0%	1	14.3%	0	.0%	1	14.3%
	Winscombe	2	1.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Wedmore	2	1.7%	0	.0%	0	.0%	0	.0%	0	.0%
	TK Maxx, North Worle Shopping Centre, Worle	2	1.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Tesco, Station Road, Weston-super-Mare	2	1.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Peacocks, Somerset Square, Nailsea	2	1.7%	0	.0%	1	14.3%	1	8.3%	0	.0%
	Matalan, Bristol Road, Somerset Bridge, Bridgewater	2	1.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Marks & Spencer, Broadmead, Bristol	2	1.7%	0	.0%	0	.0%	0	.0%	1	14.3%
	Bedminster	2	1.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Asda, Caxton Road, Highbridge	2	1.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Yatton	1	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Torquay	1	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Tesco Extra, Callington Road, Brislington, Bristol	1	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Sidmouth	1	.9%	1	12.5%	0	.0%	0	.0%	0	.0%
	Sainsbury's, North Worle Shopping Centre, Weston-super-Mare	1	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	North Worle Shopping Centre, Queens Way, Worle	1	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Newport	1	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Marks & Spencer, East Street, Taunton	1	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Exeter	1	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Edinburgh	1	.9%	0	.0%	1	14.3%	0	.0%	0	.0%
	Congresbury	1	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Clifton, Bristol	1	.9%	1	12.5%	0	.0%	0	.0%	0	.0%

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Q7. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Clothes, footwear and other fashion goods?

		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Broadmead	1	9.1%	0	.0%	1	14.3%	3	27.3%	2	14.3%
	Marks & Spencer, High Street, Weston-super-Mare	2	18.2%	5	41.7%	1	14.3%	0	.0%	1	7.1%
	Clarks Village, Farm Road, Street	0	.0%	1	8.3%	0	.0%	0	.0%	0	.0%
	Worle	3	27.3%	0	.0%	0	.0%	2	18.2%	0	.0%
	Matalan, Locking Castle District, Weston-super-Mare	1	9.1%	0	.0%	1	14.3%	3	27.3%	1	7.1%
	Wells	0	.0%	0	.0%	0	.0%	0	.0%	2	14.3%
	Bristol	0	.0%	2	16.7%	0	.0%	0	.0%	1	7.1%
	Asda, Philips Road, Weston-super-Mare	1	9.1%	1	8.3%	3	42.9%	0	.0%	0	.0%
	Marks & Spencer, Cribbs Causeway, Bristol	0	.0%	1	8.3%	0	.0%	0	.0%	0	.0%
	London	0	.0%	1	8.3%	0	.0%	0	.0%	0	.0%
	John Lewis, The Mall, Cribbs Causeway	0	.0%	0	.0%	0	.0%	0	.0%	1	7.1%
	Winscombe	0	.0%	0	.0%	0	.0%	0	.0%	1	7.1%
	Wedmore	0	.0%	0	.0%	0	.0%	0	.0%	1	7.1%
	TK Maxx, North Worle Shopping Centre, Worle	1	9.1%	0	.0%	0	.0%	0	.0%	0	.0%
	Tesco, Station Road, Weston-super-Mare	0	.0%	1	8.3%	1	14.3%	0	.0%	0	.0%
	Peacocks, Somerset Square, Nailsea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Matalan, Bristol Road, Somerset Bridge, Bridgewater	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Marks & Spencer, Broadmead, Bristol	0	.0%	0	.0%	0	.0%	1	9.1%	0	.0%
	Bedminster	0	.0%	0	.0%	0	.0%	1	9.1%	1	7.1%
	Asda, Caxton Road, Highbridge	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Yatton	0	.0%	0	.0%	0	.0%	1	9.1%	0	.0%
	Torquay	1	9.1%	0	.0%	0	.0%	0	.0%	0	.0%
	Tesco Extra, Callington Road, Brislington, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	1	7.1%
	Sidmouth	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Sainsbury's, North Worle Shopping Centre, Weston-super-Mare	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	North Worle Shopping Centre, Queens Way, Worle	1	9.1%	0	.0%	0	.0%	0	.0%	0	.0%
	Newport	0	.0%	0	.0%	0	.0%	0	.0%	1	7.1%
	Marks & Spencer, East Street, Taunton	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Exeter	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Edinburgh	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Congresbury	0	.0%	0	.0%	0	.0%	0	.0%	1	7.1%
	Clifton, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q7. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Clothes, footwear and other fashion goods?

		Zone					
		10		11		12	
		Num	%	Num	%	Num	%
Other	Broadmead	0	.0%	0	.0%	2	14.3%
	Marks & Spencer, High Street, Weston-super-Mare	0	.0%	0	.0%	1	7.1%
	Clarks Village, Farm Road, Street	4	44.4%	1	20.0%	1	7.1%
	Worle	0	.0%	1	20.0%	1	7.1%
	Matalan, Locking Castle District, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Wells	0	.0%	0	.0%	4	28.6%
	Bristol	0	.0%	0	.0%	0	.0%
	Asda, Philips Road, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Marks & Spencer, Cribbs Causeway, Bristol	0	.0%	0	.0%	1	7.1%
	London	0	.0%	0	.0%	1	7.1%
	John Lewis, The Mall, Cribbs Causeway	0	.0%	0	.0%	0	.0%
	Winscombe	0	.0%	0	.0%	1	7.1%
	Wedmore	1	11.1%	0	.0%	0	.0%
	TK Maxx, North Worle Shopping Centre, Worle	1	11.1%	0	.0%	0	.0%
	Tesco, Station Road, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Peacocks, Somerset Square, Nailsea	0	.0%	0	.0%	0	.0%
	Matalan, Bristol Road, Somerset Bridge, Bridgewater	0	.0%	2	40.0%	0	.0%
	Marks & Spencer, Broadmead, Bristol	0	.0%	0	.0%	0	.0%
	Bedminster	0	.0%	0	.0%	0	.0%
	Asda, Caxton Road, Highbridge	1	11.1%	1	20.0%	0	.0%
	Yatton	0	.0%	0	.0%	0	.0%
	Torquay	0	.0%	0	.0%	0	.0%
	Tesco Extra, Callington Road, Brislington, Bristol	0	.0%	0	.0%	0	.0%
	Sidmouth	0	.0%	0	.0%	0	.0%
	Sainsbury's, North Worle Shopping Centre, Weston-super-Mare	0	.0%	0	.0%	1	7.1%
	North Worle Shopping Centre, Queens Way, Worle	0	.0%	0	.0%	0	.0%
	Newport	0	.0%	0	.0%	0	.0%
	Marks & Spencer, East Street, Taunton	0	.0%	0	.0%	1	7.1%
	Exeter	1	11.1%	0	.0%	0	.0%
	Edinburgh	0	.0%	0	.0%	0	.0%
	Congresbury	0	.0%	0	.0%	0	.0%
	Clifton, Bristol	0	.0%	0	.0%	0	.0%

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Q7. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Clothes, footwear and other fashion goods?

		Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Bournemouth	1	.9%	0	.0%	0	.0%	1	8.3%	0	.0%
	Axbridge	1	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Asda, Cribbs Causeway, Bristol	1	.9%	1	12.5%	0	.0%	0	.0%	0	.0%

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Q7. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Clothes, footwear and other fashion goods?

		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Bournemouth	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Axbridge	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Asda, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q7. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Clothes, footwear and other fashion goods?

		Zone 10		Zone 11		Zone 12	
		Num	%	Num	%	Num	%
Other	Bournemouth	0	.0%	0	.0%	0	.0%
	Axbridge	1	11.1%	0	.0%	0	.0%
	Asda, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%

Q8. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Furniture, floor coverings and household textiles?

	Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	1202	100.0%	80	100.0%	101	100.0%	120	100.0%	120	100.0%

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Q8. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Furniture, floor coverings and household textiles?

	Zone 5		Zone 6		Zone 7		Zone 8		Zone 9	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	140	100.0%	110	100.0%	100	100.0%	90	100.0%	91	100.0%

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Q8. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Furniture, floor coverings and household textiles?

	Zone					
	10		11		12	
	Num	%	Num	%	Num	%
Base: All respondents	80	100.0%	90	100.0%	80	100.0%

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Q8. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Furniture, floor coverings and household textiles?

	Base: All respondents		Zone							
			1		2		3		4	
	Num	%	Num	%	Num	%	Num	%	Num	%
Cribbs Causeway / The Mall, BRISTOL	236	21.8%	33	45.8%	38	40.0%	37	34.6%	33	28.9%
Weston-super-Mare Town Centre	223	20.6%	0	.0%	5	5.3%	7	6.5%	17	14.9%
Don't buy	164	15.1%	15	20.8%	16	16.8%	15	14.0%	17	14.9%
Don't know/ varies	101	9.3%	5	6.9%	9	9.5%	5	4.7%	6	5.3%
Bristol - Cabot Circus Town Centre	90	8.3%	9	12.5%	9	9.5%	17	15.9%	10	8.8%
Weston Retail Park, Winterstoke Road, WESTON-SUPER-MARE	79	7.3%	2	2.8%	0	.0%	3	2.8%	4	3.5%
Internet	40	3.7%	2	2.8%	2	2.1%	5	4.7%	5	4.4%
Eastgate Centre, BRISTOL (including IKEA)	24	2.2%	1	1.4%	5	5.3%	3	2.8%	1	.9%
Clevedon Town Centre	23	2.1%	0	.0%	1	1.1%	1	.9%	16	14.0%
Taunton Town Centre	17	1.6%	0	.0%	0	.0%	0	.0%	0	.0%
Nailsea Town Centre	16	1.5%	0	.0%	3	3.2%	11	10.3%	1	.9%
Portishead Town Centre	12	1.1%	4	5.6%	6	6.3%	2	1.9%	0	.0%
Catalogue / mail order	10	.9%	1	1.4%	0	.0%	1	.9%	2	1.8%
Flower Down Retail Park, WESTON-SUPER-MARE	9	.8%	0	.0%	0	.0%	0	.0%	0	.0%
Shepton Mallet Town Centre	7	.6%	0	.0%	0	.0%	0	.0%	0	.0%
Burnham-on-Sea Town Centre	7	.6%	0	.0%	0	.0%	0	.0%	0	.0%
Cheddar Town Centre	6	.6%	0	.0%	0	.0%	0	.0%	0	.0%
Bridgwater Town Centre	5	.5%	0	.0%	0	.0%	0	.0%	0	.0%
Warminster Town Centre	4	.4%	0	.0%	0	.0%	0	.0%	0	.0%
Gallagher Retail Park, WESTON-SUPER-MARE	3	.3%	0	.0%	0	.0%	0	.0%	0	.0%
Winterstoke Road, BRISTOL	2	.2%	0	.0%	1	1.1%	0	.0%	0	.0%
St Johns Retail Park, TAUNTON	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
Hankridge Farm Retail Park, TAUNTON	1	.1%	0	.0%	0	.0%	0	.0%	1	.9%
Bridgwater Retail Park, BRIDGWATER	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
Street Town Centre	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
Frome Town Centre	1	.1%	0	.0%	0	.0%	0	.0%	1	.9%
Bath Town Centre	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%

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Q8. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Furniture, floor coverings and household textiles?

	Zone									
	5		6		7		8		9	
	Num	%	Num	%	Num	%	Num	%	Num	%
Cribbs Causeway / The Mall, BRISTOL	19	15.6%	11	11.1%	9	10.3%	17	20.7%	14	17.1%
Weston-super-Mare Town Centre	39	32.0%	41	41.4%	32	36.8%	20	24.4%	15	18.3%
Don't buy	20	16.4%	13	13.1%	12	13.8%	11	13.4%	14	17.1%
Don't know/ varies	14	11.5%	9	9.1%	6	6.9%	10	12.2%	12	14.6%
Bristol - Cabot Circus Town Centre	5	4.1%	4	4.0%	4	4.6%	7	8.5%	12	14.6%
Weston Retail Park, Winterstoke Road, WESTON-SUPER-MARE	14	11.5%	13	13.1%	10	11.5%	6	7.3%	7	8.5%
Internet	3	2.5%	2	2.0%	3	3.4%	4	4.9%	1	1.2%
Eastgate Centre, BRISTOL (including IKEA)	2	1.6%	1	1.0%	4	4.6%	0	.0%	2	2.4%
Clevedon Town Centre	0	.0%	0	.0%	0	.0%	4	4.9%	0	.0%
Taunton Town Centre	0	.0%	1	1.0%	0	.0%	0	.0%	0	.0%
Nailsea Town Centre	0	.0%	0	.0%	0	.0%	1	1.2%	0	.0%
Portishead Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Catalogue / mail order	0	.0%	3	3.0%	0	.0%	0	.0%	1	1.2%
Flower Down Retail Park, WESTON-SUPER-MARE	1	.8%	0	.0%	4	4.6%	1	1.2%	1	1.2%
Shepton Mallet Town Centre	1	.8%	0	.0%	0	.0%	1	1.2%	2	2.4%
Burnham-on-Sea Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Cheddar Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Bridgwater Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Warminster Town Centre	2	1.6%	0	.0%	1	1.1%	0	.0%	0	.0%
Gallagher Retail Park, WESTON-SUPER-MARE	2	1.6%	0	.0%	1	1.1%	0	.0%	0	.0%
Winterstoke Road, BRISTOL	0	.0%	0	.0%	1	1.1%	0	.0%	0	.0%
St Johns Retail Park, TAUNTON	0	.0%	1	1.0%	0	.0%	0	.0%	0	.0%
Hankridge Farm Retail Park, TAUNTON	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Bridgwater Retail Park, BRIDGWATER	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Street Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Frome Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Bath Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	1	1.2%

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Q8. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Furniture, floor coverings and household textiles?

	Zone					
	10		11		12	
	Num	%	Num	%	Num	%
Cribbs Causeway / The Mall, BRISTOL	16	22.2%	4	4.9%	5	7.0%
Weston-super-Mare Town Centre	14	19.4%	15	18.5%	18	25.4%
Don't buy	7	9.7%	14	17.3%	10	14.1%
Don't know/ varies	5	6.9%	9	11.1%	11	15.5%
Bristol - Cabot Circus Town Centre	4	5.6%	4	4.9%	5	7.0%
Weston Retail Park, Winterstoke Road, WESTON-SUPER-MARE	11	15.3%	3	3.7%	6	8.5%
Internet	4	5.6%	6	7.4%	3	4.2%
Eastgate Centre, BRISTOL (including IKEA)	3	4.2%	1	1.2%	1	1.4%
Clevedon Town Centre	0	.0%	0	.0%	1	1.4%
Taunton Town Centre	3	4.2%	11	13.6%	2	2.8%
Nailsea Town Centre	0	.0%	0	.0%	0	.0%
Portishead Town Centre	0	.0%	0	.0%	0	.0%
Catalogue / mail order	1	1.4%	1	1.2%	0	.0%
Flower Down Retail Park, WESTON-SUPER-MARE	2	2.8%	0	.0%	0	.0%
Shepton Mallet Town Centre	1	1.4%	0	.0%	2	2.8%
Burnham-on-Sea Town Centre	1	1.4%	6	7.4%	0	.0%
Cheddar Town Centre	0	.0%	0	.0%	6	8.5%
Bridgwater Town Centre	0	.0%	5	6.2%	0	.0%
Warminster Town Centre	0	.0%	1	1.2%	0	.0%
Gallagher Retail Park, WESTON-SUPER-MARE	0	.0%	0	.0%	0	.0%
Winterstoke Road, BRISTOL	0	.0%	0	.0%	0	.0%
St Johns Retail Park, TAUNTON	0	.0%	0	.0%	0	.0%
Hankridge Farm Retail Park, TAUNTON	0	.0%	0	.0%	0	.0%
Bridgwater Retail Park, BRIDGWATER	0	.0%	1	1.2%	0	.0%
Street Town Centre	0	.0%	0	.0%	1	1.4%
Frome Town Centre	0	.0%	0	.0%	0	.0%
Bath Town Centre	0	.0%	0	.0%	0	.0%

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Q8. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Furniture, floor coverings and household textiles?

		Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Worle	9	7.6%	0	.0%	0	.0%	1	7.7%	0	.0%
	B&Q, Flower Down Retail Park, Weston-super-Mare	9	7.6%	0	.0%	0	.0%	0	.0%	0	.0%
	Dunelm Mill, Western Retail Park, Marshfields Way, Weston-super-Mare	8	6.8%	0	.0%	0	.0%	0	.0%	1	16.7%
	John Lewis, Cribbs Causeway, Bristol	7	5.9%	0	.0%	1	16.7%	1	7.7%	1	16.7%
	Park Furnishers, Willway Street, Bedminster	6	5.1%	0	.0%	0	.0%	2	15.4%	1	16.7%
	Bristol	6	5.1%	2	25.0%	0	.0%	0	.0%	1	16.7%
	Highbridge	5	4.2%	0	.0%	0	.0%	0	.0%	0	.0%
	Broadmead, Bristol	5	4.2%	2	25.0%	1	16.7%	1	7.7%	0	.0%
	Wells	4	3.4%	0	.0%	0	.0%	0	.0%	0	.0%
	Homebase, Winterstoke Road, Weston-super-Mare	4	3.4%	0	.0%	0	.0%	0	.0%	0	.0%
	Dreams, Marchfields Way, Weston-super-Mare	4	3.4%	0	.0%	0	.0%	0	.0%	0	.0%
	Skidmores Ltd, High Street, Worle	3	2.5%	0	.0%	0	.0%	0	.0%	0	.0%
	Homebase, Queensway Centre, Worle	3	2.5%	0	.0%	0	.0%	0	.0%	0	.0%
	Bedminster	3	2.5%	1	12.5%	0	.0%	0	.0%	2	33.3%
	Backwell	3	2.5%	0	.0%	0	.0%	2	15.4%	0	.0%
	Next, Searle Crecent, Weston-super-Mare	2	1.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Homebase, Wyndham Retail Park, Wyndham Way, Portishead	2	1.7%	0	.0%	1	16.7%	1	7.7%	0	.0%
	Gardiners, Straight Street, Broad Plain, Bristol	2	1.7%	0	.0%	1	16.7%	0	.0%	0	.0%
	Clifton, Bristol	2	1.7%	2	25.0%	0	.0%	0	.0%	0	.0%
	Carpertright, Marchfields Way, Weston-super-Mare	2	1.7%	0	.0%	0	.0%	0	.0%	0	.0%
	B&Q, Imperial Park, Bristol	2	1.7%	0	.0%	0	.0%	2	15.4%	0	.0%
	Winscombe	1	.8%	0	.0%	0	.0%	0	.0%	0	.0%
	Wedmore	1	.8%	0	.0%	0	.0%	0	.0%	0	.0%
	Staples, The Wyvern Centre, Marchfields Way, Weston-super-Mare	1	.8%	0	.0%	0	.0%	0	.0%	0	.0%
	Shepton Mallet	1	.8%	0	.0%	0	.0%	0	.0%	0	.0%
	Scotts Furnishings, Victoria Street, Burnham-on-Sea	1	.8%	0	.0%	0	.0%	0	.0%	0	.0%
	St Johns Retail Park, Taunton	1	.8%	0	.0%	0	.0%	0	.0%	0	.0%
	S H Skidmore & Son, High Street, Worle	1	.8%	0	.0%	0	.0%	0	.0%	0	.0%
	RW Haskings, Wickham Way, Shepton Mallet	1	.8%	0	.0%	0	.0%	0	.0%	0	.0%

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Q8. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Furniture, floor coverings and household textiles?

		Zone									
		5		6		7		8		9	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Worle	4	22.2%	0	.0%	2	15.4%	1	12.5%	0	.0%
	B&Q, Flower Down Retail Park, Weston-super-Mare	1	5.6%	3	27.3%	2	15.4%	1	12.5%	0	.0%
	Dunelm Mill, Western Retail Park, Marshfields Way, Weston-super-Mare	2	11.1%	2	18.2%	1	7.7%	1	12.5%	0	.0%
	John Lewis, Cribbs Causeway, Bristol	0	.0%	1	9.1%	1	7.7%	0	.0%	0	.0%
	Park Furnishers, Willway Street, Bedminster	0	.0%	0	.0%	0	.0%	1	12.5%	2	22.2%
	Bristol	0	.0%	1	9.1%	0	.0%	0	.0%	2	22.2%
	Highbridge	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Broadmead, Bristol	1	5.6%	0	.0%	0	.0%	0	.0%	0	.0%
	Wells	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Homebase, Winterstoke Road, Weston-super-Mare	3	16.7%	0	.0%	1	7.7%	0	.0%	0	.0%
	Dreams, Marchfields Way, Weston-super-Mare	1	5.6%	0	.0%	1	7.7%	0	.0%	1	11.1%
	Skidmores Ltd, High Street, Worle	2	11.1%	0	.0%	1	7.7%	0	.0%	0	.0%
	Homebase, Queensway Centre, Worle	2	11.1%	0	.0%	1	7.7%	0	.0%	0	.0%
	Bedminster	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Backwell	0	.0%	0	.0%	0	.0%	1	12.5%	0	.0%
	Next, Searle Crecent, Weston-super-Mare	0	.0%	1	9.1%	1	7.7%	0	.0%	0	.0%
	Homebase, Wyndham Retail Park, Wyndham Way, Portishead	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Gardiners, Straight Street, Broad Plain, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	1	11.1%
	Clifton, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Carpertright, Marchfields Way, Weston-super-Mare	0	.0%	0	.0%	1	7.7%	0	.0%	0	.0%
	B&Q, Imperial Park, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Winscombe	0	.0%	0	.0%	0	.0%	1	12.5%	0	.0%
	Wedmore	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Staples, The Wyvern Centre, Marchfields Way, Weston-super-Mare	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Shepton Mallet	0	.0%	1	9.1%	0	.0%	0	.0%	0	.0%
	Scotts Furnishings, Victoria Street, Burnham-on-Sea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	St Johns Retail Park, Taunton	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	S H Skidmore & Son, High Street, Worle	1	5.6%	0	.0%	0	.0%	0	.0%	0	.0%
	RW Haskings, Wickham Way, Shepton Mallet	0	.0%	0	.0%	0	.0%	0	.0%	1	11.1%

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Q8. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Furniture, floor coverings and household textiles?

		Zone					
		10		11		12	
		Num	%	Num	%	Num	%
Other	Worle	0	.0%	0	.0%	1	11.1%
	B&Q, Flower Down Retail Park, Weston-super-Mare	2	25.0%	0	.0%	0	.0%
	Dunelm Mill, Western Retail Park, Marshfields Way, Weston-super-Mare	1	12.5%	0	.0%	0	.0%
	John Lewis, Cribbs Causeway, Bristol	0	.0%	0	.0%	2	22.2%
	Park Furnishers, Willway Street, Bedminster	0	.0%	0	.0%	0	.0%
	Bristol	0	.0%	0	.0%	0	.0%
	Highbridge	1	12.5%	4	44.4%	0	.0%
	Broadmead, Bristol	0	.0%	0	.0%	0	.0%
	Wells	1	12.5%	0	.0%	3	33.3%
	Homebase, Winterstoke Road, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Dreams, Marchfields Way, Weston-super-Mare	0	.0%	1	11.1%	0	.0%
	Skidmores Ltd, High Street, Worle	0	.0%	0	.0%	0	.0%
	Homebase, Queensway Centre, Worle	0	.0%	0	.0%	0	.0%
	Bedminster	0	.0%	0	.0%	0	.0%
	Backwell	0	.0%	0	.0%	0	.0%
	Next, Searle Crecent, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Homebase, Wyndham Retail Park, Wyndham Way, Portishead	0	.0%	0	.0%	0	.0%
	Gardiners, Straight Street, Broad Plain, Bristol	0	.0%	0	.0%	0	.0%
	Clifton, Bristol	0	.0%	0	.0%	0	.0%
	Carpertright, Marchfields Way, Weston-super-Mare	1	12.5%	0	.0%	0	.0%
	B&Q, Imperial Park, Bristol	0	.0%	0	.0%	0	.0%
	Winscombe	0	.0%	0	.0%	0	.0%
	Wedmore	0	.0%	0	.0%	1	11.1%
	Staples, The Wyvern Centre, Marchfields Way, Weston-super-Mare	1	12.5%	0	.0%	0	.0%
	Shepton Mallet	0	.0%	0	.0%	0	.0%
	Scotts Furnishings, Victoria Street, Burnham-on-Sea	0	.0%	1	11.1%	0	.0%
	St Johns Retail Park, Taunton	0	.0%	1	11.1%	0	.0%
	S H Skidmore & Son, High Street, Worle	0	.0%	0	.0%	0	.0%
	RW Haskings, Wickham Way, Shepton Mallet	0	.0%	0	.0%	0	.0%

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Q8. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Furniture, floor coverings and household textiles?

				Zone							
		Base: All respondents		1		2		3		4	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Richard M Jones Carpet Fitter, Western Road, Congresbury, Bristol	1	.8%	0	.0%	0	.0%	0	.0%	0	.0%
	Orchards, Somerset Square, Nailsea	1	.8%	0	.0%	0	.0%	1	7.7%	0	.0%
	Newport	1	.8%	0	.0%	0	.0%	0	.0%	0	.0%
	Mendip Carpets, High Street, Nailsea, Bristol	1	.8%	0	.0%	0	.0%	1	7.7%	0	.0%
	Matalan, Locking Castle District, Weston-super-Mare	1	.8%	0	.0%	0	.0%	0	.0%	0	.0%
	Marchfields Way, Weston-super-Mare	1	.8%	0	.0%	0	.0%	0	.0%	0	.0%
	Yeovil	1	.8%	0	.0%	0	.0%	0	.0%	0	.0%
	Cleeve	1	.8%	0	.0%	0	.0%	0	.0%	0	.0%
	Living Homes, Dolphin Square, Weston-super-Mare	1	.8%	0	.0%	0	.0%	0	.0%	0	.0%
	Homebase, Longwell Green, Bristol	1	.8%	0	.0%	0	.0%	0	.0%	0	.0%
	Harvey's, Gallagher Retail Park, Weston-super-Mare	1	.8%	0	.0%	0	.0%	0	.0%	0	.0%
	FFF Carpets, Victoria Street, Burnham-on-Sea	1	.8%	0	.0%	0	.0%	0	.0%	0	.0%
	Creative Carpets, Market Street, Wells	1	.8%	0	.0%	0	.0%	0	.0%	0	.0%
	Co-op, Bishopsworth Road, Bedminster Down, Bristol	1	.8%	0	.0%	0	.0%	0	.0%	0	.0%
	Cargo Homeshop, Beechwood Shopping Centre, High Street, Cheltenham	1	.8%	0	.0%	1	16.7%	0	.0%	0	.0%
	Bath	1	.8%	0	.0%	0	.0%	0	.0%	0	.0%
	B&Q, Cribbs Causeway, Bristol	1	.8%	0	.0%	0	.0%	1	7.7%	0	.0%
	Ashton Gate, Bristol	1	.8%	1	12.5%	0	.0%	0	.0%	0	.0%
	Argos, Wyndham Way Retail Park, Portishead	1	.8%	0	.0%	1	16.7%	0	.0%	0	.0%

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Q8. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Furniture, floor coverings and household textiles?

		Zone									
		5		6		7		8		9	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Richard M Jones Carpet Fitter, Western Road, Congresbury, Bristol	0	.0%	0	.0%	0	.0%	1	12.5%	0	.0%
	Orchards, Somerset Square, Nailsea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Newport	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Mendip Carpets, High Street, Nailsea, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Matalan, Locking Castle District, Weston-super-Mare	0	.0%	0	.0%	0	.0%	1	12.5%	0	.0%
	Marchfields Way, Weston-super-Mare	0	.0%	0	.0%	0	.0%	0	.0%	1	11.1%
	Yeovil	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Cleeve	0	.0%	0	.0%	1	7.7%	0	.0%	0	.0%
	Living Homes, Dolphin Square, Weston-super-Mare	0	.0%	1	9.1%	0	.0%	0	.0%	0	.0%
	Homebase, Longwell Green, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	1	11.1%
	Harvey's, Gallagher Retail Park, Weston-super-Mare	0	.0%	1	9.1%	0	.0%	0	.0%	0	.0%
	FFF Carpets, Victoria Street, Burnham-on-Sea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Creative Carpets, Market Street, Wells	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Co-op, Bishopsworth Road, Bedminster Down, Bristol	1	5.6%	0	.0%	0	.0%	0	.0%	0	.0%
	Cargo Homeshop, Beechwood Shopping Centre, High Street, Cheltenham	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Bath	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	B&Q, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Ashton Gate, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Argos, Wyndham Way Retail Park, Portishead	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q8. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Furniture, floor coverings and household textiles?

		Zone					
		10		11		12	
		Num	%	Num	%	Num	%
Other	Richard M Jones Carpet Fitter, Western Road, Congresbury, Bristol	0	.0%	0	.0%	0	.0%
	Orchards, Somerset Square, Nailsea	0	.0%	0	.0%	0	.0%
	Newport	1	12.5%	0	.0%	0	.0%
	Mendip Carpets, High Street, Nailsea, Bristol	0	.0%	0	.0%	0	.0%
	Matalan, Locking Castle District, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Marchfields Way, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Yeovil	0	.0%	1	11.1%	0	.0%
	Cleeve	0	.0%	0	.0%	0	.0%
	Living Homes, Dolphin Square, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Homebase, Longwell Green, Bristol	0	.0%	0	.0%	0	.0%
	Harvey's, Gallagher Retail Park, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	FFF Carpets, Victoria Street, Burnham-on-Sea	0	.0%	1	11.1%	0	.0%
	Creative Carpets, Market Street, Wells	0	.0%	0	.0%	1	11.1%
	Co-op, Bishopsworth Road, Bedminster Down, Bristol	0	.0%	0	.0%	0	.0%
	Cargo Homeshop, Beechwood Shopping Centre, High Street, Cheltenham	0	.0%	0	.0%	0	.0%
	Bath	0	.0%	0	.0%	1	11.1%
	B&Q, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%
	Ashton Gate, Bristol	0	.0%	0	.0%	0	.0%
	Argos, Wyndham Way Retail Park, Portishead	0	.0%	0	.0%	0	.0%

Q9. In which town centre, freestanding store, or retail park do you do most of your household's shopping for DIY and decorating goods?

			Zone							
	Base: All respondents		1		2		3		4	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	1202	100.0%	80	100.0%	101	100.0%	120	100.0%	120	100.0%

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Q9. In which town centre, freestanding store, or retail park do you do most of your household's shopping for DIY and decorating goods?

	Zone									
	5		6		7		8		9	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	140	100.0%	110	100.0%	100	100.0%	90	100.0%	91	100.0%

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Q9. In which town centre, freestanding store, or retail park do you do most of your household's shopping for DIY and decorating goods?

	Zone					
	10		11		12	
	Num	%	Num	%	Num	%
Base: All respondents	80	100.0%	90	100.0%	80	100.0%

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Q9. In which town centre, freestanding store, or retail park do you do most of your household's shopping for DIY and decorating goods?

	Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
	Num	%	Num	%	Num	%	Num	%	Num	%
Weston-super-Mare Town Centre	212	24.1%	0	.0%	0	.0%	5	5.6%	10	10.6%
Don't buy	136	15.5%	15	25.4%	13	17.1%	20	22.5%	12	12.8%
Weston Retail Park, Winterstoke Road, WESTON-SUPER-MARE	112	12.7%	0	.0%	2	2.6%	4	4.5%	4	4.3%
Clevedon Town Centre	89	10.1%	1	1.7%	4	5.3%	18	20.2%	53	56.4%
Cribbs Causeway / The Mall, BRISTOL	73	8.3%	22	37.3%	21	27.6%	14	15.7%	6	6.4%
Portishead Town Centre	47	5.3%	9	15.3%	33	43.4%	4	4.5%	0	.0%
Don't know/ varies	41	4.7%	1	1.7%	2	2.6%	3	3.4%	4	4.3%
Flower Down Retail Park, WESTON-SUPER-MARE	26	3.0%	0	.0%	0	.0%	0	.0%	1	1.1%
Bristol - Cabot Circus Town Centre	26	3.0%	5	8.5%	0	.0%	9	10.1%	1	1.1%
Cheddar Town Centre	24	2.7%	0	.0%	0	.0%	2	2.2%	1	1.1%
Bridgwater Town Centre	21	2.4%	0	.0%	0	.0%	0	.0%	0	.0%
Winterstoke Road, BRISTOL	10	1.1%	4	6.8%	1	1.3%	0	.0%	0	.0%
Bridgwater Retail Park, BRIDGWATER	8	.9%	0	.0%	0	.0%	0	.0%	0	.0%
Internet	6	.7%	0	.0%	0	.0%	0	.0%	0	.0%
The Junction / Imperial Park, HARTCLIFFE	6	.7%	1	1.7%	0	.0%	4	4.5%	0	.0%
Warminster Town Centre	6	.7%	0	.0%	0	.0%	0	.0%	0	.0%
Burnham-on-Sea Town Centre	6	.7%	0	.0%	0	.0%	0	.0%	0	.0%
Gallagher Retail Park, WESTON-SUPER-MARE	5	.6%	0	.0%	0	.0%	0	.0%	0	.0%
Nailsea Town Centre	5	.6%	0	.0%	0	.0%	5	5.6%	0	.0%
Glastonbury Town Centre	5	.6%	0	.0%	0	.0%	0	.0%	0	.0%
Eastgate Centre, BRISTOL (including IKEA)	4	.5%	1	1.7%	0	.0%	0	.0%	1	1.1%
Street Town Centre	3	.3%	0	.0%	0	.0%	0	.0%	0	.0%
Catalogue / mail order	2	.2%	0	.0%	0	.0%	1	1.1%	0	.0%
Taunton Town Centre	2	.2%	0	.0%	0	.0%	0	.0%	0	.0%
St Georges Retail Park, Queensway, WESTON-SUPER-MARE	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
Hankridge Farm Retail Park, TAUNTON	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
Yeovil Town Centre	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
Frome Town Centre	1	.1%	0	.0%	0	.0%	0	.0%	1	1.1%
Bath Town Centre	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%

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Q9. In which town centre, freestanding store, or retail park do you do most of your household's shopping for DIY and decorating goods?

	Zone									
	5		6		7		8		9	
	Num	%	Num	%	Num	%	Num	%	Num	%
Weston-super-Mare Town Centre	33	42.9%	35	42.2%	36	48.0%	23	34.8%	15	24.2%
Don't buy	11	14.3%	14	16.9%	8	10.7%	5	7.6%	13	21.0%
Weston Retail Park, Winterstoke Road, WESTON-SUPER-MARE	15	19.5%	18	21.7%	15	20.0%	11	16.7%	11	17.7%
Clevedon Town Centre	0	.0%	0	.0%	0	.0%	12	18.2%	0	.0%
Cribbs Causeway / The Mall, BRISTOL	1	1.3%	1	1.2%	2	2.7%	5	7.6%	0	.0%
Portishead Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	1	1.6%
Don't know/ varies	5	6.5%	3	3.6%	7	9.3%	2	3.0%	5	8.1%
Flower Down Retail Park, WESTON-SUPER-MARE	5	6.5%	8	9.6%	3	4.0%	4	6.1%	2	3.2%
Bristol - Cabot Circus Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	7	11.3%
Cheddar Town Centre	0	.0%	0	.0%	0	.0%	1	1.5%	1	1.6%
Bridgwater Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	1	1.6%
Winterstoke Road, BRISTOL	0	.0%	2	2.4%	1	1.3%	1	1.5%	1	1.6%
Bridgwater Retail Park, BRIDGWATER	0	.0%	0	.0%	0	.0%	0	.0%	1	1.6%
Internet	1	1.3%	2	2.4%	0	.0%	0	.0%	1	1.6%
The Junction / Imperial Park, HARTCLIFFE	0	.0%	0	.0%	0	.0%	0	.0%	1	1.6%
Warminster Town Centre	2	2.6%	0	.0%	2	2.7%	1	1.5%	1	1.6%
Burnham-on-Sea Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Gallagher Retail Park, WESTON-SUPER-MARE	1	1.3%	0	.0%	0	.0%	1	1.5%	1	1.6%
Nailsea Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Glastonbury Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Eastgate Centre, BRISTOL (including IKEA)	0	.0%	0	.0%	1	1.3%	0	.0%	0	.0%
Street Town Centre	1	1.3%	0	.0%	0	.0%	0	.0%	0	.0%
Catalogue / mail order	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Taunton Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
St Georges Retail Park, Queensway, WESTON-SUPER-MARE	1	1.3%	0	.0%	0	.0%	0	.0%	0	.0%
Hankridge Farm Retail Park, TAUNTON	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Yeovil Town Centre	1	1.3%	0	.0%	0	.0%	0	.0%	0	.0%
Frome Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Bath Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q9. In which town centre, freestanding store, or retail park do you do most of your household's shopping for DIY and decorating goods?

	Zone					
	10		11		12	
	Num	%	Num	%	Num	%
Weston-super-Mare Town Centre	25	37.3%	14	20.0%	16	25.8%
Don't buy	12	17.9%	9	12.9%	4	6.5%
Weston Retail Park, Winterstoke Road, WESTON-SUPER-MARE	16	23.9%	5	7.1%	11	17.7%
Clevedon Town Centre	0	.0%	0	.0%	1	1.6%
Cribbs Causeway / The Mall, BRISTOL	1	1.5%	0	.0%	0	.0%
Portishead Town Centre	0	.0%	0	.0%	0	.0%
Don't know/ varies	2	3.0%	2	2.9%	5	8.1%
Flower Down Retail Park, WESTON-SUPER-MARE	2	3.0%	0	.0%	1	1.6%
Bristol - Cabot Circus Town Centre	0	.0%	3	4.3%	1	1.6%
Cheddar Town Centre	5	7.5%	0	.0%	14	22.6%
Bridgwater Town Centre	0	.0%	19	27.1%	1	1.6%
Winterstoke Road, BRISTOL	0	.0%	0	.0%	0	.0%
Bridgwater Retail Park, BRIDGWATER	0	.0%	6	8.6%	1	1.6%
Internet	0	.0%	2	2.9%	0	.0%
The Junction / Imperial Park, HARTCLIFFE	0	.0%	0	.0%	0	.0%
Warminster Town Centre	0	.0%	0	.0%	0	.0%
Burnham-on-Sea Town Centre	1	1.5%	5	7.1%	0	.0%
Gallagher Retail Park, WESTON-SUPER-MARE	1	1.5%	1	1.4%	0	.0%
Nailsea Town Centre	0	.0%	0	.0%	0	.0%
Glastonbury Town Centre	0	.0%	0	.0%	5	8.1%
Eastgate Centre, BRISTOL (including IKEA)	0	.0%	1	1.4%	0	.0%
Street Town Centre	0	.0%	0	.0%	2	3.2%
Catalogue / mail order	1	1.5%	0	.0%	0	.0%
Taunton Town Centre	0	.0%	2	2.9%	0	.0%
St Georges Retail Park, Queensway, WESTON-SUPER-MARE	0	.0%	0	.0%	0	.0%
Hankridge Farm Retail Park, TAUNTON	1	1.5%	0	.0%	0	.0%
Yeovil Town Centre	0	.0%	0	.0%	0	.0%
Frome Town Centre	0	.0%	0	.0%	0	.0%
Bath Town Centre	0	.0%	1	1.4%	0	.0%

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Q9. In which town centre, freestanding store, or retail park do you do most of your household's shopping for DIY and decorating goods?

		Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	B&Q, Flower Down Retail Park, Weston-super-Mare	91	28.3%	0	.0%	0	.0%	2	6.5%	1	3.8%
	Homebase, Queensway Centre, Worle	34	10.6%	0	.0%	0	.0%	0	.0%	0	.0%
	Homebase, Wyndham Retail Park, Wyndham Way, Portishead	30	9.3%	8	38.1%	16	64.0%	4	12.9%	1	3.8%
	Focus, Tweed Road, Clevedon	28	8.7%	0	.0%	1	4.0%	3	9.7%	21	80.8%
	Homebase, Winterstoke Road, Weston-super-Mare	22	6.8%	0	.0%	1	4.0%	0	.0%	1	3.8%
	B&Q, Imperial Park, Bristol	22	6.8%	5	23.8%	0	.0%	11	35.5%	0	.0%
	Worle	19	5.9%	0	.0%	0	.0%	0	.0%	0	.0%
	B&Q, Cribbs Causeway, Bristol	12	3.7%	2	9.5%	6	24.0%	3	9.7%	1	3.8%
	B&Q, Bridgewater, Broadway	7	2.2%	0	.0%	0	.0%	0	.0%	0	.0%
	Maunders, Barrows Road, Cheddar	6	1.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Proper Job, High Street, Worle	3	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Mica, Farleigh Road, Backwell	3	.9%	0	.0%	0	.0%	3	9.7%	0	.0%
	Lanes, Saxon place, Station Road, Cheddar	3	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	B&Q, Wirral Road, Street Road, Glastonbury	3	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Wilkinsons, High Street, Weston-super-Mare	2	.6%	0	.0%	0	.0%	0	.0%	0	.0%
	Wickes, Ashton Gate, Bristol	2	.6%	0	.0%	0	.0%	0	.0%	0	.0%
	Marchfields Way, Weston-super-Mare	2	.6%	0	.0%	0	.0%	0	.0%	0	.0%
	Pill	2	.6%	2	9.5%	0	.0%	0	.0%	0	.0%
	Loaders Hardware, High Street, Yatton	2	.6%	0	.0%	0	.0%	0	.0%	0	.0%
	John Lewis, Cribbs Causeway, Bristol	2	.6%	1	4.8%	0	.0%	1	3.2%	0	.0%
	John Brown, High Street, Nailsea	2	.6%	0	.0%	0	.0%	2	6.5%	0	.0%
	Homebase, Longwell Green, Bristol	2	.6%	0	.0%	0	.0%	0	.0%	0	.0%
	Focus, Avonmouth Trading Estate, Atlantic Road, Bristol	2	.6%	1	4.8%	0	.0%	0	.0%	0	.0%
	Broadmead, Bristol	2	.6%	1	4.8%	1	4.0%	0	.0%	0	.0%
	Bristol	2	.6%	1	4.8%	0	.0%	0	.0%	0	.0%
	Backwell	2	.6%	0	.0%	0	.0%	2	6.5%	0	.0%
	Yatton	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Wickes, The Clink, Bridgwater	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Wells	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	North Worle Shopping Centre, Queens Way, Worle	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Newton Abbot	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Keynsham	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Highbridge	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%

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Q9. In which town centre, freestanding store, or retail park do you do most of your household's shopping for DIY and decorating goods?

		Zone 5 Num	Zone 5 %	Zone 6 Num	Zone 6 %	Zone 7 Num	Zone 7 %	Zone 8 Num	Zone 8 %	Zone 9 Num	Zone 9 %
Other	B&Q, Flower Down Retail Park, Weston-super-Mare	20	31.7%	17	63.0%	16	64.0%	9	37.5%	8	27.6%
	Homebase, Queensway Centre, Worle	22	34.9%	4	14.8%	1	4.0%	2	8.3%	3	10.3%
	Homebase, Wyndham Retail Park, Wyndham Way, Portishead	0	.0%	0	.0%	0	.0%	1	4.2%	0	.0%
	Focus, Tweed Road, Clevedon	0	.0%	0	.0%	0	.0%	3	12.5%	0	.0%
	Homebase, Winterstoke Road, Weston-super-Mare	6	9.5%	3	11.1%	4	16.0%	1	4.2%	1	3.4%
	B&Q, Imperial Park, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	6	20.7%
	Worle	12	19.0%	0	.0%	3	12.0%	2	8.3%	1	3.4%
	B&Q, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	B&Q, Bridgewater, Broadway	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Maunders, Barrows Road, Cheddar	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Proper Job, High Street, Worle	3	4.8%	0	.0%	0	.0%	0	.0%	0	.0%
	Mica, Farleigh Road, Backwell	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Lanes, Saxon place, Station Road, Cheddar	0	.0%	0	.0%	0	.0%	0	.0%	1	3.4%
	B&Q, Wirral Road, Street Road, Glastonbury	0	.0%	0	.0%	0	.0%	0	.0%	1	3.4%
	Wilkinsons, High Street, Weston-super-Mare	0	.0%	2	7.4%	0	.0%	0	.0%	0	.0%
	Wickes, Ashton Gate, Bristol	0	.0%	0	.0%	0	.0%	1	4.2%	1	3.4%
	Marchfields Way, Weston-super-Mare	0	.0%	0	.0%	0	.0%	1	4.2%	1	3.4%
	Pill	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Loaders Hardware, High Street, Yatton	0	.0%	0	.0%	0	.0%	1	4.2%	1	3.4%
	John Lewis, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	John Brown, High Street, Nailsea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Homebase, Longwell Green, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	1	3.4%
	Focus, Avonmouth Trading Estate, Atlantic Road, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	1	3.4%
	Broadmead, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Bristol	0	.0%	0	.0%	1	4.0%	0	.0%	0	.0%
	Backwell	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Yatton	0	.0%	0	.0%	0	.0%	1	4.2%	0	.0%
	Wickes, The Clink, Bridgwater	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Wells	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	North Worle Shopping Centre, Queens Way, Worle	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Newton Abbot	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Keynsham	0	.0%	0	.0%	0	.0%	0	.0%	1	3.4%
	Highbridge	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q9. In which town centre, freestanding store, or retail park do you do most of your household's shopping for DIY and decorating goods?

		Zone					
		10		11		12	
		Num	%	Num	%	Num	%
Other	B&Q, Flower Down Retail Park, Weston-super-Mare	8	61.5%	6	30.0%	4	22.2%
	Homebase, Queensway Centre, Worle	1	7.7%	1	5.0%	0	.0%
	Homebase, Wyndham Retail Park, Wyndham Way, Portishead	0	.0%	0	.0%	0	.0%
	Focus, Tweed Road, Clevedon	0	.0%	0	.0%	0	.0%
	Homebase, Winterstoke Road, Weston-super-Mare	2	15.4%	1	5.0%	2	11.1%
	B&Q, Imperial Park, Bristol	0	.0%	0	.0%	0	.0%
	Worle	0	.0%	0	.0%	1	5.6%
	B&Q, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%
	B&Q, Bridgewater, Broadway	0	.0%	7	35.0%	0	.0%
	Maunders, Barrows Road, Cheddar	0	.0%	0	.0%	6	33.3%
	Proper Job, High Street, Worle	0	.0%	0	.0%	0	.0%
	Mica, Farleigh Road, Backwell	0	.0%	0	.0%	0	.0%
	Lanes, Saxon place, Station Road, Cheddar	1	7.7%	0	.0%	1	5.6%
	B&Q, Wirral Road, Street Road, Glastonbury	0	.0%	0	.0%	2	11.1%
	Wilkinsons, High Street, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Wickes, Ashton Gate, Bristol	0	.0%	0	.0%	0	.0%
	Marchfields Way, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Pill	0	.0%	0	.0%	0	.0%
	Loaders Hardware, High Street, Yatton	0	.0%	0	.0%	0	.0%
	John Lewis, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%
	John Brown, High Street, Nailsea	0	.0%	0	.0%	0	.0%
	Homebase, Longwell Green, Bristol	0	.0%	1	5.0%	0	.0%
	Focus, Avonmouth Trading Estate, Atlantic Road, Bristol	0	.0%	0	.0%	0	.0%
	Broadmead, Bristol	0	.0%	0	.0%	0	.0%
	Bristol	0	.0%	0	.0%	0	.0%
	Backwell	0	.0%	0	.0%	0	.0%
	Yatton	0	.0%	0	.0%	0	.0%
	Wickes, The Clink, Bridgwater	0	.0%	1	5.0%	0	.0%
	Wells	0	.0%	0	.0%	1	5.6%
	North Worle Shopping Centre, Queens Way, Worle	1	7.7%	0	.0%	0	.0%
	Newton Abbot	0	.0%	1	5.0%	0	.0%
	Keynsham	0	.0%	0	.0%	0	.0%
	Highbridge	0	.0%	1	5.0%	0	.0%

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Q9. In which town centre, freestanding store, or retail park do you do most of your household's shopping for DIY and decorating goods?

		Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Kingston Upon Thames	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Jewsons, Winterstoke Road, Weston-super-Mare	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Home Hardware, High Street, Burnham on sea	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Dunelm Mill, Western Retail Park, Marshfields Way, Weston-super-Mare	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Clevedon DIY, Teignmouth Road, Clevedon	1	.3%	0	.0%	0	.0%	0	.0%	1	3.8%
	B&Q, Muller Road, Horfield	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	B&Q, Heron Gate, Riverside, Taunton	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Ashton Gate, Bristol	1	.3%	0	.0%	0	.0%	0	.0%	0	.0%

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Q9. In which town centre, freestanding store, or retail park do you do most of your household's shopping for DIY and decorating goods?

		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Kingston Upon Thames	0	.0%	0	.0%	0	.0%	1	4.2%	0	.0%
	Jewsons, Winterstoke Road, Weston-super-Mare	0	.0%	1	3.7%	0	.0%	0	.0%	0	.0%
	Home Hardware, High Street, Burnham on sea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Dunelm Mill, Western Retail Park, Marshfields Way, Weston-super-Mare	0	.0%	0	.0%	0	.0%	1	4.2%	0	.0%
	Clevedon DIY, Teignmouth Road, Clevedon	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	B&Q, Muller Road, Horfield	0	.0%	0	.0%	0	.0%	0	.0%	1	3.4%
	B&Q, Heron Gate, Riverside, Taunton	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Ashton Gate, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	1	3.4%

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Q9. In which town centre, freestanding store, or retail park do you do most of your household's shopping for DIY and decorating goods?

		Zone					
		10		11		12	
		Num	%	Num	%	Num	%
Other	Kingston Upon Thames	0	.0%	0	.0%	0	.0%
	Jewsons, Winterstoke Road, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Home Hardware, High Street, Burnham on sea	0	.0%	1	5.0%	0	.0%
	Dunelm Mill, Western Retail Park, Marshfields Way, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Clevedon DIY, Teignmouth Road, Clevedon	0	.0%	0	.0%	0	.0%
	B&Q, Muller Road, Horfield	0	.0%	0	.0%	0	.0%
	B&Q, Heron Gate, Riverside, Taunton	0	.0%	0	.0%	1	5.6%
	Ashton Gate, Bristol	0	.0%	0	.0%	0	.0%

Q10. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Domestic appliances such as washing machines, fridges, cookers and kettles?

			Zone							
	Base: All respondents		1		2		3		4	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	1202	100.0%	80	100.0%	101	100.0%	120	100.0%	120	100.0%

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Q10. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Domestic appliances such as washing machines, fridges, cookers and kettles?

	Zone									
	5		6		7		8		9	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	140	100.0%	110	100.0%	100	100.0%	90	100.0%	91	100.0%

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Q10. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Domestic appliances such as washing machines, fridges, cookers and kettles?

	Zone					
	10		11		12	
	Num	%	Num	%	Num	%
Base: All respondents	80	100.0%	90	100.0%	80	100.0%

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Q10. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Domestic appliances such as washing machines, fridges, cookers and kettles?

	Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
	Num	%	Num	%	Num	%	Num	%	Num	%
Cribbs Causeway / The Mall, BRISTOL	215	22.0%	37	53.6%	55	64.0%	41	41.8%	37	34.6%
Weston-super-Mare Town Centre	199	20.3%	1	1.4%	0	.0%	5	5.1%	16	15.0%
Weston Retail Park, Winterstoke Road, WESTON-SUPER-MARE	124	12.7%	1	1.4%	1	1.2%	7	7.1%	10	9.3%
Internet	122	12.5%	9	13.0%	10	11.6%	13	13.3%	15	14.0%
Don't know/ varies	65	6.6%	3	4.3%	6	7.0%	6	6.1%	2	1.9%
Don't buy	62	6.3%	6	8.7%	3	3.5%	7	7.1%	6	5.6%
Cheddar Town Centre	37	3.8%	0	.0%	0	.0%	1	1.0%	0	.0%
Bristol - Cabot Circus Town Centre	34	3.5%	5	7.2%	3	3.5%	12	12.2%	4	3.7%
Flower Down Retail Park, WESTON-SUPER-MARE	17	1.7%	0	.0%	1	1.2%	0	.0%	1	.9%
Clevedon Town Centre	16	1.6%	0	.0%	0	.0%	1	1.0%	12	11.2%
Bridgwater Town Centre	16	1.6%	0	.0%	0	.0%	0	.0%	0	.0%
Burnham-on-Sea Town Centre	11	1.1%	0	.0%	0	.0%	0	.0%	0	.0%
Portishead Town Centre	10	1.0%	2	2.9%	5	5.8%	0	.0%	2	1.9%
Catalogue / mail order	8	.8%	0	.0%	0	.0%	0	.0%	1	.9%
Bridgwater Retail Park, BRIDGWATER	8	.8%	1	1.4%	0	.0%	0	.0%	1	.9%
Gallagher Retail Park, WESTON-SUPER-MARE	7	.7%	0	.0%	0	.0%	0	.0%	0	.0%
Warminster Town Centre	5	.5%	0	.0%	0	.0%	0	.0%	0	.0%
Winterstoke Road, BRISTOL	4	.4%	3	4.3%	0	.0%	1	1.0%	0	.0%
Eastgate Centre, BRISTOL (including IKEA)	4	.4%	0	.0%	1	1.2%	1	1.0%	0	.0%
Nailsea Town Centre	4	.4%	0	.0%	1	1.2%	3	3.1%	0	.0%
The Junction / Imperial Park, HARTCLIFFE	2	.2%	1	1.4%	0	.0%	0	.0%	0	.0%
St Georges Retail Park, Queensway, WESTON-SUPER-MARE	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
Hankridge Farm Retail Park, TAUNTON	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
Yeovil Town Centre	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
Taunton Town Centre	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
Street Town Centre	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
Glastonbury Town Centre	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
Frome Town Centre	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
Bath Town Centre	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%

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Q10. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Domestic appliances such as washing machines, fridges, cookers and kettles?

	Zone									
	5		6		7		8		9	
	Num	%	Num	%	Num	%	Num	%	Num	%
Cribbs Causeway / The Mall, BRISTOL	6	5.6%	2	2.4%	4	5.2%	9	12.9%	10	14.9%
Weston-super-Mare Town Centre	35	32.4%	30	36.1%	31	40.3%	20	28.6%	18	26.9%
Weston Retail Park, Winterstoke Road, WESTON-SUPER-MARE	22	20.4%	18	21.7%	17	22.1%	18	25.7%	11	16.4%
Internet	14	13.0%	11	13.3%	7	9.1%	9	12.9%	5	7.5%
Don't know/ varies	12	11.1%	5	6.0%	4	5.2%	7	10.0%	5	7.5%
Don't buy	4	3.7%	9	10.8%	5	6.5%	4	5.7%	5	7.5%
Cheddar Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	4	6.0%
Bristol - Cabot Circus Town Centre	1	.9%	0	.0%	0	.0%	0	.0%	8	11.9%
Flower Down Retail Park, WESTON-SUPER-MARE	6	5.6%	2	2.4%	4	5.2%	1	1.4%	0	.0%
Clevedon Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Bridgwater Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Burnham-on-Sea Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Portishead Town Centre	0	.0%	1	1.2%	0	.0%	0	.0%	0	.0%
Catalogue / mail order	1	.9%	2	2.4%	2	2.6%	0	.0%	0	.0%
Bridgwater Retail Park, BRIDGWATER	0	.0%	0	.0%	0	.0%	0	.0%	1	1.5%
Gallagher Retail Park, WESTON-SUPER-MARE	3	2.8%	1	1.2%	1	1.3%	1	1.4%	0	.0%
Warminster Town Centre	2	1.9%	1	1.2%	1	1.3%	0	.0%	0	.0%
Winterstoke Road, BRISTOL	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Eastgate Centre, BRISTOL (including IKEA)	0	.0%	0	.0%	1	1.3%	1	1.4%	0	.0%
Nailsea Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
The Junction / Imperial Park, HARTCLIFFE	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
St Georges Retail Park, Queensway, WESTON-SUPER-MARE	1	.9%	0	.0%	0	.0%	0	.0%	0	.0%
Hankridge Farm Retail Park, TAUNTON	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Yeovil Town Centre	1	.9%	0	.0%	0	.0%	0	.0%	0	.0%
Taunton Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Street Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Glastonbury Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Frome Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Bath Town Centre	0	.0%	1	1.2%	0	.0%	0	.0%	0	.0%

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Q10. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Domestic appliances such as washing machines, fridges, cookers and kettles?

	Zone					
	10		11		12	
	Num	%	Num	%	Num	%
Cribbs Causeway / The Mall, BRISTOL	8	11.6%	2	2.7%	4	5.8%
Weston-super-Mare Town Centre	18	26.1%	15	20.0%	10	14.5%
Weston Retail Park, Winterstoke Road, WESTON-SUPER-MARE	12	17.4%	2	2.7%	5	7.2%
Internet	10	14.5%	12	16.0%	7	10.1%
Don't know/ varies	5	7.2%	6	8.0%	4	5.8%
Don't buy	2	2.9%	7	9.3%	4	5.8%
Cheddar Town Centre	7	10.1%	0	.0%	25	36.2%
Bristol - Cabot Circus Town Centre	0	.0%	1	1.3%	0	.0%
Flower Down Retail Park, WESTON-SUPER-MARE	2	2.9%	0	.0%	0	.0%
Clevedon Town Centre	1	1.4%	0	.0%	2	2.9%
Bridgwater Town Centre	0	.0%	15	20.0%	1	1.4%
Burnham-on-Sea Town Centre	3	4.3%	7	9.3%	1	1.4%
Portishead Town Centre	0	.0%	0	.0%	0	.0%
Catalogue / mail order	0	.0%	1	1.3%	1	1.4%
Bridgwater Retail Park, BRIDGWATER	0	.0%	5	6.7%	0	.0%
Gallagher Retail Park, WESTON-SUPER-MARE	0	.0%	0	.0%	1	1.4%
Warminster Town Centre	0	.0%	1	1.3%	0	.0%
Winterstoke Road, BRISTOL	0	.0%	0	.0%	0	.0%
Eastgate Centre, BRISTOL (including IKEA)	0	.0%	0	.0%	0	.0%
Nailsea Town Centre	0	.0%	0	.0%	0	.0%
The Junction / Imperial Park, HARTCLIFFE	0	.0%	0	.0%	1	1.4%
St Georges Retail Park, Queensway, WESTON-SUPER-MARE	0	.0%	0	.0%	0	.0%
Hankridge Farm Retail Park, TAUNTON	1	1.4%	0	.0%	0	.0%
Yeovil Town Centre	0	.0%	0	.0%	0	.0%
Taunton Town Centre	0	.0%	1	1.3%	0	.0%
Street Town Centre	0	.0%	0	.0%	1	1.4%
Glastonbury Town Centre	0	.0%	0	.0%	1	1.4%
Frome Town Centre	0	.0%	0	.0%	1	1.4%
Bath Town Centre	0	.0%	0	.0%	0	.0%

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Q10. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Domestic appliances such as washing machines, fridges, cookers and kettles?

		Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Currys, Marchfields Way, Weston-super-Mare	63	28.1%	0	.0%	0	.0%	1	4.5%	3	23.1%
	Comet, Marchfields Way, Weston-super-Mare	33	14.7%	0	.0%	0	.0%	2	9.1%	3	23.1%
	John Lewis, Cribbs Causeway, Bristol	23	10.3%	3	27.3%	4	26.7%	5	22.7%	3	23.1%
	Lanes, Saxon place, Station Road, Cheddar	11	4.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Currys, Winterstoke Road, Bedminster	9	4.0%	2	18.2%	0	.0%	4	18.2%	0	.0%
	Gardiners, Straight Street, Broad Plain, Bristol	7	3.1%	1	9.1%	1	6.7%	1	4.5%	1	7.7%
	Currys, Cribbs Causeway, Bristol	6	2.7%	1	9.1%	2	13.3%	0	.0%	1	7.7%
	Currys, Bridgwater Retail Park, Bridgwater	6	2.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Worle	5	2.2%	0	.0%	0	.0%	0	.0%	0	.0%
	Argos, Wyndham Retail Park, Wyndham Way, Portishead	5	2.2%	0	.0%	4	26.7%	1	4.5%	0	.0%
	Argos, Queensway, Bristol Road, Worle	5	2.2%	0	.0%	0	.0%	0	.0%	0	.0%
	Argos, High Street, Weston-super-Mare	5	2.2%	0	.0%	0	.0%	0	.0%	1	7.7%
	Dreams, Marchfields Way, Weston-super-Mare	3	1.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Currys, Weston Lock Retail Park, Lower Bristol Road, Bath	3	1.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Comet, Cribbs Causeway, Bristol	3	1.3%	0	.0%	2	13.3%	1	4.5%	0	.0%
	Comet, Bath Road, Brislington	3	1.3%	0	.0%	0	.0%	1	4.5%	0	.0%
	Broadmead, Bristol	3	1.3%	1	9.1%	0	.0%	1	4.5%	0	.0%
	Yatton	2	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Marchfields Way, Weston-super-Mare	2	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Iceland, Crown Glass Place, Nailsea	2	.9%	0	.0%	0	.0%	2	9.1%	0	.0%
	Homebase, Wyndham Retail Park, Wyndham Way, Portishead	2	.9%	1	9.1%	1	6.7%	0	.0%	0	.0%
	Costco, St Brendan's Way, Avonmouth	2	.9%	1	9.1%	0	.0%	0	.0%	0	.0%
	Co-op, Wyndham Way Retail Park, Wyndham Way, Portishead	2	.9%	1	9.1%	1	6.7%	0	.0%	0	.0%
	Wells	1	.4%	0	.0%	0	.0%	0	.0%	0	.0%
	Tesco, Station Road, Weston-super-Mare	1	.4%	0	.0%	0	.0%	0	.0%	0	.0%
	Sainsbury's, North Worle Shopping Centre, Queens Way, Worle	1	.4%	0	.0%	0	.0%	0	.0%	0	.0%
	North Worle Shopping Centre, Queens Way, Worle	1	.4%	0	.0%	0	.0%	0	.0%	0	.0%
	Loaders Hardware, High Street, Yatton	1	.4%	0	.0%	0	.0%	0	.0%	0	.0%

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Q10. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Domestic appliances such as washing machines, fridges, cookers and kettles?

		Zone									
		5		6		7		8		9	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Currys, Marchfields Way, Weston-super-Mare	13	40.6%	12	44.4%	15	65.2%	5	25.0%	5	20.8%
	Comet, Marchfields Way, Weston-super-Mare	6	18.8%	6	22.2%	5	21.7%	7	35.0%	1	4.2%
	John Lewis, Cribbs Causeway, Bristol	1	3.1%	3	11.1%	0	.0%	2	10.0%	0	.0%
	Lanes, Saxon place, Station Road, Cheddar	0	.0%	0	.0%	0	.0%	0	.0%	2	8.3%
	Currys, Winterstoke Road, Bedminster	0	.0%	1	3.7%	0	.0%	0	.0%	2	8.3%
	Gardiners, Straight Street, Broad Plain, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	3	12.5%
	Currys, Cribbs Causeway, Bristol	0	.0%	1	3.7%	0	.0%	1	5.0%	0	.0%
	Currys, Bridgwater Retail Park, Bridgwater	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Worle	3	9.4%	0	.0%	0	.0%	1	5.0%	1	4.2%
	Argos, Wyndham Retail Park, Wyndham Way, Portishead	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Argos, Queensway, Bristol Road, Worle	2	6.3%	1	3.7%	2	8.7%	0	.0%	0	.0%
	Argos, High Street, Weston-super-Mare	1	3.1%	2	7.4%	0	.0%	0	.0%	0	.0%
	Dreams, Marchfields Way, Weston-super-Mare	2	6.3%	0	.0%	0	.0%	0	.0%	1	4.2%
	Currys, Weston Lock Retail Park, Lower Bristol Road, Bath	1	3.1%	0	.0%	0	.0%	1	5.0%	0	.0%
	Comet, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Comet, Bath Road, Brislington	0	.0%	0	.0%	0	.0%	0	.0%	1	4.2%
	Broadmead, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	1	4.2%
	Yatton	0	.0%	0	.0%	0	.0%	1	5.0%	1	4.2%
	Marchfields Way, Weston-super-Mare	0	.0%	0	.0%	0	.0%	1	5.0%	1	4.2%
	Iceland, Crown Glass Place, Nailsea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Homebase, Wyndham Retail Park, Wyndham Way, Portishead	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Costco, St Brendan's Way, Avonmouth	0	.0%	0	.0%	0	.0%	0	.0%	1	4.2%
	Co-op, Wyndham Way Retail Park, Wyndham Way, Portishead	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Wells	0	.0%	0	.0%	0	.0%	0	.0%	1	4.2%
	Tesco, Station Road, Weston-super-Mare	0	.0%	1	3.7%	0	.0%	0	.0%	0	.0%
	Sainsbury's, North Worle Shopping Centre, Queens Way, Worle	1	3.1%	0	.0%	0	.0%	0	.0%	0	.0%
	North Worle Shopping Centre, Queens Way, Worle	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Loaders Hardware, High Street, Yatton	0	.0%	0	.0%	0	.0%	1	5.0%	0	.0%

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Q10. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Domestic appliances such as washing machines, fridges, cookers and kettles?

		Zone					
		10		11		12	
		Num	%	Num	%	Num	%
Other	Currys, Marchfields Way, Weston-super-Mare	2	18.2%	3	20.0%	4	36.4%
	Comet, Marchfields Way, Weston-super-Mare	2	18.2%	1	6.7%	0	.0%
	John Lewis, Cribbs Causeway, Bristol	0	.0%	0	.0%	2	18.2%
	Lanes, Saxon place, Station Road, Cheddar	5	45.5%	0	.0%	4	36.4%
	Currys, Winterstoke Road, Bedminster	0	.0%	0	.0%	0	.0%
	Gardiners, Straight Street, Broad Plain, Bristol	0	.0%	0	.0%	0	.0%
	Currys, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%
	Currys, Bridgwater Retail Park, Bridgwater	0	.0%	6	40.0%	0	.0%
	Worle	0	.0%	0	.0%	0	.0%
	Argos, Wyndham Retail Park, Wyndham Way, Portishead	0	.0%	0	.0%	0	.0%
	Argos, Queensway, Bristol Road, Worle	0	.0%	0	.0%	0	.0%
	Argos, High Street, Weston-super-Mare	1	9.1%	0	.0%	0	.0%
	Dreams, Marchfields Way, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Currys, Weston Lock Retail Park, Lower Bristol Road, Bath	0	.0%	0	.0%	1	9.1%
	Comet, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%
	Comet, Bath Road, Brislington	0	.0%	1	6.7%	0	.0%
	Broadmead, Bristol	0	.0%	0	.0%	0	.0%
	Yatton	0	.0%	0	.0%	0	.0%
	Marchfields Way, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Iceland, Crown Glass Place, Nailsea	0	.0%	0	.0%	0	.0%
	Homebase, Wyndham Retail Park, Wyndham Way, Portishead	0	.0%	0	.0%	0	.0%
	Costco, St Brendan's Way, Avonmouth	0	.0%	0	.0%	0	.0%
	Co-op, Wyndham Way Retail Park, Wyndham Way, Portishead	0	.0%	0	.0%	0	.0%
	Wells	0	.0%	0	.0%	0	.0%
	Tesco, Station Road, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Sainsbury's, North Worle Shopping Centre, Queens Way, Worle	0	.0%	0	.0%	0	.0%
	North Worle Shopping Centre, Queens Way, Worle	1	9.1%	0	.0%	0	.0%
	Loaders Hardware, High Street, Yatton	0	.0%	0	.0%	0	.0%

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Q10. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Domestic appliances such as washing machines, fridges, cookers and kettles?

				Zone							
		Base: All respondents		1		2		3		4	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Homemaker, Londmead Industrial Estate, Shaftesbury	1	.4%	0	.0%	0	.0%	0	.0%	0	.0%
	Homebase, Winterstoke Road, Weston-super-Mare	1	.4%	0	.0%	0	.0%	0	.0%	0	.0%
	Highbridge	1	.4%	0	.0%	0	.0%	0	.0%	0	.0%
	EDS Roofing Supplies, South Liberty Lane, Bristol	1	.4%	0	.0%	0	.0%	0	.0%	0	.0%
	Co-op, Bishopsworth Road, Bedminster Down, Bristol	1	.4%	0	.0%	0	.0%	0	.0%	0	.0%
	Clevedon Electrics, Kennaway Road, Clevedon	1	.4%	0	.0%	0	.0%	0	.0%	1	7.7%
	Browns, Sunningdale Road, Weston-super-Mare	1	.4%	0	.0%	0	.0%	0	.0%	0	.0%
	B&Q, Imperial Park, Bristol	1	.4%	0	.0%	0	.0%	0	.0%	0	.0%
	B&Q, Flower Down Retail Park, Weston-super-Mare	1	.4%	0	.0%	0	.0%	0	.0%	0	.0%
	B&Q, Cribbs Causeway, Bristol	1	.4%	0	.0%	0	.0%	1	4.5%	0	.0%
	Ashton Gate, Bristol	1	.4%	0	.0%	0	.0%	1	4.5%	0	.0%
	Asda, Caxon Road, Highbridge	1	.4%	0	.0%	0	.0%	0	.0%	0	.0%
	Argos, Unit B3, Bridgewater Retail Park, Bridgewater	1	.4%	0	.0%	0	.0%	0	.0%	0	.0%
	Argos, Imperial Park, Bristol	1	.4%	0	.0%	0	.0%	1	4.5%	0	.0%

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Q10. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Domestic appliances such as washing machines, fridges, cookers and kettles?

		Zone									
		5		6		7		8		9	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Homemaker, Londmead Industrial Estate, Shaftesbury	0	.0%	0	.0%	1	4.3%	0	.0%	0	.0%
	Homebase, Winterstoke Road, Weston-super-Mare	1	3.1%	0	.0%	0	.0%	0	.0%	0	.0%
	Highbridge	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	EDS Roofing Supplies, South Liberty Lane, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	1	4.2%
	Co-op, Bishopsworth Road, Bedminster Down, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	1	4.2%
	Clevedon Electrics, Kennaway Road, Clevedon	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Browns, Sunningdale Road, Weston-super-Mare	0	.0%	0	.0%	0	.0%	0	.0%	1	4.2%
	B&Q, Imperial Park, Bristol	1	3.1%	0	.0%	0	.0%	0	.0%	0	.0%
	B&Q, Flower Down Retail Park, Weston-super-Mare	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	B&Q, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Ashton Gate, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Asda, Caxon Road, Highbridge	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Argos, Unit B3, Bridgewater Retail Park, Bridgewater	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Argos, Imperial Park, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q10. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Domestic appliances such as washing machines, fridges, cookers and kettles?

		Zone					
		10		11		12	
		Num	%	Num	%	Num	%
Other	Homemaker, Londmead Industrial Estate, Shaftesbury	0	.0%	0	.0%	0	.0%
	Homebase, Winterstoke Road, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Highbridge	0	.0%	1	6.7%	0	.0%
	EDS Roofing Supplies, South Liberty Lane, Bristol	0	.0%	0	.0%	0	.0%
	Co-op, Bishopsworth Road, Bedminster Down, Bristol	0	.0%	0	.0%	0	.0%
	Clevedon Electrics, Kennaway Road, Clevedon	0	.0%	0	.0%	0	.0%
	Browns, Sunningdale Road, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	B&Q, Imperial Park, Bristol	0	.0%	0	.0%	0	.0%
	B&Q, Flower Down Retail Park, Weston-super-Mare	0	.0%	1	6.7%	0	.0%
	B&Q, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%
	Ashton Gate, Bristol	0	.0%	0	.0%	0	.0%
	Asda, Caxon Road, Highbridge	0	.0%	1	6.7%	0	.0%
	Argos, Unit B3, Bridgewater Retail Park, Bridgewater	0	.0%	1	6.7%	0	.0%
	Argos, Imperial Park, Bristol	0	.0%	0	.0%	0	.0%

Q11. In which town centre, freestanding store, or retail park do you do most of your household's shopping for TV, Hi Fi, Radio, Photographic and Computer equipment?

			Zone							
	Base: All respondents		1		2		3		4	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	1202	100.0%	80	100.0%	101	100.0%	120	100.0%	120	100.0%

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Q11. In which town centre, freestanding store, or retail park do you do most of your household's shopping for TV, Hi Fi, Radio, Photographic and Computer equipment?

	Zone									
	5		6		7		8		9	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	140	100.0%	110	100.0%	100	100.0%	90	100.0%	91	100.0%

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Q11. In which town centre, freestanding store, or retail park do you do most of your household's shopping for TV, Hi Fi, Radio, Photographic and Computer equipment?

	Zone					
	10		11		12	
	Num	%	Num	%	Num	%
Base: All respondents	80	100.0%	90	100.0%	80	100.0%

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Q11. In which town centre, freestanding store, or retail park do you do most of your household's shopping for TV, Hi Fi, Radio, Photographic and Computer equipment?

	Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
	Num	%	Num	%	Num	%	Num	%	Num	%
Cribbs Causeway / The Mall, BRISTOL	228	22.9%	31	44.9%	45	49.5%	43	43.0%	39	36.8%
Weston-super-Mare Town Centre	207	20.8%	0	.0%	2	2.2%	2	2.0%	13	12.3%
Internet	132	13.3%	9	13.0%	7	7.7%	10	10.0%	18	17.0%
Weston Retail Park, Winterstoke Road, WESTON-SUPER-MARE	102	10.3%	1	1.4%	0	.0%	3	3.0%	5	4.7%
Don't buy	65	6.5%	4	5.8%	7	7.7%	5	5.0%	7	6.6%
Portishead Town Centre	52	5.2%	12	17.4%	25	27.5%	3	3.0%	12	11.3%
Don't know/ varies	48	4.8%	4	5.8%	2	2.2%	6	6.0%	3	2.8%
Cheddar Town Centre	42	4.2%	0	.0%	0	.0%	0	.0%	0	.0%
Bristol - Cabot Circus Town Centre	41	4.1%	4	5.8%	3	3.3%	15	15.0%	6	5.7%
Flower Down Retail Park, WESTON-SUPER-MARE	13	1.3%	0	.0%	0	.0%	0	.0%	0	.0%
Nailsea Town Centre	11	1.1%	0	.0%	0	.0%	11	11.0%	0	.0%
Bridgwater Town Centre	9	.9%	0	.0%	0	.0%	0	.0%	0	.0%
Catalogue/ mail order	8	.8%	2	2.9%	0	.0%	1	1.0%	0	.0%
Burnham-on-Sea Town Centre	7	.7%	0	.0%	0	.0%	0	.0%	0	.0%
Warminster Town Centre	5	.5%	0	.0%	0	.0%	0	.0%	0	.0%
Winterstoke Road, BRISTOL	4	.4%	2	2.9%	0	.0%	1	1.0%	0	.0%
Taunton Town Centre	4	.4%	0	.0%	0	.0%	0	.0%	0	.0%
Street Town Centre	4	.4%	0	.0%	0	.0%	0	.0%	0	.0%
Gallagher Retail Park, WESTON-SUPER-MARE	3	.3%	0	.0%	0	.0%	0	.0%	0	.0%
Bridgwater Retail Park, BRIDGWATER	3	.3%	0	.0%	0	.0%	0	.0%	0	.0%
Clevedon Town Centre	3	.3%	0	.0%	0	.0%	0	.0%	3	2.8%
Eastgate Centre, BRISTOL (including IKEA)	2	.2%	0	.0%	0	.0%	0	.0%	0	.0%
Glastonbury Town Centre	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
Bath Town Centre	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%

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Q11. In which town centre, freestanding store, or retail park do you do most of your household's shopping for TV, Hi Fi, Radio, Photographic and Computer equipment?

	Zone									
	5		6		7		8		9	
	Num	%	Num	%	Num	%	Num	%	Num	%
Cribbs Causeway / The Mall, BRISTOL	10	9.1%	4	4.5%	6	7.8%	19	26.0%	15	19.7%
Weston-super-Mare Town Centre	40	36.4%	40	45.5%	29	37.7%	19	26.0%	15	19.7%
Internet	16	14.5%	12	13.6%	11	14.3%	8	11.0%	5	6.6%
Weston Retail Park, Winterstoke Road, WESTON-SUPER-MARE	20	18.2%	17	19.3%	13	16.9%	16	21.9%	12	15.8%
Don't buy	5	4.5%	8	9.1%	7	9.1%	3	4.1%	8	10.5%
Portishead Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Don't know/ varies	7	6.4%	4	4.5%	3	3.9%	5	6.8%	7	9.2%
Cheddar Town Centre	0	.0%	0	.0%	1	1.3%	0	.0%	4	5.3%
Bristol - Cabot Circus Town Centre	1	.9%	0	.0%	0	.0%	1	1.4%	6	7.9%
Flower Down Retail Park, WESTON-SUPER-MARE	5	4.5%	1	1.1%	4	5.2%	1	1.4%	0	.0%
Nailsea Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Bridgwater Town Centre	0	.0%	0	.0%	1	1.3%	0	.0%	0	.0%
Catalogue/ mail order	1	.9%	1	1.1%	1	1.3%	0	.0%	2	2.6%
Burnham-on-Sea Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Warminster Town Centre	2	1.8%	0	.0%	0	.0%	0	.0%	0	.0%
Winterstoke Road, BRISTOL	0	.0%	0	.0%	0	.0%	0	.0%	1	1.3%
Taunton Town Centre	0	.0%	1	1.1%	0	.0%	0	.0%	0	.0%
Street Town Centre	0	.0%	0	.0%	0	.0%	1	1.4%	0	.0%
Gallagher Retail Park, WESTON-SUPER-MARE	2	1.8%	0	.0%	1	1.3%	0	.0%	0	.0%
Bridgwater Retail Park, BRIDGWATER	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Clevedon Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Eastgate Centre, BRISTOL (including IKEA)	1	.9%	0	.0%	0	.0%	0	.0%	0	.0%
Glastonbury Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Bath Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	1	1.3%

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Q11. In which town centre, freestanding store, or retail park do you do most of your household's shopping for TV, Hi Fi, Radio, Photographic and Computer equipment?

	Zone					
	10		11		12	
	Num	%	Num	%	Num	%
Cribbs Causeway / The Mall, BRISTOL	9	13.2%	3	4.4%	4	5.8%
Weston-super-Mare Town Centre	19	27.9%	17	25.0%	11	15.9%
Internet	13	19.1%	13	19.1%	10	14.5%
Weston Retail Park, Winterstoke Road, WESTON-SUPER-MARE	9	13.2%	3	4.4%	3	4.3%
Don't buy	2	2.9%	6	8.8%	3	4.3%
Portishead Town Centre	0	.0%	0	.0%	0	.0%
Don't know/ varies	3	4.4%	2	2.9%	2	2.9%
Cheddar Town Centre	8	11.8%	0	.0%	29	42.0%
Bristol - Cabot Circus Town Centre	1	1.5%	1	1.5%	3	4.3%
Flower Down Retail Park, WESTON-SUPER-MARE	2	2.9%	0	.0%	0	.0%
Nailsea Town Centre	0	.0%	0	.0%	0	.0%
Bridgwater Town Centre	0	.0%	8	11.8%	0	.0%
Catalogue/ mail order	0	.0%	0	.0%	0	.0%
Burnham-on-Sea Town Centre	0	.0%	7	10.3%	0	.0%
Warminster Town Centre	2	2.9%	0	.0%	1	1.4%
Winterstoke Road, BRISTOL	0	.0%	0	.0%	0	.0%
Taunton Town Centre	0	.0%	3	4.4%	0	.0%
Street Town Centre	0	.0%	2	2.9%	1	1.4%
Gallagher Retail Park, WESTON-SUPER-MARE	0	.0%	0	.0%	0	.0%
Bridgwater Retail Park, BRIDGWATER	0	.0%	3	4.4%	0	.0%
Clevedon Town Centre	0	.0%	0	.0%	0	.0%
Eastgate Centre, BRISTOL (including IKEA)	0	.0%	0	.0%	1	1.4%
Glastonbury Town Centre	0	.0%	0	.0%	1	1.4%
Bath Town Centre	0	.0%	0	.0%	0	.0%

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Q11. In which town centre, freestanding store, or retail park do you do most of your household's shopping for TV, Hi Fi, Radio, Photographic and Computer equipment?

		Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Currys, Marshfields Way, Weston-super-Mare	42	20.3%	0	.0%	0	.0%	1	5.0%	2	14.3%
	John Lewis, Cribbs Causeway, Bristol	26	12.6%	1	9.1%	2	20.0%	6	30.0%	5	35.7%
	Comet, Marchfields Way, Weston-super-Mare	21	10.1%	0	.0%	1	10.0%	0	.0%	2	14.3%
	Freemans, High Street, Portishead	9	4.3%	1	9.1%	5	50.0%	0	.0%	3	21.4%
	Currys, Winterstoke Road, Bedminster	8	3.9%	1	9.1%	0	.0%	3	15.0%	0	.0%
	PC World, Gallagher Retail Park, Weston-super-Mare	7	3.4%	0	.0%	0	.0%	0	.0%	0	.0%
	Lanes, Saxon place, Station Road, Cheddar	7	3.4%	0	.0%	0	.0%	0	.0%	1	7.1%
	Currys, Cribbs Causeway, Bristol	7	3.4%	1	9.1%	2	20.0%	2	10.0%	0	.0%
	Worle	6	2.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Argos, Queensway, Worle	6	2.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Currys, The Wyvern Centre, Weston-super-Mare	5	2.4%	0	.0%	0	.0%	0	.0%	0	.0%
	Currys, Bridgwater Retail Park, Bridgwater	4	1.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Costco, St Brendans Way, Avonmouth	4	1.9%	1	9.1%	0	.0%	1	5.0%	0	.0%
	Asda, Phillips Road, Weston-super-Mare	4	1.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Argos, High Street, Weston-super-Mare	4	1.9%	0	.0%	0	.0%	0	.0%	1	7.1%
	PC World, Cribbs Causeway, Bristol	3	1.4%	1	9.1%	0	.0%	0	.0%	0	.0%
	Comet, Flowerdown Retail Park, Aimscome Way, Weston-super-Mare	3	1.4%	0	.0%	0	.0%	0	.0%	0	.0%
	Sony Centre, Glass Walk, Cabot Circus, Bristol	2	1.0%	1	9.1%	0	.0%	0	.0%	0	.0%
	Sainsbury's, Winterstoke Road, Bristol	2	1.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Sainsbury's, North Worle District Centre, Worle	2	1.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Marchfields Way, Weston-super-Mare	2	1.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Avonmouth	2	1.0%	1	9.1%	0	.0%	0	.0%	0	.0%
	Currys, Hankridge Way, Taunton	2	1.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Broadmead, Bristol	2	1.0%	1	9.1%	0	.0%	0	.0%	0	.0%
	Ashton, Bristol	2	1.0%	0	.0%	0	.0%	2	10.0%	0	.0%
	Yatton	1	.5%	0	.0%	0	.0%	0	.0%	0	.0%
	Westbury Park, Bristol	1	.5%	0	.0%	0	.0%	1	5.0%	0	.0%
	Tesco, Stockway North, Nailsea	1	.5%	0	.0%	0	.0%	1	5.0%	0	.0%
	Tesco, Station Road, Weston-super-Mare	1	.5%	0	.0%	0	.0%	0	.0%	0	.0%

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Q11. In which town centre, freestanding store, or retail park do you do most of your household's shopping for TV, Hi Fi, Radio, Photographic and Computer equipment?

		Zone									
		5		6		7		8		9	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Currys, Marshfields Way, Weston-super-Mare	9	30.0%	6	27.3%	8	34.8%	6	35.3%	3	20.0%
	John Lewis, Cribbs Causeway, Bristol	0	.0%	2	9.1%	2	8.7%	2	11.8%	1	6.7%
	Comet, Marchfields Way, Weston-super-Mare	9	30.0%	2	9.1%	2	8.7%	1	5.9%	0	.0%
	Freemans, High Street, Portishead	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Currys, Winterstoke Road, Bedminster	0	.0%	1	4.5%	1	4.3%	0	.0%	2	13.3%
	PC World, Gallagher Retail Park, Weston-super-Mare	2	6.7%	4	18.2%	0	.0%	0	.0%	0	.0%
	Lanes, Saxon place, Station Road, Cheddar	0	.0%	0	.0%	0	.0%	0	.0%	1	6.7%
	Currys, Cribbs Causeway, Bristol	1	3.3%	0	.0%	1	4.3%	0	.0%	0	.0%
	Worle	2	6.7%	0	.0%	0	.0%	3	17.6%	1	6.7%
	Argos, Queensway, Worle	2	6.7%	1	4.5%	2	8.7%	0	.0%	0	.0%
	Currys, The Wyvern Centre, Weston-super-Mare	1	3.3%	2	9.1%	0	.0%	0	.0%	0	.0%
	Currys, Bridgwater Retail Park, Bridgwater	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Costco, St Brendans Way, Avonmouth	0	.0%	0	.0%	0	.0%	0	.0%	1	6.7%
	Asda, Phillips Road, Weston-super-Mare	0	.0%	0	.0%	2	8.7%	0	.0%	0	.0%
	Argos, High Street, Weston-super-Mare	0	.0%	1	4.5%	0	.0%	1	5.9%	0	.0%
	PC World, Cribbs Causeway, Bristol	0	.0%	1	4.5%	0	.0%	1	5.9%	0	.0%
	Comet, Flowerdown Retail Park, Aimscome Way, Weston-super-Mare	0	.0%	1	4.5%	1	4.3%	0	.0%	0	.0%
	Sony Centre, Glass Walk, Cabot Circus, Bristol	0	.0%	0	.0%	1	4.3%	0	.0%	0	.0%
	Sainsbury's, Winterstoke Road, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	2	13.3%
	Sainsbury's, North Worle District Centre, Worle	1	3.3%	0	.0%	0	.0%	1	5.9%	0	.0%
	Marchfields Way, Weston-super-Mare	0	.0%	0	.0%	1	4.3%	0	.0%	1	6.7%
	Avonmouth	0	.0%	0	.0%	0	.0%	1	5.9%	0	.0%
	Currys, Hankridge Way, Taunton	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Broadmead, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	1	6.7%
	Ashton, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Yatton	0	.0%	0	.0%	0	.0%	1	5.9%	0	.0%
	Westbury Park, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Tesco, Stockway North, Nailsea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Tesco, Station Road, Weston-super-Mare	1	3.3%	0	.0%	0	.0%	0	.0%	0	.0%

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Q11. In which town centre, freestanding store, or retail park do you do most of your household's shopping for TV, Hi Fi, Radio, Photographic and Computer equipment?

		Zone					
		10		11		12	
		Num	%	Num	%	Num	%
Other	Currys, Marshfields Way, Weston-super-Mare	1	8.3%	5	22.7%	1	9.1%
	John Lewis, Cribbs Causeway, Bristol	1	8.3%	1	4.5%	3	27.3%
	Comet, Marchfields Way, Weston-super-Mare	2	16.7%	2	9.1%	0	.0%
	Freemans, High Street, Portishead	0	.0%	0	.0%	0	.0%
	Currys, Winterstoke Road, Bedminster	0	.0%	0	.0%	0	.0%
	PC World, Gallagher Retail Park, Weston-super-Mare	0	.0%	0	.0%	1	9.1%
	Lanes, Saxon place, Station Road, Cheddar	3	25.0%	0	.0%	2	18.2%
	Currys, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%
	Worle	0	.0%	0	.0%	0	.0%
	Argos, Queensway, Worle	1	8.3%	0	.0%	0	.0%
	Currys, The Wyvern Centre, Weston-super-Mare	1	8.3%	1	4.5%	0	.0%
	Currys, Bridgwater Retail Park, Bridgwater	0	.0%	4	18.2%	0	.0%
	Costco, St Brendans Way, Avonmouth	0	.0%	0	.0%	1	9.1%
	Asda, Phillips Road, Weston-super-Mare	0	.0%	2	9.1%	0	.0%
	Argos, High Street, Weston-super-Mare	1	8.3%	0	.0%	0	.0%
	PC World, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%
	Comet, Flowerdown Retail Park, Aimscome Way, Weston-super-Mare	1	8.3%	0	.0%	0	.0%
	Sony Centre, Glass Walk, Cabot Circus, Bristol	0	.0%	0	.0%	0	.0%
	Sainsbury's, Winterstoke Road, Bristol	0	.0%	0	.0%	0	.0%
	Sainsbury's, North Worle District Centre, Worle	0	.0%	0	.0%	0	.0%
	Marchfields Way, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Avonmouth	0	.0%	0	.0%	0	.0%
	Currys, Hankridge Way, Taunton	0	.0%	2	9.1%	0	.0%
	Broadmead, Bristol	0	.0%	0	.0%	0	.0%
	Ashton, Bristol	0	.0%	0	.0%	0	.0%
	Yatton	0	.0%	0	.0%	0	.0%
	Westbury Park, Bristol	0	.0%	0	.0%	0	.0%
	Tesco, Stockway North, Nailsea	0	.0%	0	.0%	0	.0%
	Tesco, Station Road, Weston-super-Mare	0	.0%	0	.0%	0	.0%

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Q11. In which town centre, freestanding store, or retail park do you do most of your household's shopping for TV, Hi Fi, Radio, Photographic and Computer equipment?

		Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Staples, Winterstoke Road, Bristol	1	.5%	1	9.1%	0	.0%	0	.0%	0	.0%
	Sainsbury's, Gravenchon Way, Street	1	.5%	0	.0%	0	.0%	0	.0%	0	.0%
	Peter Castell, Meadow Street, Weston-super-Mare	1	.5%	0	.0%	0	.0%	0	.0%	0	.0%
	Panasonic, Clifton Down Shopping Centre, Bristol	1	.5%	0	.0%	0	.0%	0	.0%	0	.0%
	Newton Abbot	1	.5%	0	.0%	0	.0%	0	.0%	0	.0%
	Morrisons, Summer Lane, Weston-super-Mare	1	.5%	0	.0%	0	.0%	0	.0%	0	.0%
	Microbitz, Broad Street, Wells	1	.5%	0	.0%	0	.0%	0	.0%	0	.0%
	Long Ashton	1	.5%	0	.0%	0	.0%	1	5.0%	0	.0%
	Nailsea	1	.5%	0	.0%	0	.0%	1	5.0%	0	.0%
	Living Homes, Dolphin Square, Weston-super-Mare	1	.5%	0	.0%	0	.0%	0	.0%	0	.0%
	Jessops, Whiteladies Road, Bristol	1	.5%	0	.0%	0	.0%	0	.0%	0	.0%
	Jessops, High Street, Weston-super-Mare	1	.5%	0	.0%	0	.0%	0	.0%	0	.0%
	Highbridge	1	.5%	0	.0%	0	.0%	0	.0%	0	.0%
	Dixons, The Grange Business Park, West Hewish, Weston-super-Mare	1	.5%	0	.0%	0	.0%	0	.0%	0	.0%
	Clifton, Bristol	1	.5%	0	.0%	0	.0%	0	.0%	0	.0%
	Chew Stoke	1	.5%	0	.0%	0	.0%	0	.0%	0	.0%
	Central Radio Services, High Street, Burnham-on-Sea	1	.5%	0	.0%	0	.0%	0	.0%	0	.0%
	Brislington, Bristol	1	.5%	0	.0%	0	.0%	1	5.0%	0	.0%
	Avonmouth	1	.5%	0	.0%	0	.0%	0	.0%	0	.0%
	Asda, Caxton Road, Highbridge	1	.5%	0	.0%	0	.0%	0	.0%	0	.0%
	Argos, Wyndham Way Retail Park, Wyndham Way, Portishead	1	.5%	1	9.1%	0	.0%	0	.0%	0	.0%

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Q11. In which town centre, freestanding store, or retail park do you do most of your household's shopping for TV, Hi Fi, Radio, Photographic and Computer equipment?

		Zone									
		5		6		7		8		9	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Staples, Winterstoke Road, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Sainsbury's, Gravenchon Way, Street	0	.0%	0	.0%	0	.0%	0	.0%	1	6.7%
	Peter Castell, Meadow Street, Weston-super-Mare	0	.0%	1	4.5%	0	.0%	0	.0%	0	.0%
	Panasonic, Clifton Down Shopping Centre, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Newton Abbot	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Morrisons, Summer Lane, Weston-super-Mare	0	.0%	0	.0%	1	4.3%	0	.0%	0	.0%
	Microbitz, Broad Street, Wells	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Long Ashton	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Nailsea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Living Homes, Dolphin Square, Weston-super-Mare	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Jessops, Whiteladies Road, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Jessops, High Street, Weston-super-Mare	0	.0%	0	.0%	1	4.3%	0	.0%	0	.0%
	Highbridge	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Dixons, The Grange Business Park, West Hewish, Weston-super-Mare	1	3.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Clifton, Bristol	1	3.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Chew Stoke	0	.0%	0	.0%	0	.0%	0	.0%	1	6.7%
	Central Radio Services, High Street, Burnham-on-Sea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Brislington, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Avonmouth	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Asda, Caxton Road, Highbridge	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Argos, Wyndham Way Retail Park, Wyndham Way, Portishead	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q11. In which town centre, freestanding store, or retail park do you do most of your household's shopping for TV, Hi Fi, Radio, Photographic and Computer equipment?

		Zone					
		10		11		12	
		Num	%	Num	%	Num	%
Other	Staples, Winterstoke Road, Bristol	0	.0%	0	.0%	0	.0%
	Sainsbury's, Gravenchon Way, Street	0	.0%	0	.0%	0	.0%
	Peter Castell, Meadow Street, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Panasonic, Clifton Down Shopping Centre, Bristol	0	.0%	0	.0%	1	9.1%
	Newton Abbot	0	.0%	1	4.5%	0	.0%
	Morrisons, Summer Lane, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Microbitz, Broad Street, Wells	0	.0%	0	.0%	1	9.1%
	Long Ashton	0	.0%	0	.0%	0	.0%
	Nailsea	0	.0%	0	.0%	0	.0%
	Living Homes, Dolphin Square, Weston-super-Mare	1	8.3%	0	.0%	0	.0%
	Jessops, Whiteladies Road, Bristol	0	.0%	0	.0%	1	9.1%
	Jessops, High Street, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Highbridge	0	.0%	1	4.5%	0	.0%
	Dixons, The Grange Business Park, West Hewish, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Clifton, Bristol	0	.0%	0	.0%	0	.0%
	Chew Stoke	0	.0%	0	.0%	0	.0%
	Central Radio Services, High Street, Burnham-on-Sea	0	.0%	1	4.5%	0	.0%
	Brislington, Bristol	0	.0%	0	.0%	0	.0%
	Avonmouth	0	.0%	1	4.5%	0	.0%
	Asda, Caxton Road, Highbridge	0	.0%	1	4.5%	0	.0%
	Argos, Wyndham Way Retail Park, Wyndham Way, Portishead	0	.0%	0	.0%	0	.0%

Q12. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Personal / luxury goods including books, jewellery, china, glass, cosmetics and medical goods?

			Zone							
	Base: All respondents		1		2		3		4	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	1202	100.0%	80	100.0%	101	100.0%	120	100.0%	120	100.0%

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Q12. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Personal / luxury goods including books, jewellery, china, glass, cosmetics and medical goods?

	Zone									
	5		6		7		8		9	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	140	100.0%	110	100.0%	100	100.0%	90	100.0%	91	100.0%

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Q12. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Personal / luxury goods including books, jewellery, china, glass, cosmetics and medical goods?

	Zone					
	10		11		12	
	Num	%	Num	%	Num	%
Base: All respondents	80	100.0%	90	100.0%	80	100.0%

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Q12. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Personal / luxury goods including books, jewellery, china, glass, cosmetics and medical goods?

	Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
	Num	%	Num	%	Num	%	Num	%	Num	%
Weston-super-Mare Town Centre	256	24.2%	1	1.4%	5	5.4%	1	1.0%	6	5.5%
Cribbs Causeway / The Mall, BRISTOL	183	17.3%	26	36.6%	36	38.7%	17	16.3%	29	26.4%
Internet	150	14.2%	13	18.3%	12	12.9%	18	17.3%	18	16.4%
Don't buy	112	10.6%	5	7.0%	10	10.8%	12	11.5%	9	8.2%
Bristol - Cabot Circus Town Centre	77	7.3%	13	18.3%	3	3.2%	16	15.4%	6	5.5%
Don't know/ varies	73	6.9%	2	2.8%	8	8.6%	9	8.7%	5	4.5%
Clevedon Town Centre	39	3.7%	0	.0%	2	2.2%	0	.0%	34	30.9%
Weston Retail Park, Winterstoke Road, WESTON-SUPER-MARE	28	2.6%	0	.0%	1	1.1%	1	1.0%	1	.9%
Nailsea Town Centre	28	2.6%	2	2.8%	0	.0%	25	24.0%	1	.9%
Portishead Town Centre	23	2.2%	7	9.9%	15	16.1%	1	1.0%	0	.0%
Burnham-on-Sea Town Centre	22	2.1%	0	.0%	0	.0%	0	.0%	0	.0%
Catalogue/ mail order	21	2.0%	2	2.8%	1	1.1%	4	3.8%	0	.0%
Taunton Town Centre	12	1.1%	0	.0%	0	.0%	0	.0%	0	.0%
Warminster Town Centre	10	.9%	0	.0%	0	.0%	0	.0%	0	.0%
Cheddar Town Centre	7	.7%	0	.0%	0	.0%	0	.0%	0	.0%
Bridgwater Town Centre	6	.6%	0	.0%	0	.0%	0	.0%	1	.9%
Street Town Centre	4	.4%	0	.0%	0	.0%	0	.0%	0	.0%
The Junction / Imperial Park, HARTCLIFFE	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
Gallagher Retail Park, WESTON-SUPER-MARE	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
Flower Down Retail Park, WESTON-SUPER-MARE	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
Eastgate Centre, BRISTOL (including IKEA)	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
Bridgwater Retail Park, BRIDGWATER	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
Yeovil Town Centre	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
Bath Town Centre	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%

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Q12. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Personal / luxury goods including books, jewellery, china, glass, cosmetics and medical goods?

	Zone									
	5		6		7		8		9	
	Num	%	Num	%	Num	%	Num	%	Num	%
Weston-super-Mare Town Centre	55	44.7%	62	59.0%	48	51.6%	22	27.8%	13	17.6%
Cribbs Causeway / The Mall, BRISTOL	15	12.2%	8	7.6%	9	9.7%	9	11.4%	11	14.9%
Internet	15	12.2%	12	11.4%	6	6.5%	12	15.2%	13	17.6%
Don't buy	11	8.9%	8	7.6%	11	11.8%	9	11.4%	12	16.2%
Bristol - Cabot Circus Town Centre	4	3.3%	5	4.8%	4	4.3%	10	12.7%	9	12.2%
Don't know/ varies	6	4.9%	5	4.8%	4	4.3%	10	12.7%	9	12.2%
Clevedon Town Centre	0	.0%	1	1.0%	0	.0%	2	2.5%	0	.0%
Weston Retail Park, Winterstoke Road, WESTON-SUPER-MARE	5	4.1%	1	1.0%	6	6.5%	3	3.8%	1	1.4%
Nailsea Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Portishead Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Burnham-on-Sea Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Catalogue/ mail order	7	5.7%	1	1.0%	2	2.2%	2	2.5%	1	1.4%
Taunton Town Centre	2	1.6%	1	1.0%	0	.0%	0	.0%	1	1.4%
Warminster Town Centre	1	.8%	0	.0%	3	3.2%	0	.0%	2	2.7%
Cheddar Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Bridgwater Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Street Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
The Junction / Imperial Park, HARTCLIFFE	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Gallagher Retail Park, WESTON-SUPER-MARE	1	.8%	0	.0%	0	.0%	0	.0%	0	.0%
Flower Down Retail Park, WESTON-SUPER-MARE	0	.0%	0	.0%	0	.0%	0	.0%	1	1.4%
Eastgate Centre, BRISTOL (including IKEA)	0	.0%	1	1.0%	0	.0%	0	.0%	0	.0%
Bridgwater Retail Park, BRIDGWATER	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Yeovil Town Centre	1	.8%	0	.0%	0	.0%	0	.0%	0	.0%
Bath Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	1	1.4%

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Q12. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Personal / luxury goods including books, jewellery, china, glass, cosmetics and medical goods?

	Zone					
	10		11		12	
	Num	%	Num	%	Num	%
Weston-super-Mare Town Centre	21	28.8%	12	15.8%	10	17.5%
Cribbs Causeway / The Mall, BRISTOL	14	19.2%	7	9.2%	2	3.5%
Internet	10	13.7%	8	10.5%	13	22.8%
Don't buy	7	9.6%	10	13.2%	8	14.0%
Bristol - Cabot Circus Town Centre	2	2.7%	2	2.6%	3	5.3%
Don't know/ varies	7	9.6%	4	5.3%	4	7.0%
Clevedon Town Centre	0	.0%	0	.0%	0	.0%
Weston Retail Park, Winterstoke Road, WESTON-SUPER-MARE	4	5.5%	2	2.6%	3	5.3%
Nailsea Town Centre	0	.0%	0	.0%	0	.0%
Portishead Town Centre	0	.0%	0	.0%	0	.0%
Burnham-on-Sea Town Centre	2	2.7%	19	25.0%	1	1.8%
Catalogue/ mail order	0	.0%	0	.0%	1	1.8%
Taunton Town Centre	2	2.7%	5	6.6%	1	1.8%
Warminster Town Centre	1	1.4%	1	1.3%	2	3.5%
Cheddar Town Centre	1	1.4%	0	.0%	6	10.5%
Bridgwater Town Centre	0	.0%	5	6.6%	0	.0%
Street Town Centre	2	2.7%	0	.0%	2	3.5%
The Junction / Imperial Park, HARTCLIFFE	0	.0%	0	.0%	1	1.8%
Gallagher Retail Park, WESTON-SUPER-MARE	0	.0%	0	.0%	0	.0%
Flower Down Retail Park, WESTON-SUPER-MARE	0	.0%	0	.0%	0	.0%
Eastgate Centre, BRISTOL (including IKEA)	0	.0%	0	.0%	0	.0%
Bridgwater Retail Park, BRIDGWATER	0	.0%	1	1.3%	0	.0%
Yeovil Town Centre	0	.0%	0	.0%	0	.0%
Bath Town Centre	0	.0%	0	.0%	0	.0%

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Q12. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Personal / luxury goods including books, jewellery, china, glass, cosmetics and medical goods?

		Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Wells	17	11.8%	0	.0%	0	.0%	0	.0%	0	.0%
	Broadmead, Bristol	14	9.7%	4	44.4%	3	37.5%	2	12.5%	0	.0%
	John Lewis, Cribbs Causeway, Bristol	10	6.9%	0	.0%	2	25.0%	1	6.3%	1	10.0%
	Boots, High Street, Weston-super-Mare	8	5.6%	0	.0%	0	.0%	0	.0%	1	10.0%
	Boots, Somerset Square, Nailsea	8	5.6%	1	11.1%	0	.0%	6	37.5%	0	.0%
	Worle	7	4.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Asda, Phillips Road, Weston-super-Mare	6	4.2%	0	.0%	0	.0%	0	.0%	0	.0%
	Boots, Cribbs Causeway, Bristol	5	3.5%	0	.0%	1	12.5%	2	12.5%	1	10.0%
	Boots, Castle District Centre, Weston-super-Mare	5	3.5%	0	.0%	0	.0%	0	.0%	0	.0%
	Morrisons, Summer Lane, Weston-super-Mare	4	2.8%	0	.0%	0	.0%	0	.0%	1	10.0%
	Boots, Summer Lane, Worle	4	2.8%	0	.0%	0	.0%	0	.0%	0	.0%
	TK Maxx, North Worle Shopping Centre, Queensway, Worle	3	2.1%	0	.0%	0	.0%	0	.0%	0	.0%
	Highbridge	3	2.1%	0	.0%	0	.0%	0	.0%	0	.0%
	Boots, Clevedon Triangle, Clevedon	3	2.1%	0	.0%	0	.0%	0	.0%	3	30.0%
	Asda, Caxton Road, Highbridge	3	2.1%	0	.0%	0	.0%	0	.0%	0	.0%
	WHSmiths, High Street, Weston-super-Mare	2	1.4%	0	.0%	0	.0%	0	.0%	0	.0%
	Waterstones, Cribbs Causeway, Bristol	2	1.4%	0	.0%	0	.0%	1	6.3%	1	10.0%
	Superdrug, Clevedon Triangle Centre, Clevedon	2	1.4%	0	.0%	0	.0%	0	.0%	2	20.0%
	Clifton, Bristol	2	1.4%	1	11.1%	0	.0%	0	.0%	0	.0%
	Axbridge	2	1.4%	0	.0%	0	.0%	0	.0%	0	.0%
	Argos, Queensway, Worle	2	1.4%	0	.0%	0	.0%	0	.0%	0	.0%
	Yatton	1	.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Westbury Park, Bristol	1	.7%	1	11.1%	0	.0%	0	.0%	0	.0%
	Wedmore	1	.7%	0	.0%	0	.0%	0	.0%	0	.0%
	The Galleries, Newgate, Bristol	1	.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Tesco, Stockway North, Nailsea	1	.7%	0	.0%	0	.0%	1	6.3%	0	.0%
	Superdrug, High Street, Burnham-on-Sea	1	.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Sainsbury's, Winterstoke Road, Ashton, Bristol	1	.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Sainsbury's, North Worle District Centre, Worle	1	.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Oxfam Bookstore, Princess Victoria Street, Nailsea	1	.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Next, High Street, Weston-super-Mare	1	.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Next, Cribbs Causeway,, Bristol	1	.7%	0	.0%	1	12.5%	0	.0%	0	.0%

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Q12. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Personal / luxury goods including books, jewellery, china, glass, cosmetics and medical goods?

		Zone									
		5		6		7		8		9	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Wells	0	.0%	0	.0%	0	.0%	0	.0%	2	11.8%
	Broadmead, Bristol	0	.0%	0	.0%	0	.0%	4	36.4%	0	.0%
	John Lewis, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	3	17.6%
	Boots, High Street, Weston-super-Mare	2	11.8%	1	20.0%	1	14.3%	1	9.1%	1	5.9%
	Boots, Somerset Square, Nailsea	0	.0%	0	.0%	0	.0%	0	.0%	1	5.9%
	Worle	6	35.3%	0	.0%	0	.0%	1	9.1%	0	.0%
	Asda, Phillips Road, Weston-super-Mare	0	.0%	2	40.0%	2	28.6%	1	9.1%	0	.0%
	Boots, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	1	5.9%
	Boots, Castle District Centre, Weston-super-Mare	2	11.8%	0	.0%	0	.0%	0	.0%	2	11.8%
	Morrisons, Summer Lane, Weston-super-Mare	1	5.9%	0	.0%	0	.0%	1	9.1%	0	.0%
	Boots, Summer Lane, Worle	1	5.9%	0	.0%	2	28.6%	0	.0%	0	.0%
	TK Maxx, North Worle Shopping Centre, Queensway, Worle	2	11.8%	0	.0%	0	.0%	0	.0%	1	5.9%
	Highbridge	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Boots, Clevedon Triangle, Clevedon	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Asda, Caxton Road, Highbridge	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	WHSmiths, High Street, Weston-super-Mare	0	.0%	1	20.0%	0	.0%	0	.0%	0	.0%
	Waterstones, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Superdrug, Clevedon Triangle Centre, Clevedon	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Clifton, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Axbridge	0	.0%	0	.0%	0	.0%	0	.0%	1	5.9%
	Argos, Queensway, Worle	1	5.9%	0	.0%	1	14.3%	0	.0%	0	.0%
	Yatton	0	.0%	0	.0%	0	.0%	1	9.1%	0	.0%
	Westbury Park, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Wedmore	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	The Galleries, Newgate, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	1	5.9%
	Tesco, Stockway North, Nailsea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Superdrug, High Street, Burnham-on-Sea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Sainsbury's, Winterstoke Road, Ashton, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	1	5.9%
	Sainsbury's, North Worle District Centre, Worle	1	5.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Oxfam Bookstore, Princess Victoria Street, Nailsea	0	.0%	0	.0%	0	.0%	0	.0%	1	5.9%
	Next, High Street, Weston-super-Mare	0	.0%	1	20.0%	0	.0%	0	.0%	0	.0%
	Next, Cribbs Causeway,, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q12. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Personal / luxury goods including books, jewellery, china, glass, cosmetics and medical goods?

		Zone					
		10		11		12	
		Num	%	Num	%	Num	%
Other	Wells	0	.0%	1	7.1%	14	60.9%
	Broadmead, Bristol	0	.0%	0	.0%	1	4.3%
	John Lewis, Cribbs Causeway, Bristol	0	.0%	0	.0%	3	13.0%
	Boots, High Street, Weston-super-Mare	1	14.3%	0	.0%	0	.0%
	Boots, Somerset Square, Nailsea	0	.0%	0	.0%	0	.0%
	Worle	0	.0%	0	.0%	0	.0%
	Asda, Phillips Road, Weston-super-Mare	0	.0%	1	7.1%	0	.0%
	Boots, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%
	Boots, Castle District Centre, Weston-super-Mare	0	.0%	1	7.1%	0	.0%
	Morrisons, Summer Lane, Weston-super-Mare	0	.0%	1	7.1%	0	.0%
	Boots, Summer Lane, Worle	1	14.3%	0	.0%	0	.0%
	TK Maxx, North Worle Shopping Centre, Queensway, Worle	0	.0%	0	.0%	0	.0%
	Highbridge	0	.0%	3	21.4%	0	.0%
	Boots, Clevedon Triangle, Clevedon	0	.0%	0	.0%	0	.0%
	Asda, Caxton Road, Highbridge	1	14.3%	2	14.3%	0	.0%
	WHSmiths, High Street, Weston-super-Mare	0	.0%	0	.0%	1	4.3%
	Waterstones, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%
	Superdrug, Clevedon Triangle Centre, Clevedon	0	.0%	0	.0%	0	.0%
	Clifton, Bristol	1	14.3%	0	.0%	0	.0%
	Axbridge	1	14.3%	0	.0%	0	.0%
	Argos, Queensway, Worle	0	.0%	0	.0%	0	.0%
	Yatton	0	.0%	0	.0%	0	.0%
	Westbury Park, Bristol	0	.0%	0	.0%	0	.0%
	Wedmore	0	.0%	0	.0%	1	4.3%
	The Galleries, Newgate, Bristol	0	.0%	0	.0%	0	.0%
	Tesco, Stockway North, Nailsea	0	.0%	0	.0%	0	.0%
	Superdrug, High Street, Burnham-on-Sea	0	.0%	1	7.1%	0	.0%
	Sainsbury's, Winterstoke Road, Ashton, Bristol	0	.0%	0	.0%	0	.0%
	Sainsbury's, North Worle District Centre, Worle	0	.0%	0	.0%	0	.0%
	Oxfam Bookstore, Princess Victoria Street, Nailsea	0	.0%	0	.0%	0	.0%
	Next, High Street, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Next, Cribbs Causeway,, Bristol	0	.0%	0	.0%	0	.0%

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Q12. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Personal / luxury goods including books, jewellery, china, glass, cosmetics and medical goods?

		Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Newton Abbot	1	.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Marks & Spencer, High Street, Weston-super-Mare	1	.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Mallory's, Bridge Street, Bath	1	.7%	0	.0%	0	.0%	0	.0%	0	.0%
	London	1	.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Pill	1	.7%	1	11.1%	0	.0%	0	.0%	0	.0%
	Lloyds Pharmacy, Victoria Square, Portishead	1	.7%	0	.0%	1	12.5%	0	.0%	0	.0%
	Lloyds Chemist, Pages Court, Yatton	1	.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Lanes, Saxon place, Station Road, Cheddar	1	.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Debenhams, North Street, Taunton	1	.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Day Lewis Pharmacy, The Square, Wiveliscombe	1	.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Costco, St Brendans Way, Avonmouth	1	.7%	1	11.1%	0	.0%	0	.0%	0	.0%
	Co-op Pharmacy, Victoria Street, Burnham-on-Sea	1	.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Claverham	1	.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Clarks Retail Village, Farm Road, Street, Somerset	1	.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Brislington, Bristol	1	.7%	0	.0%	0	.0%	1	6.3%	0	.0%
	Break Charity Shop, High Street, Nailsea	1	.7%	0	.0%	0	.0%	1	6.3%	0	.0%
	Boots, High Street, Burnham-on-Sea	1	.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Bath	1	.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Ashton, Bristol	1	.7%	0	.0%	0	.0%	1	6.3%	0	.0%
	Asda, Bridgwater, Bristol	1	.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Argos, High Street, Weston-super-Mare	1	.7%	0	.0%	0	.0%	0	.0%	0	.0%

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Q12. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Personal / luxury goods including books, jewellery, china, glass, cosmetics and medical goods?

		Zone									
		5		6		7		8		9	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Newton Abbot	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Marks & Spencer, High Street, Weston-super-Mare	0	.0%	0	.0%	0	.0%	0	.0%	1	5.9%
	Mallory's, Bridge Street, Bath	0	.0%	0	.0%	0	.0%	0	.0%	1	5.9%
	London	1	5.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Pill	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Lloyds Pharmacy, Victoria Square, Portishead	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Lloyds Chemist, Pages Court, Yatton	0	.0%	0	.0%	0	.0%	1	9.1%	0	.0%
	Lanes, Saxon place, Station Road, Cheddar	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Debenhams, North Street, Taunton	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Day Lewis Pharmacy, The Square, Wiveliscombe	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Costco, St Brendans Way, Avonmouth	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Co-op Pharmacy, Victoria Street, Burnham-on-Sea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Claverham	0	.0%	0	.0%	0	.0%	1	9.1%	0	.0%
	Clarks Retail Village, Farm Road, Street, Somerset	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Brislington, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Break Charity Shop, High Street, Nailsea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Boots, High Street, Burnham-on-Sea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Bath	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Ashton, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Asda, Bridgwater, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Argos, High Street, Weston-super-Mare	0	.0%	0	.0%	1	14.3%	0	.0%	0	.0%

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Q12. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Personal / luxury goods including books, jewellery, china, glass, cosmetics and medical goods?

		Zone					
		10		11		12	
		Num	%	Num	%	Num	%
Other	Newton Abbot	0	.0%	1	7.1%	0	.0%
	Marks & Spencer, High Street, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Mallory's, Bridge Street, Bath	0	.0%	0	.0%	0	.0%
	London	0	.0%	0	.0%	0	.0%
	Pill	0	.0%	0	.0%	0	.0%
	Lloyds Pharmacy, Victoria Square, Portishead	0	.0%	0	.0%	0	.0%
	Lloyds Chemist, Pages Court, Yatton	0	.0%	0	.0%	0	.0%
	Lanes, Saxon place, Station Road, Cheddar	0	.0%	0	.0%	1	4.3%
	Debenhams, North Street, Taunton	0	.0%	1	7.1%	0	.0%
	Day Lewis Pharmacy, The Square, Wiveliscombe	1	14.3%	0	.0%	0	.0%
	Costco, St Brendans Way, Avonmouth	0	.0%	0	.0%	0	.0%
	Co-op Pharmacy, Victoria Street, Burnham-on-Sea	0	.0%	1	7.1%	0	.0%
	Claverham	0	.0%	0	.0%	0	.0%
	Clarks Retail Village, Farm Road, Street, Somerset	0	.0%	0	.0%	1	4.3%
	Brislington, Bristol	0	.0%	0	.0%	0	.0%
	Break Charity Shop, High Street, Nailsea	0	.0%	0	.0%	0	.0%
	Boots, High Street, Burnham-on-Sea	1	14.3%	0	.0%	0	.0%
	Bath	0	.0%	0	.0%	1	4.3%
	Ashton, Bristol	0	.0%	0	.0%	0	.0%
	Asda, Bridgwater, Bristol	0	.0%	1	7.1%	0	.0%
	Argos, High Street, Weston-super-Mare	0	.0%	0	.0%	0	.0%

Q13. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Recreational goods including bicycles, games, toys, sports and camping equipment?

			Zone							
	Base: All respondents		1		2		3		4	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	1202	100.0%	80	100.0%	101	100.0%	120	100.0%	120	100.0%

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Q13. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Recreational goods including bicycles, games, toys, sports and camping equipment?

	Zone									
	5		6		7		8		9	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	140	100.0%	110	100.0%	100	100.0%	90	100.0%	91	100.0%

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Q13. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Recreational goods including bicycles, games, toys, sports and camping equipment?

	Zone					
	10		11		12	
	Num	%	Num	%	Num	%
Base: All respondents	80	100.0%	90	100.0%	80	100.0%

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Q13. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Recreational goods including bicycles, games, toys, sports and camping equipment?

	Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
	Num	%	Num	%	Num	%	Num	%	Num	%
Don't buy	428	39.4%	38	52.8%	32	36.0%	42	38.5%	39	35.1%
Weston-super-Mare Town Centre	171	15.7%	0	.0%	3	3.4%	2	1.8%	9	8.1%
Cribbs Causeway / The Mall, BRISTOL	127	11.7%	18	25.0%	26	29.2%	15	13.8%	25	22.5%
Internet	106	9.8%	5	6.9%	8	9.0%	13	11.9%	7	6.3%
Don't know/ varies	68	6.3%	2	2.8%	4	4.5%	11	10.1%	6	5.4%
Bristol - Cabot Circus Town Centre	59	5.4%	4	5.6%	3	3.4%	17	15.6%	4	3.6%
Weston Retail Park, Winterstoke Road, WESTON-SUPER-MARE	31	2.9%	0	.0%	0	.0%	1	.9%	1	.9%
Clevedon Town Centre	22	2.0%	0	.0%	3	3.4%	1	.9%	16	14.4%
Portishead Town Centre	17	1.6%	5	6.9%	10	11.2%	0	.0%	2	1.8%
Burnham-on-Sea Town Centre	12	1.1%	0	.0%	0	.0%	1	.9%	1	.9%
Taunton Town Centre	9	.8%	0	.0%	0	.0%	1	.9%	0	.0%
Street Town Centre	7	.6%	0	.0%	0	.0%	0	.0%	0	.0%
Cheddar Town Centre	7	.6%	0	.0%	0	.0%	0	.0%	0	.0%
Warminster Town Centre	5	.5%	0	.0%	0	.0%	0	.0%	0	.0%
Nailsea Town Centre	5	.5%	0	.0%	0	.0%	5	4.6%	0	.0%
Bridgwater Town Centre	4	.4%	0	.0%	0	.0%	0	.0%	0	.0%
Yeovil Town Centre	2	.2%	0	.0%	0	.0%	0	.0%	0	.0%
Catalogue/ mail order	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
St Georges Retail Park, Queensway, WESTON-SUPER-MARE	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
Gallagher Retail Park, WESTON-SUPER-MARE	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
Flower Down Retail Park, WESTON-SUPER-MARE	1	.1%	0	.0%	0	.0%	0	.0%	1	.9%
Shepton Mallet Town Centre	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%
Glastonbury Town Centre	1	.1%	0	.0%	0	.0%	0	.0%	0	.0%

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Q13. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Recreational goods including bicycles, games, toys, sports and camping equipment?

	Zone									
	5		6		7		8		9	
	Num	%	Num	%	Num	%	Num	%	Num	%
Don't buy	52	40.9%	44	42.3%	27	29.3%	34	45.9%	34	43.0%
Weston-super-Mare Town Centre	33	26.0%	32	30.8%	34	37.0%	14	18.9%	8	10.1%
Cribbs Causeway / The Mall, BRISTOL	9	7.1%	6	5.8%	5	5.4%	7	9.5%	4	5.1%
Internet	12	9.4%	6	5.8%	10	10.9%	6	8.1%	7	8.9%
Don't know/ varies	7	5.5%	7	6.7%	8	8.7%	4	5.4%	9	11.4%
Bristol - Cabot Circus Town Centre	4	3.1%	4	3.8%	4	4.3%	2	2.7%	10	12.7%
Weston Retail Park, Winterstoke Road, WESTON-SUPER-MARE	4	3.1%	5	4.8%	4	4.3%	5	6.8%	2	2.5%
Clevedon Town Centre	0	.0%	0	.0%	0	.0%	1	1.4%	1	1.3%
Portishead Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Burnham-on-Sea Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Taunton Town Centre	1	.8%	0	.0%	0	.0%	0	.0%	0	.0%
Street Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	1	1.3%
Cheddar Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	1	1.3%
Warminster Town Centre	1	.8%	0	.0%	0	.0%	1	1.4%	1	1.3%
Nailsea Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Bridgwater Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Yeovil Town Centre	2	1.6%	0	.0%	0	.0%	0	.0%	0	.0%
Catalogue/ mail order	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
St Georges Retail Park, Queensway, WESTON-SUPER-MARE	1	.8%	0	.0%	0	.0%	0	.0%	0	.0%
Gallagher Retail Park, WESTON-SUPER-MARE	0	.0%	0	.0%	0	.0%	0	.0%	1	1.3%
Flower Down Retail Park, WESTON-SUPER-MARE	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Shepton Mallet Town Centre	1	.8%	0	.0%	0	.0%	0	.0%	0	.0%
Glastonbury Town Centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q13. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Recreational goods including bicycles, games, toys, sports and camping equipment?

	Zone					
	10		11		12	
	Num	%	Num	%	Num	%
Don't buy	26	35.1%	35	42.7%	25	34.2%
Weston-super-Mare Town Centre	11	14.9%	12	14.6%	13	17.8%
Cribbs Causeway / The Mall, BRISTOL	6	8.1%	3	3.7%	3	4.1%
Internet	12	16.2%	8	9.8%	12	16.4%
Don't know/ varies	4	5.4%	2	2.4%	4	5.5%
Bristol - Cabot Circus Town Centre	5	6.8%	1	1.2%	1	1.4%
Weston Retail Park, Winterstoke Road, WESTON-SUPER-MARE	2	2.7%	4	4.9%	3	4.1%
Clevedon Town Centre	0	.0%	0	.0%	0	.0%
Portishead Town Centre	0	.0%	0	.0%	0	.0%
Burnham-on-Sea Town Centre	1	1.4%	9	11.0%	0	.0%
Taunton Town Centre	2	2.7%	5	6.1%	0	.0%
Street Town Centre	1	1.4%	0	.0%	5	6.8%
Cheddar Town Centre	2	2.7%	0	.0%	4	5.5%
Warminster Town Centre	1	1.4%	0	.0%	1	1.4%
Nailsea Town Centre	0	.0%	0	.0%	0	.0%
Bridgwater Town Centre	0	.0%	3	3.7%	1	1.4%
Yeovil Town Centre	0	.0%	0	.0%	0	.0%
Catalogue/ mail order	0	.0%	0	.0%	1	1.4%
St Georges Retail Park, Queensway, WESTON-SUPER-MARE	0	.0%	0	.0%	0	.0%
Gallagher Retail Park, WESTON-SUPER-MARE	0	.0%	0	.0%	0	.0%
Flower Down Retail Park, WESTON-SUPER-MARE	0	.0%	0	.0%	0	.0%
Shepton Mallet Town Centre	0	.0%	0	.0%	0	.0%
Glastonbury Town Centre	1	1.4%	0	.0%	0	.0%

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Q13. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Recreational goods including bicycles, games, toys, sports and camping equipment?

		Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Worle	8	6.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Broadmead, Bristol	7	6.0%	1	12.5%	2	16.7%	0	.0%	0	.0%
	Argos, Wyndham Way Retail Park, Portishead	7	6.0%	1	12.5%	6	50.0%	0	.0%	0	.0%
	Argos, Queensway, Worle	7	6.0%	0	.0%	0	.0%	1	9.1%	0	.0%
	Highbridge	6	5.2%	0	.0%	0	.0%	0	.0%	1	11.1%
	Halfords, Marchfields Way, Weston-super-Mare	6	5.2%	0	.0%	0	.0%	0	.0%	0	.0%
	Wells	5	4.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Asda, Phillips Road, Weston-super-Mare	5	4.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Argos, High Street, Weston-super-Mare	5	4.3%	0	.0%	0	.0%	0	.0%	0	.0%
	John Lewis, Cribbs Causeway, Bristol	4	3.4%	0	.0%	1	8.3%	1	9.1%	0	.0%
	Toys R Us, Cribbs Causeway, Bristol	3	2.6%	0	.0%	0	.0%	0	.0%	1	11.1%
	Sainsbury's, North Worle District Centre, Worle	3	2.6%	0	.0%	0	.0%	0	.0%	0	.0%
	Highbridge Caravan Centre Ltd, Bristol Road, Highbridge	3	2.6%	0	.0%	1	8.3%	0	.0%	0	.0%
	Halfords, Tweed Road, Clevedon	3	2.6%	0	.0%	1	8.3%	0	.0%	2	22.2%
	Clarks Retail Village, Farm Road, Street	3	2.6%	0	.0%	0	.0%	0	.0%	0	.0%
	Nailsea Cycles, High Street, Nailsea, Bristol	2	1.7%	0	.0%	0	.0%	2	18.2%	0	.0%
	Halfords, Winterstoke Road, Bristol	2	1.7%	1	12.5%	0	.0%	0	.0%	0	.0%
	Costco, St Brendans Way, Avonmouth	2	1.7%	2	25.0%	0	.0%	0	.0%	0	.0%
	Cheddar Cycle, Wedmore Road, Cheddar	2	1.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Yatton	1	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Winchester	1	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Toy Master, Clevedon	1	.9%	0	.0%	0	.0%	0	.0%	1	11.1%
	The Original Factory Shop, High Street, Nailsea	1	.9%	0	.0%	0	.0%	1	9.1%	0	.0%
	The Early Learning Centre, Cribbs Causeway, Bristol	1	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Tesco Home, Cribbs Causeway, Bristol	1	.9%	0	.0%	0	.0%	0	.0%	1	11.1%
	Tesco, Carllington Road, Bristol	1	.9%	1	12.5%	0	.0%	0	.0%	0	.0%
	Tesco, Stockway North, Nailsea	1	.9%	0	.0%	0	.0%	1	9.1%	0	.0%
	Tesco, Station Road, Weston-super-Mare	1	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Tesco Homeplus, Bristol	1	.9%	0	.0%	0	.0%	0	.0%	0	.0%

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Q13. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Recreational goods including bicycles, games, toys, sports and camping equipment?

		Zone									
		5		6		7		8		9	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Worle	3	23.1%	0	.0%	1	12.5%	2	12.5%	0	.0%
	Broadmead, Bristol	0	.0%	0	.0%	0	.0%	2	12.5%	1	8.3%
	Argos, Wyndham Way Retail Park, Portishead	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Argos, Queensway, Worle	1	7.7%	1	16.7%	2	25.0%	1	6.3%	0	.0%
	Highbridge	0	.0%	0	.0%	1	12.5%	0	.0%	0	.0%
	Halfords, Marchfields Way, Weston-super-Mare	0	.0%	1	16.7%	1	12.5%	1	6.3%	3	25.0%
	Wells	0	.0%	0	.0%	0	.0%	0	.0%	2	16.7%
	Asda, Phillips Road, Weston-super-Mare	2	15.4%	0	.0%	0	.0%	2	12.5%	0	.0%
	Argos, High Street, Weston-super-Mare	1	7.7%	1	16.7%	2	25.0%	1	6.3%	0	.0%
	John Lewis, Cribbs Causeway, Bristol	0	.0%	1	16.7%	0	.0%	0	.0%	1	8.3%
	Toys R Us, Cribbs Causeway, Bristol	1	7.7%	0	.0%	0	.0%	1	6.3%	0	.0%
	Sainsbury's, North Worle District Centre, Worle	1	7.7%	0	.0%	0	.0%	1	6.3%	1	8.3%
	Highbridge Caravan Centre Ltd, Bristol Road, Highbridge	1	7.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Halfords, Tweed Road, Clevedon	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Clarks Retail Village, Farm Road, Street	0	.0%	0	.0%	0	.0%	1	6.3%	0	.0%
	Nailsea Cycles, High Street, Nailsea, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Halfords, Winterstoke Road, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	1	8.3%
	Costco, St Brendans Way, Avonmouth	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Cheddar Cycle, Wedmore Road, Cheddar	0	.0%	0	.0%	0	.0%	0	.0%	1	8.3%
	Yatton	0	.0%	0	.0%	0	.0%	1	6.3%	0	.0%
	Winchester	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Toy Master, Clevedon	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	The Original Factory Shop, High Street, Nailsea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	The Early Learning Centre, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	1	8.3%
	Tesco Home, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Tesco, Carllington Road, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Tesco, Stockway North, Nailsea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Tesco, Station Road, Weston-super-Mare	0	.0%	1	16.7%	0	.0%	0	.0%	0	.0%
	Tesco Homeplus, Bristol	0	.0%	0	.0%	0	.0%	1	6.3%	0	.0%

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Q13. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Recreational goods including bicycles, games, toys, sports and camping equipment?

		Zone					
		10		11		12	
		Num	%	Num	%	Num	%
Other	Worle	0	.0%	2	25.0%	0	.0%
	Broadmead, Bristol	0	.0%	0	.0%	1	14.3%
	Argos, Wyndham Way Retail Park, Portishead	0	.0%	0	.0%	0	.0%
	Argos, Queensway, Worle	0	.0%	0	.0%	1	14.3%
	Highbridge	2	33.3%	2	25.0%	0	.0%
	Halfords, Marchfields Way, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Wells	1	16.7%	0	.0%	2	28.6%
	Asda, Phillips Road, Weston-super-Mare	0	.0%	1	12.5%	0	.0%
	Argos, High Street, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	John Lewis, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%
	Toys R Us, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%
	Sainsbury's, North Worle District Centre, Worle	0	.0%	0	.0%	0	.0%
	Highbridge Caravan Centre Ltd, Bristol Road, Highbridge	1	16.7%	0	.0%	0	.0%
	Halfords, Tweed Road, Clevedon	0	.0%	0	.0%	0	.0%
	Clarks Retail Village, Farm Road, Street	0	.0%	0	.0%	2	28.6%
	Nailsea Cycles, High Street, Nailsea, Bristol	0	.0%	0	.0%	0	.0%
	Halfords, Winterstoke Road, Bristol	0	.0%	0	.0%	0	.0%
	Costco, St Brendans Way, Avonmouth	0	.0%	0	.0%	0	.0%
	Cheddar Cycle, Wedmore Road, Cheddar	0	.0%	0	.0%	1	14.3%
	Yatton	0	.0%	0	.0%	0	.0%
	Winchester	0	.0%	1	12.5%	0	.0%
	Toy Master, Clevedon	0	.0%	0	.0%	0	.0%
	The Original Factory Shop, High Street, Nailsea	0	.0%	0	.0%	0	.0%
	The Early Learning Centre, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%
	Tesco Home, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%
	Tesco, Carllington Road, Bristol	0	.0%	0	.0%	0	.0%
	Tesco, Stockway North, Nailsea	0	.0%	0	.0%	0	.0%
	Tesco, Station Road, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Tesco Homeplus, Bristol	0	.0%	0	.0%	0	.0%

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Q13. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Recreational goods including bicycles, games, toys, sports and camping equipment?

		Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Sanders Garden World, Bristol Road, Brent Knoll	1	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Round Trees Garden Centre, Smallway, Congresbury	1	.9%	0	.0%	0	.0%	0	.0%	1	11.1%
	PC World, Cribbs Causeway, Bristol	1	.9%	0	.0%	0	.0%	1	9.1%	0	.0%
	Outdoors and Active, Meadow Street, Western-super-Mare	1	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	NK Sports, Station Road, Weston-super-Mare	1	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Newton Abbot	1	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Morrisons, Summer Lane, Weston-super-Mare	1	.9%	0	.0%	0	.0%	0	.0%	1	11.1%
	Martins of Exeter, Clyst Road, Sandygate, Exeter	1	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Avonmouth	1	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Lloyds Toys & Models, High Street, Weston-super-Mare	1	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Isle of Wedmore Golf Club, Lineage, Lascot Hill, Wedmore	1	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Hamptons Golf Club, Bristol	1	.9%	1	12.5%	0	.0%	0	.0%	0	.0%
	Go Outdoors, Tramway Road, Brislington, Bristol	1	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Early Learning Centre, Cribbs Causeway, Bristol	1	.9%	1	12.5%	0	.0%	0	.0%	0	.0%
	Currys, Cribbs Causeway, Bristol	1	.9%	0	.0%	0	.0%	0	.0%	1	11.1%
	Currys, Bridgwater Retail Park, Bridgwater	1	.9%	0	.0%	0	.0%	1	9.1%	0	.0%
	Clifton, Bristol	1	.9%	0	.0%	0	.0%	1	9.1%	0	.0%
	Cadbury Garden & Leisure, Smallway, Congresbury, Bristol	1	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Brislington, Bristol	1	.9%	0	.0%	0	.0%	1	9.1%	0	.0%
	Blacks, Bond Street, Bristol	1	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Bike Shop, Bristol	1	.9%	0	.0%	0	.0%	1	9.1%	0	.0%
	The Bicycle Chain, Bridgwater	1	.9%	0	.0%	0	.0%	0	.0%	0	.0%
	Ashton, Bristol	1	.9%	0	.0%	1	8.3%	0	.0%	0	.0%

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Q13. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Recreational goods including bicycles, games, toys, sports and camping equipment?

		Zone									
		5		6		7		8		9	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Sanders Garden World, Bristol Road, Brent Knoll	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Round Trees Garden Centre, Smallway, Congresbury	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	PC World, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Outdoors and Active, Meadow Street, Western-super-Mare	1	7.7%	0	.0%	0	.0%	0	.0%	0	.0%
	NK Sports, Station Road, Weston-super-Mare	1	7.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Newton Abbot	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Morrisons, Summer Lane, Weston-super-Mare	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Martins of Exeter, Clyst Road, Sandygate, Exeter	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Avonmouth	0	.0%	1	16.7%	0	.0%	0	.0%	0	.0%
	Lloyds Toys & Models, High Street, Weston-super-Mare	0	.0%	0	.0%	1	12.5%	0	.0%	0	.0%
	Isle of Wedmore Golf Club, Lineage, Lascot Hill, Wedmore	0	.0%	0	.0%	0	.0%	1	6.3%	0	.0%
	Hamptons Golf Club, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Go Outdoors, Tramway Road, Brislington, Bristol	0	.0%	0	.0%	0	.0%	1	6.3%	0	.0%
	Early Learning Centre, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Currys, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Currys, Bridgwater Retail Park, Bridgwater	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Clifton, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Cadbury Garden & Leisure, Smallway, Congresbury, Bristol	1	7.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Brislington, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Blacks, Bond Street, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	1	8.3%
	Bike Shop, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	The Bicycle Chain, Bridgwater	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Ashton, Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q13. In which town centre, freestanding store, or retail park do you do most of your household's shopping for Recreational goods including bicycles, games, toys, sports and camping equipment?

		Zone					
		10		11		12	
		Num	%	Num	%	Num	%
Other	Sanders Garden World, Bristol Road, Brent Knoll	1	16.7%	0	.0%	0	.0%
	Round Trees Garden Centre, Smallway, Congresbury	0	.0%	0	.0%	0	.0%
	PC World, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%
	Outdoors and Active, Meadow Street, Western-super-Mare	0	.0%	0	.0%	0	.0%
	NK Sports, Station Road, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Newton Abbot	0	.0%	1	12.5%	0	.0%
	Morrisons, Summer Lane, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Martins of Exeter, Clyst Road, Sandygate, Exeter	1	16.7%	0	.0%	0	.0%
	Avonmouth	0	.0%	0	.0%	0	.0%
	Lloyds Toys & Models, High Street, Weston-super-Mare	0	.0%	0	.0%	0	.0%
	Isle of Wedmore Golf Club, Lineage, Lascot Hill, Wedmore	0	.0%	0	.0%	0	.0%
	Hamptons Golf Club, Bristol	0	.0%	0	.0%	0	.0%
	Go Outdoors, Tramway Road, Brislington, Bristol	0	.0%	0	.0%	0	.0%
	Early Learning Centre, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%
	Currys, Cribbs Causeway, Bristol	0	.0%	0	.0%	0	.0%
	Currys, Bridgwater Retail Park, Bridgwater	0	.0%	0	.0%	0	.0%
	Clifton, Bristol	0	.0%	0	.0%	0	.0%
	Cadbury Garden & Leisure, Smallway, Congresbury, Bristol	0	.0%	0	.0%	0	.0%
	Brislington, Bristol	0	.0%	0	.0%	0	.0%
	Blacks, Bond Street, Bristol	0	.0%	0	.0%	0	.0%
	Bike Shop, Bristol	0	.0%	0	.0%	0	.0%
	The Bicycle Chain, Bridgwater	0	.0%	1	12.5%	0	.0%
	Ashton, Bristol	0	.0%	0	.0%	0	.0%

Q14. How does your household normally travel when undertaking shopping for non-food goods?

			Zone							
	Base: All respondents		1		2		3		4	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	1202	100.0%	80	100.0%	101	100.0%	120	100.0%	120	100.0%

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Q14. How does your household normally travel when undertaking shopping for non-food goods?

	Zone											
	5		6		7		8		9		10	
	Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	140	100.0%	110	100.0%	100	100.0%	90	100.0%	91	100.0%	80	100.0%

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Q14. How does your household normally travel when undertaking shopping for non-food goods?

	Zone			
	11		12	
	Num	%	Num	%
Base: All respondents	90	100.0%	80	100.0%

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Q14. How does your household normally travel when undertaking shopping for non-food goods?

		Base: All respondents		Zone							
				1		2		3		4	
		Num	%	Num	%	Num	%	Num	%	Num	%
	Car / van (as driver)	784	66.0%	55	68.8%	73	73.7%	75	64.7%	73	60.8%
	Car / van (as passenger)	178	15.0%	10	12.5%	11	11.1%	21	18.1%	23	19.2%
	Bus	151	12.7%	11	13.8%	10	10.1%	12	10.3%	19	15.8%
	Walk	43	3.6%	3	3.8%	5	5.1%	6	5.2%	4	3.3%
	Taxi	9	.8%	0	.0%	0	.0%	1	.9%	0	.0%
	Goods delivered	8	.7%	1	1.3%	0	.0%	0	.0%	0	.0%
	Bicycle	7	.6%	0	.0%	0	.0%	1	.9%	0	.0%
	Train	7	.6%	0	.0%	0	.0%	0	.0%	0	.0%
	Motorcycle	1	.1%	0	.0%	0	.0%	0	.0%	1	.8%
Other	Park & ride	12	92.3%	0	.0%	1	100.0%	4	100.0%	0	.0%
	Mobility scooter	1	7.7%	0	.0%	0	.0%	0	.0%	0	.0%

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Q14. How does your household normally travel when undertaking shopping for non-food goods?

		Zone											
		5		6		7		8		9		10	
		Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
	Car / van (as driver)	88	63.3%	48	44.0%	67	68.4%	62	69.7%	74	81.3%	64	81.0%
	Car / van (as passenger)	20	14.4%	16	14.7%	13	13.3%	12	13.5%	13	14.3%	5	6.3%
	Bus	23	16.5%	20	18.3%	16	16.3%	11	12.4%	4	4.4%	6	7.6%
	Walk	3	2.2%	17	15.6%	0	.0%	1	1.1%	0	.0%	1	1.3%
	Taxi	2	1.4%	4	3.7%	0	.0%	1	1.1%	0	.0%	0	.0%
	Goods delivered	1	.7%	0	.0%	1	1.0%	0	.0%	0	.0%	2	2.5%
	Bicycle	1	.7%	2	1.8%	1	1.0%	0	.0%	0	.0%	1	1.3%
	Train	1	.7%	2	1.8%	0	.0%	2	2.2%	0	.0%	0	.0%
	Motorcycle	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Other	Park & ride	1	100.0%	1	100.0%	2	100.0%	1	100.0%	0	.0%	1	100.0%
	Mobility scooter	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q14. How does your household normally travel when undertaking shopping for non-food goods?

		Zone			
		11		12	
		Num	%	Num	%
	Car / van (as driver)	55	61.8%	50	63.3%
	Car / van (as passenger)	20	22.5%	14	17.7%
	Bus	9	10.1%	10	12.7%
	Walk	2	2.2%	1	1.3%
	Taxi	0	.0%	1	1.3%
	Goods delivered	1	1.1%	2	2.5%
	Bicycle	1	1.1%	0	.0%
	Train	1	1.1%	1	1.3%
	Motorcycle	0	.0%	0	.0%
Other	Park & ride	0	.0%	1	100.0%
	Mobility scooter	1	100.0%	0	.0%

Q15. Do you visit [Portishead/ Nailsea/ Clevedon/ Weston-super-Mare] to visit shops, services and other facilities?

			Zone									
	Base: Zones 1 to 9		1		2		3		4		5	
	Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Base: Zones 1 to 9	952	100.0%	80	100.0%	101	100.0%	120	100.0%	120	100.0%	140	100.0%
Yes	872	91.6%	65	81.3%	98	97.0%	118	98.3%	118	98.3%	128	91.4%
No	80	8.4%	15	18.8%	3	3.0%	2	1.7%	2	1.7%	12	8.6%

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Q15. Do you visit [Portishead/ Nailsea/ Clevedon/ Weston-super-Mare] to visit shops, services and other facilities?

	Zone							
	6		7		8		9	
	Num	%	Num	%	Num	%	Num	%
Base: Zones 1 to 9	110	100.0%	100	100.0%	90	100.0%	91	100.0%
Yes	108	98.2%	93	93.0%	78	86.7%	66	72.5%
No	2	1.8%	7	7.0%	12	13.3%	25	27.5%

Q16. Why do you not visit [Portishead/ Nailsea/ Clevedon/ Weston-super-Mare]?

	Base: Those not visiting [Portishead/ Nailsea/ Clevedon/ Weston-super-Mare]	
	Num	%
Base: Those not visiting [Portishead/ Nailsea/ Clevedon/ Weston-super-Mare]	80	100.0%

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Q16. Why do you not visit [Portishead/ Nailsea/ Clevedon/ Weston-super-Mare]?

	Zone									
	1		2		3		4		5	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: Those not visiting [Portishead/ Nailsea/ Clevedon/ Weston-super-Mare]	15	100.0%	3	100.0%	2	100.0%	2	100.0%	12	100.0%

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Q16. Why do you not visit [Portishead/ Nailsea/ Clevedon/ Weston-super-Mare]?

	Zone							
	6		7		8		9	
	Num	%	Num	%	Num	%	Num	%
Base: Those not visiting [Portishead/ Nailsea/ Clevedon/ Weston-super-Mare]	2	100.0%	7	100.0%	12	100.0%	25	100.0%

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Q16. Why do you not visit [Portishead/ Nailsea/ Clevedon/ Weston-super-Mare]?

		Base: Those not visiting [Portishead/ Nailsea/ Clevedon/ Weston-super-Mare]	
		Num	%
	Too far from home	19	35.8%
	Poor selection / choice of multiple shops	9	17.0%
	Nothing	9	17.0%
	Difficult parking	6	11.3%
	Don't know / can't remember	6	11.3%
	Too expensive	3	5.7%
	Unattractive environment / dirty streets / litter	3	5.7%
	Expensive parking	1	1.9%
	Selection / choice of independent shops	1	1.9%
Other	Poor quality of shops / environment	5	16.1%
	No need to	4	12.9%
	Prefer Bristol	4	12.9%
	Ill health	3	9.7%
	Poor accessibility	2	6.5%
	Nothing to do there	2	6.5%
	Not able bodied	2	6.5%
	Too many tourists	1	3.2%
	Prefer Cribbs Causeway	1	3.2%
	Old age	1	3.2%
	No John Lewis	1	3.2%
	Lack of public transport	1	3.2%
	Go to Worle which is more local	1	3.2%
	Dull	1	3.2%
	Don't know the area	1	3.2%
	Dated	1	3.2%

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Q16. Why do you not visit [Portishead/ Nailsea/ Clevedon/ Weston-super-Mare]?

		Zone									
		1		2		3		4		5	
		Num	%	Num	%	Num	%	Num	%	Num	%
	Too far from home	8	57.1%	0	.0%	0	.0%	0	.0%	0	.0%
	Poor selection / choice of multiple shops	1	7.1%	1	33.3%	0	.0%	1	100.0%	2	40.0%
	Nothing	2	14.3%	1	33.3%	1	100.0%	0	.0%	1	20.0%
	Difficult parking	0	.0%	0	.0%	0	.0%	0	.0%	1	20.0%
	Don't know / can't remember	2	14.3%	0	.0%	0	.0%	0	.0%	1	20.0%
	Too expensive	1	7.1%	1	33.3%	0	.0%	0	.0%	0	.0%
	Unattractive environment / dirty streets / litter	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Expensive parking	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Selection / choice of independent shops	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Other	Poor quality of shops / environment	0	.0%	0	.0%	1	100.0%	0	.0%	2	28.6%
	No need to	0	.0%	0	.0%	0	.0%	0	.0%	1	14.3%
	Prefer Bristol	1	100.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Ill health	0	.0%	0	.0%	0	.0%	0	.0%	1	14.3%
	Poor accessibility	0	.0%	0	.0%	0	.0%	0	.0%	1	14.3%
	Nothing to do there	0	.0%	0	.0%	0	.0%	1	100.0%	0	.0%
	Not able bodied	0	.0%	0	.0%	0	.0%	0	.0%	1	14.3%
	Too many tourists	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Prefer Cribbs Causeway	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Old age	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	No John Lewis	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Lack of public transport	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Go to Worle which is more local	0	.0%	0	.0%	0	.0%	0	.0%	1	14.3%
	Dull	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Don't know the area	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Dated	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q16. Why do you not visit [Portishead/ Nailsea/ Clevedon/ Weston-super-Mare]?

		Zone							
		6		7		8		9	
		Num	%	Num	%	Num	%	Num	%
	Too far from home	0	.0%	1	25.0%	0	.0%	10	55.6%
	Poor selection / choice of multiple shops	0	.0%	2	50.0%	0	.0%	2	11.1%
	Nothing	0	.0%	0	.0%	2	33.3%	2	11.1%
	Difficult parking	1	100.0%	1	25.0%	2	33.3%	1	5.6%
	Don't know / can't remember	0	.0%	1	25.0%	1	16.7%	1	5.6%
	Too expensive	0	.0%	0	.0%	0	.0%	1	5.6%
	Unattractive environment / dirty streets / litter	0	.0%	0	.0%	1	16.7%	2	11.1%
	Expensive parking	0	.0%	0	.0%	0	.0%	1	5.6%
	Selection / choice of independent shops	0	.0%	0	.0%	0	.0%	1	5.6%
Other	Poor quality of shops / environment	0	.0%	1	20.0%	0	.0%	1	11.1%
	No need to	0	.0%	1	20.0%	2	33.3%	0	.0%
	Prefer Bristol	0	.0%	0	.0%	0	.0%	3	33.3%
	Ill health	0	.0%	0	.0%	1	16.7%	1	11.1%
	Poor accessibility	0	.0%	1	20.0%	0	.0%	0	.0%
	Nothing to do there	0	.0%	1	20.0%	0	.0%	0	.0%
	Not able bodied	0	.0%	0	.0%	0	.0%	1	11.1%
	Too many tourists	0	.0%	0	.0%	0	.0%	1	11.1%
	Prefer Cribbs Causeway	0	.0%	0	.0%	1	16.7%	0	.0%
	Old age	0	.0%	0	.0%	0	.0%	1	11.1%
	No John Lewis	0	.0%	0	.0%	0	.0%	1	11.1%
	Lack of public transport	1	100.0%	0	.0%	0	.0%	0	.0%
	Go to Worle which is more local	0	.0%	0	.0%	0	.0%	0	.0%
	Dull	0	.0%	0	.0%	1	16.7%	0	.0%
	Don't know the area	0	.0%	0	.0%	1	16.7%	0	.0%
	Dated	0	.0%	1	20.0%	0	.0%	0	.0%

Q17. What, if anything, would make you visit [Portishead/ Nailsea/ Clevedon/ Weston-super-Mare] more often?

	Base: Those not visiting [Portishead/ Nailsea/ Clevedon/ Weston-super-Mare]	
	Num	%
Base: Those not visiting [Portishead/ Nailsea/ Clevedon/ Weston-super-Mare]	80	100.0%

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Q17. What, if anything, would make you visit [Portishead/ Nailsea/ Clevedon/ Weston-super-Mare] more often?

	Zone									
	1		2		3		4		5	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: Those not visiting [Portishead/ Nailsea/ Clevedon/ Weston-super-Mare]	15	100.0%	3	100.0%	2	100.0%	2	100.0%	12	100.0%

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Q17. What, if anything, would make you visit [Portishead/ Nailsea/ Clevedon/ Weston-super-Mare] more often?

	Zone							
	6		7		8		9	
	Num	%	Num	%	Num	%	Num	%
Base: Those not visiting [Portishead/ Nailsea/ Clevedon/ Weston-super-Mare]	2	100.0%	7	100.0%	12	100.0%	25	100.0%

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Q17. What, if anything, would make you visit [Portishead/ Nailsea/ Clevedon/ Weston-super-Mare] more often?

		Base: Those not visiting [Portishead/ Nailsea/ Clevedon/ Weston-super-Mare]	
		Num	%
	Nothing in particular	37	51.4%
	Improve choice of multiple shops	9	12.5%
	Don't know / can't remember	6	8.3%
	Improve range of independent / specialist shops	5	6.9%
	Develop new shopping facilities	4	5.6%
	Attract larger retailers	3	4.2%
	Introduce a larger supermarket	3	4.2%
	Improve public transport links	3	4.2%
	More parking spaces - long stay	2	2.8%
	More parking spaces - short stay	2	2.8%
	More parking spaces - type unspecified	2	2.8%
	Encourage reduced shop prices	1	1.4%
	Improve market stalls	1	1.4%
	Enhanced range of health and fitness centres / gyms	1	1.4%
	Improved play areas for children	1	1.4%
	Improved range of places to eat	1	1.4%
	New / improved cinema	1	1.4%
	Improve layout of car parks	1	1.4%
	Improve location of bus stops / bus station	1	1.4%
	Reduce cost of parking	1	1.4%
	Attract less people / relieve over-crowding	1	1.4%
Other	Complete refurbishment	3	27.3%
	Debenhams	2	18.2%
	More local/ independent stores	1	9.1%
	Marks & Spencer and a bigger Boots	1	9.1%
	John Lewis	1	9.1%
	Good music shop	1	9.1%
	Clean sea	1	9.1%
	A large department store	1	9.1%

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Q17. What, if anything, would make you visit [Portishead/ Nailsea/ Clevedon/ Weston-super-Mare] more often?

		Zone									
		1		2		3		4		5	
		Num	%	Num	%	Num	%	Num	%	Num	%
	Nothing in particular	12	80.0%	0	.0%	1	50.0%	1	50.0%	0	.0%
	Improve choice of multiple shops	0	.0%	1	33.3%	0	.0%	1	50.0%	2	25.0%
	Don't know / can't remember	2	13.3%	0	.0%	0	.0%	0	.0%	1	12.5%
	Improve range of independent / specialist shops	0	.0%	2	66.7%	0	.0%	0	.0%	1	12.5%
	Develop new shopping facilities	0	.0%	0	.0%	1	50.0%	1	50.0%	1	12.5%
	Attract larger retailers	0	.0%	0	.0%	0	.0%	0	.0%	1	12.5%
	Introduce a larger supermarket	1	6.7%	1	33.3%	0	.0%	0	.0%	0	.0%
	Improve public transport links	0	.0%	0	.0%	0	.0%	0	.0%	1	12.5%
	More parking spaces - long stay	0	.0%	0	.0%	0	.0%	0	.0%	1	12.5%
	More parking spaces - short stay	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	More parking spaces - type unspecified	0	.0%	0	.0%	0	.0%	0	.0%	1	12.5%
	Encourage reduced shop prices	0	.0%	1	33.3%	0	.0%	0	.0%	0	.0%
	Improve market stalls	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Enhanced range of health and fitness centres / gyms	0	.0%	0	.0%	0	.0%	0	.0%	1	12.5%
	Improved play areas for children	0	.0%	0	.0%	0	.0%	0	.0%	1	12.5%
	Improved range of places to eat	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	New / improved cinema	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Improve layout of car parks	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Improve location of bus stops / bus station	0	.0%	0	.0%	0	.0%	0	.0%	1	12.5%
	Reduce cost of parking	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Attract less people / relieve over-crowding	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Other	Complete refurbishment	0	.0%	0	.0%	0	.0%	0	.0%	1	16.7%
	Debenhams	0	.0%	0	.0%	0	.0%	0	.0%	2	33.3%
	More local/ independent stores	0	.0%	0	.0%	0	.0%	0	.0%	1	16.7%
	Marks & Spencer and a bigger Boots	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	John Lewis	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Good music shop	0	.0%	0	.0%	0	.0%	0	.0%	1	16.7%
	Clean sea	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	A large department store	0	.0%	0	.0%	0	.0%	0	.0%	1	16.7%

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Q17. What, if anything, would make you visit [Portishead/ Nailsea/ Clevedon/ Weston-super-Mare] more often?

		Zone							
		6		7		8		9	
		Num	%	Num	%	Num	%	Num	%
	Nothing in particular	0	.0%	3	42.9%	3	30.0%	17	73.9%
	Improve choice of multiple shops	0	.0%	1	14.3%	3	30.0%	1	4.3%
	Don't know / can't remember	1	50.0%	0	.0%	1	10.0%	1	4.3%
	Improve range of independent / specialist shops	0	.0%	1	14.3%	1	10.0%	0	.0%
	Develop new shopping facilities	0	.0%	1	14.3%	0	.0%	0	.0%
	Attract larger retailers	0	.0%	0	.0%	0	.0%	2	8.7%
	Introduce a larger supermarket	0	.0%	1	14.3%	0	.0%	0	.0%
	Improve public transport links	0	.0%	1	14.3%	1	10.0%	0	.0%
	More parking spaces - long stay	0	.0%	0	.0%	1	10.0%	0	.0%
	More parking spaces - short stay	0	.0%	0	.0%	2	20.0%	0	.0%
	More parking spaces - type unspecified	0	.0%	0	.0%	1	10.0%	0	.0%
	Encourage reduced shop prices	0	.0%	0	.0%	0	.0%	0	.0%
	Improve market stalls	0	.0%	0	.0%	0	.0%	1	4.3%
	Enhanced range of health and fitness centres / gyms	0	.0%	0	.0%	0	.0%	0	.0%
	Improved play areas for children	0	.0%	0	.0%	0	.0%	0	.0%
	Improved range of places to eat	1	50.0%	0	.0%	0	.0%	0	.0%
	New / improved cinema	0	.0%	0	.0%	0	.0%	1	4.3%
	Improve layout of car parks	0	.0%	0	.0%	1	10.0%	0	.0%
	Improve location of bus stops / bus station	0	.0%	0	.0%	0	.0%	0	.0%
	Reduce cost of parking	0	.0%	0	.0%	1	10.0%	0	.0%
	Attract less people / relieve over-crowding	0	.0%	1	14.3%	0	.0%	0	.0%
Other	Complete refurbishment	0	.0%	0	.0%	1	50.0%	1	50.0%
	Debenhams	0	.0%	0	.0%	0	.0%	0	.0%
	More local/ independent stores	0	.0%	0	.0%	0	.0%	0	.0%
	Marks & Spencer and a bigger Boots	0	.0%	1	100.0%	0	.0%	0	.0%
	John Lewis	0	.0%	0	.0%	0	.0%	1	50.0%
	Good music shop	0	.0%	0	.0%	0	.0%	0	.0%
	Clean sea	0	.0%	0	.0%	1	50.0%	0	.0%
	A large department store	0	.0%	0	.0%	0	.0%	0	.0%

Q18a. Which of the following of these other centres in North Somerset do you use most frequently?

	Base: Those not visiting [Portishead/ Nailsea/ Clevedon/ Weston-super-Mare]	
	Num	%
Base: Those not visiting [Portishead/ Nailsea/ Clevedon/ Weston-super-Mare]	80	100.0%

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Q18a. Which of the following of these other centres in North Somerset do you use most frequently?

	Zone									
	1		2		3		4		5	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: Those not visiting [Portishead/ Nailsea/ Clevedon/ Weston-super-Mare]	15	100.0%	3	100.0%	2	100.0%	2	100.0%	12	100.0%

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Q18a. Which of the following of these other centres in North Somerset do you use most frequently?

	Zone							
	6		7		8		9	
	Num	%	Num	%	Num	%	Num	%
Base: Those not visiting [Portishead/ Nailsea/ Clevedon/ Weston-super-Mare]	2	100.0%	7	100.0%	12	100.0%	25	100.0%

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Q18a. Which of the following of these other centres in North Somerset do you use most frequently?

		Base: Those not visiting [Portishead/ Nailsea/ Clevedon/ Weston-super-Mare]	
		Num	%
	Clevedon	23	51.1%
	Nailsea	12	26.7%
	Weston-super-Mare	6	13.3%
	Portishead	4	8.9%
Other	None	13	37.1%
	Bristol	12	34.3%
	Cribbs Causeway Bristol	3	8.6%
	Worle	2	5.7%
	Wells	2	5.7%
	Bath	2	5.7%
	Clifton, Bristol	1	2.9%

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Q18a. Which of the following of these other centres in North Somerset do you use most frequently?

		Zone									
		1		2		3		4		5	
		Num	%	Num	%	Num	%	Num	%	Num	%
	Clevedon	3	42.9%	1	33.3%	1	50.0%	0	.0%	5	71.4%
	Nailsea	4	57.1%	0	.0%	0	.0%	0	.0%	1	14.3%
	Weston-super-Mare	0	.0%	2	66.7%	1	50.0%	2	100.0%	1	14.3%
	Portishead	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Other	None	3	37.5%	0	.0%	0	.0%	0	.0%	2	40.0%
	Bristol	4	50.0%	0	.0%	0	.0%	0	.0%	2	40.0%
	Cribbs Causeway Bristol	0	.0%	0	.0%	0	.0%	0	.0%	1	20.0%
	Worle	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Wells	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Bath	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Clifton, Bristol	1	12.5%	0	.0%	0	.0%	0	.0%	0	.0%

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Q18a. Which of the following of these other centres in North Somerset do you use most frequently?

		Zone							
		6		7		8		9	
		Num	%	Num	%	Num	%	Num	%
	Clevedon	0	.0%	2	100.0%	5	62.5%	6	46.2%
	Nailsea	0	.0%	0	.0%	2	25.0%	5	38.5%
	Weston-super-Mare	0	.0%	0	.0%	0	.0%	0	.0%
	Portishead	1	100.0%	0	.0%	1	12.5%	2	15.4%
Other	None	1	100.0%	2	40.0%	1	25.0%	4	33.3%
	Bristol	0	.0%	1	20.0%	2	50.0%	3	25.0%
	Cribbs Causeway Bristol	0	.0%	2	40.0%	0	.0%	0	.0%
	Worle	0	.0%	0	.0%	1	25.0%	1	8.3%
	Wells	0	.0%	0	.0%	0	.0%	2	16.7%
	Bath	0	.0%	0	.0%	0	.0%	2	16.7%
	Clifton, Bristol	0	.0%	0	.0%	0	.0%	0	.0%

Q18b. Of the following centres which do you consider your main centre?

	Zone							
	Base: Zones 10 to 12		10		11		12	
	Num	%	Num	%	Num	%	Num	%
Base: Zones 10 to 12	250	100.0%	80	100.0%	90	100.0%	80	100.0%

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Q18b. Of the following centres which do you consider your main centre?

		Base: Zones 10 to 12		Zone 10		Zone 11		Zone 12	
		Num	%	Num	%	Num	%	Num	%
	Weston-super-Mare	115	47.5%	56	70.9%	22	25.9%	37	47.4%
	Burnham-on-Sea	38	15.7%	9	11.4%	29	34.1%	0	.0%
	Wells	27	11.2%	5	6.3%	0	.0%	22	28.2%
	Taunton	21	8.7%	3	3.8%	16	18.8%	2	2.6%
	Bristol - Cribbs Causeway	12	5.0%	5	6.3%	5	5.9%	2	2.6%
	Bridgwater	9	3.7%	0	.0%	9	10.6%	0	.0%
	Cheddar	8	3.3%	0	.0%	0	.0%	8	10.3%
	Bristol - Broadmead / Cabot Circus	6	2.5%	1	1.3%	2	2.4%	3	3.8%
	Street	5	2.1%	0	.0%	1	1.2%	4	5.1%
	Bishopsworth, Bristol	1	.4%	0	.0%	1	1.2%	0	.0%
Other	Highbridge	4	50.0%	0	.0%	4	80.0%	0	.0%
Other	None	1	12.5%	0	.0%	0	.0%	1	50.0%
Other	Newton Abbot	1	12.5%	0	.0%	1	20.0%	0	.0%
Other	Clarks Village	1	12.5%	0	.0%	0	.0%	1	50.0%
Other	Axbridge	1	12.5%	1	100.0%	0	.0%	0	.0%

Q19. What is the main reason for your visits to [place specified]?

	Base: All who visit a centre in North Somerset	
	Num	%
Base: All who visit a centre in North Somerset	1188	100.0%
Shopping	827	76.6%
Using finacial services (e.g. banks, building societies)	70	6.5%
Social / leisure reasons	54	5.0%
Work in / near to town centre	51	4.7%
Using other services (e.g. hairdressers, travel agent, opticians etc)	26	2.4%
Tourism / sight-seeing / browsing	25	2.3%
Visting restaurants / Cafes / public houses	20	1.9%
Visting Council offices / Job Centre / other public agency	6	.6%

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Q19. What is the main reason for your visits to [place specified]?

	Zone									
	1		2		3		4		5	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All who visit a centre in North Somerset	77	100.0%	101	100.0%	120	100.0%	120	100.0%	138	100.0%
Shopping	46	63.9%	66	74.2%	93	84.5%	77	80.2%	97	72.4%
Using finacial services (e.g. banks, building societies)	7	9.7%	8	9.0%	6	5.5%	7	7.3%	7	5.2%
Social / leisure reasons	8	11.1%	5	5.6%	1	.9%	2	2.1%	4	3.0%
Work in / near to town centre	3	4.2%	4	4.5%	3	2.7%	5	5.2%	7	5.2%
Using other services (e.g. hairdressers, travel agent, opticians etc)	5	6.9%	2	2.2%	4	3.6%	2	2.1%	6	4.5%
Tourism / sight-seeing / browsing	1	1.4%	1	1.1%	1	.9%	0	.0%	5	3.7%
Visting restaurants / Cafes / public houses	2	2.8%	2	2.2%	0	.0%	3	3.1%	6	4.5%
Visting Council offices / Job Centre / other public agency	0	.0%	1	1.1%	2	1.8%	0	.0%	2	1.5%

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Q19. What is the main reason for your visits to [place specified]?

	Zone									
	6		7		8		9		10	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All who visit a centre in North Somerset	109	100.0%	98	100.0%	89	100.0%	87	100.0%	80	100.0%
Shopping	71	74.7%	62	72.1%	61	71.8%	62	73.8%	62	83.8%
Using finacial services (e.g. banks, building societies)	11	11.6%	9	10.5%	5	5.9%	3	3.6%	3	4.1%
Social / leisure reasons	7	7.4%	1	1.2%	10	11.8%	7	8.3%	3	4.1%
Work in / near to town centre	4	4.2%	9	10.5%	3	3.5%	3	3.6%	2	2.7%
Using other services (e.g. hairdressers, travel agent, opticians etc)	0	.0%	0	.0%	2	2.4%	4	4.8%	1	1.4%
Tourism / sight-seeing / browsing	1	1.1%	3	3.5%	3	3.5%	5	6.0%	1	1.4%
Visting restaurants / Cafes / public houses	1	1.1%	2	2.3%	1	1.2%	0	.0%	1	1.4%
Visting Council offices / Job Centre / other public agency	0	.0%	0	.0%	0	.0%	0	.0%	1	1.4%

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Q19. What is the main reason for your visits to [place specified]?

	Zone			
	11		12	
	Num	%	Num	%
Base: All who visit a centre in North Somerset	90	100.0%	79	100.0%
Shopping	70	85.4%	60	83.3%
Using finacial services (e.g. banks, building societies)	4	4.9%	0	.0%
Social / leisure reasons	1	1.2%	5	6.9%
Work in / near to town centre	3	3.7%	5	6.9%
Using other services (e.g. hairdressers, travel agent, opticians etc)	0	.0%	0	.0%
Tourism / sight-seeing / browsing	3	3.7%	1	1.4%
Visting restaurants / Cafes / public houses	1	1.2%	1	1.4%
Visting Council offices / Job Centre / other public agency	0	.0%	0	.0%

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Q19. What is the main reason for your visits to [place specified]?

		Base: All who visit a centre in North Somerset	
		Num	%
Other	Live there	52	47.7%
	Convenience	39	35.8%
	Varies	8	7.3%
	Church	3	2.8%
	Train station	1	.9%
	School run	1	.9%
	Petrol	1	.9%
	Library	1	.9%
	Environment	1	.9%
	Clothes shopping	1	.9%
	Children's playgroup	1	.9%

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Q19. What is the main reason for your visits to [place specified]?

		Zone									
		1		2		3		4		5	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Live there	0	.0%	8	66.7%	6	60.0%	16	66.7%	1	25.0%
	Convenience	4	80.0%	3	25.0%	4	40.0%	4	16.7%	0	.0%
	Varies	0	.0%	0	.0%	0	.0%	0	.0%	3	75.0%
	Church	1	20.0%	0	.0%	0	.0%	2	8.3%	0	.0%
	Train station	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	School run	0	.0%	1	8.3%	0	.0%	0	.0%	0	.0%
	Petrol	0	.0%	0	.0%	0	.0%	1	4.2%	0	.0%
	Library	0	.0%	0	.0%	0	.0%	1	4.2%	0	.0%
	Environment	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Clothes shopping	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Children's playgroup	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q19. What is the main reason for your visits to [place specified]?

		Zone									
		6		7		8		9		10	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Live there	13	92.9%	4	33.3%	0	.0%	0	.0%	1	16.7%
	Convenience	0	.0%	4	33.3%	3	75.0%	2	66.7%	3	50.0%
	Varies	1	7.1%	1	8.3%	1	25.0%	1	33.3%	1	16.7%
	Church	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Train station	0	.0%	0	.0%	0	.0%	0	.0%	1	16.7%
	School run	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Petrol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Library	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Environment	0	.0%	1	8.3%	0	.0%	0	.0%	0	.0%
	Clothes shopping	0	.0%	1	8.3%	0	.0%	0	.0%	0	.0%
	Children's playgroup	0	.0%	1	8.3%	0	.0%	0	.0%	0	.0%

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Q19. What is the main reason for your visits to [place specified]?

		Zone			
		11		12	
		Num	%	Num	%
Other	Live there	2	25.0%	1	14.3%
	Convenience	6	75.0%	6	85.7%
	Varies	0	.0%	0	.0%
	Church	0	.0%	0	.0%
	Train station	0	.0%	0	.0%
	School run	0	.0%	0	.0%
	Petrol	0	.0%	0	.0%
	Library	0	.0%	0	.0%
	Environment	0	.0%	0	.0%
	Clothes shopping	0	.0%	0	.0%
	Children's playgroup	0	.0%	0	.0%

Q20. Are there any other reasons for your visits to [place specified]?

		Base: All who visit a centre in North Somerset	
		Num	%
	Base: All who visit a centre in North Somerset	1188	100.0%
	Don't know / no answer	240	21.7%
	Social / leisure reasons	236	21.4%
	Using finacial services (e.g. banks, building societies)	204	18.5%
	Visting restaurants / Cafes / public houses	178	16.1%
	Shopping	171	15.5%
	Using other services (e.g. hairdressers, travel agent, opticians etc)	159	14.4%
	Won't be doing anything else	116	10.5%
	Tourism / sight-seeing / browsing	66	6.0%
	Visting Council offices / Job Centre / other public agency	36	3.3%
	Work in / near to town centre	28	2.5%

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Q20. Are there any other reasons for your visits to [place specified]?

	Zone									
	1		2		3		4		5	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All who visit a centre in North Somerset	77	100.0%	101	100.0%	120	100.0%	120	100.0%	138	100.0%
Don't know / no answer	16	22.2%	17	17.9%	20	18.3%	20	17.9%	24	18.8%
Social / leisure reasons	18	25.0%	18	18.9%	14	12.8%	25	22.3%	29	22.7%
Using finacial services (e.g. banks, building societies)	13	18.1%	29	30.5%	34	31.2%	26	23.2%	17	13.3%
Visting restaurants / Cafes / public houses	12	16.7%	15	15.8%	14	12.8%	22	19.6%	21	16.4%
Shopping	15	20.8%	17	17.9%	9	8.3%	19	17.0%	21	16.4%
Using other services (e.g. hairdressers, travel agent, opticians etc)	5	6.9%	20	21.1%	35	32.1%	20	17.9%	15	11.7%
Won't be doing anything else	5	6.9%	9	9.5%	4	3.7%	13	11.6%	13	10.2%
Tourism / sight-seeing / browsing	3	4.2%	2	2.1%	2	1.8%	3	2.7%	16	12.5%
Visting Council offices / Job Centre / other public agency	1	1.4%	7	7.4%	10	9.2%	5	4.5%	2	1.6%
Work in / near to town centre	0	.0%	3	3.2%	5	4.6%	2	1.8%	3	2.3%

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Q20. Are there any other reasons for your visits to [place specified]?

	Zone									
	6		7		8		9		10	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All who visit a centre in North Somerset	109	100.0%	98	100.0%	89	100.0%	87	100.0%	80	100.0%
Don't know / no answer	15	14.7%	20	22.7%	21	24.7%	23	28.0%	20	27.8%
Social / leisure reasons	24	23.5%	13	14.8%	29	34.1%	11	13.4%	21	29.2%
Using finacial services (e.g. banks, building societies)	27	26.5%	18	20.5%	5	5.9%	11	13.4%	5	6.9%
Visting restaurants / Cafes / public houses	25	24.5%	13	14.8%	15	17.6%	11	13.4%	6	8.3%
Shopping	21	20.6%	16	18.2%	15	17.6%	12	14.6%	10	13.9%
Using other services (e.g. hairdressers, travel agent, opticians etc)	15	14.7%	13	14.8%	3	3.5%	7	8.5%	11	15.3%
Won't be doing anything else	7	6.9%	10	11.4%	7	8.2%	10	12.2%	8	11.1%
Tourism / sight-seeing / browsing	8	7.8%	7	8.0%	4	4.7%	6	7.3%	5	6.9%
Visting Council offices / Job Centre / other public agency	7	6.9%	0	.0%	1	1.2%	0	.0%	2	2.8%
Work in / near to town centre	5	4.9%	2	2.3%	2	2.4%	1	1.2%	2	2.8%

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Q20. Are there any other reasons for your visits to [place specified]?

	Zone 11 Num	Zone 11 %	Zone 12 Num	Zone 12 %
Base: All who visit a centre in North Somerset	90	100.0%	79	100.0%
Don't know / no answer	19	22.6%	25	32.9%
Social / leisure reasons	17	20.2%	17	22.4%
Using finacial services (e.g. banks, building societies)	11	13.1%	8	10.5%
Visting restaurants / Cafes / public houses	15	17.9%	9	11.8%
Shopping	9	10.7%	7	9.2%
Using other services (e.g. hairdressers, travel agent, opticians etc)	8	9.5%	7	9.2%
Won't be doing anything else	17	20.2%	13	17.1%
Tourism / sight-seeing / browsing	4	4.8%	6	7.9%
Visting Council offices / Job Centre / other public agency	0	.0%	1	1.3%
Work in / near to town centre	2	2.4%	1	1.3%

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Q20. Are there any other reasons for your visits to [place specified]?

		Base: All who visit a centre in North Somerset Num	%
Other	Visting friends/ familiy	40	36.4%
	Live there	18	16.4%
	Convenience	13	11.8%
	Walking	10	9.1%
	Cinema	6	5.5%
	Theatre	5	4.5%
	The peer/ seafront	5	4.5%
	Petrol	4	3.6%
	The market	3	2.7%
	College	2	1.8%
	Church	2	1.8%
	School run	1	.9%
	Library	1	.9%

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Q20. Are there any other reasons for your visits to [place specified]?

		Zone									
		1		2		3		4		5	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Visting friends/ familiy	7	100.0%	2	25.0%	3	20.0%	1	11.1%	4	30.8%
	Live there	0	.0%	3	37.5%	4	26.7%	3	33.3%	2	15.4%
	Convenience	0	.0%	2	25.0%	2	13.3%	2	22.2%	1	7.7%
	Walking	0	.0%	0	.0%	0	.0%	1	11.1%	1	7.7%
	Cinema	0	.0%	0	.0%	0	.0%	1	11.1%	2	15.4%
	Theatre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	The peer/ seafront	0	.0%	0	.0%	0	.0%	0	.0%	2	15.4%
	Petrol	0	.0%	1	12.5%	2	13.3%	1	11.1%	0	.0%
	The market	0	.0%	0	.0%	1	6.7%	0	.0%	0	.0%
	College	0	.0%	0	.0%	0	.0%	0	.0%	1	7.7%
	Church	0	.0%	0	.0%	2	13.3%	0	.0%	0	.0%
	School run	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Library	0	.0%	0	.0%	1	6.7%	0	.0%	0	.0%

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Q20. Are there any other reasons for your visits to [place specified]?

		Zone									
		6		7		8		9		10	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Visting friends/ familiy	1	11.1%	2	16.7%	7	87.5%	3	42.9%	4	44.4%
	Live there	3	33.3%	3	25.0%	0	.0%	0	.0%	0	.0%
	Convenience	3	33.3%	2	16.7%	0	.0%	0	.0%	1	11.1%
	Walking	0	.0%	2	16.7%	1	12.5%	2	28.6%	1	11.1%
	Cinema	0	.0%	0	.0%	0	.0%	1	14.3%	0	.0%
	Theatre	1	11.1%	0	.0%	0	.0%	1	14.3%	2	22.2%
	The peer/ seafront	0	.0%	2	16.7%	0	.0%	0	.0%	0	.0%
	Petrol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	The market	0	.0%	0	.0%	0	.0%	0	.0%	1	11.1%
	College	0	.0%	1	8.3%	0	.0%	0	.0%	0	.0%
	Church	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	School run	1	11.1%	0	.0%	0	.0%	0	.0%	0	.0%
	Library	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q20. Are there any other reasons for your visits to [place specified]?

		Zone			
		11		12	
		Num	%	Num	%
Other	Visting friends/ familiy	4	50.0%	2	40.0%
	Live there	0	.0%	0	.0%
	Convenience	0	.0%	0	.0%
	Walking	1	12.5%	1	20.0%
	Cinema	2	25.0%	0	.0%
	Theatre	1	12.5%	0	.0%
	The peer/ seafront	0	.0%	1	20.0%
	Petrol	0	.0%	0	.0%
	The market	0	.0%	1	20.0%
	College	0	.0%	0	.0%
	Church	0	.0%	0	.0%
	School run	0	.0%	0	.0%
	Library	0	.0%	0	.0%

Q21. What type of goods and services do you normally buy from [place specified]?

		Base: Those shopping or using services and who visit a centre in North Somerset	
		Num	%
	Base: Those shopping or using services and who visit a centre in North Somerset	1040	100.0%
	Food / groceries	632	62.6%
	Clothes and shoes	418	41.4%
	Personal and luxury goods	208	20.6%
	Electical goods	139	13.8%
	DIY and hardware goods	136	13.5%
	Gifts / souvenirs	127	12.6%
	Services	97	9.6%
	Confectionary / tobacco / newspapers and magazines	86	8.5%
	Recreational goods	70	6.9%
	Furniture and carpets	65	6.4%
	Don't know / no answer	45	4.5%

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Q21. What type of goods and services do you normally buy from [place specified]?

	Zone									
	1		2		3		4		5	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: Those shopping or using services and who visit a centre in North Somerset	69	100.0%	86	100.0%	109	100.0%	99	100.0%	124	100.0%
Food / groceries	51	75.0%	68	81.9%	94	87.9%	80	83.3%	46	39.3%
Clothes and shoes	8	11.8%	14	16.9%	26	24.3%	15	15.6%	69	59.0%
Personal and luxury goods	9	13.2%	17	20.5%	25	23.4%	25	26.0%	23	19.7%
Electical goods	7	10.3%	10	12.0%	6	5.6%	5	5.2%	15	12.8%
DIY and hardware goods	13	19.1%	10	12.0%	8	7.5%	14	14.6%	10	8.5%
Gifts / souvenirs	9	13.2%	13	15.7%	10	9.3%	11	11.5%	13	11.1%
Services	9	13.2%	19	22.9%	15	14.0%	10	10.4%	9	7.7%
Confectionary / tobacco / newspapers and magazines	5	7.4%	16	19.3%	12	11.2%	10	10.4%	8	6.8%
Recreational goods	4	5.9%	4	4.8%	7	6.5%	3	3.1%	13	11.1%
Furniture and carpets	3	4.4%	2	2.4%	7	6.5%	1	1.0%	5	4.3%
Don't know / no answer	2	2.9%	2	2.4%	1	.9%	4	4.2%	8	6.8%

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Q21. What type of goods and services do you normally buy from [place specified]?

	Zone									
	6		7		8		9		10	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: Those shopping or using services and who visit a centre in North Somerset	95	100.0%	83	100.0%	76	100.0%	77	100.0%	74	100.0%
Food / groceries	67	72.8%	40	48.8%	31	41.9%	36	48.6%	42	59.2%
Clothes and shoes	47	51.1%	51	62.2%	40	54.1%	34	45.9%	42	59.2%
Personal and luxury goods	27	29.3%	25	30.5%	9	12.2%	10	13.5%	16	22.5%
Electical goods	16	17.4%	17	20.7%	18	24.3%	8	10.8%	18	25.4%
DIY and hardware goods	14	15.2%	13	15.9%	14	18.9%	9	12.2%	9	12.7%
Gifts / souvenirs	13	14.1%	12	14.6%	8	10.8%	8	10.8%	8	11.3%
Services	9	9.8%	9	11.0%	1	1.4%	1	1.4%	6	8.5%
Confectionary / tobacco / newspapers and magazines	10	10.9%	6	7.3%	2	2.7%	2	2.7%	4	5.6%
Recreational goods	8	8.7%	12	14.6%	5	6.8%	3	4.1%	5	7.0%
Furniture and carpets	8	8.7%	6	7.3%	10	13.5%	3	4.1%	10	14.1%
Don't know / no answer	3	3.3%	4	4.9%	4	5.4%	6	8.1%	2	2.8%

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Q21. What type of goods and services do you normally buy from [place specified]?

	Zone			
	11		12	
	Num	%	Num	%
Base: Those shopping or using services and who visit a centre in North Somerset	81	100.0%	67	100.0%
Food / groceries	35	44.3%	42	63.6%
Clothes and shoes	38	48.1%	34	51.5%
Personal and luxury goods	12	15.2%	10	15.2%
Electical goods	12	15.2%	7	10.6%
DIY and hardware goods	12	15.2%	10	15.2%
Gifts / souvenirs	14	17.7%	8	12.1%
Services	8	10.1%	1	1.5%
Confectionary / tobacco / newspapers and magazines	9	11.4%	2	3.0%
Recreational goods	5	6.3%	1	1.5%
Furniture and carpets	7	8.9%	3	4.5%
Don't know / no answer	5	6.3%	4	6.1%

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Q21. What type of goods and services do you normally buy from [place specified]?

		Base: Those shopping or using services and who visit a centre in North Somerset	
		Num	%
Other	Everything/ whatever I need	23	25.6%
	Household goods	15	16.7%
	Chemist goods	14	15.6%
	Books	10	11.1%
	Pet products	5	5.6%
	Stationery	4	4.4%
	Petrol	4	4.4%
	Childrens products	4	4.4%
	Cards	4	4.4%
	Glasses	2	2.2%
	Garden goods	2	2.2%
	Plants	1	1.1%
	Musical Instruments	1	1.1%
	Livestock food	1	1.1%

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Q21. What type of goods and services do you normally buy from [place specified]?

		Zone									
		1		2		3		4		5	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Everything/ whatever I need	0	.0%	2	25.0%	1	11.1%	0	.0%	7	43.8%
	Household goods	2	33.3%	2	25.0%	1	11.1%	1	10.0%	0	.0%
	Chemist goods	0	.0%	0	.0%	6	66.7%	2	20.0%	0	.0%
	Books	0	.0%	2	25.0%	0	.0%	2	20.0%	3	18.8%
	Pet products	0	.0%	1	12.5%	1	11.1%	0	.0%	1	6.3%
	Stationery	1	16.7%	0	.0%	0	.0%	3	30.0%	0	.0%
	Petrol	1	16.7%	1	12.5%	0	.0%	0	.0%	0	.0%
	Childrens products	0	.0%	0	.0%	0	.0%	0	.0%	1	6.3%
	Cards	1	16.7%	0	.0%	0	.0%	1	10.0%	2	12.5%
	Glasses	0	.0%	0	.0%	0	.0%	0	.0%	1	6.3%
	Garden goods	1	16.7%	0	.0%	0	.0%	0	.0%	1	6.3%
	Plants	0	.0%	0	.0%	0	.0%	1	10.0%	0	.0%
	Musical Instruments	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Livestock food	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q21. What type of goods and services do you normally buy from [place specified]?

		Zone									
		6		7		8		9		10	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Everything/ whatever I need	3	42.9%	0	.0%	3	30.0%	1	25.0%	3	60.0%
	Household goods	2	28.6%	3	50.0%	1	10.0%	2	50.0%	0	.0%
	Chemist goods	1	14.3%	0	.0%	2	20.0%	0	.0%	0	.0%
	Books	0	.0%	1	16.7%	0	.0%	0	.0%	1	20.0%
	Pet products	1	14.3%	0	.0%	1	10.0%	0	.0%	0	.0%
	Stationery	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Petrol	0	.0%	0	.0%	2	20.0%	0	.0%	0	.0%
	Childrens products	0	.0%	1	16.7%	1	10.0%	0	.0%	1	20.0%
	Cards	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Glasses	0	.0%	1	16.7%	0	.0%	0	.0%	0	.0%
	Garden goods	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Plants	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Musical Instruments	0	.0%	0	.0%	0	.0%	1	25.0%	0	.0%
	Livestock food	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q21. What type of goods and services do you normally buy from [place specified]?

		Zone			
		11		12	
		Num	%	Num	%
Other	Everything/ whatever I need	1	25.0%	2	40.0%
	Household goods	0	.0%	1	20.0%
	Chemist goods	2	50.0%	1	20.0%
	Books	0	.0%	1	20.0%
	Pet products	0	.0%	0	.0%
	Stationery	0	.0%	0	.0%
	Petrol	0	.0%	0	.0%
	Childrens products	0	.0%	0	.0%
	Cards	0	.0%	0	.0%
	Glasses	0	.0%	0	.0%
	Garden goods	0	.0%	0	.0%
	Plants	0	.0%	0	.0%
	Musical Instruments	0	.0%	0	.0%
	Livestock food	1	25.0%	0	.0%

Q22. How much do you normally spend at [place specified]?

		Base: Those shopping or using services and who visit a centre in North Somerset	
		Num	%
	Base: Those shopping or using services and who visit a centre in North Somerset	1040	100.0%
	£0-5	35	3.4%
	£6-10	52	5.0%
	£11-20	115	11.1%
	£21-30	118	11.3%
	£31-40	60	5.8%
	£41-50	82	7.9%
	£51-60	66	6.3%
	£61-70	36	3.5%
	£71-80	34	3.3%
	£81-90	13	1.3%
	£91-100	58	5.6%
	£100+	47	4.5%
	Don't know / refused	324	31.2%

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Q22. How much do you normally spend at [place specified]?

	Zone									
	1		2		3		4		5	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: Those shopping or using services and who visit a centre in North Somerset	69	100.0%	86	100.0%	109	100.0%	99	100.0%	124	100.0%
£0-5	3	4.3%	6	7.0%	1	.9%	5	5.1%	8	6.5%
£6-10	7	10.1%	6	7.0%	12	11.0%	8	8.1%	8	6.5%
£11-20	11	15.9%	14	16.3%	19	17.4%	10	10.1%	14	11.3%
£21-30	14	20.3%	12	14.0%	9	8.3%	10	10.1%	12	9.7%
£31-40	3	4.3%	3	3.5%	5	4.6%	10	10.1%	6	4.8%
£41-50	2	2.9%	4	4.7%	3	2.8%	9	9.1%	5	4.0%
£51-60	1	1.4%	5	5.8%	8	7.3%	7	7.1%	4	3.2%
£61-70	1	1.4%	5	5.8%	8	7.3%	5	5.1%	4	3.2%
£71-80	2	2.9%	0	.0%	8	7.3%	5	5.1%	1	.8%
£81-90	0	.0%	2	2.3%	2	1.8%	0	.0%	0	.0%
£91-100	0	.0%	4	4.7%	7	6.4%	5	5.1%	5	4.0%
£100+	2	2.9%	0	.0%	3	2.8%	1	1.0%	8	6.5%
Don't know / refused	23	33.3%	25	29.1%	24	22.0%	24	24.2%	49	39.5%

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Q22. How much do you normally spend at [place specified]?

	Zone									
	6		7		8		9		10	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: Those shopping or using services and who visit a centre in North Somerset	95	100.0%	83	100.0%	76	100.0%	77	100.0%	74	100.0%
£0-5	4	4.2%	2	2.4%	0	.0%	0	.0%	1	1.4%
£6-10	2	2.1%	2	2.4%	2	2.6%	1	1.3%	2	2.7%
£11-20	9	9.5%	8	9.6%	9	11.8%	6	7.8%	5	6.8%
£21-30	17	17.9%	8	9.6%	8	10.5%	4	5.2%	9	12.2%
£31-40	4	4.2%	5	6.0%	5	6.6%	6	7.8%	4	5.4%
£41-50	7	7.4%	7	8.4%	10	13.2%	13	16.9%	7	9.5%
£51-60	6	6.3%	1	1.2%	6	7.9%	8	10.4%	11	14.9%
£61-70	3	3.2%	3	3.6%	2	2.6%	0	.0%	0	.0%
£71-80	5	5.3%	2	2.4%	2	2.6%	1	1.3%	3	4.1%
£81-90	3	3.2%	2	2.4%	0	.0%	0	.0%	2	2.7%
£91-100	5	5.3%	3	3.6%	4	5.3%	3	3.9%	12	16.2%
£100+	6	6.3%	5	6.0%	2	2.6%	2	2.6%	5	6.8%
Don't know / refused	24	25.3%	35	42.2%	26	34.2%	33	42.9%	13	17.6%

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Q22. How much do you normally spend at [place specified]?

	Zone			
	11		12	
	Num	%	Num	%
Base: Those shopping or using services and who visit a centre in North Somerset	81	100.0%	67	100.0%
£0-5	5	6.2%	0	.0%
£6-10	1	1.2%	1	1.5%
£11-20	8	9.9%	2	3.0%
£21-30	9	11.1%	6	9.0%
£31-40	7	8.6%	2	3.0%
£41-50	7	8.6%	8	11.9%
£51-60	2	2.5%	7	10.4%
£61-70	2	2.5%	3	4.5%
£71-80	3	3.7%	2	3.0%
£81-90	1	1.2%	1	1.5%
£91-100	5	6.2%	5	7.5%
£100+	8	9.9%	5	7.5%
Don't know / refused	23	28.4%	25	37.3%

Q23. Why do you chose to go to [place specified] for shopping and services?

	Base: All who visit a centre in North Somerset	
	Num	%
Base: All who visit a centre in North Somerset	1188	100.0%
Close to home / live here	863	80.1%
Good range of shops / shops that I like	109	10.1%
Easy parking	54	5.0%
Attractivenss envornment / nice place to visit	44	4.1%
Close to friends / relatives	35	3.2%
Good public transport	27	2.5%
Close to work	24	2.2%
Don't know / no answer	23	2.1%
To visit a particular shop / service	14	1.3%
Competitive prices	12	1.1%
Traffic free pedestrian area	4	.4%
Visiting as a tourist	3	.3%
Recommended to you	3	.3%

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Q23. Why do you chose to go to [place specified] for shopping and services?

	Zone									
	1		2		3		4		5	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All who visit a centre in North Somerset	77	100.0%	101	100.0%	120	100.0%	120	100.0%	138	100.0%
Close to home / live here	32	51.6%	89	90.8%	114	95.8%	99	88.4%	98	78.4%
Good range of shops / shops that I like	10	16.1%	5	5.1%	7	5.9%	7	6.3%	14	11.2%
Easy parking	6	9.7%	1	1.0%	5	4.2%	0	.0%	3	2.4%
Attractivenss envornment / nice place to visit	6	9.7%	2	2.0%	3	2.5%	4	3.6%	5	4.0%
Close to friends / relatives	6	9.7%	5	5.1%	2	1.7%	3	2.7%	2	1.6%
Good public transport	3	4.8%	0	.0%	1	.8%	0	.0%	5	4.0%
Close to work	1	1.6%	1	1.0%	1	.8%	2	1.8%	2	1.6%
Don't know / no answer	2	3.2%	1	1.0%	1	.8%	1	.9%	2	1.6%
To visit a particular shop / service	3	4.8%	2	2.0%	1	.8%	1	.9%	0	.0%
Competitive prices	1	1.6%	0	.0%	0	.0%	1	.9%	2	1.6%
Traffic free pedestrian area	1	1.6%	0	.0%	0	.0%	0	.0%	1	.8%
Visiting as a tourist	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Recommended to you	0	.0%	0	.0%	0	.0%	0	.0%	1	.8%

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Q23. Why do you chose to go to [place specified] for shopping and services?

	Zone									
	6		7		8		9		10	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All who visit a centre in North Somerset	109	100.0%	98	100.0%	89	100.0%	87	100.0%	80	100.0%
Close to home / live here	94	93.1%	89	95.7%	55	73.3%	54	67.5%	56	78.9%
Good range of shops / shops that I like	4	4.0%	3	3.2%	7	9.3%	4	5.0%	11	15.5%
Easy parking	0	.0%	2	2.2%	10	13.3%	8	10.0%	5	7.0%
Attractivenss envornment / nice place to visit	0	.0%	0	.0%	5	6.7%	6	7.5%	3	4.2%
Close to friends / relatives	1	1.0%	0	.0%	4	5.3%	4	5.0%	3	4.2%
Good public transport	3	3.0%	2	2.2%	3	4.0%	1	1.3%	1	1.4%
Close to work	3	3.0%	4	4.3%	2	2.7%	2	2.5%	1	1.4%
Don't know / no answer	3	3.0%	2	2.2%	3	4.0%	6	7.5%	0	.0%
To visit a particular shop / service	0	.0%	0	.0%	1	1.3%	4	5.0%	0	.0%
Competitive prices	0	.0%	0	.0%	2	2.7%	0	.0%	2	2.8%
Traffic free pedestrian area	0	.0%	0	.0%	1	1.3%	0	.0%	0	.0%
Visiting as a tourist	0	.0%	0	.0%	0	.0%	1	1.3%	1	1.4%
Recommended to you	0	.0%	0	.0%	1	1.3%	0	.0%	1	1.4%

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Q23. Why do you chose to go to [place specified] for shopping and services?

	Zone			
	11		12	
	Num	%	Num	%
Base: All who visit a centre in North Somerset	90	100.0%	79	100.0%
Close to home / live here	46	58.2%	37	59.7%
Good range of shops / shops that I like	26	32.9%	11	17.7%
Easy parking	12	15.2%	2	3.2%
Attractivenss envornment / nice place to visit	4	5.1%	6	9.7%
Close to friends / relatives	3	3.8%	2	3.2%
Good public transport	2	2.5%	6	9.7%
Close to work	2	2.5%	3	4.8%
Don't know / no answer	1	1.3%	1	1.6%
To visit a particular shop / service	1	1.3%	1	1.6%
Competitive prices	1	1.3%	3	4.8%
Traffic free pedestrian area	1	1.3%	0	.0%
Visiting as a tourist	0	.0%	1	1.6%
Recommended to you	0	.0%	0	.0%

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Q23. Why do you chose to go to [place specified] for shopping and services?

		Base: All who visit a centre in North Somerset	
		Num	%
Other	Convenient	76	42.7%
	Nearest large town	13	7.3%
	Habit/ familiarity	10	5.6%
	Support local businesses	8	4.5%
	Compact	7	3.9%
	Free parking	6	3.4%
	Waitrose	5	2.8%
	Dislike Bristol	5	2.8%
	Tesco	3	1.7%
	Limited public transport	3	1.7%
	Like the seaside	3	1.7%
	For a change	3	1.7%
	Undercover shopping area	2	1.1%
	Poor health/ old age	2	1.1%
	Optician	2	1.1%
	Library	2	1.1%
	Less busy	2	1.1%
	Homebase	2	1.1%
	Waitrose/ Sainsbury's/ Morrisons	1	.6%
	Train station	1	.6%
	Swimming	1	.6%
	Sports shop	1	.6%
	Social reasons	1	.6%
	Post Office	1	.6%
	Pass through the town	1	.6%
	Music shop	1	.6%
	Morrisons	1	.6%
	Marks & Spencer	1	.6%
	John Lewis	1	.6%
	Iceland	1	.6%
	Health foods	1	.6%
	Hairdressers	1	.6%
	Green grocer/ baker	1	.6%
	Gamestation Store	1	.6%
	Friendly	1	.6%
	Dentist	1	.6%
	Church group	1	.6%
	Cafes	1	.6%
	Butchers	1	.6%

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Q23. Why do you chose to go to [place specified] for shopping and services?

		Zone									
		1		2		3		4		5	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Convenient	9	40.9%	2	28.6%	4	57.1%	4	40.0%	14	56.0%
	Nearest large town	0	.0%	0	.0%	0	.0%	0	.0%	2	8.0%
	Habit/ familiarity	1	4.5%	0	.0%	0	.0%	0	.0%	0	.0%
	Support local businesses	0	.0%	1	14.3%	0	.0%	3	30.0%	1	4.0%
	Compact	0	.0%	0	.0%	0	.0%	0	.0%	2	8.0%
	Free parking	2	9.1%	0	.0%	1	14.3%	0	.0%	0	.0%
	Waitrose	3	13.6%	1	14.3%	0	.0%	0	.0%	0	.0%
	Dislike Bristol	0	.0%	0	.0%	0	.0%	0	.0%	1	4.0%
	Tesco	0	.0%	1	14.3%	0	.0%	0	.0%	0	.0%
	Limited public transport	0	.0%	0	.0%	1	14.3%	0	.0%	0	.0%
	Like the seaside	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	For a change	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Undercover shopping area	0	.0%	0	.0%	0	.0%	0	.0%	1	4.0%
	Poor health/ old age	0	.0%	0	.0%	0	.0%	0	.0%	1	4.0%
	Optician	1	4.5%	0	.0%	0	.0%	0	.0%	1	4.0%
	Library	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Less busy	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Homebase	2	9.1%	0	.0%	0	.0%	0	.0%	0	.0%
	Waitrose/ Sainsbury's/ Morrisons	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Train station	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Swimming	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Sports shop	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Social reasons	0	.0%	0	.0%	0	.0%	0	.0%	1	4.0%
	Post Office	0	.0%	1	14.3%	0	.0%	0	.0%	0	.0%
	Pass through the town	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Music shop	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Morrisons	0	.0%	0	.0%	0	.0%	1	10.0%	0	.0%
	Marks & Spencer	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	John Lewis	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Iceland	0	.0%	1	14.3%	0	.0%	0	.0%	0	.0%
	Health foods	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Hairdressers	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Green grocer/ baker	0	.0%	0	.0%	1	14.3%	0	.0%	0	.0%
	Gamestation Store	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Friendly	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Dentist	1	4.5%	0	.0%	0	.0%	0	.0%	0	.0%
	Church group	0	.0%	0	.0%	0	.0%	1	10.0%	0	.0%
	Cafes	0	.0%	0	.0%	0	.0%	0	.0%	1	4.0%
	Butchers	1	4.5%	0	.0%	0	.0%	0	.0%	0	.0%

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Q23. Why do you chose to go to [place specified] for shopping and services?

		Zone									
		6		7		8		9		10	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Convenient	5	45.5%	3	50.0%	10	43.5%	2	14.3%	3	17.6%
	Nearest large town	0	.0%	0	.0%	1	4.3%	1	7.1%	3	17.6%
	Habit/ familiarity	1	9.1%	0	.0%	0	.0%	2	14.3%	3	17.6%
	Support local businesses	1	9.1%	0	.0%	0	.0%	0	.0%	0	.0%
	Compact	0	.0%	1	16.7%	3	13.0%	0	.0%	1	5.9%
	Free parking	0	.0%	0	.0%	1	4.3%	0	.0%	1	5.9%
	Waitrose	0	.0%	0	.0%	0	.0%	0	.0%	1	5.9%
	Dislike Bristol	0	.0%	1	16.7%	1	4.3%	2	14.3%	0	.0%
	Tesco	0	.0%	0	.0%	0	.0%	1	7.1%	0	.0%
	Limited public transport	2	18.2%	0	.0%	0	.0%	0	.0%	0	.0%
	Like the seaside	0	.0%	0	.0%	0	.0%	1	7.1%	2	11.8%
	For a change	0	.0%	0	.0%	2	8.7%	1	7.1%	0	.0%
	Undercover shopping area	1	9.1%	0	.0%	0	.0%	0	.0%	0	.0%
	Poor health/ old age	1	9.1%	0	.0%	0	.0%	0	.0%	0	.0%
	Optician	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Library	0	.0%	0	.0%	0	.0%	1	7.1%	0	.0%
	Less busy	0	.0%	0	.0%	1	4.3%	0	.0%	1	5.9%
	Homebase	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Waitrose/ Sainsbury's/ Morrisons	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Train station	0	.0%	0	.0%	0	.0%	0	.0%	1	5.9%
	Swimming	0	.0%	0	.0%	1	4.3%	0	.0%	0	.0%
	Sports shop	0	.0%	0	.0%	0	.0%	1	7.1%	0	.0%
	Social reasons	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Post Office	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Pass through the town	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Music shop	0	.0%	0	.0%	0	.0%	1	7.1%	0	.0%
	Morrisons	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Marks & Spencer	0	.0%	0	.0%	1	4.3%	0	.0%	0	.0%
	John Lewis	0	.0%	1	16.7%	0	.0%	0	.0%	0	.0%
	Iceland	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Health foods	0	.0%	0	.0%	1	4.3%	0	.0%	0	.0%
	Hairdressers	0	.0%	0	.0%	0	.0%	1	7.1%	0	.0%
	Green grocer/ baker	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Gamestation Store	0	.0%	0	.0%	1	4.3%	0	.0%	0	.0%
	Friendly	0	.0%	0	.0%	0	.0%	0	.0%	1	5.9%
	Dentist	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Church group	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Cafes	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Butchers	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q23. Why do you chose to go to [place specified] for shopping and services?

		Zone			
		11		12	
		Num	%	Num	%
	Convenient	7	50.0%	13	59.1%
	Nearest large town	2	14.3%	4	18.2%
	Habit/ familiarity	2	14.3%	1	4.5%
	Support local businesses	1	7.1%	1	4.5%
	Compact	0	.0%	0	.0%
	Free parking	1	7.1%	0	.0%
	Waitrose	0	.0%	0	.0%
	Dislike Bristol	0	.0%	0	.0%
	Tesco	1	7.1%	0	.0%
	Limited public transport	0	.0%	0	.0%
	Like the seaside	0	.0%	0	.0%
	For a change	0	.0%	0	.0%
	Undercover shopping area	0	.0%	0	.0%
	Poor health/ old age	0	.0%	0	.0%
	Optician	0	.0%	0	.0%
	Library	0	.0%	1	4.5%
	Less busy	0	.0%	0	.0%
	Homebase	0	.0%	0	.0%
	Waitrose/ Sainsbury's/ Morrisons	0	.0%	1	4.5%
Other	Train station	0	.0%	0	.0%
	Swimming	0	.0%	0	.0%
	Sports shop	0	.0%	0	.0%
	Social reasons	0	.0%	0	.0%
	Post Office	0	.0%	0	.0%
	Pass through the town	0	.0%	1	4.5%
	Music shop	0	.0%	0	.0%
	Morrisons	0	.0%	0	.0%
	Marks & Spencer	0	.0%	0	.0%
	John Lewis	0	.0%	0	.0%
	Iceland	0	.0%	0	.0%
	Health foods	0	.0%	0	.0%
	Hairdressers	0	.0%	0	.0%
	Green grocer/ baker	0	.0%	0	.0%
	Gamestation Store	0	.0%	0	.0%
	Friendly	0	.0%	0	.0%
	Dentist	0	.0%	0	.0%
	Church group	0	.0%	0	.0%
	Cafes	0	.0%	0	.0%
	Butchers	0	.0%	0	.0%

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Q23. Why do you chose to go to [place specified] for shopping and services?

		Base: All who visit a centre in North Somerset	
		Num	%
Other	Browsing	1	.6%
	Bank	1	.6%
	Argos/ Iceland	1	.6%

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Q23. Why do you chose to go to [place specified] for shopping and services?

		Zone									
		1		2		3		4		5	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Browsing	0	.0%	0	.0%	0	.0%	1	10.0%	0	.0%
	Bank	1	4.5%	0	.0%	0	.0%	0	.0%	0	.0%
	Argos/ Iceland	1	4.5%	0	.0%	0	.0%	0	.0%	0	.0%

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Q23. Why do you chose to go to [place specified] for shopping and services?

		Zone									
		6		7		8		9		10	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Browsing	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Bank	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Argos/ Iceland	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q23. Why do you chose to go to [place specified] for shopping and services?

		Zone			
		11		12	
		Num	%	Num	%
Other	Browsing	0	.0%	0	.0%
	Bank	0	.0%	0	.0%
	Argos/ Iceland	0	.0%	0	.0%

Q24. How long on average do you normally stay in [place specified]?

	Base: All who visit a centre in North Somerset	
	Num	%
Base: All who visit a centre in North Somerset	1188	100.0%

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Q24. How long on average do you normally stay in [place specified]?

	Zone									
	1		2		3		4		5	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All who visit a centre in North Somerset	77	100.0%	101	100.0%	120	100.0%	120	100.0%	138	100.0%

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Q24. How long on average do you normally stay in [place specified]?

	Zone									
	6		7		8		9		10	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All who visit a centre in North Somerset	109	100.0%	98	100.0%	89	100.0%	87	100.0%	80	100.0%

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Q24. How long on average do you normally stay in [place specified]?

	Zone			
	11		12	
	Num	%	Num	%
Base: All who visit a centre in North Somerset	90	100.0%	79	100.0%

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Q24. How long on average do you normally stay in [place specified]?

	Base: All who visit a centre in North Somerset	
	Num	%
0-30 mins	105	8.8%
30 - 1 hour	302	25.4%
1-2 hours	459	38.6%
2-3 hours	182	15.3%
3-4 hours	60	5.1%
Over 4 hours	37	3.1%
Don't know / no answer	43	3.6%

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Q24. How long on average do you normally stay in [place specified]?

	Zone									
	1		2		3		4		5	
	Num	%	Num	%	Num	%	Num	%	Num	%
0-30 mins	5	6.5%	18	17.8%	18	15.0%	20	16.7%	5	3.6%
30 - 1 hour	28	36.4%	38	37.6%	48	40.0%	49	40.8%	25	18.1%
1-2 hours	31	40.3%	25	24.8%	43	35.8%	30	25.0%	65	47.1%
2-3 hours	5	6.5%	4	4.0%	4	3.3%	12	10.0%	27	19.6%
3-4 hours	1	1.3%	7	6.9%	0	.0%	0	.0%	9	6.5%
Over 4 hours	4	5.2%	2	2.0%	1	.8%	2	1.7%	4	2.9%
Don't know / no answer	3	3.9%	7	6.9%	6	5.0%	7	5.8%	3	2.2%

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Q24. How long on average do you normally stay in [place specified]?

	Zone									
	6		7		8		9		10	
	Num	%	Num	%	Num	%	Num	%	Num	%
0-30 mins	6	5.5%	5	5.1%	4	4.5%	2	2.3%	3	3.8%
30 - 1 hour	27	24.8%	16	16.3%	14	15.7%	9	10.3%	17	21.3%
1-2 hours	47	43.1%	50	51.0%	34	38.2%	48	55.2%	34	42.5%
2-3 hours	19	17.4%	19	19.4%	24	27.0%	17	19.5%	18	22.5%
3-4 hours	6	5.5%	3	3.1%	8	9.0%	3	3.4%	4	5.0%
Over 4 hours	1	.9%	2	2.0%	2	2.2%	2	2.3%	4	5.0%
Don't know / no answer	3	2.8%	3	3.1%	3	3.4%	6	6.9%	0	.0%

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Q24. How long on average do you normally stay in [place specified]?

	Zone			
	11		12	
	Num	%	Num	%
0-30 mins	12	13.3%	7	8.9%
30 - 1 hour	19	21.1%	12	15.2%
1-2 hours	22	24.4%	30	38.0%
2-3 hours	21	23.3%	12	15.2%
3-4 hours	7	7.8%	12	15.2%
Over 4 hours	8	8.9%	5	6.3%
Don't know / no answer	1	1.1%	1	1.3%

Q25. How do you normally travel to [place specified]?

		Base: All who visit a centre in North Somerset	
		Num	%
	Base: All who visit a centre in North Somerset	1188	100.0%
	Car / van (as driver)	746	63.1%
	Walk	151	12.8%
	Car / van (as passenger)	137	11.6%
	Bus	127	10.7%
	Bicycle	13	1.1%
	Taxi	5	.4%
	Train	3	.3%
	Motorcycle	1	.1%
Other	Both car and bus	4	80.0%
	Mobility scooter	1	20.0%

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Q25. How do you normally travel to [place specified]?

		Zone 1 Num	Zone 1 %	Zone 2 Num	Zone 2 %	Zone 3 Num	Zone 3 %	Zone 4 Num	Zone 4 %	Zone 5 Num	Zone 5 %
	Base: All who visit a centre in North Somerset	77	100.0%	101	100.0%	120	100.0%	120	100.0%	138	100.0%
	Car / van (as driver)	56	72.7%	59	58.4%	69	57.5%	63	52.5%	88	64.2%
	Walk	2	2.6%	30	29.7%	34	28.3%	36	30.0%	2	1.5%
	Car / van (as passenger)	11	14.3%	7	6.9%	12	10.0%	10	8.3%	13	9.5%
	Bus	8	10.4%	4	4.0%	2	1.7%	7	5.8%	33	24.1%
	Bicycle	0	.0%	1	1.0%	2	1.7%	3	2.5%	1	.7%
	Taxi	0	.0%	0	.0%	1	.8%	0	.0%	0	.0%
	Train	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Motorcycle	0	.0%	0	.0%	0	.0%	1	.8%	0	.0%
Other	Both car and bus	0	.0%	0	.0%	0	.0%	0	.0%	1	100.0%
	Mobility scooter	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q25. How do you normally travel to [place specified]?

		Zone 6 Num	Zone 6 %	Zone 7 Num	Zone 7 %	Zone 8 Num	Zone 8 %	Zone 9 Num	Zone 9 %	Zone 10 Num	Zone 10 %
	Base: All who visit a centre in North Somerset	109	100.0%	98	100.0%	89	100.0%	87	100.0%	80	100.0%
	Car / van (as driver)	39	35.8%	69	71.1%	68	77.3%	69	79.3%	65	81.3%
	Walk	32	29.4%	1	1.0%	0	.0%	0	.0%	1	1.3%
	Car / van (as passenger)	15	13.8%	10	10.3%	10	11.4%	13	14.9%	6	7.5%
	Bus	16	14.7%	16	16.5%	9	10.2%	5	5.7%	8	10.0%
	Bicycle	3	2.8%	1	1.0%	0	.0%	0	.0%	0	.0%
	Taxi	4	3.7%	0	.0%	0	.0%	0	.0%	0	.0%
	Train	0	.0%	0	.0%	1	1.1%	0	.0%	0	.0%
	Motorcycle	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Other	Both car and bus	0	.0%	1	100.0%	1	100.0%	0	.0%	0	.0%
	Mobility scooter	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q25. How do you normally travel to [place specified]?

		Zone			
		11		12	
		Num	%	Num	%
	Base: All who visit a centre in North Somerset	90	100.0%	79	100.0%
	Car / van (as driver)	50	56.2%	51	65.4%
	Walk	11	12.4%	2	2.6%
	Car / van (as passenger)	15	16.9%	15	19.2%
	Bus	9	10.1%	10	12.8%
	Bicycle	2	2.2%	0	.0%
	Taxi	0	.0%	0	.0%
	Train	2	2.2%	0	.0%
	Motorcycle	0	.0%	0	.0%
Other	Both car and bus	0	.0%	1	100.0%
	Mobility scooter	1	100.0%	0	.0%

Q26. What do you most like about [place specified]?

		Base: All who visit a centre in North Somerset	
		Num	%
	Base: All who visit a centre in North Somerset	1188	100.0%
	Near / convenient	359	45.3%
	Nothing	158	19.9%
	Selection / choice multiple shops	84	10.6%
	Character	40	5.0%
	Easy parking	33	4.2%
	Countryside Location	25	3.2%
	Close to friends / relatives	24	3.0%
	Feels safe	16	2.0%
	Selection / choice of independent shops	15	1.9%
	Pedestrian friendly environment	14	1.8%
	Good public transport links	6	.8%
	Competitive prices	5	.6%
	Cleanliness of streets	4	.5%
	Farmers Market	3	.4%
	Cheap parking	3	.4%
	Financial services (banks / building societies, etc)	2	.3%
	Evening entertainment	2	.3%

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Q26. What do you most like about [place specified]?

	Zone									
	1		2		3		4		5	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All who visit a centre in North Somerset	77	100.0%	101	100.0%	120	100.0%	120	100.0%	138	100.0%
Near / convenient	22	42.3%	29	46.8%	47	56.0%	28	39.4%	36	41.9%
Nothing	10	19.2%	4	6.5%	11	13.1%	7	9.9%	23	26.7%
Selection / choice multiple shops	3	5.8%	5	8.1%	6	7.1%	4	5.6%	9	10.5%
Character	5	9.6%	9	14.5%	1	1.2%	9	12.7%	3	3.5%
Easy parking	2	3.8%	0	.0%	4	4.8%	1	1.4%	5	5.8%
Countryside Location	1	1.9%	4	6.5%	5	6.0%	3	4.2%	3	3.5%
Close to friends / relatives	1	1.9%	2	3.2%	2	2.4%	7	9.9%	3	3.5%
Feels safe	2	3.8%	1	1.6%	1	1.2%	8	11.3%	0	.0%
Selection / choice of independent shops	3	5.8%	1	1.6%	1	1.2%	3	4.2%	0	.0%
Pedestrian friendly environment	0	.0%	4	6.5%	2	2.4%	1	1.4%	2	2.3%
Good public transport links	1	1.9%	1	1.6%	0	.0%	0	.0%	2	2.3%
Competitive prices	1	1.9%	0	.0%	0	.0%	0	.0%	0	.0%
Cleanliness of streets	0	.0%	0	.0%	1	1.2%	0	.0%	0	.0%
Farmers Market	0	.0%	0	.0%	1	1.2%	0	.0%	0	.0%
Cheap parking	0	.0%	0	.0%	1	1.2%	0	.0%	0	.0%
Financial services (banks / building societies, etc)	1	1.9%	1	1.6%	0	.0%	0	.0%	0	.0%
Evening entertainment	0	.0%	1	1.6%	1	1.2%	0	.0%	0	.0%

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Q26. What do you most like about [place specified]?

	Zone 6		7		8		9		10	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All who visit a centre in North Somerset	109	100.0%	98	100.0%	89	100.0%	87	100.0%	80	100.0%
Near / convenient	29	43.9%	34	52.3%	30	43.5%	27	40.3%	26	48.1%
Nothing	18	27.3%	15	23.1%	14	20.3%	19	28.4%	13	24.1%
Selection / choice multiple shops	8	12.1%	6	9.2%	10	14.5%	4	6.0%	7	13.0%
Character	1	1.5%	2	3.1%	1	1.4%	2	3.0%	2	3.7%
Easy parking	0	.0%	1	1.5%	9	13.0%	4	6.0%	4	7.4%
Countryside Location	2	3.0%	2	3.1%	0	.0%	3	4.5%	0	.0%
Close to friends / relatives	1	1.5%	3	4.6%	1	1.4%	4	6.0%	0	.0%
Feels safe	0	.0%	0	.0%	1	1.4%	1	1.5%	0	.0%
Selection / choice of independent shops	3	4.5%	2	3.1%	1	1.4%	0	.0%	1	1.9%
Pedestrian friendly environment	2	3.0%	0	.0%	1	1.4%	1	1.5%	0	.0%
Good public transport links	0	.0%	0	.0%	0	.0%	1	1.5%	0	.0%
Competitive prices	0	.0%	0	.0%	1	1.4%	0	.0%	0	.0%
Cleanliness of streets	2	3.0%	0	.0%	0	.0%	0	.0%	0	.0%
Farmers Market	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Cheap parking	0	.0%	0	.0%	0	.0%	1	1.5%	1	1.9%
Financial services (banks / building societies, etc)	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Evening entertainment	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q26. What do you most like about [place specified]?

	Zone			
	11		12	
	Num	%	Num	%
Base: All who visit a centre in North Somerset	90	100.0%	79	100.0%
Near / convenient	24	40.0%	27	47.4%
Nothing	11	18.3%	13	22.8%
Selection / choice multiple shops	14	23.3%	8	14.0%
Character	4	6.7%	1	1.8%
Easy parking	3	5.0%	0	.0%
Countryside Location	0	.0%	2	3.5%
Close to friends / relatives	0	.0%	0	.0%
Feels safe	1	1.7%	1	1.8%
Selection / choice of independent shops	0	.0%	0	.0%
Pedestrian friendly environment	1	1.7%	0	.0%
Good public transport links	1	1.7%	0	.0%
Competitive prices	0	.0%	3	5.3%
Cleanliness of streets	1	1.7%	0	.0%
Farmers Market	0	.0%	2	3.5%
Cheap parking	0	.0%	0	.0%
Financial services (banks / building societies, etc)	0	.0%	0	.0%
Evening entertainment	0	.0%	0	.0%

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Q26. What do you most like about [place specified]?

		Base: All who visit a centre in North Somerset	
		Num	%
Other	Pleasant environment/ nice town	147	37.2%
	The seafront/ pier	92	23.3%
	Compact shopping area	28	7.1%
	Variety of shops	27	6.8%
	Habit/ familiarity	21	5.3%
	Has everything I need	19	4.8%
	Not too crowded	9	2.3%
	Tesco	6	1.5%
	Waitrose	5	1.3%
	Schools	4	1.0%
	Good range of services	4	1.0%
	Good transport links	3	.8%
	Good for children	3	.8%
	The Sovereign centre	2	.5%
	Marks & Spencer	2	.5%
	Marina	2	.5%
	It's improving	2	.5%
	Cathedral	2	.5%
	Tourism	1	.3%
	Theatre	1	.3%
	The church	1	.3%
	The Big Sky	1	.3%
	Architecture	1	.3%
	Shoe shops	1	.3%
	Plenty of seating	1	.3%
	Murrays of Clevedon	1	.3%
	McDonalds	1	.3%
	Market Square	1	.3%
	Lidl	1	.3%
	John Lewis	1	.3%
	Holiday atmosphere	1	.3%
	Cinema	1	.3%
	Cheaper to live than Bristol	1	.3%
	Charity shops	1	.3%
	Asda	1	.3%

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Q26. What do you most like about [place specified]?

		Zone									
		1		2		3		4		5	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Pleasant environment/ nice town	13	52.0%	27	69.2%	22	61.1%	22	44.9%	11	21.2%
	The seafront/ pier	2	8.0%	3	7.7%	0	.0%	17	34.7%	26	50.0%
	Compact shopping area	1	4.0%	1	2.6%	2	5.6%	1	2.0%	1	1.9%
	Variety of shops	4	16.0%	1	2.6%	1	2.8%	1	2.0%	2	3.8%
	Habit/ familiarity	2	8.0%	2	5.1%	2	5.6%	3	6.1%	4	7.7%
	Has everything I need	0	.0%	1	2.6%	1	2.8%	1	2.0%	0	.0%
	Not too crowded	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Tesco	0	.0%	2	5.1%	2	5.6%	0	.0%	0	.0%
	Waitrose	1	4.0%	0	.0%	2	5.6%	0	.0%	0	.0%
	Schools	0	.0%	1	2.6%	2	5.6%	1	2.0%	0	.0%
	Good range of services	1	4.0%	0	.0%	1	2.8%	0	.0%	0	.0%
	Good transport links	0	.0%	0	.0%	1	2.8%	1	2.0%	1	1.9%
	Good for children	0	.0%	0	.0%	0	.0%	1	2.0%	2	3.8%
	The Sovereign centre	0	.0%	0	.0%	0	.0%	0	.0%	1	1.9%
	Marks & Spencer	0	.0%	0	.0%	0	.0%	0	.0%	1	1.9%
	Marina	1	4.0%	1	2.6%	0	.0%	0	.0%	0	.0%
	It's improving	0	.0%	0	.0%	0	.0%	0	.0%	1	1.9%
	Cathedral	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Tourism	0	.0%	0	.0%	0	.0%	0	.0%	1	1.9%
	Theatre	0	.0%	0	.0%	0	.0%	0	.0%	1	1.9%
	The church	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	The Big Sky	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Architecture	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Shoe shops	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Plenty of seating	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Murrays of Clevedon	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	McDonalds	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Market Square	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Lidl	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	John Lewis	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Holiday atmosphere	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Cinema	0	.0%	0	.0%	0	.0%	1	2.0%	0	.0%
	Cheaper to live than Bristol	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Charity shops	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Asda	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q26. What do you most like about [place specified]?

		Zone									
		6		7		8		9		10	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Pleasant environment/ nice town	14	32.6%	8	24.2%	5	25.0%	6	30.0%	6	23.1%
	The seafront/ pier	12	27.9%	10	30.3%	5	25.0%	5	25.0%	5	19.2%
	Compact shopping area	3	7.0%	3	9.1%	2	10.0%	3	15.0%	6	23.1%
	Variety of shops	1	2.3%	4	12.1%	1	5.0%	2	10.0%	1	3.8%
	Habit/ familiarity	3	7.0%	2	6.1%	0	.0%	0	.0%	1	3.8%
	Has everything I need	3	7.0%	3	9.1%	2	10.0%	1	5.0%	1	3.8%
	Not too crowded	1	2.3%	1	3.0%	1	5.0%	1	5.0%	2	7.7%
	Tesco	0	.0%	0	.0%	0	.0%	0	.0%	2	7.7%
	Waitrose	0	.0%	0	.0%	0	.0%	0	.0%	1	3.8%
	Schools	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Good range of services	1	2.3%	0	.0%	1	5.0%	0	.0%	0	.0%
	Good transport links	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Good for children	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	The Sovereign centre	0	.0%	0	.0%	0	.0%	1	5.0%	0	.0%
	Marks & Spencer	0	.0%	0	.0%	1	5.0%	0	.0%	0	.0%
	Marina	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	It's improving	1	2.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Cathedral	0	.0%	0	.0%	0	.0%	0	.0%	1	3.8%
	Tourism	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Theatre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	The church	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	The Big Sky	1	2.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Architecture	1	2.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Shoe shops	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Plenty of seating	0	.0%	1	3.0%	0	.0%	0	.0%	0	.0%
	Murrays of Clevedon	0	.0%	0	.0%	0	.0%	1	5.0%	0	.0%
	McDonalds	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Market Square	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Lidl	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	John Lewis	0	.0%	1	3.0%	0	.0%	0	.0%	0	.0%
	Holiday atmosphere	1	2.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Cinema	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Cheaper to live than Bristol	1	2.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Charity shops	0	.0%	0	.0%	1	5.0%	0	.0%	0	.0%
	Asda	0	.0%	0	.0%	1	5.0%	0	.0%	0	.0%

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Q26. What do you most like about [place specified]?

		Zone			
		11		12	
		Num	%	Num	%
Other	Pleasant environment/ nice town	8	26.7%	5	22.7%
	The seafront/ pier	6	20.0%	1	4.5%
	Compact shopping area	2	6.7%	3	13.6%
	Variety of shops	6	20.0%	3	13.6%
	Habit/ familiarity	1	3.3%	1	4.5%
	Has everything I need	3	10.0%	3	13.6%
	Not too crowded	1	3.3%	2	9.1%
	Tesco	0	.0%	0	.0%
	Waitrose	0	.0%	1	4.5%
	Schools	0	.0%	0	.0%
	Good range of services	0	.0%	0	.0%
	Good transport links	0	.0%	0	.0%
	Good for children	0	.0%	0	.0%
	The Sovereign centre	0	.0%	0	.0%
	Marks & Spencer	0	.0%	0	.0%
	Marina	0	.0%	0	.0%
	It's improving	0	.0%	0	.0%
	Cathedral	0	.0%	1	4.5%
	Tourism	0	.0%	0	.0%
	Theatre	0	.0%	0	.0%
	The church	1	3.3%	0	.0%
	The Big Sky	0	.0%	0	.0%
	Architecture	0	.0%	0	.0%
	Shoe shops	0	.0%	1	4.5%
	Plenty of seating	0	.0%	0	.0%
	Murrays of Clevedon	0	.0%	0	.0%
	McDonalds	1	3.3%	0	.0%
	Market Square	0	.0%	1	4.5%
	Lidl	1	3.3%	0	.0%
	John Lewis	0	.0%	0	.0%
	Holiday atmosphere	0	.0%	0	.0%
	Cinema	0	.0%	0	.0%
	Cheaper to live than Bristol	0	.0%	0	.0%
	Charity shops	0	.0%	0	.0%
	Asda	0	.0%	0	.0%

Q27. What do you most dislike about [place specified]?

	Base: All who visit a centre in North Somerset	
	Num	%
Base: All who visit a centre in North Somerset	1188	100.0%
Nothing	540	57.8%
Poor selection/choice of multiple shops	97	10.4%
Unattractive environment/dirty streets/litter	68	7.3%
Difficult parking	58	6.2%
Lack of safety/personal security/hooligans	53	5.7%
Selection/choice of independent shops	34	3.6%
Poor public transport	23	2.5%
Lack of services (banks/building societies etc)	23	2.5%
Poor pedestrian environment / pavements/roads in need of rep	15	1.6%
Expensive parking	12	1.3%
Too far from home	9	1.0%
Too expensive	3	.3%

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Q27. What do you most dislike about [place specified]?

	Zone									
	1		2		3		4		5	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All who visit a centre in North Somerset	77	100.0%	101	100.0%	120	100.0%	120	100.0%	138	100.0%
Nothing	36	64.3%	50	64.9%	58	63.0%	76	71.7%	48	44.4%
Poor selection/choice of multiple shops	4	7.1%	7	9.1%	16	17.4%	10	9.4%	12	11.1%
Unattractive environment/dirty streets/litter	2	3.6%	0	.0%	6	6.5%	4	3.8%	7	6.5%
Difficult parking	4	7.1%	8	10.4%	2	2.2%	1	.9%	11	10.2%
Lack of safety/personal security/hooligans	1	1.8%	0	.0%	1	1.1%	1	.9%	17	15.7%
Selection/choice of independent shops	0	.0%	3	3.9%	8	8.7%	6	5.7%	2	1.9%
Poor public transport	7	12.5%	4	5.2%	0	.0%	2	1.9%	2	1.9%
Lack of services (banks/building societies etc)	1	1.8%	2	2.6%	1	1.1%	0	.0%	6	5.6%
Poor pedestrian environment / pavements/roads in need of rep	0	.0%	3	3.9%	0	.0%	3	2.8%	0	.0%
Expensive parking	1	1.8%	0	.0%	0	.0%	1	.9%	2	1.9%
Too far from home	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Too expensive	0	.0%	0	.0%	0	.0%	2	1.9%	1	.9%

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Q27. What do you most dislike about [place specified]?

	Zone									
	6		7		8		9		10	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All who visit a centre in North Somerset	109	100.0%	98	100.0%	89	100.0%	87	100.0%	80	100.0%
Nothing	42	49.4%	27	38.0%	41	63.1%	41	61.2%	29	44.6%
Poor selection/choice of multiple shops	9	10.6%	12	16.9%	3	4.6%	3	4.5%	6	9.2%
Unattractive environment/dirty streets/litter	12	14.1%	3	4.2%	6	9.2%	7	10.4%	10	15.4%
Difficult parking	7	8.2%	4	5.6%	6	9.2%	5	7.5%	5	7.7%
Lack of safety/personal security/hooligans	9	10.6%	11	15.5%	1	1.5%	2	3.0%	7	10.8%
Selection/choice of independent shops	1	1.2%	4	5.6%	1	1.5%	1	1.5%	3	4.6%
Poor public transport	1	1.2%	1	1.4%	3	4.6%	0	.0%	1	1.5%
Lack of services (banks/building societies etc)	0	.0%	5	7.0%	2	3.1%	3	4.5%	1	1.5%
Poor pedestrian environment / pavements/roads in need of rep	2	2.4%	0	.0%	1	1.5%	3	4.5%	1	1.5%
Expensive parking	2	2.4%	2	2.8%	0	.0%	1	1.5%	1	1.5%
Too far from home	0	.0%	2	2.8%	1	1.5%	1	1.5%	1	1.5%
Too expensive	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q27. What do you most dislike about [place specified]?

	Zone			
	11		12	
	Num	%	Num	%
Base: All who visit a centre in North Somerset	90	100.0%	79	100.0%
Nothing	53	67.1%	39	60.9%
Poor selection/choice of multiple shops	7	8.9%	8	12.5%
Unattractive environment/dirty streets/litter	8	10.1%	3	4.7%
Difficult parking	3	3.8%	2	3.1%
Lack of safety/personal security/hooligans	0	.0%	3	4.7%
Selection/choice of independent shops	1	1.3%	4	6.3%
Poor public transport	0	.0%	2	3.1%
Lack of services (banks/building societies etc)	0	.0%	2	3.1%
Poor pedestrian environment / pavements/roads in need of rep	2	2.5%	0	.0%
Expensive parking	1	1.3%	1	1.6%
Too far from home	4	5.1%	0	.0%
Too expensive	0	.0%	0	.0%

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Q27. What do you most dislike about [place specified]?

		Base: All who visit a centre in North Somerset	
		Num	%
Other	Traffic congestion	41	16.2%
	Too many tourists	29	11.5%
	Too busy	23	9.1%
	Roadworks	14	5.5%
	Too many charity shops	12	4.7%
	Too many empty shops	10	4.0%
	Parking	10	4.0%
	The people	9	3.6%
	Too many new developments	8	3.2%
	Growing too fast	7	2.8%
	The council	6	2.4%
	The town centre	5	2.0%
	Quality of the shops	5	2.0%
	Lack of shops in general	5	2.0%
	Everything	5	2.0%
	Derelict buildings	5	2.0%
	Muddy beach	4	1.6%
	Boring	4	1.6%
	Weather	3	1.2%
	Old fashioned	3	1.2%
	Nothing to do in the evenings	3	1.2%
	No swimming pool	3	1.2%
	No Primark	3	1.2%
	Lack of jobs	3	1.2%
	Lack of childrens leisure facilities	3	1.2%
	Too many slot machines	2	.8%
	Toilets are closed	2	.8%
	Shops are closing	2	.8%
	Pier not open	2	.8%
	Outdated shops	2	.8%
	More restaurants	2	.8%
	Lack of things to do for young people	2	.8%
	Too many pubs	1	.4%
	Too many phone shops	1	.4%
	Too many canvassers in town centre	1	.4%
	The shopping units are too small	1	.4%
	The seafront	1	.4%
	The sculpture in the centre	1	.4%
	The Dolphin Square area	1	.4%

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Q27. What do you most dislike about [place specified]?

		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Traffic congestion	10	47.6%	9	37.5%	0	.0%	0	.0%	4	13.3%
	Too many tourists	0	.0%	0	.0%	0	.0%	0	.0%	4	13.3%
	Too busy	3	14.3%	4	16.7%	2	7.1%	1	7.1%	1	3.3%
	Roadworks	0	.0%	0	.0%	1	3.6%	0	.0%	6	20.0%
	Too many charity shops	1	4.8%	0	.0%	9	32.1%	0	.0%	0	.0%
	Too many empty shops	0	.0%	0	.0%	4	14.3%	2	14.3%	1	3.3%
	Parking	3	14.3%	0	.0%	0	.0%	1	7.1%	1	3.3%
	The people	0	.0%	0	.0%	2	7.1%	1	7.1%	2	6.7%
	Too many new developments	1	4.8%	6	25.0%	0	.0%	0	.0%	0	.0%
	Growing too fast	0	.0%	4	16.7%	1	3.6%	0	.0%	0	.0%
	The council	0	.0%	0	.0%	0	.0%	2	14.3%	1	3.3%
	The town centre	0	.0%	0	.0%	1	3.6%	0	.0%	0	.0%
	Quality of the shops	0	.0%	0	.0%	1	3.6%	1	7.1%	2	6.7%
	Lack of shops in general	0	.0%	0	.0%	1	3.6%	2	14.3%	0	.0%
	Everything	1	4.8%	0	.0%	0	.0%	0	.0%	2	6.7%
	Derelict buildings	0	.0%	0	.0%	0	.0%	0	.0%	1	3.3%
	Muddy beach	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Boring	0	.0%	0	.0%	0	.0%	0	.0%	1	3.3%
	Weather	0	.0%	0	.0%	0	.0%	1	7.1%	0	.0%
	Old fashioned	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Nothing to do in the evenings	1	4.8%	0	.0%	0	.0%	1	7.1%	0	.0%
	No swimming pool	0	.0%	0	.0%	1	3.6%	0	.0%	1	3.3%
	No Primark	0	.0%	0	.0%	0	.0%	0	.0%	1	3.3%
	Lack of jobs	0	.0%	0	.0%	0	.0%	1	7.1%	0	.0%
	Lack of childrens leisure facilities	0	.0%	0	.0%	1	3.6%	0	.0%	0	.0%
	Too many slot machines	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Toilets are closed	0	.0%	0	.0%	1	3.6%	0	.0%	1	3.3%
	Shops are closing	1	4.8%	0	.0%	1	3.6%	0	.0%	0	.0%
	Pier not open	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Outdated shops	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	More restaurants	0	.0%	0	.0%	2	7.1%	0	.0%	0	.0%
	Lack of things to do for young people	0	.0%	0	.0%	0	.0%	0	.0%	1	3.3%
	Too many pubs	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Too many phone shops	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Too many canvassers in town centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	The shopping units are too small	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	The seafront	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	The sculpture in the centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	The Dolphin Square area	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q27. What do you most dislike about [place specified]?

		Zone									
		6		7		8		9		10	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Traffic congestion	4	16.7%	2	7.4%	3	12.5%	3	15.0%	1	6.7%
	Too many tourists	3	12.5%	3	11.1%	5	20.8%	2	10.0%	6	40.0%
	Too busy	3	12.5%	0	.0%	1	4.2%	4	20.0%	2	13.3%
	Roadworks	1	4.2%	2	7.4%	1	4.2%	1	5.0%	0	.0%
	Too many charity shops	2	8.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Too many empty shops	1	4.2%	1	3.7%	1	4.2%	0	.0%	0	.0%
	Parking	1	4.2%	1	3.7%	0	.0%	0	.0%	2	13.3%
	The people	0	.0%	0	.0%	2	8.3%	1	5.0%	0	.0%
	Too many new developments	0	.0%	1	3.7%	0	.0%	0	.0%	0	.0%
	Growing too fast	1	4.2%	0	.0%	0	.0%	0	.0%	0	.0%
	The council	0	.0%	0	.0%	1	4.2%	1	5.0%	1	6.7%
	The town centre	0	.0%	2	7.4%	0	.0%	0	.0%	1	6.7%
	Quality of the shops	0	.0%	0	.0%	1	4.2%	0	.0%	0	.0%
	Lack of shops in general	0	.0%	1	3.7%	0	.0%	0	.0%	0	.0%
	Everything	0	.0%	2	7.4%	0	.0%	0	.0%	0	.0%
	Derelict buildings	0	.0%	1	3.7%	1	4.2%	2	10.0%	0	.0%
	Muddy beach	0	.0%	1	3.7%	0	.0%	2	10.0%	0	.0%
	Boring	1	4.2%	0	.0%	0	.0%	1	5.0%	0	.0%
	Weather	0	.0%	1	3.7%	1	4.2%	0	.0%	0	.0%
	Old fashioned	0	.0%	0	.0%	2	8.3%	1	5.0%	0	.0%
	Nothing to do in the evenings	0	.0%	0	.0%	0	.0%	0	.0%	1	6.7%
	No swimming pool	0	.0%	1	3.7%	0	.0%	0	.0%	0	.0%
	No Primark	0	.0%	1	3.7%	1	4.2%	0	.0%	0	.0%
	Lack of jobs	0	.0%	1	3.7%	0	.0%	0	.0%	0	.0%
	Lack of childrens leisure facilities	0	.0%	2	7.4%	0	.0%	0	.0%	0	.0%
	Too many slot machines	0	.0%	0	.0%	2	8.3%	0	.0%	0	.0%
	Toilets are closed	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Shops are closing	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Pier not open	0	.0%	1	3.7%	1	4.2%	0	.0%	0	.0%
	Outdated shops	0	.0%	1	3.7%	0	.0%	1	5.0%	0	.0%
	More restaurants	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Lack of things to do for young people	1	4.2%	0	.0%	0	.0%	0	.0%	0	.0%
	Too many pubs	1	4.2%	0	.0%	0	.0%	0	.0%	0	.0%
	Too many phone shops	1	4.2%	0	.0%	0	.0%	0	.0%	0	.0%
	Too many canvassers in town centre	1	4.2%	0	.0%	0	.0%	0	.0%	0	.0%
	The shopping units are too small	1	4.2%	0	.0%	0	.0%	0	.0%	0	.0%
	The seafront	1	4.2%	0	.0%	0	.0%	0	.0%	0	.0%
	The sculpture in the centre	0	.0%	0	.0%	1	4.2%	0	.0%	0	.0%
	The Dolphin Square area	1	4.2%	0	.0%	0	.0%	0	.0%	0	.0%

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Q27. What do you most dislike about [place specified]?

		Zone			
		11		12	
		Num	%	Num	%
Other	Traffic congestion	1	9.1%	4	26.7%
	Too many tourists	5	45.5%	1	6.7%
	Too busy	1	9.1%	1	6.7%
	Roadworks	0	.0%	2	13.3%
	Too many charity shops	0	.0%	0	.0%
	Too many empty shops	0	.0%	0	.0%
	Parking	1	9.1%	0	.0%
	The people	0	.0%	1	6.7%
	Too many new developments	0	.0%	0	.0%
	Growing too fast	1	9.1%	0	.0%
	The council	0	.0%	0	.0%
	The town centre	0	.0%	1	6.7%
	Quality of the shops	0	.0%	0	.0%
	Lack of shops in general	1	9.1%	0	.0%
	Everything	0	.0%	0	.0%
	Derelict buildings	0	.0%	0	.0%
	Muddy beach	0	.0%	1	6.7%
	Boring	0	.0%	1	6.7%
	Weather	0	.0%	0	.0%
	Old fashioned	0	.0%	0	.0%
	Nothing to do in the evenings	0	.0%	0	.0%
	No swimming pool	0	.0%	0	.0%
	No Primark	0	.0%	0	.0%
	Lack of jobs	0	.0%	1	6.7%
	Lack of childrens leisure facilities	0	.0%	0	.0%
	Too many slot machines	0	.0%	0	.0%
	Toilets are closed	0	.0%	0	.0%
	Shops are closing	0	.0%	0	.0%
	Pier not open	0	.0%	0	.0%
	Outdated shops	0	.0%	0	.0%
	More restaurants	0	.0%	0	.0%
	Lack of things to do for young people	0	.0%	0	.0%
	Too many pubs	0	.0%	0	.0%
	Too many phone shops	0	.0%	0	.0%
	Too many canvassers in town centre	0	.0%	0	.0%
	The shopping units are too small	0	.0%	0	.0%
	The seafront	0	.0%	0	.0%
	The sculpture in the centre	0	.0%	0	.0%
	The Dolphin Square area	0	.0%	0	.0%

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Q27. What do you most dislike about [place specified]?

		Base: All who visit a centre in North Somerset	
		Num	%
Other	Tesco is too small	1	.4%
	Shopping area is too spread out	1	.4%
	Nothing gets finished	1	.4%
	No Woolworths	1	.4%
	No Marks and Spencer	1	.4%
	Next	1	.4%
	Need a clock	1	.4%
	Laura Ashley	1	.4%
	Opening hours	1	.4%

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Q27. What do you most dislike about [place specified]?

		Zone									
		1		2		3		4		5	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Tesco is too small	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Shopping area is too spread out	0	.0%	0	.0%	0	.0%	1	7.1%	0	.0%
	Nothing gets finished	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	No Woolworths	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	No Marks and Spencer	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Next	0	.0%	1	4.2%	0	.0%	0	.0%	0	.0%
	Need a clock	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Laura Ashley	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Opening hours	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q27. What do you most dislike about [place specified]?

		Zone									
		6		7		8		9		10	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Tesco is too small	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Shopping area is too spread out	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Nothing gets finished	0	.0%	1	3.7%	0	.0%	0	.0%	0	.0%
	No Woolworths	0	.0%	0	.0%	0	.0%	1	5.0%	0	.0%
	No Marks and Spencer	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Next	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Need a clock	0	.0%	1	3.7%	0	.0%	0	.0%	0	.0%
	Laura Ashley	0	.0%	0	.0%	0	.0%	0	.0%	1	6.7%
	Opening hours	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q27. What do you most dislike about [place specified]?

		Zone			
		11		12	
		Num	%	Num	%
Other	Tesco is too small	0	.0%	1	6.7%
	Shopping area is too spread out	0	.0%	0	.0%
	Nothing gets finished	0	.0%	0	.0%
	No Woolworths	0	.0%	0	.0%
	No Marks and Spencer	0	.0%	1	6.7%
	Next	0	.0%	0	.0%
	Need a clock	0	.0%	0	.0%
	Laura Ashley	0	.0%	0	.0%
	Opening hours	1	9.1%	0	.0%

Q28. What improvements to the quality and range of facilities in [place specified] would persuade your household to visit it more often?

	Base: All who visit a centre in North Somerset	
	Num	%
Base: All who visit a centre in North Somerset	1188	100.0%

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Q28. What improvements to the quality and range of facilities in [place specified] would persuade your household to visit it more often?

	Zone									
	1		2		3		4		5	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All who visit a centre in North Somerset	77	100.0%	101	100.0%	120	100.0%	120	100.0%	138	100.0%

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Q28. What improvements to the quality and range of facilities in [place specified] would persuade your household to visit it more often?

	Zone									
	6		7		8		9		10	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All who visit a centre in North Somerset	109	100.0%	98	100.0%	89	100.0%	87	100.0%	80	100.0%

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Q28. What improvements to the quality and range of facilities in [place specified] would persuade your household to visit it more often?

	Zone			
	11		12	
	Num	%	Num	%
Base: All who visit a centre in North Somerset	90	100.0%	79	100.0%

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Q28. What improvements to the quality and range of facilities in [place specified] would persuade your household to visit it more often?

	Base: All who visit a centre in North Somerset	
	Num	%
Nothing in particular	485	46.6%
Improve choice of multiple shops	146	14.0%
Improve range of independent / specialist shops	76	7.3%
More parking spaces - type unspecified	53	5.1%
Improve public transport links	49	4.7%
Develop new shopping facilities	38	3.7%
More parking spaces - short stay	37	3.6%
Don't know / can't remember	36	3.5%
More parking spaces - long stay	32	3.1%
Reduce cost of parking	32	3.1%
Clean shopping streets	31	3.0%
Introduce a larger supermarket	29	2.8%
Reduce road congestion	27	2.6%
Enhanced range of health and fitness centres / gyms	24	2.3%
Attract larger retailers	21	2.0%
Refurbish / improve existing shopping facilities	14	1.3%
Improved range of places to eat	14	1.3%
Improve layout of car parks	13	1.2%
Improved play areas for children	12	1.2%
Improved range of pubs and night clubs	12	1.2%
New / improved cinema	12	1.2%
Improve location of bus stops / bus station	12	1.2%
Improve signage / routeways within centre	11	1.1%
Improve policing / other security measures	11	1.1%
Improve number and attractiveness of meeting places	8	.8%
Improve street furniture / floral displays	8	.8%
More pedestrianisation	7	.7%
Improve market stalls	6	.6%
Increase frequency of public transport generally	6	.6%
Attract more people / make more lively	6	.6%
Improve directional signs to town centre	5	.5%
Create more open spaces	5	.5%

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Q28. What improvements to the quality and range of facilities in [place specified] would persuade your household to visit it more often?

	Zone									
	1		2		3		4		5	
	Num	%	Num	%	Num	%	Num	%	Num	%
Nothing in particular	34	45.3%	35	39.3%	39	39.0%	50	47.2%	47	38.8%
Improve choice of multiple shops	5	6.7%	9	10.1%	29	29.0%	19	17.9%	23	19.0%
Improve range of independent / specialist shops	3	4.0%	7	7.9%	15	15.0%	15	14.2%	7	5.8%
More parking spaces - type unspecified	5	6.7%	7	7.9%	1	1.0%	5	4.7%	4	3.3%
Improve public transport links	11	14.7%	9	10.1%	4	4.0%	2	1.9%	5	4.1%
Develop new shopping facilities	0	.0%	2	2.2%	10	10.0%	3	2.8%	6	5.0%
More parking spaces - short stay	1	1.3%	6	6.7%	0	.0%	3	2.8%	6	5.0%
Don't know / can't remember	2	2.7%	1	1.1%	3	3.0%	5	4.7%	4	3.3%
More parking spaces - long stay	2	2.7%	5	5.6%	2	2.0%	1	.9%	4	3.3%
Reduce cost of parking	0	.0%	1	1.1%	1	1.0%	0	.0%	8	6.6%
Clean shopping streets	0	.0%	0	.0%	2	2.0%	2	1.9%	7	5.8%
Introduce a larger supermarket	3	4.0%	10	11.2%	3	3.0%	2	1.9%	2	1.7%
Reduce road congestion	4	5.3%	2	2.2%	1	1.0%	1	.9%	3	2.5%
Enhanced range of health and fitness centres / gyms	1	1.3%	1	1.1%	4	4.0%	1	.9%	6	5.0%
Attract larger retailers	0	.0%	0	.0%	5	5.0%	1	.9%	1	.8%
Refurbish / improve existing shopping facilities	0	.0%	1	1.1%	1	1.0%	1	.9%	4	3.3%
Improved range of places to eat	1	1.3%	4	4.5%	2	2.0%	2	1.9%	0	.0%
Improve layout of car parks	2	2.7%	2	2.2%	0	.0%	2	1.9%	0	.0%
Improved play areas for children	0	.0%	2	2.2%	1	1.0%	1	.9%	3	2.5%
Improved range of pubs and night clubs	0	.0%	1	1.1%	1	1.0%	3	2.8%	1	.8%
New / improved cinema	1	1.3%	5	5.6%	2	2.0%	1	.9%	0	.0%
Improve location of bus stops / bus station	1	1.3%	2	2.2%	1	1.0%	0	.0%	3	2.5%
Improve signage / routeways within centre	5	6.7%	1	1.1%	0	.0%	0	.0%	2	1.7%
Improve policing / other security measures	0	.0%	0	.0%	1	1.0%	0	.0%	3	2.5%
Improve number and attractiveness of meeting places	0	.0%	0	.0%	1	1.0%	0	.0%	1	.8%
Improve street furniture / floral displays	0	.0%	0	.0%	0	.0%	2	1.9%	2	1.7%
More pedestrianisation	0	.0%	0	.0%	1	1.0%	1	.9%	0	.0%
Improve market stalls	1	1.3%	2	2.2%	0	.0%	0	.0%	0	.0%
Increase frequency of public transport generally	1	1.3%	1	1.1%	1	1.0%	0	.0%	1	.8%
Attract more people / make more lively	0	.0%	1	1.1%	0	.0%	1	.9%	1	.8%
Improve directional signs to town centre	1	1.3%	1	1.1%	0	.0%	0	.0%	0	.0%
Create more open spaces	0	.0%	0	.0%	1	1.0%	0	.0%	1	.8%

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Q28. What improvements to the quality and range of facilities in [place specified] would persuade your household to visit it more often?

	Zone									
	6		7		8		9		10	
	Num	%	Num	%	Num	%	Num	%	Num	%
Nothing in particular	38	43.7%	28	34.6%	47	60.3%	40	52.6%	38	52.8%
Improve choice of multiple shops	16	18.4%	11	13.6%	7	9.0%	9	11.8%	7	9.7%
Improve range of independent / specialist shops	11	12.6%	7	8.6%	2	2.6%	0	.0%	3	4.2%
More parking spaces - type unspecified	4	4.6%	7	8.6%	3	3.8%	6	7.9%	5	6.9%
Improve public transport links	3	3.4%	3	3.7%	4	5.1%	5	6.6%	1	1.4%
Develop new shopping facilities	4	4.6%	3	3.7%	1	1.3%	2	2.6%	1	1.4%
More parking spaces - short stay	0	.0%	1	1.2%	7	9.0%	5	6.6%	4	5.6%
Don't know / can't remember	3	3.4%	5	6.2%	3	3.8%	1	1.3%	3	4.2%
More parking spaces - long stay	0	.0%	1	1.2%	4	5.1%	3	3.9%	4	5.6%
Reduce cost of parking	0	.0%	8	9.9%	4	5.1%	1	1.3%	3	4.2%
Clean shopping streets	4	4.6%	3	3.7%	1	1.3%	4	5.3%	4	5.6%
Introduce a larger supermarket	0	.0%	1	1.2%	2	2.6%	1	1.3%	2	2.8%
Reduce road congestion	0	.0%	5	6.2%	3	3.8%	3	3.9%	3	4.2%
Enhanced range of health and fitness centres / gyms	5	5.7%	2	2.5%	1	1.3%	1	1.3%	2	2.8%
Attract larger retailers	5	5.7%	1	1.2%	1	1.3%	2	2.6%	2	2.8%
Refurbish / improve existing shopping facilities	2	2.3%	0	.0%	1	1.3%	0	.0%	0	.0%
Improved range of places to eat	1	1.1%	1	1.2%	0	.0%	1	1.3%	0	.0%
Improve layout of car parks	0	.0%	1	1.2%	2	2.6%	1	1.3%	2	2.8%
Improved play areas for children	2	2.3%	1	1.2%	0	.0%	0	.0%	2	2.8%
Improved range of pubs and night clubs	2	2.3%	2	2.5%	0	.0%	0	.0%	1	1.4%
New / improved cinema	2	2.3%	1	1.2%	0	.0%	0	.0%	0	.0%
Improve location of bus stops / bus station	2	2.3%	0	.0%	0	.0%	1	1.3%	0	.0%
Improve signage / routeways within centre	1	1.1%	0	.0%	0	.0%	0	.0%	0	.0%
Improve policing / other security measures	2	2.3%	3	3.7%	0	.0%	0	.0%	1	1.4%
Improve number and attractiveness of meeting places	1	1.1%	0	.0%	0	.0%	2	2.6%	2	2.8%
Improve street furniture / floral displays	1	1.1%	0	.0%	0	.0%	1	1.3%	1	1.4%
More pedestrianisation	0	.0%	0	.0%	0	.0%	1	1.3%	1	1.4%
Improve market stalls	0	.0%	1	1.2%	0	.0%	1	1.3%	1	1.4%
Increase frequency of public transport generally	1	1.1%	0	.0%	0	.0%	0	.0%	0	.0%
Attract more people / make more lively	0	.0%	2	2.5%	0	.0%	0	.0%	1	1.4%
Improve directional signs to town centre	0	.0%	1	1.2%	0	.0%	0	.0%	1	1.4%
Create more open spaces	1	1.1%	0	.0%	0	.0%	1	1.3%	0	.0%

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Q28. What improvements to the quality and range of facilities in [place specified] would persuade your household to visit it more often?

	Zone			
	11		12	
	Num	%	Num	%
Nothing in particular	50	59.5%	39	54.2%
Improve choice of multiple shops	5	6.0%	6	8.3%
Improve range of independent / specialist shops	3	3.6%	3	4.2%
More parking spaces - type unspecified	4	4.8%	2	2.8%
Improve public transport links	2	2.4%	0	.0%
Develop new shopping facilities	2	2.4%	4	5.6%
More parking spaces - short stay	3	3.6%	1	1.4%
Don't know / can't remember	2	2.4%	4	5.6%
More parking spaces - long stay	3	3.6%	3	4.2%
Reduce cost of parking	2	2.4%	4	5.6%
Clean shopping streets	1	1.2%	3	4.2%
Introduce a larger supermarket	2	2.4%	1	1.4%
Reduce road congestion	0	.0%	2	2.8%
Enhanced range of health and fitness centres / gyms	0	.0%	0	.0%
Attract larger retailers	2	2.4%	1	1.4%
Refurbish / improve existing shopping facilities	4	4.8%	0	.0%
Improved range of places to eat	0	.0%	2	2.8%
Improve layout of car parks	0	.0%	1	1.4%
Improved play areas for children	0	.0%	0	.0%
Improved range of pubs and night clubs	1	1.2%	0	.0%
New / improved cinema	0	.0%	0	.0%
Improve location of bus stops / bus station	1	1.2%	1	1.4%
Improve signage / routeways within centre	1	1.2%	1	1.4%
Improve policing / other security measures	1	1.2%	0	.0%
Improve number and attractiveness of meeting places	1	1.2%	0	.0%
Improve street furniture / floral displays	1	1.2%	0	.0%
More pedestrianisation	3	3.6%	0	.0%
Improve market stalls	0	.0%	0	.0%
Increase frequency of public transport generally	0	.0%	1	1.4%
Attract more people / make more lively	0	.0%	0	.0%
Improve directional signs to town centre	0	.0%	1	1.4%
Create more open spaces	0	.0%	1	1.4%

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Q28. What improvements to the quality and range of facilities in [place specified] would persuade your household to visit it more often?

	Base: All who visit a centre in North Somerset	
	Num	%
Improved music/theatre provision	4	.4%
Improved policing / enhance security / CCTV	4	.4%
Less pubs and clubs	3	.3%
Enhance shopmobility service	3	.3%
Improve safety of pedestrians	3	.3%
Introduction of Farmers market or increased existing provision	2	.2%
Improved public transport facilities during the evenings	2	.2%
Improve access for pushchairs / wheelchairs, etc	2	.2%
Attract less people / relieve over-crowding	2	.2%
Improve play areas for children	2	.2%
Encourage reduced shop prices	1	.1%
New / improved museum or art gallery	1	.1%
New / improved ten pin bowling centre	1	.1%
Increase number of taxis	1	.1%

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Q28. What improvements to the quality and range of facilities in [place specified] would persuade your household to visit it more often?

	Zone									
	1		2		3		4		5	
	Num	%	Num	%	Num	%	Num	%	Num	%
Improved music/theatre provision	0	.0%	0	.0%	0	.0%	0	.0%	1	.8%
Improved policing / enhance security / CCTV	0	.0%	0	.0%	0	.0%	0	.0%	2	1.7%
Less pubs and clubs	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Enhance shopmobility service	2	2.7%	0	.0%	0	.0%	0	.0%	0	.0%
Improve safety of pedestrians	0	.0%	1	1.1%	0	.0%	1	.9%	0	.0%
Introduction of Farmers market or increased existing provision	0	.0%	0	.0%	1	1.0%	1	.9%	0	.0%
Improved public transport facilities during the evenings	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Improve access for pushchairs / wheelchairs, etc	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Attract less people / relieve over-crowding	0	.0%	1	1.1%	0	.0%	0	.0%	0	.0%
Improve play areas for children	0	.0%	0	.0%	1	1.0%	0	.0%	0	.0%
Encourage reduced shop prices	0	.0%	1	1.1%	0	.0%	0	.0%	0	.0%
New / improved museum or art gallery	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
New / improved ten pin bowling centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Increase number of taxis	0	.0%	1	1.1%	0	.0%	0	.0%	0	.0%

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Q28. What improvements to the quality and range of facilities in [place specified] would persuade your household to visit it more often?

	Zone									
	6		7		8		9		10	
	Num	%	Num	%	Num	%	Num	%	Num	%
Improved music/theatre provision	2	2.3%	0	.0%	0	.0%	0	.0%	0	.0%
Improved policing / enhance security / CCTV	0	.0%	1	1.2%	1	1.3%	0	.0%	0	.0%
Less pubs and clubs	0	.0%	0	.0%	1	1.3%	1	1.3%	1	1.4%
Enhance shopmobility service	0	.0%	0	.0%	0	.0%	1	1.3%	0	.0%
Improve safety of pedestrians	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Introduction of Farmers market or increased existing provision	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Improved public transport facilities during the evenings	1	1.1%	1	1.2%	0	.0%	0	.0%	0	.0%
Improve access for pushchairs / wheelchairs, etc	0	.0%	0	.0%	0	.0%	1	1.3%	0	.0%
Attract less people / relieve over-crowding	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Improve play areas for children	0	.0%	0	.0%	0	.0%	1	1.3%	0	.0%
Encourage reduced shop prices	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
New / improved museum or art gallery	1	1.1%	0	.0%	0	.0%	0	.0%	0	.0%
New / improved ten pin bowling centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Increase number of taxis	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q28. What improvements to the quality and range of facilities in [place specified] would persuade your household to visit it more often?

	Zone			
	11		12	
	Num	%	Num	%
Improved music/theatre provision	0	.0%	1	1.4%
Improved policing / enhance security / CCTV	0	.0%	0	.0%
Less pubs and clubs	0	.0%	0	.0%
Enhance shopmobility service	0	.0%	0	.0%
Improve safety of pedestrians	1	1.2%	0	.0%
Introduction of Farmers market or increased existing provision	0	.0%	0	.0%
Improved public transport facilities during the evenings	0	.0%	0	.0%
Improve access for pushchairs / wheelchairs, etc	1	1.2%	0	.0%
Attract less people / relieve over-crowding	0	.0%	1	1.4%
Improve play areas for children	0	.0%	0	.0%
Encourage reduced shop prices	0	.0%	0	.0%
New / improved museum or art gallery	0	.0%	0	.0%
New / improved ten pin bowling centre	1	1.2%	0	.0%
Increase number of taxis	0	.0%	0	.0%

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Q28. What improvements to the quality and range of facilities in [place specified] would persuade your household to visit it more often?

		Base: All who visit a centre in North Somerset	
		Num	%
Other	Tropicana	29	12.5%
	More clothing stores	22	9.5%
	Swimming pool	20	8.6%
	Better road access	12	5.2%
	When the seafront is finished	11	4.7%
	Tidy the town	11	4.7%
	More things for children/ young people	11	4.7%
	Debenhams	10	4.3%
	Primark	8	3.4%
	Reopen the Grand Pier	6	2.6%
	New library	6	2.6%
	Less charity shops	5	2.2%
	Park and ride	4	1.7%
	More public toilets	4	1.7%
	More music shops	4	1.7%
	More facilities for old people	4	1.7%
	Marks & Spencer	4	1.7%
	John Lewis	4	1.7%
	Sainsbury's	3	1.3%
	Revamp the Dolphin Square area	3	1.3%
	New Post Office	3	1.3%
	Butcher's/ Fishmonger's	3	1.3%
	Woolworths	2	.9%
	New shoe shops	2	.9%
	New petrol station	2	.9%
	Less empty shops	2	.9%
	Waitrose	1	.4%
	Update the skate park	1	.4%
	They cater mainly for youngsters and old people	1	.4%
	The cove needs redeveloping	1	.4%
	Tesco	1	.4%
	Tennis Courts	1	.4%
	Repair pavements	1	.4%
	Parking concessions for local people	1	.4%
	Open up the Railway line	1	.4%
	No bikes on the prom	1	.4%
	Next	1	.4%
	New theatre/cinema	1	.4%

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Q28. What improvements to the quality and range of facilities in [place specified] would persuade your household to visit it more often?

		Zone									
		1		2		3		4		5	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Tropicana	0	.0%	0	.0%	1	3.6%	0	.0%	11	37.9%
	More clothing stores	0	.0%	2	9.5%	6	21.4%	7	33.3%	1	3.4%
	Swimming pool	0	.0%	0	.0%	7	25.0%	0	.0%	2	6.9%
	Better road access	1	14.3%	2	9.5%	1	3.6%	2	9.5%	1	3.4%
	When the seafront is finished	0	.0%	0	.0%	0	.0%	0	.0%	1	3.4%
	Tidy the town	0	.0%	0	.0%	2	7.1%	0	.0%	2	6.9%
	More things for children/ young people	0	.0%	1	4.8%	1	3.6%	3	14.3%	2	6.9%
	Debenhams	0	.0%	0	.0%	0	.0%	1	4.8%	2	6.9%
	Primark	0	.0%	0	.0%	0	.0%	0	.0%	1	3.4%
	Reopen the Grand Pier	0	.0%	0	.0%	0	.0%	0	.0%	2	6.9%
	New library	1	14.3%	4	19.0%	1	3.6%	0	.0%	0	.0%
	Less charity shops	0	.0%	0	.0%	2	7.1%	2	9.5%	0	.0%
	Park and ride	0	.0%	0	.0%	0	.0%	0	.0%	1	3.4%
	More public toilets	0	.0%	1	4.8%	0	.0%	0	.0%	2	6.9%
	More music shops	0	.0%	0	.0%	0	.0%	1	4.8%	0	.0%
	More facilities for old people	1	14.3%	2	9.5%	0	.0%	0	.0%	0	.0%
	Marks & Spencer	0	.0%	0	.0%	1	3.6%	0	.0%	0	.0%
	John Lewis	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Sainsbury's	2	28.6%	1	4.8%	0	.0%	0	.0%	0	.0%
	Revamp the Dolphin Square area	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	New Post Office	0	.0%	3	14.3%	0	.0%	0	.0%	0	.0%
	Butcher's/ Fishmonger's	0	.0%	1	4.8%	1	3.6%	1	4.8%	0	.0%
	Woolworths	0	.0%	0	.0%	1	3.6%	0	.0%	0	.0%
	New shoe shops	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	New petrol station	0	.0%	2	9.5%	0	.0%	0	.0%	0	.0%
	Less empty shops	0	.0%	0	.0%	0	.0%	1	4.8%	0	.0%
	Waitrose	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Update the skate park	0	.0%	0	.0%	1	3.6%	0	.0%	0	.0%
	They cater mainly for youngsters and old people	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	The cove needs redeveloping	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Tesco	0	.0%	0	.0%	1	3.6%	0	.0%	0	.0%
	Tennis Courts	0	.0%	0	.0%	0	.0%	0	.0%	1	3.4%
	Repair pavements	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Parking concessions for local people	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Open up the Railway line	0	.0%	1	4.8%	0	.0%	0	.0%	0	.0%
	No bikes on the prom	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Next	0	.0%	1	4.8%	0	.0%	0	.0%	0	.0%
	New theatre/cinema	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q28. What improvements to the quality and range of facilities in [place specified] would persuade your household to visit it more often?

		Zone									
		6		7		8		9		10	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	Tropicana	4	13.3%	6	22.2%	3	18.8%	1	7.1%	2	13.3%
	More clothing stores	1	3.3%	2	7.4%	1	6.3%	0	.0%	0	.0%
	Swimming pool	6	20.0%	3	11.1%	1	6.3%	0	.0%	1	6.7%
	Better road access	1	3.3%	1	3.7%	2	12.5%	0	.0%	1	6.7%
	When the seafront is finished	4	13.3%	2	7.4%	2	12.5%	2	14.3%	0	.0%
	Tidy the town	1	3.3%	0	.0%	1	6.3%	1	7.1%	1	6.7%
	More things for children/ young people	0	.0%	2	7.4%	0	.0%	0	.0%	1	6.7%
	Debenhams	0	.0%	1	3.7%	2	12.5%	1	7.1%	2	13.3%
	Primark	3	10.0%	2	7.4%	1	6.3%	0	.0%	0	.0%
	Reopen the Grand Pier	1	3.3%	2	7.4%	0	.0%	0	.0%	1	6.7%
	New library	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Less charity shops	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Park and ride	1	3.3%	0	.0%	1	6.3%	0	.0%	1	6.7%
	More public toilets	0	.0%	0	.0%	1	6.3%	0	.0%	0	.0%
	More music shops	2	6.7%	0	.0%	0	.0%	0	.0%	1	6.7%
	More facilities for old people	0	.0%	0	.0%	0	.0%	1	7.1%	0	.0%
	Marks & Spencer	0	.0%	1	3.7%	0	.0%	1	7.1%	1	6.7%
	John Lewis	0	.0%	0	.0%	0	.0%	3	21.4%	0	.0%
	Sainsbury's	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Revamp the Dolphin Square area	2	6.7%	0	.0%	0	.0%	0	.0%	0	.0%
	New Post Office	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Butcher's/ Fishmonger's	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Woolworths	0	.0%	1	3.7%	0	.0%	0	.0%	0	.0%
	New shoe shops	1	3.3%	0	.0%	0	.0%	0	.0%	1	6.7%
	New petrol station	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Less empty shops	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Waitrose	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Update the skate park	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	They cater mainly for youngsters and old people	0	.0%	0	.0%	0	.0%	0	.0%	1	6.7%
	The cove needs redeveloping	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Tesco	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Tennis Courts	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Repair pavements	0	.0%	0	.0%	0	.0%	1	7.1%	0	.0%
	Parking concessions for local people	0	.0%	1	3.7%	0	.0%	0	.0%	0	.0%
	Open up the Railway line	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	No bikes on the prom	0	.0%	0	.0%	0	.0%	1	7.1%	0	.0%
	Next	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	New theatre/cinema	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q28. What improvements to the quality and range of facilities in [place specified] would persuade your household to visit it more often?

		Zone			
		11		12	
		Num	%	Num	%
Other	Tropicana	0	.0%	1	6.3%
	More clothing stores	1	12.5%	1	6.3%
	Swimming pool	0	.0%	0	.0%
	Better road access	0	.0%	0	.0%
	When the seafront is finished	0	.0%	0	.0%
	Tidy the town	1	12.5%	2	12.5%
	More things for children/ young people	1	12.5%	0	.0%
	Debenhams	0	.0%	1	6.3%
	Primark	0	.0%	1	6.3%
	Reopen the Grand Pier	0	.0%	0	.0%
	New library	0	.0%	0	.0%
	Less charity shops	0	.0%	1	6.3%
	Park and ride	0	.0%	0	.0%
	More public toilets	0	.0%	0	.0%
	More music shops	0	.0%	0	.0%
	More facilities for old people	0	.0%	0	.0%
	Marks & Spencer	0	.0%	0	.0%
	John Lewis	0	.0%	1	6.3%
	Sainsbury's	0	.0%	0	.0%
	Revamp the Dolphin Square area	0	.0%	1	6.3%
	New Post Office	0	.0%	0	.0%
	Butcher's/ Fishmonger's	0	.0%	0	.0%
	Woolworths	0	.0%	0	.0%
	New shoe shops	0	.0%	0	.0%
	New petrol station	0	.0%	0	.0%
	Less empty shops	1	12.5%	0	.0%
	Waitrose	0	.0%	1	6.3%
	Update the skate park	0	.0%	0	.0%
	They cater mainly for youngsters and old people	0	.0%	0	.0%
	The cove needs redeveloping	1	12.5%	0	.0%
	Tesco	0	.0%	0	.0%
	Tennis Courts	0	.0%	0	.0%
	Repair pavements	0	.0%	0	.0%
	Parking concessions for local people	0	.0%	0	.0%
	Open up the Railway line	0	.0%	0	.0%
	No bikes on the prom	0	.0%	0	.0%
	Next	0	.0%	0	.0%
	New theatre/cinema	0	.0%	1	6.3%

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Q28. What improvements to the quality and range of facilities in [place specified] would persuade your household to visit it more often?

		Base: All who visit a centre in North Somerset	
		Num	%
Other	New Morrisons	1	.4%
	More toy shops	1	.4%
	More things to do generally	1	.4%
	More entertainment	1	.4%
	More classical music events	1	.4%
	Marks & Spencer/ Next	1	.4%
	Marks & Spencer/ Waitrose	1	.4%
	Marks & Spencer/ Littlewoods	1	.4%
	Lack of eco/ethical stores	1	.4%
	John Lewis/ Primark/ Debenhams	1	.4%
	Improve sea front	1	.4%
	Improve parking control	1	.4%
	Iceland	1	.4%
	Ice rink	1	.4%
	Get a better council who would allow for more enterprise and development	1	.4%
	Electrical Shops	1	.4%
	DIY shop	1	.4%
	Cheaper parking	1	.4%
	Car parking at hospital	1	.4%
	Book shop	1	.4%
	Better value shops	1	.4%
	B&Q	1	.4%
	Asda	1	.4%
	A roof over Broadmead	1	.4%
	A decent clock in the centre	1	.4%

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Q28. What improvements to the quality and range of facilities in [place specified] would persuade your household to visit it more often?

		Zone									
		1		2		3		4		5	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	New Morrisons	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	More toy shops	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	More things to do generally	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	More entertainment	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	More classical music events	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Marks & Spencer/ Next	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Marks & Spencer/ Waitrose	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Marks & Spencer/ Littlewoods	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Lack of eco/ethical stores	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	John Lewis/ Primark/ Debenhams	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Improve sea front	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Improve parking control	0	.0%	0	.0%	0	.0%	1	4.8%	0	.0%
	Iceland	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Ice rink	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Get a better council who would allow for more enterprise and development	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Electrical Shops	0	.0%	0	.0%	0	.0%	1	4.8%	0	.0%
	DIY shop	0	.0%	0	.0%	1	3.6%	0	.0%	0	.0%
	Cheaper parking	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Car parking at hospital	0	.0%	0	.0%	0	.0%	1	4.8%	0	.0%
	Book shop	1	14.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Better value shops	0	.0%	0	.0%	1	3.6%	0	.0%	0	.0%
	B&Q	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Asda	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	A roof over Broadmead	1	14.3%	0	.0%	0	.0%	0	.0%	0	.0%
	A decent clock in the centre	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q28. What improvements to the quality and range of facilities in [place specified] would persuade your household to visit it more often?

		Zone									
		6		7		8		9		10	
		Num	%	Num	%	Num	%	Num	%	Num	%
Other	New Morrisons	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	More toy shops	0	.0%	1	3.7%	0	.0%	0	.0%	0	.0%
	More things to do generally	0	.0%	0	.0%	0	.0%	0	.0%	1	6.7%
	More entertainment	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	More classical music events	1	3.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Marks & Spencer/ Next	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Marks & Spencer/ Waitrose	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Marks & Spencer/ Littlewoods	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Lack of eco/ethical stores	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	John Lewis/ Primark/ Debenhams	0	.0%	1	3.7%	0	.0%	0	.0%	0	.0%
	Improve sea front	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Improve parking control	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Iceland	0	.0%	0	.0%	0	.0%	1	7.1%	0	.0%
	Ice rink	1	3.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Get a better council who would allow for more enterprise and development	0	.0%	0	.0%	0	.0%	1	7.1%	0	.0%
	Electrical Shops	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	DIY shop	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Cheaper parking	1	3.3%	0	.0%	0	.0%	0	.0%	0	.0%
	Car parking at hospital	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Book shop	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Better value shops	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	B&Q	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Asda	0	.0%	0	.0%	1	6.3%	0	.0%	0	.0%
	A roof over Broadmead	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	A decent clock in the centre	0	.0%	1	3.7%	0	.0%	0	.0%	0	.0%

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Q28. What improvements to the quality and range of facilities in [place specified] would persuade your household to visit it more often?

		Zone			
		11		12	
		Num	%	Num	%
Other	New Morrisons	0	.0%	1	6.3%
	More toy shops	0	.0%	0	.0%
	More things to do generally	0	.0%	0	.0%
	More entertainment	0	.0%	1	6.3%
	More classical music events	0	.0%	0	.0%
	Marks & Spencer/ Next	0	.0%	1	6.3%
	Marks & Spencer/ Waitrose	0	.0%	1	6.3%
	Marks & Spencer/ Littlewoods	1	12.5%	0	.0%
	Lack of eco/ethical stores	0	.0%	1	6.3%
	John Lewis/ Primark/ Debenhams	0	.0%	0	.0%
	Improve sea front	1	12.5%	0	.0%
	Improve parking control	0	.0%	0	.0%
	Iceland	0	.0%	0	.0%
	Ice rink	0	.0%	0	.0%
	Get a better council who would allow for more enterprise and development	0	.0%	0	.0%
	Electrical Shops	0	.0%	0	.0%
	DIY shop	0	.0%	0	.0%
	Cheaper parking	0	.0%	0	.0%
	Car parking at hospital	0	.0%	0	.0%
	Book shop	0	.0%	0	.0%
	Better value shops	0	.0%	0	.0%
	B&Q	1	12.5%	0	.0%
	Asda	0	.0%	0	.0%
	A roof over Broadmead	0	.0%	0	.0%
	A decent clock in the centre	0	.0%	0	.0%

Q29b. SEG

	Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
	Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	1202	100.0%	80	100.0%	101	100.0%	120	100.0%	120	100.0%	140	100.0%
A	91	7.6%	9	11.3%	9	8.9%	12	10.0%	9	7.5%	6	4.3%
B	218	18.1%	19	23.8%	20	19.8%	25	20.8%	23	19.2%	12	8.6%
C1	372	30.9%	25	31.3%	32	31.7%	40	33.3%	39	32.5%	44	31.4%
C2	250	20.8%	9	11.3%	17	16.8%	17	14.2%	26	21.7%	42	30.0%
D	104	8.7%	8	10.0%	13	12.9%	7	5.8%	10	8.3%	14	10.0%
E1 - Retired state	72	6.0%	4	5.0%	2	2.0%	8	6.7%	6	5.0%	8	5.7%
E2 - Unemployed	20	1.7%	0	.0%	1	1.0%	2	1.7%	1	.8%	5	3.6%
Refused	75	6.2%	6	7.5%	7	6.9%	9	7.5%	6	5.0%	9	6.4%

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Q29b. SEG

	Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11
	Num	%	Num	%	Num	%	Num	%	Num	%	Num
Base: All respondents	110	100.0%	100	100.0%	90	100.0%	91	100.0%	80	100.0%	90
A	9	8.2%	6	6.0%	5	5.6%	13	14.3%	5	6.3%	5
B	22	20.0%	17	17.0%	20	22.2%	20	22.0%	21	26.3%	4
C1	28	25.5%	27	27.0%	35	38.9%	24	26.4%	22	27.5%	33
C2	20	18.2%	23	23.0%	12	13.3%	17	18.7%	19	23.8%	27
D	10	9.1%	13	13.0%	5	5.6%	5	5.5%	6	7.5%	6
E1 - Retired state	11	10.0%	9	9.0%	5	5.6%	4	4.4%	4	5.0%	5
E2 - Unemployed	2	1.8%	3	3.0%	2	2.2%	0	.0%	0	.0%	4
Refused	8	7.3%	2	2.0%	6	6.7%	8	8.8%	3	3.8%	6

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Q29b. SEG

	Zone 11	Zone 12	
	%	Num	%
Base: All respondents	100.0%	80	100.0%
A	5.6%	3	3.8%
B	4.4%	15	18.8%
C1	36.7%	23	28.8%
C2	30.0%	21	26.3%
D	6.7%	7	8.8%
E1 - Retired state	5.6%	6	7.5%
E2 - Unemployed	4.4%	0	.0%
Refused	6.7%	5	6.3%

Q30. How many cars does your household own or have the use of?

	Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
	Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	1202	100.0%	80	100.0%	101	100.0%	120	100.0%	120	100.0%	140	100.0%
None	124	10.3%	4	5.0%	10	9.9%	10	8.3%	15	12.5%	15	10.7%
One	542	45.1%	49	61.3%	47	46.5%	47	39.2%	54	45.0%	67	47.9%
Two	414	34.4%	19	23.8%	36	35.6%	52	43.3%	42	35.0%	41	29.3%
Three or more	94	7.8%	6	7.5%	4	4.0%	9	7.5%	7	5.8%	15	10.7%
Refused	28	2.3%	2	2.5%	4	4.0%	2	1.7%	2	1.7%	2	1.4%

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Q30. How many cars does your household own or have the use of?

	Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11
	Num	%	Num	%	Num	%	Num	%	Num	%	Num
Base: All respondents	110	100.0%	100	100.0%	90	100.0%	91	100.0%	80	100.0%	90
None	31	28.2%	7	7.0%	6	6.7%	8	8.8%	3	3.8%	8
One	49	44.5%	54	54.0%	43	47.8%	28	30.8%	25	31.3%	41
Two	24	21.8%	34	34.0%	30	33.3%	39	42.9%	43	53.8%	28
Three or more	3	2.7%	4	4.0%	8	8.9%	14	15.4%	8	10.0%	9
Refused	3	2.7%	1	1.0%	3	3.3%	2	2.2%	1	1.3%	4

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Q30. How many cars does your household own or have the use of?

	Zone 11	Zone 12	
	%	Num	%
Base: All respondents	100.0%	80	100.0%
None	8.9%	7	8.8%
One	45.6%	38	47.5%
Two	31.1%	26	32.5%
Three or more	10.0%	7	8.8%
Refused	4.4%	2	2.5%

Q31 Which of the following age bands do you fall into?

	Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	1202	100.0%	80	100.0%	101	100.0%	120	100.0%	120	100.0%
18 - 24 years	16	1.3%	2	2.5%	2	2.0%	1	.8%	0	.0%
25 - 34 years	46	3.8%	3	3.8%	5	5.0%	3	2.5%	7	5.8%
35 - 44 years	144	12.0%	11	13.8%	9	8.9%	11	9.2%	13	10.8%
45 - 54 years	206	17.1%	9	11.3%	11	10.9%	24	20.0%	18	15.0%
55 - 64 years	273	22.7%	19	23.8%	28	27.7%	31	25.8%	25	20.8%
65 years or above	487	40.5%	34	42.5%	42	41.6%	48	40.0%	55	45.8%
Refused (DO NOT READ OUT)	30	2.5%	2	2.5%	4	4.0%	2	1.7%	2	1.7%

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Q31 Which of the following age bands do you fall into?

	Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
	Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	140	100.0%	110	100.0%	100	100.0%	90	100.0%	91	100.0%	80	100.0%
18 - 24 years	1	.7%	1	.9%	3	3.0%	1	1.1%	3	3.3%	0	.0%
25 - 34 years	7	5.0%	3	2.7%	3	3.0%	3	3.3%	1	1.1%	3	3.8%
35 - 44 years	19	13.6%	13	11.8%	19	19.0%	14	15.6%	6	6.6%	12	15.0%
45 - 54 years	33	23.6%	17	15.5%	15	15.0%	11	12.2%	20	22.0%	21	26.3%
55 - 64 years	24	17.1%	24	21.8%	17	17.0%	21	23.3%	27	29.7%	16	20.0%
65 years or above	53	37.9%	48	43.6%	43	43.0%	36	40.0%	31	34.1%	27	33.8%
Refused (DO NOT READ OUT)	3	2.1%	4	3.6%	0	.0%	4	4.4%	3	3.3%	1	1.3%

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Q31 Which of the following age bands do you fall into?

	Zone 11		Zone 12	
	Num	%	Num	%
Base: All respondents	90	100.0%	80	100.0%
18 - 24 years	2	2.2%	0	.0%
25 - 34 years	7	7.8%	1	1.3%
35 - 44 years	8	8.9%	9	11.3%
45 - 54 years	16	17.8%	11	13.8%
55 - 64 years	20	22.2%	21	26.3%
65 years or above	34	37.8%	36	45.0%
Refused (DO NOT READ OUT)	3	3.3%	2	2.5%

Q32. Which of the following best describes the chief wage earner of your household's current employment situation?

	Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	1202	100.0%	80	100.0%	101	100.0%	120	100.0%	120	100.0%

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Q32. Which of the following best describes the chief wage earner of your household's current employment situation?

	Zone 5		Zone 6		Zone 7		Zone 8		Zone 9	
	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	140	100.0%	110	100.0%	100	100.0%	90	100.0%	91	100.0%

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Q32. Which of the following best describes the chief wage earner of your household's current employment situation?

	Zone 10		Zone 11		Zone 12	
	Num	%	Num	%	Num	%
Base: All respondents	80	100.0%	90	100.0%	80	100.0%

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Q32. Which of the following best describes the chief wage earner of your household's current employment situation?

		Base: All respondents		Zone 1		Zone 2		Zone 3		Zone 4	
		Num	%	Num	%	Num	%	Num	%	Num	%
	Retired	548	45.9%	35	43.8%	52	51.5%	54	45.0%	61	51.3%
	Working full time	471	39.4%	34	42.5%	32	31.7%	47	39.2%	42	35.3%
	Working part time	105	8.8%	6	7.5%	10	9.9%	13	10.8%	10	8.4%
	Refused	39	3.3%	4	5.0%	5	5.0%	2	1.7%	4	3.4%
	Unemployed	18	1.5%	0	.0%	0	.0%	3	2.5%	1	.8%
	A housewife	9	.8%	0	.0%	2	2.0%	1	.8%	1	.8%
	A student	5	.4%	1	1.3%	0	.0%	0	.0%	0	.0%
Other	Full time carer	2	28.6%	0	.0%	0	.0%	0	.0%	0	.0%
Other	Incapacity benefit	1	14.3%	0	.0%	0	.0%	0	.0%	1	100.0%
Other	Retired	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
Other	Self employed	3	42.9%	0	.0%	0	.0%	0	.0%	0	.0%
Other	Semi-retired	1	14.3%	0	.0%	0	.0%	0	.0%	0	.0%
Other	Taken time of work to look after ill dad	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q32. Which of the following best describes the chief wage earner of your household's current employment situation?

		Zone									
		5		6		7		8		9	
		Num	%	Num	%	Num	%	Num	%	Num	%
	Retired	60	42.9%	57	52.8%	44	44.0%	40	44.4%	39	43.3%
	Working full time	57	40.7%	34	31.5%	45	45.0%	42	46.7%	37	41.1%
	Working part time	11	7.9%	9	8.3%	8	8.0%	1	1.1%	10	11.1%
	Refused	6	4.3%	3	2.8%	1	1.0%	4	4.4%	3	3.3%
	Unemployed	4	2.9%	3	2.8%	2	2.0%	2	2.2%	0	.0%
	A housewife	1	.7%	1	.9%	0	.0%	0	.0%	0	.0%
	A student	1	.7%	1	.9%	0	.0%	1	1.1%	1	1.1%
Other	Full time carer	0	.0%	1	50.0%	0	.0%	0	.0%	0	.0%
	Incapacity benefit	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Retired	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%
	Self employed	0	.0%	1	50.0%	0	.0%	0	.0%	0	.0%
	Semi-retired	0	.0%	0	.0%	0	.0%	0	.0%	1	100.0%
	Taken time of work to look after ill dad	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q32. Which of the following best describes the chief wage earner of your household's current employment situation?

		Zone					
		10		11		12	
		Num	%	Num	%	Num	%
	Retired	32	41.6%	38	42.2%	36	45.0%
	Working full time	37	48.1%	38	42.2%	26	32.5%
	Working part time	7	9.1%	6	6.7%	14	17.5%
	Refused	1	1.3%	3	3.3%	3	3.8%
	Unemployed	0	.0%	3	3.3%	0	.0%
	A housewife	0	.0%	2	2.2%	1	1.3%
	A student	0	.0%	0	.0%	0	.0%
Other	Full time carer	1	33.3%	0	.0%	0	.0%
	Incapacity benefit	0	.0%	0	.0%	0	.0%
	Retired	0	.0%	0	.0%	0	.0%
	Self employed	2	66.7%	0	.0%	0	.0%
	Semi-retired	0	.0%	0	.0%	0	.0%
	Taken time of work to look after ill dad	0	.0%	0	.0%	0	.0%

Q33. Approximately, what is your total household income?

			Zone									
	Base: All respondents		1		2		3		4		5	
	Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	1202	100.0%	80	100.0%	101	100.0%	120	100.0%	120	100.0%	140	100.0%

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Q33. Approximately, what is your total household income?

	Zone										
	6		7		8		9		10		11
	Num	%	Num	%	Num	%	Num	%	Num	%	Num
Base: All respondents	110	100.0%	100	100.0%	90	100.0%	91	100.0%	80	100.0%	90

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Q33. Approximately, what is your total household income?

	Zone		
	11	12	
	%	Num	%
Base: All respondents	100.0%	80	100.0%

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Q33. Approximately, what is your total household income?

	Base: All respondents		Zone									
			1		2		3		4		5	
	Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Don't know / refused	743	61.8%	48	60.0%	64	63.4%	80	66.7%	83	69.2%	83	59.3%
£0-£15,000	123	10.2%	7	8.8%	8	7.9%	7	5.8%	9	7.5%	22	15.7%
£21,000 - £30,000	107	8.9%	9	11.3%	6	5.9%	10	8.3%	7	5.8%	8	5.7%
£15,000 - £20,000	59	4.9%	4	5.0%	9	8.9%	4	3.3%	6	5.0%	9	6.4%
£31,000 - £40,000	52	4.3%	2	2.5%	5	5.0%	2	1.7%	8	6.7%	8	5.7%
£41,000 - £50,000	40	3.3%	5	6.3%	2	2.0%	6	5.0%	4	3.3%	3	2.1%
£51,000 - £60,000	33	2.7%	5	6.3%	5	5.0%	4	3.3%	0	.0%	4	2.9%
£61,000 - £70,000	18	1.5%	0	.0%	1	1.0%	4	3.3%	2	1.7%	0	.0%
£71,000 - £80,000	14	1.2%	0	.0%	0	.0%	2	1.7%	1	.8%	1	.7%
£100,000 - £150,000	7	.6%	0	.0%	1	1.0%	0	.0%	0	.0%	1	.7%
£91,000 - £100,000	4	.3%	0	.0%	0	.0%	1	.8%	0	.0%	1	.7%
£81,000 - £90,000	2	.2%	0	.0%	0	.0%	0	.0%	0	.0%	0	.0%

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Q33. Approximately, what is your total household income?

	Zone										
	6		7		8		9		10		11
	Num	%	Num	%	Num	%	Num	%	Num	%	Num
Don't know / refused	66	60.0%	57	57.0%	44	48.9%	62	68.1%	43	53.8%	56
£0-£15,000	14	12.7%	16	16.0%	13	14.4%	7	7.7%	7	8.8%	10
£21,000 - £30,000	13	11.8%	6	6.0%	12	13.3%	7	7.7%	9	11.3%	10
£15,000 - £20,000	9	8.2%	2	2.0%	6	6.7%	3	3.3%	3	3.8%	2
£31,000 - £40,000	0	.0%	4	4.0%	7	7.8%	2	2.2%	5	6.3%	6
£41,000 - £50,000	2	1.8%	7	7.0%	3	3.3%	2	2.2%	1	1.3%	3
£51,000 - £60,000	4	3.6%	4	4.0%	2	2.2%	0	.0%	2	2.5%	3
£61,000 - £70,000	1	.9%	1	1.0%	1	1.1%	3	3.3%	5	6.3%	0
£71,000 - £80,000	1	.9%	2	2.0%	2	2.2%	1	1.1%	1	1.3%	0
£100,000 - £150,000	0	.0%	0	.0%	0	.0%	3	3.3%	2	2.5%	0
£91,000 - £100,000	0	.0%	0	.0%	0	.0%	1	1.1%	1	1.3%	0
£81,000 - £90,000	0	.0%	1	1.0%	0	.0%	0	.0%	1	1.3%	0

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Q33. Approximately, what is your total household income?

	Zone		
	11	12	
	%	Num	%
Don't know / refused	62.2%	57	71.3%
£0-£15,000	11.1%	3	3.8%
£21,000 - £30,000	11.1%	10	12.5%
£15,000 - £20,000	2.2%	2	2.5%
£31,000 - £40,000	6.7%	3	3.8%
£41,000 - £50,000	3.3%	2	2.5%
£51,000 - £60,000	3.3%	0	.0%
£61,000 - £70,000	.0%	0	.0%
£71,000 - £80,000	.0%	3	3.8%
£100,000 - £150,000	.0%	0	.0%
£91,000 - £100,000	.0%	0	.0%
£81,000 - £90,000	.0%	0	.0%

Q34. Gender of respondent

			Zone									
	Base: All respondents		1		2		3		4		5	
	Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	1202	100.0%	80	100.0%	101	100.0%	120	100.0%	120	100.0%	140	100.0%
Female	858	71.4%	56	70.0%	72	71.3%	86	71.7%	95	79.2%	89	63.6%
Male	344	28.6%	24	30.0%	29	28.7%	34	28.3%	25	20.8%	51	36.4%

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Q34. Gender of respondent

	Zone										
	6		7		8		9		10		11
	Num	%	Num	%	Num	%	Num	%	Num	%	Num
Base: All respondents	110	100.0%	100	100.0%	90	100.0%	91	100.0%	80	100.0%	90
Female	75	68.2%	70	70.0%	64	71.1%	71	78.0%	55	68.8%	64
Male	35	31.8%	30	30.0%	26	28.9%	20	22.0%	25	31.3%	26

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Q34. Gender of respondent

	Zone		
	11	12	
	%	Num	%
Base: All respondents	100.0%	80	100.0%
Female	71.1%	61	76.3%
Male	28.9%	19	23.8%

Q35. Would you be willing to be re-contacted for future quality control purposes?

			Zone									
	Base: All respondents		1		2		3		4		5	
	Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	1202	100.0%	80	100.0%	101	100.0%	120	100.0%	120	100.0%	140	100.0%
Yes	796	66.2%	55	68.8%	60	59.4%	76	63.3%	80	66.7%	97	69.3%
No	406	33.8%	25	31.3%	41	40.6%	44	36.7%	40	33.3%	43	30.7%

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Q35. Would you be willing to be re-contacted for future quality control purposes?

	Zone										
	6		7		8		9		10		11
	Num	%	Num	%	Num	%	Num	%	Num	%	Num
Base: All respondents	110	100.0%	100	100.0%	90	100.0%	91	100.0%	80	100.0%	90
Yes	73	66.4%	73	73.0%	62	68.9%	53	58.2%	54	67.5%	64
No	37	33.6%	27	27.0%	28	31.1%	38	41.8%	26	32.5%	26

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Q35. Would you be willing to be re-contacted for future quality control purposes?

	Zone		
	11	12	
	%	Num	%
Base: All respondents	100.0%	80	100.0%
Yes	71.1%	49	61.3%
No	28.9%	31	38.8%

C:

Quantitative Need Assessment

NORTH SOMERSET COUNCIL
NORTH SOMERSET RETAIL STUDY UPDATE 2010

TABLE 1: POPULATION OF STUDY AREA, BY SURVEY ZONE (2010-2026)

ZONE	2010	2015	2021	2026		Change, 2010-15 No.	(%)	Change, 2010-21 No.	(%)	Change, 2010-26 No.	(%)
1	11801	11846	11846	11846		44.8	0.4	45	0.4	45	0.4
2	25993	29285	29285	29285		3292.2	12.7	3292	12.7	3292	12.7
3	23838	24003	24003	24003		165.2	0.7	165	0.7	165	0.7
4	24828	25099	25099	25099		271.4	1.1	271	1.1	271	1.1
5	39097	41190	41190	41190		2093.3	5.4	2093	5.4	2093	5.4
6	39721	40290	40290	40290		568.8	1.4	569	1.4	569	1.4
7	16343	20844	26245	30746		4501.0	27.5	9902	60.6	14403	88.1
8	14957	15304	15304	15304		346.9	2.3	347	2.3	347	2.3
9	18343	18553	18553	18553		210.0	1.1	210	1.1	210	1.1
10	7050	7340	7628	7877		290.0	4.1	578	8.2	827	11.7
11	30651	31407	32010	32709		756.0	2.5	1359	4.4	2058	6.7
12	10452	10731	10977	11242		279.0	2.7	525	5.0	790	7.6
TOTAL	**263074**	**275892.6**	**282430.8**	**288144.8**		**12818.6**	**4.9**	**19357**	**7.4**	**25071**	**9.5**

Notes:

Population figures for each zone for 2010 derived from Experian Business Strategies Retail Planner Reports (dated November 2009).

Projections for Zones 1-9 based on committed and proposed residential development across North Somerset - date supplied by North Somerset Council

NORTH SOMERSET COUNCIL
NORTH SOMERSET RETAIL STUDY UPDATE 2010

TABLE 2: PER CAPITA EXPENDITURE WITHIN STUDY AREA BY GOODS CATEGORY AND ZONE, 2010-2026

A: CONVENIENCE GOODS

	2010	2015	2021	2026
per capita expenditure	1752	1787	1864	1930

B: CLOTHES & FOOTWEAR GOODS EXPENDITURE

	2010	2015	2021	2026
per capita expenditure	625	707	867	1039

C: FURNITURE, FLOORCOVERING & TEXTILE GOODS

	2010	2015	2021	2026
per capita expenditure	316	358	438	526

D: DIY & DECORATING GOODS

	2010	2015	2021	2026
per capita expenditure	343	388	476	571

Notes:
convenience expenditure excludes 5.1% for special forms of trading and an increase in expenditure of 0.25% pa up to 2012, 0.6% pa 2012-17 and 0.7% pa 2017-31
comparison expenditure excludes 11.3% for special forms of trading and an increase in expenditure of 1.5% pa up to 2012, 3.2% pa 2012-17 and 3.7% pa 2017-31

2007 PRICES

NORTH SOMERSET COUNCIL
NORTH SOMERSET RETAIL STUDY UPDATE 2010

TABLE 2 (Continued): PER CAPITA EXPENDITURE WITHIN STUDY AREA BY GOODS CATEGORY AND ZONE, 2010-2026

E: DOMESTIC APPLIANCES

	2010	2015	2021	2026
per capita expenditure	125	142	174	208

F: TV, HI-FI, RADIO, PHOTOGRAPHIC & COMPUTER GOODS

	2010	2015	2021	2026
per capita expenditure	420	476	583	699

G: PERSONAL & LUXURY GOODS

	2010	2015	2021	2026
per capita expenditure	534	604	741	888

H: RECREATIONAL GOODS

	2010	2015	2021	2026
per capita expenditure	487	551	676	810

Notes:

comparison expenditure excludes 11.3% for special forms of trading and an increase in expenditure of 1.5% pa up to 2012, 3.2% pa 2012-17 and 3.7% pa 2017-31

2007 PRICES

NORTH SOMERSET COUNCIL
NORTH SOMERSET RETAIL STUDY UPDATE 2010

TABLE 3: TOTAL EXPENDITURE WITHIN STUDY AREA BY GOODS CATEGORY AND ZONE, 2010-2026

A: CONVENIENCE GOODS

ZONE	2010	2015	2021	2026
1	20.7	21.2	22.1	22.9
2	45.5	52.3	54.6	56.5
3	41.8	42.9	44.7	46.3
4	43.5	44.9	46.8	48.4
5	68.5	73.6	76.8	79.5
6	69.6	72.0	75.1	77.8
7	28.6	37.3	48.9	59.3
8	26.2	27.4	28.5	29.5
9	32.1	33.2	34.6	35.8
10	12.4	13.1	14.2	15.2
11	53.7	56.1	59.7	63.1
12	18.3	19.2	20.5	21.7
TOTAL	**460.9**	**493.1**	**526.4**	**556.1**

B: CLOTHES & FOOTWEAR GOODS EXPENDITURE

ZONE	2010	2015	2021	2026
1	7.4	8.4	10.3	12.3
2	16.2	20.7	25.4	30.4
3	14.9	17.0	20.8	24.9
4	15.5	17.7	21.8	26.1
5	24.4	29.1	35.7	42.8
6	24.8	28.5	34.9	41.9
7	10.2	14.7	22.7	32.0
8	9.3	10.8	13.3	15.9
9	11.5	13.1	16.1	19.3
10	4.4	5.2	6.6	8.2
11	19.2	22.2	27.7	34.0
12	6.5	7.6	9.5	11.7
TOTAL	**164.4**	**195.1**	**244.8**	**299.5**

C: FURNITURE, FLOORCOVERING & TEXTILE GOODS

ZONE	2010	2015	2021	2026
1	3.7	4.2	5.2	6.2
2	8.2	10.5	12.8	15.4
3	7.5	8.6	10.5	12.6
4	7.9	9.0	11.0	13.2
5	12.4	14.7	18.1	21.7
6	12.6	14.4	17.7	21.2
7	5.2	7.5	11.5	16.2
8	4.7	5.5	6.7	8.0
9	5.8	6.6	8.1	9.8
10	2.2	2.6	3.3	4.1
11	9.7	11.2	14.0	17.2
12	3.3	3.8	4.8	5.9
TOTAL	**83.2**	**98.7**	**123.8**	**151.5**

D: DIY & DECORATING GOODS

ZONE	2010	2015	2021	2026
1	4.0	4.6	5.6	6.8
2	8.9	11.4	13.9	16.7
3	8.2	9.3	11.4	13.7
4	8.5	9.7	11.9	14.3
5	13.4	16.0	19.6	23.5
6	13.6	15.6	19.2	23.0
7	5.6	8.1	12.5	17.5
8	5.1	5.9	7.3	8.7
9	6.3	7.2	8.8	10.6
10	2.4	2.8	3.6	4.5
11	10.5	12.2	15.2	18.7
12	3.6	4.2	5.2	6.4
TOTAL	**90.3**	**107.1**	**134.4**	**164.4**

Notes:

Total expenditure for individual goods categories calculated by multiplying resident population by per capita expenditure.

2007 PRICES

NORTH SOMERSET COUNCIL
NORTH SOMERSET RETAIL STUDY UPDATE 2010

TABLE 3 (Continued): TOTAL EXPENDITURE WITHIN STUDY AREA BY GOODS CATEGORY AND ZONE, 2010-2026

E: DOMESTIC APPLIANCES

ZONE	2010	2015	2021	2026
1	1.5	1.7	2.1	2.5
2	3.3	4.2	5.1	6.1
3	3.0	3.4	4.2	5.0
4	3.1	3.6	4.4	5.2
5	4.9	5.8	7.2	8.6
6	5.0	5.7	7.0	8.4
7	2.0	3.0	4.6	6.4
8	1.9	2.2	2.7	3.2
9	2.3	2.6	3.2	3.9
10	0.9	1.0	1.3	1.6
11	3.8	4.5	5.6	6.8
12	1.3	1.5	1.9	2.3
TOTAL	**33.0**	**39.1**	**49.1**	**60.0**

F: TV, HI-FI, RADIO, PHOTOGRAPHIC & COMPUTER GOODS

ZONE	2010	2015	2021	2026
1	5.0	5.6	6.9	8.3
2	10.9	13.9	17.1	20.5
3	10.0	11.4	14.0	16.8
4	10.4	11.9	14.6	17.5
5	16.4	19.6	24.0	28.8
6	16.7	19.2	23.5	28.2
7	6.9	9.9	15.3	21.5
8	6.3	7.3	8.9	10.7
9	7.7	8.8	10.8	13.0
10	3.0	3.5	4.4	5.5
11	12.9	14.9	18.7	22.9
12	4.4	5.1	6.4	7.9
TOTAL	**110.6**	**131.2**	**164.6**	**201.4**

G: PERSONAL & LUXURY GOODS

ZONE	2010	2015	2021	2026
1	6.3	7.2	8.8	10.5
2	13.9	17.7	21.7	26.0
3	12.7	14.5	17.8	21.3
4	13.3	15.2	18.6	22.3
5	20.9	24.9	30.5	36.6
6	21.2	24.3	29.8	35.8
7	8.7	12.6	19.4	27.3
8	8.0	9.2	11.3	13.6
9	9.8	11.2	13.7	16.5
10	3.8	4.4	5.6	7.0
11	16.4	19.0	23.7	29.1
12	5.6	6.5	8.1	10.0
TOTAL	**140.5**	**166.7**	**209.2**	**255.9**

H: RECREATIONAL GOODS

ZONE	2010	2015	2021	2026
1	5.8	6.5	8.0	9.6
2	12.7	16.1	19.8	23.7
3	11.6	13.2	16.2	19.5
4	12.1	13.8	17.0	20.3
5	19.1	22.7	27.8	33.4
6	19.4	22.2	27.2	32.7
7	8.0	11.5	17.7	24.9
8	7.3	8.4	10.3	12.4
9	8.9	10.2	12.5	15.0
10	3.4	4.0	5.2	6.4
11	14.9	17.3	21.6	26.5
12	5.1	5.9	7.4	9.1
TOTAL	**128.2**	**152.1**	**190.9**	**233.5**

Notes:

Total expenditure for individual goods categories calculated by multiplying resident population by per capita expenditure.

2007 PRICES

NORTH SOMERSET COUNCIL
NORTH SOMERSET RETAIL STUDY UPDATE 2010

TABLE 4A: MARKET SHARE OF MAIN FOOD CONVENIENCE FACILITIES IN NORTH SOMERSET

	ZONE											
STORE / CENTRE	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**	**12**
WESTON-SUPER-MARE	1.3%	0.0%	1.7%	1.7%	97.1%	98.1%	100.0%	32.6%	51.2%	47.4%	5.6%	30.1%
NAILSEA	7.7%	3.1%	89.8%	2.6%	0.0%	0.0%	0.0%	5.6%	3.6%	0.0%	0.0%	0.0%
CLEVEDON	9.0%	18.8%	4.2%	94.9%	0.0%	0.0%	0.0%	48.3%	4.8%	0.0%	0.0%	0.0%
PORTISHEAD	21.8%	62.5%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Notes:

Market shares taken from North Somerset Household Telephone Survey, excluding 'don't do', 'don't know, 'varies' and internet shopping trips.

NORTH SOMERSET COUNCIL
NORTH SOMERSET RETAIL STUDY UPDATE 2010

TABLE 4B: MARKET SHARE OF TOP-UP FOOD CONVENIENCE FACILITIES IN NORTH SOMERSET

	ZONE											
STORE / CENTRE	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**	**12**
WESTON-SUPER-MARE	0.0%	2.2%	3.8%	2.0%	94.8%	97.8%	96.5%	16.0%	11.5%	23.5%	4.1%	1.5%
NAILSEA	8.3%	1.1%	79.0%	3.9%	0.0%	0.0%	0.0%	1.3%	2.6%	0.0%	0.0%	0.0%
CLEVEDON	5.6%	7.6%	3.8%	93.1%	0.9%	1.1%	0.0%	6.7%	3.8%	2.9%	0.0%	4.5%
PORTISHEAD	20.8%	87.0%	1.0%	1.0%	0.0%	0.0%	0.0%	1.3%	1.3%	0.0%	0.0%	0.0%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Notes:

Market shares taken from North Somerset Household Telephone Survey, excluding 'don't do', 'don't know, 'varies' and internet shopping trips.

NORTH SOMERSET COUNCIL
NORTH SOMERSET RETAIL STUDY UPDATE 2010

TABLE 5A: MAIN FOOD TURNOVER OF CONVENIENCE FACILITIES IN NORTH SOMERSET DISTRICT 2010

	ZONE												TOTAL
STORE / CENTRE	1	2	3	4	5	6	7	8	9	10	11	12	TURNOVER
WESTON-SUPER-MARE	0.2	0.0	0.5	0.5	46.5	47.8	20.0	6.0	11.5	4.1	2.1	3.9	143.1
NAILSEA	1.1	1.0	26.3	0.8	0.0	0.0	0.0	1.0	0.8	0.0	0.0	0.0	31.0
CLEVEDON	1.3	6.0	1.2	28.9	0.0	0.0	0.0	8.9	1.1	0.0	0.0	0.0	47.3
PORTISHEAD	3.2	19.9	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	23.4
TOTAL	14.5	31.9	29.2	30.4	47.9	48.7	20.0	18.3	22.5	8.6	37.6	12.8	322.6

Notes:

Turnover for each centre calculated by applying market share to available expenditure. 70% of convenience goods expenditure to main food destinations and 30% of expenditure to top-up food shopping destinations

NORTH SOMERSET COUNCIL
NORTH SOMERSET RETAIL STUDY UPDATE 2010

TABLE 5B: TOP-UP FOOD TURNOVER OF CONVENIENCE FACILITIES IN NORTH SOMERSET 2010

	ZONE												TOTAL
STORE / CENTRE	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**	**12**	**TURNOVER**
WESTON-SUPER-MARE	0.0	0.3	0.5	0.3	19.5	20.4	8.3	1.3	1.1	0.9	0.7	0.1	53.2
NAILSEA	0.5	0.1	9.9	0.5	0.0	0.0	0.0	0.1	0.2	0.0	0.0	0.0	11.4
CLEVEDON	0.3	1.0	0.5	12.2	0.2	0.2	0.0	0.5	0.4	0.1	0.0	0.2	15.7
PORTISHEAD	1.3	11.9	0.1	0.1	0.0	0.0	0.0	0.1	0.1	0.0	0.0	0.0	13.6
TOTAL	6.2	13.7	12.5	13.0	20.5	20.9	8.6	7.9	9.6	3.7	16.1	5.5	138.3

Notes:

Turnover for each centre calculated by applying market share to available expenditure. 70% of convenience goods expenditure to main food destinations and 30% of expenditure to top-up food shopping destinations

NORTH SOMERSET COUNCIL
NORTH SOMERSET RETAIL STUDY UPDATE 2010

TABLE 5C: MAIN FOOD TURNOVER OF CONVENIENCE FACILITIES IN NORTH SOMERSET 2015

	ZONE												TOTAL
STORE / CENTRE	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**	**12**	**TURNOVER**
WESTON-SUPER-MARE	0.2	0.0	0.5	0.5	50.0	49.5	26.1	6.2	11.9	4.4	2.2	4.0	155.5
NAILSEA	1.1	1.1	27.0	0.8	0.0	0.0	0.0	1.1	0.8	0.0	0.0	0.0	32.0
CLEVEDON	1.3	6.9	1.3	29.8	0.0	0.0	0.0	9.3	1.1	0.0	0.0	0.0	49.6
PORTISHEAD	3.2	22.9	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	26.5
TOTAL	14.8	36.6	30.0	31.4	51.5	50.4	26.1	19.1	23.2	9.2	39.3	13.4	345.2

Notes:

Turnover for each centre calculated by applying market share to available expenditure. 70% of convenience goods expenditure to main food destinations and 30% of expenditure to top-up food shopping destinations

NORTH SOMERSET COUNCIL
NORTH SOMERSET RETAIL STUDY UPDATE 2010

TABLE 5D: TOP-UP FOOD TURNOVER OF CONVENIENCE FACILITIES IN NORTH SOMERSET 2015

	ZONE												TOTAL
STORE / CENTRE	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**	**12**	**TURNOVER**
WESTON-SUPER-MARE	0.0	0.3	0.5	0.3	20.9	21.1	10.8	1.3	1.1	0.9	0.7	0.1	58.1
NAILSEA	0.5	0.2	10.2	0.5	0.0	0.0	0.0	0.1	0.3	0.0	0.0	0.0	11.8
CLEVEDON	0.4	1.2	0.5	12.5	0.2	0.2	0.0	0.5	0.4	0.1	0.0	0.3	16.3
PORTISHEAD	1.3	13.7	0.1	0.1	0.0	0.0	0.0	0.1	0.1	0.0	0.0	0.0	15.5
TOTAL	6.4	15.7	12.9	13.5	22.1	21.6	11.2	8.2	9.9	3.9	16.8	5.8	147.9

Notes:

Turnover for each centre calculated by applying market share to available expenditure. 70% of convenience goods expenditure to main food destinations and 30% of expenditure to top-up food shopping destinations

NORTH SOMERSET COUNCIL
NORTH SOMERSET RETAIL STUDY UPDATE 2010

TABLE 5E: MAIN FOOD TURNOVER OF CONVENIENCE FACILITIES IN NORTH SOMERSET 2021

	ZONE												TOTAL
STORE / CENTRE	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**	**12**	**TURNOVER**
WESTON-SUPER-MARE	0.2	0.0	0.5	0.6	52.2	51.6	34.2	6.5	12.4	4.7	2.3	4.3	169.5
NAILSEA	1.2	1.2	28.1	0.8	0.0	0.0	0.0	1.1	0.9	0.0	0.0	0.0	33.3
CLEVEDON	1.4	7.2	1.3	31.1	0.0	0.0	0.0	9.6	1.2	0.0	0.0	0.0	51.7
PORTISHEAD	3.4	23.9	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	27.6
TOTAL	15.5	38.2	31.3	32.7	53.7	52.6	34.2	20.0	24.2	10.0	41.8	14.3	368.5

Notes:

Turnover for each centre calculated by applying market share to available expenditure. 70% of convenience goods expenditure to main food destinations and 30% of expenditure to top-up food shopping destinations

NORTH SOMERSET COUNCIL
NORTH SOMERSET RETAIL STUDY UPDATE 2010

TABLE 5F: TOP-UP FOOD TURNOVER OF CONVENIENCE FACILITIES IN NORTH SOMERSET 2021

	ZONE												TOTAL
STORE / CENTRE	1	2	3	4	5	6	7	8	9	10	11	12	TURNOVER
WESTON-SUPER-MARE	0.0	0.4	0.5	0.3	21.8	22.0	14.2	1.4	1.2	1.0	0.7	0.1	63.5
NAILSEA	0.6	0.2	10.6	0.6	0.0	0.0	0.0	0.1	0.3	0.0	0.0	0.0	12.3
CLEVEDON	0.4	1.2	0.5	13.1	0.2	0.3	0.0	0.6	0.4	0.1	0.0	0.3	17.0
PORTISHEAD	1.4	14.2	0.1	0.1	0.0	0.0	0.0	0.1	0.1	0.0	0.0	0.0	16.1
TOTAL	6.6	16.4	13.4	14.0	23.0	22.5	14.7	8.6	10.4	4.3	17.9	6.1	157.9

Notes:

Turnover for each centre calculated by applying market share to available expenditure. 70% of convenience goods expenditure to main food destinations and 30% of expenditure to top-up food shopping destinations

NORTH SOMERSET COUNCIL
NORTH SOMERSET RETAIL STUDY UPDATE 2010

TABLE 5G: MAIN FOOD TURNOVER OF CONVENIENCE FACILITIES IN NORTH SOMERSET 2026

	ZONE												TOTAL
STORE / CENTRE	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**	**12**	**TURNOVER**
WESTON-SUPER-MARE	0.2	0.0	0.5	0.6	54.0	53.4	41.5	6.7	12.8	5.0	2.5	4.6	182.0
NAILSEA	1.2	1.2	29.1	0.9	0.0	0.0	0.0	1.2	0.9	0.0	0.0	0.0	34.5
CLEVEDON	1.4	7.4	1.4	32.2	0.0	0.0	0.0	10.0	1.2	0.0	0.0	0.0	53.6
PORTISHEAD	3.5	24.7	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	28.6
TOTAL	16.0	39.6	32.4	33.9	55.6	54.4	41.5	20.7	25.1	10.6	44.2	15.2	389.3

Notes:

Turnover for each centre calculated by applying market share to available expenditure. 70% of convenience goods expenditure to main food destinations and 30% of expenditure to top-up food shopping destinations

NORTH SOMERSET COUNCIL
NORTH SOMERSET RETAIL STUDY UPDATE 2010

TABLE 5H: TOP-UP FOOD TURNOVER OF CONVENIENCE FACILITIES IN NORTH SOMERSET 2026

	ZONE												TOTAL
STORE / CENTRE	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**	**12**	**TURNOVER**
WESTON-SUPER-MARE	**0.0**	**0.4**	**0.5**	**0.3**	**22.6**	**22.8**	**17.2**	**1.4**	**1.2**	**1.1**	**0.8**	**0.1**	**68.4**
NAILSEA	**0.6**	**0.2**	**11.0**	**0.6**	**0.0**	**0.0**	**0.0**	**0.1**	**0.3**	**0.0**	**0.0**	**0.0**	**12.7**
CLEVEDON	**0.4**	**1.3**	**0.5**	**13.5**	**0.2**	**0.3**	**0.0**	**0.6**	**0.4**	**0.1**	**0.0**	**0.3**	**17.6**
PORTISHEAD	**1.4**	**14.7**	**0.1**	**0.1**	**0.0**	**0.0**	**0.0**	**0.1**	**0.1**	**0.0**	**0.0**	**0.0**	**16.7**
TOTAL	**6.9**	**17.0**	**13.9**	**14.5**	**23.8**	**23.3**	**17.8**	**8.9**	**10.7**	**4.6**	**18.9**	**6.5**	**166.8**

Notes:

Turnover for each centre calculated by applying market share to available expenditure. 70% of convenience goods expenditure to main food destinations and 30% of expenditure to top-up food shopping destinations

NORTH SOMERSET COUNCIL
NORTH SOMERSET RETAIL STUDY UPDATE 2010

TABLE 6A: MARKET SHARE & TURNOVER OF CLOTHES AND FOOTWEAR GOODS FACILITIES 2010

CENTRE	MARKET SHARE, BY ZONE (%)													TURNOVER, BY ZONE (£m)												TURNOVER
	1	2	3	4	5	6	7	8	9	10	11	12		1	2	3	4	5	6	7	8	9	10	11	12	(£m)
WSM	0%	10%	12%	37%	64%	74%	67%	48%	32%	42%	30%	36%		0.0	1.6	1.8	5.8	15.6	18.3	6.8	4.4	3.6	1.9	5.7	2.4	67.9
NAILSEA	0%	1%	8%	2%	0%	0%	0%	0%	0%	0%	0%	0%		0.0	0.2	1.2	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.7
CLEVEDON	1%	2%	2%	2%	0%	0%	0%	0%	0%	0%	0%	0%		0.1	0.4	0.3	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0
PORTISHEAD	0%	3%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%		0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5

Notes:

market shares taken from North Somerset household telephone survey. Turnover levels calculated by applying market shares to available expenditure per zone.

2007 PRICES

NORTH SOMERSET COUNCIL
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TABLE 6B: MARKET SHARE & TURNOVER OF CLOTHES AND FOOTWEAR GOODS FACILITIES 2015

CENTRE	MARKET SHARE, BY ZONE (%)													TURNOVER, BY ZONE (£m)												TURNOVER
	1	2	3	4	5	6	7	8	9	10	11	12		1	2	3	4	5	6	7	8	9	10	11	12	(£m)
WSM	0%	10%	12%	37%	64%	74%	67%	48%	32%	42%	30%	36%		0.0	2.0	2.0	6.6	18.6	20.9	9.8	5.1	4.2	2.2	6.7	2.8	81.0
NAILSEA	0%	1%	8%	2%	0%	0%	0%	0%	0%	0%	0%	0%		0.0	0.2	1.4	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.9
CLEVEDON	1%	2%	2%	2%	0%	0%	0%	0%	0%	0%	0%	0%		0.1	0.5	0.3	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.2
PORTISHEAD	0%	3%	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	0.0	0.0	0.0	0.0	0.7

Notes:

market shares taken from North Somerset household telephone survey. Turnover levels calculated by applying market shares to available expenditure per zone.

NORTH SOMERSET COUNCIL
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TABLE 6C: MARKET SHARE & TURNOVER OF CLOTHES AND FOOTWEAR GOODS FACILITIES 2021

CENTRE	MARKET SHARE, BY ZONE (%)													TURNOVER, BY ZONE (£m)												TURNOVER
	1	2	3	4	5	6	7	8	9	10	11	12		1	2	3	4	5	6	7	8	9	10	11	12	(£m)
WSM	0%	10%	12%	37%	64%	74%	67%	48%	32%	42%	30%	36%		0.0	2.5	2.5	8.1	22.8	25.7	15.2	6.3	5.1	2.8	8.3	3.5	102.7
NAILSEA	0%	1%	8%	2%	0%	0%	0%	0%	0%	0%	0%	0%		0.0	0.3	1.7	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.4
CLEVEDON	1%	2%	2%	2%	0%	0%	0%	0%	0%	0%	0%	0%		0.1	0.6	0.4	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5
PORTISHEAD	0%	3%	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	0.0	0.0	0.0	0.0	0.8

Notes:

market shares taken from North Somerset household telephone survey. Turnover levels calculated by applying market shares to available expenditure per zone.

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NORTH SOMERSET RETAIL STUDY UPDATE 2010

TABLE 6D: MARKET SHARE & TURNOVER OF CLOTHES AND FOOTWEAR GOODS FACILITIES 2026

CENTRE	MARKET SHARE, BY ZONE (%)													TURNOVER, BY ZONE (£m)												TURNOVER
	1	2	3	4	5	6	7	8	9	10	11	12		1	2	3	4	5	6	7	8	9	10	11	12	(£m)
WSM	0%	10%	12%	37%	64%	74%	67%	48%	32%	42%	30%	36%		0.0	3.0	2.9	9.7	27.4	30.8	21.3	7.6	6.1	3.5	10.2	4.3	126.7
NAILSEA	0%	1%	8%	2%	0%	0%	0%	0%	0%	0%	0%	0%		0.0	0.3	2.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.8
CLEVEDON	1%	2%	2%	2%	0%	0%	0%	0%	0%	0%	0%	0%		0.2	0.7	0.5	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.7
PORTISHEAD	0%	3%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%		0.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0

Notes:

market shares taken from North Somerset household telephone survey. Turnover levels calculated by applying market shares to available expenditure per zone.

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NORTH SOMERSET RETAIL STUDY UPDATE 2010

TABLE 7A: MARKET SHARE & TURNOVER OF FURNITURE, FLOORCOVERINGS AND TEXTILE GOODS FACILITIES 2010

CENTRE	MARKET SHARE, BY ZONE (%)												TURNOVER, BY ZONE (£m)												TURNOVER
	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	(£m)
WSM	4%	7%	12%	24%	70%	75%	73%	48%	40%	51%	32%	45%	0.1	0.6	0.9	1.9	8.6	9.4	3.8	2.3	2.3	1.1	3.1	1.5	35.5
NAILSEA	0%	4%	14%	1%	0%	0%	0%	2%	0%	0%	0%	0%	0.0	0.3	1.0	0.1	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	1.5
CLEVEDON	0%	1%	1%	18%	0%	0%	0%	6%	0%	0%	0%	2%	0.0	0.1	0.1	1.4	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.1	1.9
PORTISHEAD	7%	11%	3%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0.3	0.9	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.4

Notes:

market shares taken from North Somerset household telephone survey. Turnover levels calculated by applying market shares to available expenditure per zone.

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TABLE 7B: MARKET SHARE & TURNOVER OF FURNITURE, FLOORCOVERINGS AND TEXTILE GOODS FACILITIES 2015

CENTRE	MARKET SHARE, BY ZONE (%)												TURNOVER, BY ZONE (£m)												TURNOVER
	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	(£m)
WSM	4%	7%	12%	24%	70%	75%	73%	48%	40%	51%	32%	45%	0.1	0.7	1.0	2.2	10.3	10.8	5.5	2.6	2.6	1.3	3.6	1.7	42.4
NAILSEA	0%	4%	14%	1%	0%	0%	0%	2%	0%	0%	0%	0%	0.0	0.4	1.2	0.1	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	1.8
CLEVEDON	0%	1%	1%	18%	0%	0%	0%	6%	0%	0%	0%	2%	0.0	0.1	0.1	1.6	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.1	2.2
PORTISHEAD	7%	11%	3%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0.3	1.1	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.7

Notes:

market shares taken from North Somerset household telephone survey. Turnover levels calculated by applying market shares to available expenditure per zone.

NORTH SOMERSET COUNCIL
NORTH SOMERSET RETAIL STUDY UPDATE 2010

TABLE 7C: MARKET SHARE & TURNOVER OF FURNITURE, FLOORCOVERINGS AND TEXTILE GOODS FACILITIES 2021

CENTRE	MARKET SHARE, BY ZONE (%)													TURNOVER, BY ZONE (£m)												TURNOVER
	1	2	3	4	5	6	7	8	9	10	11	12		1	2	3	4	5	6	7	8	9	10	11	12	(£m)
WSM	4%	7%	12%	24%	70%	75%	73%	48%	40%	51%	32%	45%		0.2	0.9	1.2	2.7	12.6	13.2	8.4	3.2	3.2	1.7	4.4	2.1	54.0
NAILSEA	0%	4%	14%	1%	0%	0%	0%	2%	0%	0%	0%	0%		0.0	0.5	1.5	0.1	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	2.2
CLEVEDON	0%	1%	1%	18%	0%	0%	0%	6%	0%	0%	0%	2%		0.0	0.2	0.1	2.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.1	2.7
PORTISHEAD	7%	11%	3%	0%	0%	0%	0%	0%	0%	0%	0%	0%		0.4	1.4	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.1

Notes:

market shares taken from North Somerset household telephone survey. Turnover levels calculated by applying market shares to available expenditure per zone.

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TABLE 7D: MARKET SHARE & TURNOVER OF FURNITURE, FLOORCOVERINGS AND TEXTILE GOODS FACILITIES 2026

CENTRE	MARKET SHARE, BY ZONE (%)													TURNOVER, BY ZONE (£m)												TURNOVER
	1	2	3	4	5	6	7	8	9	10	11	12		1	2	3	4	5	6	7	8	9	10	11	12	(£m)
WSM	4%	7%	12%	24%	70%	75%	73%	48%	40%	51%	32%	45%		0.2	1.0	1.5	3.2	15.1	15.8	11.9	3.8	3.9	2.1	5.4	2.6	66.7
NAILSEA	0%	4%	14%	1%	0%	0%	0%	2%	0%	0%	0%	0%		0.0	0.6	1.7	0.1	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	2.6
CLEVEDON	0%	1%	1%	18%	0%	0%	0%	6%	0%	0%	0%	2%		0.0	0.2	0.1	2.3	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.1	3.3
PORTISHEAD	7%	11%	3%	0%	0%	0%	0%	0%	0%	0%	0%	0%		0.4	1.7	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.5

Notes:

market shares taken from North Somerset household telephone survey. Turnover levels calculated by applying market shares to available expenditure per zone.

NORTH SOMERSET COUNCIL
NORTH SOMERSET RETAIL STUDY UPDATE 2010

TABLE 8A: MARKET SHARE & TURNOVER OF DIY GOODS FACILITIES 2010

CENTRE	MARKET SHARE, BY ZONE (%)												TURNOVER, BY ZONE (£m)												TURNOVER
	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	(£m)
WSM	0%	3%	11%	16%	96%	97%	92%	66%	60%	86%	36%	49%	0.0	0.3	0.9	1.4	12.9	13.2	5.1	3.4	3.8	2.1	3.8	1.8	48.7
													0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
NAILSEA	0%	0%	7%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0.0	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6
													0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
CLEVEDON	2%	6%	22%	72%	0%	0%	0%	18%	0%	0%	0%	1%	0.1	0.5	1.8	6.1	0.0	0.0	0.0	0.9	0.0	0.0	0.0	0.1	9.5
													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
PORTISHEAD	27%	57%	8%	1%	0%	0%	0%	1%	1%	0%	0%	0%	1.1	5.1	0.7	0.1	0.0	0.0	0.0	0.1	0.1	0.0	0.0	0.0	7.1

Notes:

market shares taken from North Somerset household telephone survey. Turnover levels calculated by applying market shares to available expenditure per zone.

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TABLE 8B: MARKET SHARE & TURNOVER OF DIY GOODS FACILITIES 2015

CENTRE	MARKET SHARE, BY ZONE (%)												TURNOVER, BY ZONE (£m)												TURNOVER
	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	(£m)
WSM	0%	3%	11%	16%	96%	97%	92%	66%	60%	86%	36%	49%	0.0	0.4	1.1	1.6	15.3	15.1	7.4	3.9	4.3	2.5	4.4	2.1	58.1
													0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
NAILSEA	0%	0%	7%	0%	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	0.0	0.0	0.0	0.7
													0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
CLEVEDON	2%	6%	22%	72%	0%	0%	0%	18%	0%	0%	0%	1%	0.1	0.7	2.0	7.0	0.0	0.0	0.0	1.1	0.0	0.0	0.0	0.1	10.9
													0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
PORTISHEAD	27%	57%	8%	1%	0%	0%	0%	1%	1%	0%	0%	0%	1.2	6.5	0.8	0.1	0.0	0.0	0.0	0.1	0.1	0.0	0.0	0.0	8.7

Notes:

market shares taken from North Somerset household telephone survey. Turnover levels calculated by applying market shares to available expenditure per zone.

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TABLE 8C: MARKET SHARE & TURNOVER OF DIY GOODS FACILITIES 2021

CENTRE	MARKET SHARE, BY ZONE (%)													TURNOVER, BY ZONE (£m)												TURNOVER
	1	2	3	4	5	6	7	8	9	10	11	12		1	2	3	4	5	6	7	8	9	10	11	12	(£m)
WSM	0%	3%	11%	16%	96%	97%	92%	66%	60%	86%	36%	49%		0.0	0.5	1.3	2.0	18.8	18.5	11.5	4.8	5.3	3.1	5.5	2.6	73.9
NAILSEA	0%	0%	7%	0%	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	0.0	0.0	0.0	0.8
CLEVEDON	2%	6%	22%	72%	0%	0%	0%	18%	0%	0%	0%	1%		0.1	0.8	2.5	8.6	0.0	0.0	0.0	1.3	0.0	0.0	0.0	0.1	13.4
PORTISHEAD	27%	57%	8%	1%	0%	0%	0%	1%	1%	0%	0%	0%		1.5	7.9	1.0	0.1	0.0	0.0	0.0	0.1	0.1	0.0	0.0	0.0	10.7

Notes:

market shares taken from North Somerset household telephone survey. Turnover levels calculated by applying market shares to available expenditure per zone.

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TABLE 8D: MARKET SHARE & TURNOVER OF DIY GOODS FACILITIES 2026

CENTRE	MARKET SHARE, BY ZONE (%)												TURNOVER, BY ZONE (£m)												TURNOVER
	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	(£m)
WSM	0%	3%	11%	16%	96%	97%	92%	66%	60%	86%	36%	49%	0.0	0.6	1.6	2.3	22.6	22.2	16.1	5.8	6.3	3.9	6.8	3.2	91.3
													0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
NAILSEA	0%	0%	7%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0.0	0.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0
													0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
CLEVEDON	2%	6%	22%	72%	0%	0%	0%	18%	0%	0%	0%	1%	0.1	1.0	3.0	10.3	0.0	0.0	0.0	1.6	0.0	0.0	0.0	0.1	16.1
													0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
PORTISHEAD	27%	57%	8%	1%	0%	0%	0%	1%	1%	0%	0%	0%	1.8	9.5	1.1	0.1	0.0	0.0	0.0	0.1	0.1	0.0	0.0	0.0	12.8

Notes:

market shares taken from North Somerset household telephone survey. Turnover levels calculated by applying market shares to available expenditure per zone.

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TABLE 9A: MARKET SHARE & TURNOVER OF DOMESTIC APPLIANCE GOODS FACILITIES 2010

CENTRE	MARKET SHARE, BY ZONE (%)												TURNOVER, BY ZONE (£m)												TURNOVER
	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	(£m)
WSM	3%	2%	16%	35%	88%	88%	91%	77%	51%	60%	34%	31%	0.0	0.1	0.5	1.1	4.3	4.4	1.9	1.4	1.2	0.5	1.3	0.4	17.2
NAILSEA	0%	1%	5%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2
CLEVEDON	0%	0%	1%	14%	0%	0%	0%	0%	0%	2%	0%	3%	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5
PORTISHEAD	6%	13%	1%	2%	0%	1%	0%	0%	0%	0%	0%	0%	0.1	0.4	0.0	0.1	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.7

Notes:

market shares taken from North Somerset household telephone survey. Turnover levels calculated by applying market shares to available expenditure per zone.

NORTH SOMERSET COUNCIL
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TABLE 9B: MARKET SHARE & TURNOVER OF DOMESTIC APPLIANCE GOODS FACILITIES 2015

CENTRE	MARKET SHARE, BY ZONE (%)													TURNOVER, BY ZONE (£m)												TURNOVER
	1	2	3	4	5	6	7	8	9	10	11	12		1	2	3	4	5	6	7	8	9	10	11	12	(£m)
WSM	3%	2%	16%	35%	88%	88%	91%	77%	51%	60%	34%	31%		0.1	0.1	0.5	1.3	5.1	5.0	2.7	1.7	1.3	0.6	1.5	0.5	20.5
NAILSEA	0%	1%	5%	0%	0%	0%	0%	0%	0%	0%	0%	0%		0.0	0.1	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2
CLEVEDON	0%	0%	1%	14%	0%	0%	0%	0%	0%	2%	0%	3%		0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6
PORTISHEAD	6%	13%	1%	2%	0%	1%	0%	0%	0%	0%	0%	0%		0.1	0.6	0.0	0.1	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.8

Notes:

market shares taken from North Somerset household telephone survey. Turnover levels calculated by applying market shares to available expenditure per zone.

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TABLE 9C: MARKET SHARE & TURNOVER OF DOMESTIC APPLIANCE GOODS FACILITIES 2021

CENTRE	MARKET SHARE, BY ZONE (%)													TURNOVER, BY ZONE (£m)												TURNOVER
	1	2	3	4	5	6	7	8	9	10	11	12		1	2	3	4	5	6	7	8	9	10	11	12	(£m)
WSM	3%	2%	16%	35%	88%	88%	91%	77%	51%	60%	34%	31%		0.1	0.1	0.7	1.5	6.3	6.2	4.2	2.1	1.7	0.8	1.9	0.6	26.0
NAILSEA	0%	1%	5%	0%	0%	0%	0%	0%	0%	0%	0%	0%		0.0	0.1	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3
CLEVEDON	0%	0%	1%	14%	0%	0%	0%	0%	0%	2%	0%	3%		0.0	0.0	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.7
PORTISHEAD	6%	13%	1%	2%	0%	1%	0%	0%	0%	0%	0%	0%		0.1	0.7	0.0	0.1	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	1.0

Notes:

market shares taken from North Somerset household telephone survey. Turnover levels calculated by applying market shares to available expenditure per zone.

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TABLE 9D: MARKET SHARE & TURNOVER OF DOMESTIC APPLIANCE GOODS FACILITIES 2026

CENTRE	MARKET SHARE, BY ZONE (%)													TURNOVER, BY ZONE (£m)												TURNOVER (£m)
	1	2	3	4	5	6	7	8	9	10	11	12		1	2	3	4	5	6	7	8	9	10	11	12	
WSM	3%	2%	16%	35%	88%	88%	91%	77%	51%	60%	34%	31%		0.1	0.1	0.8	1.9	7.6	7.4	5.9	2.5	2.0	1.0	2.3	0.7	32.2
NAILSEA	0%	1%	5%	0%	0%	0%	0%	0%	0%	0%	0%	0%		0.0	0.1	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3
CLEVEDON	0%	0%	1%	14%	0%	0%	0%	0%	0%	2%	0%	3%		0.0	0.0	0.1	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.9
PORTISHEAD	6%	13%	1%	2%	0%	1%	0%	0%	0%	0%	0%	0%		0.2	0.8	0.1	0.1	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	1.2

Notes:

market shares taken from North Somerset household telephone survey. Turnover levels calculated by applying market shares to available expenditure per zone.

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NORTH SOMERSET RETAIL STUDY UPDATE 2010

TABLE 10A: MARKET SHARE & TURNOVER OF TV, HI-FI, RADIO, PHOTOGRAPHIC AND COMPUTER GOODS FACILITIES 2010

CENTRE	MARKET SHARE, BY ZONE (%)												TURNOVER, BY ZONE (£m)												TURNOVER
	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	(£m)
WSM	2%	4%	6%	25%	86%	89%	83%	65%	46%	61%	43%	25%	0.1	0.4	0.6	2.6	14.1	14.9	5.7	4.1	3.6	1.8	5.6	1.1	54.6
NAILSEA	0%	0%	13%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0.0	0.0	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.3
CLEVEDON	0%	0%	0%	3%	0%	0%	0%	0%	0%	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	0.0	0.3
PORTISHEAD	23%	35%	3%	16%	0%	0%	0%	0%	0%	0%	0%	0%	1.1	3.9	0.3	1.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.0

Notes:

market shares taken from North Somerset household telephone survey. Turnover levels calculated by applying market shares to available expenditure per zone.

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NORTH SOMERSET RETAIL STUDY UPDATE 2010

TABLE 10B: MARKET SHARE & TURNOVER OF TV, HI-FI, RADIO, PHOTOGRAPHIC AND COMPUTER GOODS FACILITIES 2015

CENTRE	MARKET SHARE, BY ZONE (%)												TURNOVER, BY ZONE (£m)												TURNOVER
	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	(£m)
WSM	2%	4%	6%	25%	86%	89%	83%	65%	46%	61%	43%	25%	0.1	0.5	0.7	3.0	16.8	17.1	8.3	4.7	4.1	2.1	6.5	1.3	65.1
NAILSEA	0%	0%	13%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0.0	0.0	1.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5
CLEVEDON	0%	0%	0%	3%	0%	0%	0%	0%	0%	0%	0%	0%	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4
PORTISHEAD	23%	35%	3%	16%	0%	0%	0%	0%	0%	0%	0%	0%	1.3	4.9	0.3	1.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	8.5

Notes:

market shares taken from North Somerset household telephone survey. Turnover levels calculated by applying market shares to available expenditure per zone.

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TABLE 10C: MARKET SHARE & TURNOVER OF TV, HI-FI, RADIO, PHOTOGRAPHIC AND COMPUTER GOODS FACILITIES 2021

CENTRE	MARKET SHARE, BY ZONE (%)												TURNOVER, BY ZONE (£m)												TURNOVER
	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	(£m)
WSM	2%	4%	6%	25%	86%	89%	83%	65%	46%	61%	43%	25%	0.1	0.6	0.9	3.7	20.6	21.0	12.7	5.8	5.0	2.7	8.1	1.6	82.7
NAILSEA	0%	0%	13%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0.0	0.0	1.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.9
CLEVEDON	0%	0%	0%	3%	0%	0%	0%	0%	0%	0%	0%	0%	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5
PORTISHEAD	23%	35%	3%	16%	0%	0%	0%	0%	0%	0%	0%	0%	1.6	6.0	0.4	2.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	10.4

Notes:

market shares taken from North Somerset household telephone survey. Turnover levels calculated by applying market shares to available expenditure per zone.

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TABLE 10D: MARKET SHARE & TURNOVER OF TV, HI-FI, RADIO, PHOTOGRAPHIC AND COMPUTER GOODS FACILITIES 2026

CENTRE	MARKET SHARE, BY ZONE (%)												TURNOVER, BY ZONE (£m)												TURNOVER
	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	(£m)
WSM	2%	4%	6%	25%	86%	89%	83%	65%	46%	61%	43%	25%	0.1	0.7	1.0	4.4	24.6	25.2	17.9	6.9	6.0	3.4	9.9	1.9	102.2
NAILSEA	0%	0%	13%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0.0	0.0	2.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.2
CLEVEDON	0%	0%	0%	3%	0%	0%	0%	0%	0%	0%	0%	0%	0.0	0.0	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6
PORTISHEAD	23%	35%	3%	16%	0%	0%	0%	0%	0%	0%	0%	0%	1.9	7.2	0.5	2.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	12.5

Notes:

market shares taken from North Somerset household telephone survey. Turnover levels calculated by applying market shares to available expenditure per zone.

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TABLE 11A: MARKET SHARE & TURNOVER OF PERSONAL AND LUXURY GOODS FACILITIES 2010

CENTRE	MARKET SHARE, BY ZONE (%)												TURNOVER, BY ZONE (£m)												TURNOVER
	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	(£m)
WSM	2%	9%	3%	10%	76%	81%	79%	51%	36%	48%	25%	26%	0.1	1.2	0.3	1.4	15.9	17.2	6.9	4.1	3.5	1.8	4.1	1.4	57.9
NAILSEA	5%	0%	43%	1%	0%	0%	0%	0%	4%	0%	0%	0%	0.3	0.0	5.5	0.2	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	6.3
CLEVEDON	0%	3%	0%	44%	0%	1%	0%	4%	0%	0%	0%	0%	0.0	0.4	0.0	5.9	0.0	0.3	0.0	0.3	0.0	0.0	0.0	0.0	6.8
PORTISHEAD	12%	23%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0.8	3.2	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.1

Notes:

market shares taken from North Somerset household telephone survey. Turnover levels calculated by applying market shares to available expenditure per zone.

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TABLE 11B: MARKET SHARE & TURNOVER OF PERSONAL AND LUXURY GOODS FACILITIES 2015

CENTRE	MARKET SHARE, BY ZONE (%)													TURNOVER, BY ZONE (£m)												TURNOVER
	1	2	3	4	5	6	7	8	9	10	11	12		1	2	3	4	5	6	7	8	9	10	11	12	(£m)
WSM	2%	9%	3%	10%	76%	81%	79%	51%	36%	48%	25%	26%		0.1	1.5	0.4	1.6	19.0	19.7	10.0	4.7	4.0	2.1	4.7	1.7	69.5
NAILSEA	5%	0%	43%	1%	0%	0%	0%	0%	4%	0%	0%	0%		0.4	0.0	6.2	0.2	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	7.2
CLEVEDON	0%	3%	0%	44%	0%	1%	0%	4%	0%	0%	0%	0%		0.0	0.5	0.0	6.7	0.0	0.3	0.0	0.3	0.0	0.0	0.0	0.0	7.8
PORTISHEAD	12%	23%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%		0.9	4.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.1

Notes:

market shares taken from North Somerset household telephone survey. Turnover levels calculated by applying market shares to available expenditure per zone.

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TABLE 11C: MARKET SHARE & TURNOVER OF PERSONAL AND LUXURY GOODS FACILITIES 2021

CENTRE	MARKET SHARE, BY ZONE (%)													TURNOVER, BY ZONE (£m)												TURNOVER
	1	2	3	4	5	6	7	8	9	10	11	12		1	2	3	4	5	6	7	8	9	10	11	12	(£m)
WSM	2%	9%	3%	10%	76%	81%	79%	51%	36%	48%	25%	26%		0.2	1.9	0.5	1.9	23.3	24.2	15.4	5.8	4.9	2.7	5.9	2.1	88.6
NAILSEA	5%	0%	43%	1%	0%	0%	0%	0%	4%	0%	0%	0%		0.5	0.0	9.3	0.2	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	10.5
CLEVEDON	0%	3%	0%	44%	0%	1%	0%	4%	0%	0%	0%	0%		0.0	0.6	0.0	8.2	0.0	0.4	0.0	0.4	0.0	0.0	0.0	0.0	9.6
PORTISHEAD	12%	23%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%		1.1	5.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.2

Notes:

market shares taken from North Somerset household telephone survey. Turnover levels calculated by applying market shares to available expenditure per zone.

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TABLE 11D: MARKET SHARE & TURNOVER OF PERSONAL AND LUXURY GOODS FACILITIES 2026

CENTRE	MARKET SHARE, BY ZONE (%)												TURNOVER, BY ZONE (£m)												TURNOVER
	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11	12	(£m)
WSM	2%	9%	3%	10%	76%	81%	79%	51%	36%	48%	25%	26%	0.2	2.2	0.6	2.3	27.9	29.0	21.6	6.9	5.9	3.4	7.3	2.6	109.8
Weston-super-Mare Town Centre	2%	7%	1%	7%	54%	74%	62%	39%	23%	38%	18%	19%	0.2	1.9	0.3	1.5	19.9	26.4	17.0	5.2	3.8	2.6	5.1	1.8	85.9
Weston Retail Park, Winterstoke Roa	%	1%	1%	1%	5%	1%	8%	5%	2%	7%	3%	6%	0.0	0.4	0.3	0.3	1.8	0.4	2.1	0.7	0.3	0.5	0.9	0.6	8.2
Gallagher Retail Park, WESTON-SU	%	%	%	%	1%	%	%	%	%	%	%	%	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4
Flower Down Retail Park, WESTON-	%	%	%	%	%	%	%	%	2%	%	%	%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.3
Boots, High Street, Weston-super-Ma	%	%	%	1%	2%	1%	1%	2%	2%	2%	%	%	0.0	0.0	0.0	0.3	0.7	0.4	0.4	0.2	0.3	0.1	0.0	0.0	2.4
Worle	%	%	%	%	6%	%	%	2%	%	%	%	%	0.0	0.0	0.0	0.0	2.2	0.0	0.0	0.2	0.0	0.0	0.0	0.0	2.4
Asda, Phillips Road, Weston-super-M	%	%	%	%	%	2%	3%	2%	%	%	1%	%	0.0	0.0	0.0	0.0	0.0	0.9	0.7	0.2	0.0	0.0	0.4	0.0	2.2
Boots, Castle District Centre, Westor	%	%	%	%	2%	%	%	%	4%	%	1%	%	0.0	0.0	0.0	0.0	0.7	0.0	0.0	0.0	0.6	0.0	0.4	0.0	1.7
Morrisons, Summer Lane, Weston-su	%	%	%	1%	1%	%	%	2%	%	%	1%	%	0.0	0.0	0.0	0.3	0.4	0.0	0.0	0.2	0.0	0.0	0.4	0.0	1.3
Boots, Summer Lane, Worle	%	%	%	%	1%	%	3%	%	%	2%	%	%	0.0	0.0	0.0	0.0	0.4	0.0	0.7	0.0	0.0	0.1	0.0	0.0	1.2
TK Maxx, North Worle Shopping Cer	%	%	%	%	2%	%	%	%	2%	%	%	%	0.0	0.0	0.0	0.0	0.7	0.0	0.0	0.0	0.3	0.0	0.0	0.0	1.0
WHSmiths, High Street, Weston-sup	%	%	%	%	%	1%	%	%	%	%	%	2%	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.2	0.6
Argos, Queensway, Worle	%	%	%	%	1%	%	1%	%	%	%	%	%	0.0	0.0	0.0	0.0	0.4	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.7
Sainsbury's, North Worle District Cer	%	%	%	%	1%	%	%	%	%	%	%	%	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4
Next, High Street, Weston-super-Ma	%	%	%	%	%	1%	%	%	%	%	%	%	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.4
Marks & Spencer, High Street, West	%	%	%	%	%	%	%	%	2%	%	%	%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.3
Argos, High Street, Weston-super-M	%	%	%	%	%	%	1%	%	%	%	%	%	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.4
NAILSEA	5%	0%	43%	1%	0%	0%	0%	0%	4%	0%	0%	0%	0.5	0.0	9.1	0.3	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.0	10.5
CLEVEDON	0%	3%	0%	44%	0%	1%	0%	4%	0%	0%	0%	0%	0.0	0.7	0.0	9.9	0.0	0.4	0.0	0.5	0.0	0.0	0.0	0.0	11.5
PORTISHEAD	12%	23%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1.3	5.9	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.5

Notes:

market shares taken from North Somerset household telephone survey. Turnover levels calculated by applying market shares to available expenditure per zone.

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TABLE 12A: MARKET SHARE & TURNOVER OF RECREATIONAL GOODS FACILITIES 2010

CENTRE	MARKET SHARE, BY ZONE (%)													TURNOVER, BY ZONE (£m)												TURNOVER
	1	2	3	4	5	6	7	8	9	10	11	12		1	2	3	4	5	6	7	8	9	10	11	12	(£m)
WSM	0%	5%	7%	18%	70%	77%	82%	59%	37%	34%	42%	45%		0.0	0.7	0.9	2.1	13.3	15.0	6.5	4.3	3.3	1.2	6.3	2.3	55.7
NAILSEA	0%	0%	17%	0%	0%	0%	0%	0%	0%	0%	0%	0%		0.0	0.0	1.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.9
CLEVEDON	0%	7%	2%	28%	0%	0%	0%	2%	2%	0%	0%	0%		0.0	0.9	0.2	3.4	0.0	0.0	0.0	0.2	0.2	0.0	0.0	0.0	4.9
PORTISHEAD	17%	28%	0%	3%	0%	0%	0%	0%	0%	0%	0%	0%		1.0	3.6	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.9

Notes:

market shares taken from North Somerset household telephone survey. Turnover levels calculated by applying market shares to available expenditure per zone.

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TABLE 12B: MARKET SHARE & TURNOVER OF RECREATIONAL GOODS FACILITIES 2015

CENTRE	MARKET SHARE, BY ZONE (%)													TURNOVER, BY ZONE (£m)												TURNOVER
	1	2	3	4	5	6	7	8	9	10	11	12		1	2	3	4	5	6	7	8	9	10	11	12	(£m)
WSM	0%	5%	7%	18%	70%	77%	82%	59%	37%	34%	42%	45%		0.0	0.8	1.0	2.4	15.8	17.2	9.4	5.0	3.7	1.4	7.3	2.6	66.7
NAILSEA	0%	0%	17%	0%	0%	0%	0%	0%	0%	0%	0%	0%		0.0	0.0	2.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.2
CLEVEDON	0%	7%	2%	28%	0%	0%	0%	2%	2%	0%	0%	0%		0.0	1.1	0.2	3.9	0.0	0.0	0.0	0.2	0.2	0.0	0.0	0.0	5.7
PORTISHEAD	17%	28%	0%	3%	0%	0%	0%	0%	0%	0%	0%	0%		1.1	4.5	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.1

Notes:

market shares taken from North Somerset household telephone survey. Turnover levels calculated by applying market shares to available expenditure per zone.

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TABLE 12C: MARKET SHARE & TURNOVER OF RECREATIONAL GOODS FACILITIES 2021

CENTRE	MARKET SHARE, BY ZONE (%)													TURNOVER, BY ZONE (£m)												TURNOVER
	1	2	3	4	5	6	7	8	9	10	11	12		1	2	3	4	5	6	7	8	9	10	11	12	(£m)
WSM	0%	5%	7%	18%	70%	77%	82%	59%	37%	34%	42%	45%		0.0	1.0	1.2	3.0	19.4	21.1	14.5	6.1	4.6	1.8	9.1	3.3	85.0
NAILSEA	0%	0%	17%	0%	0%	0%	0%	0%	0%	0%	0%	0%		0.0	0.0	2.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.7
CLEVEDON	0%	7%	2%	28%	0%	0%	0%	2%	2%	0%	0%	0%		0.0	1.4	0.3	4.7	0.0	0.0	0.0	0.2	0.3	0.0	0.0	0.0	7.0
PORTISHEAD	17%	28%	0%	3%	0%	0%	0%	0%	0%	0%	0%	0%		1.4	5.6	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.4

Notes:

market shares taken from North Somerset household telephone survey. Turnover levels calculated by applying market shares to available expenditure per zone.

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TABLE 12D: MARKET SHARE & TURNOVER OF RECREATIONAL GOODS FACILITIES 2026

CENTRE	MARKET SHARE, BY ZONE (%)													TURNOVER, BY ZONE (£m)												TURNOVER
	1	2	3	4	5	6	7	8	9	10	11	12		1	2	3	4	5	6	7	8	9	10	11	12	(£m)
WSM	0%	5%	7%	18%	70%	77%	82%	59%	37%	34%	42%	45%		0.0	1.2	1.4	3.6	23.2	25.3	20.4	7.3	5.5	2.2	11.2	4.1	105.4
NAILSEA	0%	0%	17%	0%	0%	0%	0%	0%	0%	0%	0%	0%		0.0	0.0	3.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.2
CLEVEDON	0%	7%	2%	28%	0%	0%	0%	2%	2%	0%	0%	0%		0.0	1.7	0.4	5.7	0.0	0.0	0.0	0.3	0.4	0.0	0.0	0.0	8.3
PORTISHEAD	17%	28%	0%	3%	0%	0%	0%	0%	0%	0%	0%	0%		1.6	6.7	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	8.9

Notes:

market shares taken from North Somerset household telephone survey. Turnover levels calculated by applying market shares to available expenditure per zone.

TABLE 13: TOTAL COMPARISON GOODS TURNOVER OF NORTH SOMERSET SETTLEMENTS, 2010

CENTRE	TURNOVER, BY ZONE (£m)												TURNOVER (£m)
	1	2	3	4	5	6	7	8	9	10	11	12	
WSM	0.4	4.8	5.9	16.3	84.7	92.3	36.8	24.0	21.2	10.4	30.0	10.8	337.5
NAILSEA	0.3	0.5	11.7	0.5	0.0	0.0	0.0	0.1	0.3	0.0	0.0	0.0	13.5
CLEVEDON	0.2	2.3	2.4	17.8	0.0	0.3	0.0	1.7	0.2	0.0	0.0	0.2	24.9
PORTISHEAD	4.3	17.5	1.4	2.2	0.0	0.1	0.0	0.1	0.1	0.0	0.0	0.0	25.7

Notes:

Total comparison goods turnover (by zone) for each centre taken from Tables 6-12

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TABLE 14: EXISTING & COMMITMENTS CONVENIENCE FLOORSPACE AND COMMITTED COMPARISON GOODS FLOORSPACE IN THE MAIN SETTLEMENTS IN NORTH SOMERSET

STORE / LOCATION	FLOORSPACE (sq m net) Total Net Sales	Convenience Goods Sales	CONV GOODS SALES DENSITY (£/sq m)	TOTAL CONVENIENCE GOODS TURNOVER (£m)
WESTON-SUPER-MARE				
Town Centre				
Tesco	4522	2849	13089	37.3
Marks & Spencer		531	11367	6.0
Other	1605	1445	4000	5.8
Sub-Total				49.1
Out-of-Centre				
Lidl, Summer Lane	800	640	2961	1.9
Lidl, Winterstoke Road	1020	800	2961	2.4
Waitrose, Phillips Road	2000	1700	11571	19.7
Aldi, Flowerdown RP	1200	960	4011	3.9
Phillips Road				
ASDA, Phillips Road	3983	2230	13154	29.3
Queensway, Worle				
Sainsburys, Worle	4228	3256	9213	30.0
Locking Castle				
Morrisons, Worle	2926	2253	11003	24.8
Worle High Street				
Co-op, Worle	506	430	5823	2.5
Other, Worle DC	299	269	4000	1.1
Whitecross Road LC				
Tesco Express	137	130	7500	1.0
Co-op	195	176	5823	1.0
Other	286	257	4000	1.0
Milton LC	137	130	4000	0.5
Locking Road LC				
Farmfoods, Locking Road	536	482	4500	2.2
Other	65	60	4000	0.2
Milton Hill LC	176	167	4000	0.7
Castlemead LC				
Tesco Express	140	126	7500	0.9
Other	60	60	4000	0.2
Other				8.7
TOTAL - WSM				**181.1**
CLEVEDON				
Morrisons, Kenn Road	1728	1382	11003	15.2
Tesco, Kenn Road	2378	1665	13089	21.8
Lidl, Great Weston Road	997	798	2961	2.4
Other	700	630	4000	2.5
PORTISHEAD				
Co-op, High Street	418	376	5823	2.2
Iceland, The Precinct	406	386	5694	2.2
Co-op, Wyndham Way	1445	1156	5823	6.7
Costcutter, Avon Way	516	464	5000	2.3
Waitrose, Harbour Road	2508	2207	11571	25.5
Other	833	750	4000	3.0
NAILSEA				
Waitrose, High Street	2120	1908	11571	22.1
Tesco, Stockway North	2511	1757.7	13089	23.0
Iceland, Crown Glass Place	620	589	5694	3.4
Other	459	413	4000	1.7
COMMITMENTS - CONVENIENCE	**FLOORSPACE (sq m net) Total Net Sales**	**Convenience Goods Sales**	**CONV GOODS SALES DENSITY (£/sq m)**	**TOTAL CONVENIENCE GOODS TURNOVER (£m)**
Vacant former Kwik Save, Clevedon	885	885	10000	8.9
Sainsburys, Portishead (convenience)	2787	2230	9231	20.6
Lidl, Portishead (convenience)	1022	869	2961	2.6
COMMITMENTS - COMPARISON	**FLOORSPACE (sq m net) Total Net Sales**	**Comparison Goods Sales**	**COMP GOODS SALES DENSITY (£/sq m)**	**TOTAL COMPARISON GOODS TURNOVER (£m)**
Sainsburys, Portishead (comparison)	2787	557	7483	4.2
Lidl, Portishead (comparison)	1022	153	2961	0.5
Arthur Llewellyn Jenkins				

Notes:

floorspace data from North Somerset Council, GVA, planning applications and IGD data

sales densities for large stores derived from Mintel and Verdict research and sales densities for other town centre floorspace based on existing trading levels

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TABLE 15a: CONVENIENCE GOODS CAPACITY 2010-2026

WSM

	2010	2015	2021	2026
Available Convenience Goods Expenditure (£m)	460.9	493.1	526.4	556.1
Turnover from Study Area (£m)	196.3	213.6	233.1	250.3
Market Share (%)	42.6	43.3	44.3	45.0
Expenditure Inflow (£m)	14.7	16.0	17.5	18.8
Total Turnover Potential (£m)	211.1	229.6	250.6	269.1
Benchmark Turnover of Existing and Committed Facilities (£m)	181.1	182.0	185.3	188.1
Residual Expenditure (£m)	**30.0**	**47.6**	**65.2**	**81.0**
Indicative sales density for new convenience goods floorspace (£/sq m)	10000	10050	10273	10533
Indicative retail floorspace capacity (£m)	**2996**	**4739**	**6351**	**7689**

Notes:

Available convenience goods expenditure taken from Table 3.
Turnover from study area taken from Tables 5a - 5h.
Market share is the turnover from study area expressed as a percentage of available expenditure.
Expenditure inflow based on data in Value of Tourism 2008 report and GVA assumptions
Total turnover potential is the turnover from study area plus the expenditure inflow.
Benchmark turnover from existing facilities taken from Table 13, assumed to experience an increase in floorspace efficiency of 0.1% to 2016 and 0.5% thereafter
Residual expenditure is the total turnover potential minus the benchmark turnover of existing facilities.

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TABLE 15b: CONVENIENCE GOODS CAPACITY 2010-2026

CLEVEDON

	2010	2015	2021	2026
Available Convenience Goods Expenditure (£m)	460.9	493.1	526.4	556.1
Turnover from Study Area (£m)	63.0	58.2	60.6	62.5
Market Share (%)	13.7	11.8	11.5	11.2
Expenditure Inflow (£m)	2.5	2.3	2.4	2.5
Total Turnover Potential (£m)	65.5	60.5	63.0	65.0
Benchmark Turnover of Existing and Committed Facilities (£m)	50.7	51.0	51.9	52.7
Residual Expenditure (£m)	**14.8**	**9.5**	**11.1**	**12.3**
Indicative sales density for new convenience goods floorspace (£/sq m)	10000	10050	10273	10533
Indicative retail floorspace capacity (£m)	**1480**	**949**	**1082**	**1168**

Notes:

Available convenience goods expenditure taken from Table 3.
Turnover from study area taken from Tables 5a - 5h.
Market share is the turnover from study area expressed as a percentage of available expenditure.
Expenditure inflow based on data in Value of Tourism 2008 report and GVA assumptions
Total turnover potential is the turnover from study area plus the expenditure inflow.
Benchmark turnover from existing facilities taken from Table 13, assumed to experience an increase in floorspace efficiency of 0.1% to 2016 and 0.5% thereafter
Residual expenditure is the total turnover potential minus the benchmark turnover of existing facilities.

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TABLE 15c: CONVENIENCE GOODS CAPACITY 2010-2026

PORTISHEAD

	2010	2015	2021	2026
Available Convenience Goods Expenditure (£m)	460.9	493.1	526.4	556.1
Turnover from Study Area (£m)	37.1	55.5	58.0	60.3
Market Share (%)	8.0	11.3	11.0	10.8
Expenditure Inflow (£m)	2.6	2.9	3.1	3.2
Total Turnover Potential (£m)	39.7	58.4	61.1	63.5
Benchmark Turnover of Existing and Committed Facilities (£m)	65.1	65.5	66.6	67.7
Residual Expenditure (£m)	**-25.5**	**-7.1**	**-5.5**	**-4.2**
Indicative sales density for new convenience goods floorspace (£/sq m)	10000	10050	10273	10533
Indicative retail floorspace capacity (£m)	**-2546**	**-703**	**-540**	**-394**

Notes:

Available convenience goods expenditure taken from Table 3.
Turnover from study area taken from Tables 5a - 5h.
Market share is the turnover from study area expressed as a percentage of available expenditure.
Expenditure inflow based on data in Value of Tourism 2008 report and GVA assumptions
Total turnover potential is the turnover from study area plus the expenditure inflow.
Benchmark turnover from existing facilities taken from Table 13, assumed to experience an increase in floorspace efficiency of 0.1% to 2016 and 0.5% thereafter
Residual expenditure is the total turnover potential minus the benchmark turnover of existing facilities.

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TABLE 15D: CONVENIENCE GOODS CAPACITY 2010-2026

NAILSEA

	2010	2015	2021	2026
Available Convenience Goods Expenditure (£m)	460.9	493.1	526.4	556.1
Turnover from Study Area (£m)	42.4	43.7	45.6	47.2
Market Share (%)	9.2	8.9	8.7	8.5
Expenditure Inflow (£m)	2.5	2.6	2.7	2.8
Total Turnover Potential (£m)	45.0	46.4	48.3	50.1
Benchmark Turnover of Existing and Committed Facilities (£m)	50.1	50.3	51.3	52.0
Residual Expenditure (£m)	**-5.1**	**-4.0**	**-2.9**	**-2.0**
Indicative sales density for new convenience goods floorspace (£/sq m)	10000	10050	10273	10533
Indicative retail floorspace capacity (£m)	**-512**	**-396**	**-283**	**-187**

Notes:

Available convenience goods expenditure taken from Table 3.
Turnover from study area taken from Tables 5a - 5h.
Market share is the turnover from study area expressed as a percentage of available expenditure.
Expenditure inflow based on data in Value of Tourism 2008 report and GVA assumptions
Total turnover potential is the turnover from study area plus the expenditure inflow.
Benchmark turnover from existing facilities taken from Table 13, assumed to experience an increase in floorspace efficiency of 0.1% to 2016 and 0.5% thereafter
Residual expenditure is the total turnover potential minus the benchmark turnover of existing facilities.

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TABLE 16a: COMPARISON GOODS CAPACITY - 2010-2026

WSM

	2010	2015	2021	2026
Available Comparison Goods Expenditure (£m)	750.1	890.0	1116.8	1366.3
Turnover from Study Area (£m)	337.5	402.9	512.4	633.6
Market Share (%)	45.0	45.3	45.9	46.4
Expenditure Inflow (£m)	30.4	36.3	46.1	57.0
Total Turnover Potential (£m)	367.8	439.1	558.5	690.6
Benchmark Turnover of Existing and Committed Facilities (£m)	367.5	386.2	432.8	477.9
Residual Expenditure (£m)	**0.3**	**52.9**	**125.7**	**212.7**
Indicative sales density for new comparison goods floorspace (£/sq m)	5000	5334	5924	6541
Indicative retail floorspace capacity (£m)	**65**	**9915**	**21217**	**32519**

Notes:

Available comparison goods expenditure taken from Table 3.
Turnover from study area taken from Tables 6-12.
Market share is the turnover of stores gained from the study area expressed as a percentage of available expenditure
Expenditure inflow based on data in Value of Tourism 2008 report and GVA assumptions
Total turnover potential is the turnover from study area plus the expenditure inflow.
Benchmark turnover at 2010 of existing and committed facilities takes into account existing turnover of facilities, town centre health issues and turnover of committed floorspace
Benchmark turnover of existing and committed floorspace assumed to benefit from increases in floorspace efficiency of 1.3% to 2016 and then 2% thereafter
Residual expenditure is the total turnover potential minus the benchmark turnover of existing facilities.

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TABLE 16b1: COMPARISON GOODS CAPACITY - 2010-2026

CLEVEDON (Donaldsons benchmark turnover level)

	2010	2015	2021	2026
Available Comparison Goods Expenditure (£m)	750.1	890.0	1116.8	1366.3
Turnover from Study Area (£m)	24.9	28.8	35.4	42.4
Market Share (%)	3.3	3.2	3.2	3.1
Expenditure Inflow (£m)	2.0	2.3	2.8	3.4
Total Turnover Potential (£m)	26.9	31.2	38.2	45.8
Benchmark Turnover of Existing and Committed Facilities (£m)	36.9	38.8	43.5	48.0
Residual Expenditure (£m)	**-10.0**	**-7.6**	**-5.3**	**-2.2**
Indicative sales density for new comparison goods floorspace (£/sq m)	5000	5334	5924	6541
Indicative retail floorspace capacity (£m)	**-1991**	**-1430**	**-890**	**-333**

Notes:

Available comparison goods expenditure taken from Table 3.
Turnover from study area taken from Tables 6-12.
Market share is the turnover of stores gained from the study area expressed as a percentage of available expenditure
Expenditure inflow based on data in Value of Tourism 2008 report and GVA assumptions
Total turnover potential is the turnover from study area plus the expenditure inflow.
Benchmark turnover at 2010 of existing and committed facilities takes into account existing turnover of facilities, town centre health issues and turnover of committed floorspace
Benchmark turnover of existing and committed floorspace assumed to benefit from increases in floorspace efficiency of 1.3% to 2016 and then 2% thereafter
Residual expenditure is the total turnover potential minus the benchmark turnover of existing facilities.

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TABLE 16b2: COMPARISON GOODS CAPACITY - 2010-2026

CLEVEDON (lower 2010 benchmark)

	2010	2015	2021	2026
Available Comparison Goods Expenditure (£m)	750.1	890.0	1116.8	1366.3
Turnover from Study Area (£m)	24.9	28.8	35.4	42.4
Market Share (%)	3.3	3.2	3.2	3.1
Expenditure Inflow (£m)	2.0	2.3	2.8	3.4
Total Turnover Potential (£m)	26.9	31.2	38.2	45.8
Benchmark Turnover of Existing and Committed Facilities (£m)	32.7	34.3	38.5	42.5
Residual Expenditure (£m)	**-5.7**	**-3.2**	**-0.3**	**3.3**
Indicative sales density for new comparison goods floorspace (£/sq m)	5000	5334	5924	6541
Indicative retail floorspace capacity (£m)	**-1146**	**-598**	**-50**	**507**

Notes:

Available comparison goods expenditure taken from Table 3.
Turnover from study area taken from Tables 6-12.
Market share is the turnover of stores gained from the study area expressed as a percentage of available expenditure
Expenditure inflow based on data in Value of Tourism 2008 report and GVA assumptions
Total turnover potential is the turnover from study area plus the expenditure inflow.
Benchmark turnover at 2010 of existing and committed facilities takes into account existing turnover of facilities, town centre health issues and turnover of committed floorspace
Benchmark turnover of existing and committed floorspace assumed to benefit from increases in floorspace efficiency of 1.3% to 2016 and then 2% thereafter
Residual expenditure is the total turnover potential minus the benchmark turnover of existing facilities.

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TABLE 16c: COMPARISON GOODS CAPACITY - 2010-2026

PORTISHEAD

	2010	2015	2021	2026
Available Comparison Goods Expenditure (£m)	750.1	890.0	1116.8	1366.3
Turnover from Study Area (£m)	25.7	37.9	46.7	56.1
Market Share (%)	3.4	4.3	4.2	4.1
Expenditure Inflow (£m)	2.1	3.0	3.7	4.5
Total Turnover Potential (£m)	27.7	41.0	50.4	60.6
Benchmark Turnover of Existing and Committed Facilities (£m)	36.8	38.7	43.4	47.9
Residual Expenditure (£m)	**-9.1**	**2.3**	**7.0**	**12.7**
Indicative sales density for new comparison goods floorspace (£/sq m)	5000	5334	5924	6541
Indicative retail floorspace capacity (£m)	**-1818**	**424**	**1186**	**1940**

Notes:

Available comparison goods expenditure taken from Table 3.
Turnover from study area taken from Tables 6-12.
Market share is the turnover of stores gained from the study area expressed as a percentage of available expenditure
Expenditure inflow based on data in Value of Tourism 2008 report and GVA assumptions
Total turnover potential is the turnover from study area plus the expenditure inflow.
Benchmark turnover at 2010 of existing and committed facilities takes into account existing turnover of facilities, town centre health issues and turnover of committed floorspace
Benchmark turnover of existing and committed floorspace assumed to benefit from increases in floorspace efficiency of 1.3% to 2016 and then 2% thereafter
Residual expenditure is the total turnover potential minus the benchmark turnover of existing facilities.

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TABLE 16d: COMPARISON GOODS CAPACITY - 2010-2026

NAILSEA

	2010	2015	2021	2026
Available Comparison Goods Expenditure (£m)	750.1	890.0	1116.8	1366.3
Turnover from Study Area (£m)	13.5	15.5	20.7	22.8
Market Share (%)	1.8	1.7	1.9	1.7
Expenditure Inflow (£m)	2.0	2.3	3.1	3.4
Total Turnover Potential (£m)	15.6	17.8	23.8	26.2
Benchmark Turnover of Existing and Committed Facilities (£m)	22.6	23.7	26.6	29.3
Residual Expenditure (£m)	**-7.0**	**-5.9**	**-2.8**	**-3.1**
Indicative sales density for new comparison goods floorspace (£/sq m)	5000	5334	5924	6541
Indicative retail floorspace capacity (£m)	**-1395**	**-1099**	**-467**	**-475**

Notes:

Available comparison goods expenditure taken from Table 3.
Turnover from study area taken from Tables 6-12.
Market share is the turnover of stores gained from the study area expressed as a percentage of available expenditure
Expenditure inflow based on data in Value of Tourism 2008 report and GVA assumptions
Total turnover potential is the turnover from study area plus the expenditure inflow.
Benchmark turnover at 2010 of existing and committed facilities takes into account existing turnover of facilities, town centre health issues and turnover of committed floorspace
Benchmark turnover of existing and committed floorspace assumed to benefit from increases in floorspace efficiency of 1.3% to 2016 and then 2% thereafter
Residual expenditure is the total turnover potential minus the benchmark turnover of existing facilities.

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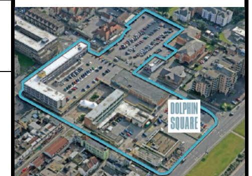
D:

Site Assessment Tables

SITE 1: DOLPHIN SQUARE, WESTON-SUPER-MARE	
ASSESSMENT CRITERIA	**COMMENTS**
A. SITE DESCRIPTION	
Location	Site is situated at the southern end of the High Street, bounded to the north by Oxford Street, Beach Road to the west and Union Street to the east. Carlton Street currently divides the site with Carlton Street Car Park to the south of main shopping centre and Dolphin square car park.
Site area / size	2.62ha
Existing Land Uses	The site includes Dolphin Square with its covered market and car park, a Nightclub, a Restaurant and Takeaway, Carlton Street Car Park, a Public House and the former National Association of Local Government Officers (NALGO) building.
Adjoining land-uses	To the north of the site is predominantly retail with secondary retail uses leading up to the retail core on the High Street and the Sovereign Centre. To the east of the main Dolphin Square car park and retail units are the existing Council offices and a church. To the east of Carlton Street car park is a school. To the west is the beach front and to the west of Carlton Street car park is a combination of residential and commercial uses. To the south of Carlton Street car park is predominantly residential.
B. PLANNING POLICY ISSUES	
Planning Policy Status	The site is allocated as a priority regeneration and development area under Policy E1/A of the North Somerset Replacement Local Plan. Furthermore, western parts of Dolphin Square and Carlton Street Car Park fall within the designated Beach Lawns Conservation Area. The site is also subject to the Dolphin Square Supplementary Planning Document (SPD) which was adopted in May 2008. This provides a planning policy framework for the future redevelopment of the site.
C. ACCESSIBILITY	
Accessibility by private car	Due to the size and complexity of the site there are a number of access points by private car. The site currently accommodates 525 off-street public car parking spaces (382 for public use) and this may need to be retained as part of any redevelopment.
Accessibility by public transport	The site is highly accessible by public transport. It is situated within the town centre and is within walking distance of the prime shopping area. The train station is located approximately 500 metres to the east. Regular bus routes serve the town centre and there are bus stops situated on Oxford Street, Beach Road and Walliscote Road.
D. CONSTRAINTS TO DEVELOPMENT	
Access	There are multiple access points into the site. Comprehensive redevelopment is likely to result in revised points of access into the site. The adopted SPD seeks to provide safe and direct pedestrian and cycle access and to encourage more sustainable forms of transport to the private car.
Parking	Currently the site accommodates 525 off-street car parking spaces with 382 available for public use. The adopted SPD requires that 150 spaces are retained for public use during the redevelopment of the site so as not to adversely affect the economy of the town centre.
Impacts on neighbouring properties / land	There are a number of neighbouring properties due to the size of the site. However, the positioning of the site and the height of surrounding buildings enables an element of flexibility on the scope of achievable development. The adopted SPD envisages proposed building heights complementing those of surrounding streets.
Visual Impact	The majority of existing buildings on site are of low design quality and are not considered to contribute to the urban fabric. However, redevelopment will need to take into account the Beach Lawns Conservation Area and nearby Listed buildings.
Servicing	The site is large enough to incorporate sufficient access for servicing vehicles. The adopted SPD seeks to ensure a robust waste collection scheme.
Difficulties with displacing existing uses	There are a number of land uses on this site, some of which will need to be relocated elsewhere in Weston and some which will be re-accommodated on site.
Environmental impacts	The far western boundary of the site on the seafront is situated within designated flood plain and therefore this will need to be addressed and if necessary, mitigated.
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Land Uses	The site lies within the existing town centre in a highly accessible location and could therefore accommodate a wide range of town centre uses. This includes retail, leisure, commercial and residential.
Development Costs	This would need to take into account demolition costs, relocation of existing uses and retention of parking throughout any redevelopment.
Timescale	Pre-application discussions are underway and an application is due to be submitted in December 2010.
Commercial Attractiveness	The site is situated within the town centre in a prominent location. However, there are uncertainties over the level of retail which could be attracted to the site given the secondary retail uses which divide the site from the existing retail core.
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	This site is a prime candidate to meet the identified need for additional retail floorspace within Weston, particularly comparison goods floorspace.
Trade Draw	New retail provision on this site has the potential to provide a positive impact upon the health and attractiveness of Weston town centre, although improved linkages with the existing core retail area will need to be improved.



CONCLUSIONS

Overall Conclusions:
Dolphin Square has long been recognised as a key redevelopment site in Weston town centre and has already been identified in previous drafts of the Core Strategy and draft AAP. It is currently subject to commercial interest and this should be encouraged and pursued by the Council in order to ascertain whether there is a commercially viable and deliverable retail-led mixed use scheme. With regards to the mix and quantum of uses, this is dependent on the ability of the site to successfully link in with the prime shopping area on the High Street.

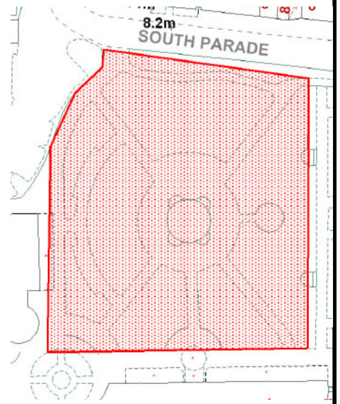
SITE 2: VICTORIA SQUARE, WESTON-SUPER-MARE

ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	The site is located in between the seafront (Royal Parade) on its western boundary and the Sovereign Shopping Centre to the east. The site is bounded to the north by St Margaret's Terrace with the Winter Gardens Pavilion beyond. To the south are landscaped areas dividing Beach Road from Marine Parade.
Site area / size	0.74ha
Existing land-uses	The site is currently occupied by 17 different landowners. The uses include retail (Use Class A1), a bar (Use Class A4), Hotel & B&B (Use Class C1), Residential (Use Class C3) and an outdoor Crazy Golf.
Adjoining land-uses	Land uses to the north include the Winter Gardens Pavilion which is predominantly used for conference facilities, retail to the east (Sovereign Shopping centre and High Street beyond), and landscaping and wider commercial / residential uses to the south.
B. PLANNING POLICY ISSUES	
Planning Policy Status	The Replacement Local Plan identifies the site as being within the defined town centre. It also falls within the Beach Lawns Conservation Area. The site is also identified within the Town Centre AAP (Preferred Options Stage) as a 'Priority Site within the Retail Core'. Draft Policy RC2 seeks to redevelop the site for a mix of uses including: • Approx. 6,800 sqm of comparison retail uses; • A high quality hotel; • Residential uses above ground floor (approx. 157 units); • Café's and restaurants; • Office uses above ground floor and; • A clear and direct pedestrian route through the site fro the Royal Parade to the Sovereign Shopping Centre.
C. ACCESSIBILITY	
Accessibility by private car	The site is accessible due to its central location and access points from the Royal Parade.
Accessibility by public transport	The site is within close walking distance of primary shopping frontages both within the Sovereign Centre and the High Street. The train station is sited approximately 800 metres to the south east and there are bus stops located on Royal Parade, immediately north of the site.
D. CONSTRAINTS TO DEVELOPMENT	
Access	The site benefits from a good level of access and the emerging TCAAP seeks to enhance pedestrian and cycle links with the town centre.
Parking	There is on-street parking located around Victoria Square which may need to be accommodated as part of any redevelopment.
Impacts on neighbouring properties / land	The only properties which would be directly affected are the Sovereign Shopping Centre to the east and the Winter Gardens Pavilion to the north. Residential amenity is unlikely to be impacted by any proposed development.
Visual Impact	The site is wholly located within the Beach Lawns Conservation Area and currently accommodates a number of attractive three to four-storey Georgian properties which may be worthy of retention.
Servicing	No identified constraints.
Difficulties with displacing existing uses	The multiple ownerships on the site suggest that comprehensive development will be challenging. The use of CPO powers will delay the timetable for redevelopment and incur additional cost.
Environmental impacts	Potential flood mitigation necessary.
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Land Uses	The emerging TCAAP promotes the site for a mix of uses included retail, leisure, residential and commercial. However, the constraints on the site may limit the scope for all of these uses to come forward as part of a comprehensive development.
Development Costs	This is dependent on the extent of CPO powers required to enable development. Demolition costs will be incurred and potential flood mitigation measures.
Timescale	Medium to long-term given the known constraints.
Commercial Attractiveness	The location of the site enhances its commercial attractiveness, situated between the seafront and the retail core. There is potential for significant footfall through the site. However, the complicated land ownership will undermine its overall attractiveness to investors.
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	In principle, site can accommodate a significant amount of retail and other development although ownership and viability constraints may hinder delivery.
Trade Draw	If retail uses can be provided on this site, it can have a positive effect on the town centre.

CONCLUSIONS

Overall Conclusions:
Victoria Square has been identified as a key redevelopment site in Weston town centre and redevelopment of this area has the potential to improve linkages between the core retail area and the seafront. However, viability and site ownership issues will constraint delivery to the extent that this area cannot form part a primary candidate for meeting the short term need for comparison goods floorspace in Weston town centre.

SITE 3: TOWN SQUARE, WESTON-SUPER-MARE



ASSESSMENT CRITERIA	COMMENTS
A. SITE DESCRIPTION	
Location	The site is located to the west of the High Street and north of the Sovereign Shopping Centre. The site is bound to the north by South Parade with retail and commercial uses beyond. To the west is the Winter Gardens Pavilion.
Site area / size	0.56ha
Existing land-uses	The site is currently landscaped for public use. There are no existing buildings.
Adjoining land-uses	Retail uses bound the site to the east and south, with a more commercial focus to the north. Leisure and conference facilities are sited to the west.
B. PLANNING POLICY ISSUES	
Planning Policy Status	The site falls just outside of the town centre, as defined within the Replacement Local Plan. It is located within the Beach Lawns Conservation Area. The site is not identified for development within the Preferred options version of the TCAAP.
C. ACCESSIBILITY	
Accessibility by private car	Currently the site is only open to pedestrian access. However, the site is located in a position where it can benefit from access from the High Street, South Parade or Royal Parade.
Accessibility by public transport	This is a highly accessible location within close proximity to the retail core. The train station is located approximately 830m to the south east of the site. Furthermore, there are public bus stops located on Waterloo Street and Royal Parade.
D. CONSTRAINTS TO DEVELOPMENT	
Access	The site is highly accessible by sustainable means. Should vehicles be required to enter the site, a new access will be required.
Parking	There is no existing parking although the site is large enough to accommodate an element of parking as part of any redevelopment, or rely upon existing provision within the Sovereign Shopping Centre.
Impacts on neighbouring properties / land	There are no residential properties adjacent to the site. It is anticipated that the site is large enough to accommodate development without significant impact on neighbouring properties.
Visual Impact	The site does provide landscaped open space for the residents and visitors to the town centre. Development of this site may impact upon the attractiveness of the town centre.
Servicing	No existing servicing.
Difficulties with displacing existing uses	The major constraint to delivery of retail development on this site is concern over the loss of open space from this part town centre.
Environmental impacts	No known environmental constraints.
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Land Uses	Given the site's proximity to the town centre, mixed use and/or retail as an extension to the town centre would be appropriate uses for this location.
Development Costs	No abnormal costs envisaged.
Timescale	Has the potential to be a short term development opportunity
Commercial Attractiveness	Site is in a commercially attractive location given its proximity to the prime retail area.
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	This site has the potential to meet a significant part of the identified need for additional comparison goods floorspace within Weston town centre.
Trade Draw	Retail floorspace on this site would have a significant positive impact upon the health and attractiveness of Weston town centre.

CONCLUSIONS

Overall Conclusions:

Town Square has been considered and dismissed as a potential retail development location in Weston town centre in the Area Action Plan. This site is commercially attractive and has the potential to provide a logical extension to the adjacent Sovereign Centre although the main reason why this site has been dismissed is due to the loss of an existing open space which is perceived to be important for the overall attractiveness of the town centre.

SITE 4: NCP CAR PARK, WESTON-SUPER-MARE	
ASSESSMENT CRITERIA	**COMMENTS**
A. SITE DESCRIPTION	
Location	The site is bounded to the north by Regent Street. High Street forms its western boundary and the southern loop of Union Street its southern boundary.
Site area / size	0.6ha
Existing land-uses	The site currently accommodates a multi-storey public car park, offices, retail units and a food takeaway.
Adjoining land-uses	To the east of the site are retail units with residential and/or storage uses on upper levels. To the north is Alexandra Gardens dividing Regent Street and Alexandra Parade with the Tavern Inn public house. To the west is the high Street which accommodates predominantly secondary retail uses leading up to the retail core further to the north. To the south are buildings used for secondary retail, commercial and community uses.
B. PLANNING POLICY ISSUES	
Planning Policy Status	The Replacement Local Plan identifies the entirety of the site as falling within the defined town centre. Primary Shopping Frontages extend along its northern and western boundary. The site is also identified within the emerging TCAAP (Preferred Options) (Policy RC5) and seeks to develop the site for a mix of uses including: • Approximately 7,000sq m of comparison retail uses; • Residential uses above ground floor (approx. 164 units); • Cafes and restaurants on the ground floor; • Office uses above ground floor; • The creation of a distinct landmark building on the corner of High Street / Regent Street facing Big Lamp Corner.
C. ACCESSIBILITY	
Accessibility by private car	The site is in a central location and accessible by private car given the current MSCP use.
Accessibility by public transport	Due to its town centre location, the site is highly accessible by public transport. There are numerous bus stops located along the High Street and Regent Street and the site is located approximately 550m from the railway station.
D. CONSTRAINTS TO DEVELOPMENT	
Access	Currently the main vehicular entrance into the site is from Regent Street, accessing the multi-storey car park. High Street is pedestrianised and therefore access will need to be retained off Regent Street.
Parking	The existing NCP car park currently accommodates 407 spaces. The preferred option in the TCAAP does not specify a requirement for this provision to be retained, which could have an impact on other parking provision in the town centre.
Impacts on neighbouring properties / land	Redevelopment of the site in totality will need to be designed to minimise impact upon adjacent properties along High Street and buildings directly south of the site.
Visual Impact	The NCP building is dated and architecturally does not contribute to the attractiveness of the town centre. Redevelopment therefore presents an opportunity for enhancement of this part of the town centre.
Servicing	No known constraints.
Difficulties with displacing existing uses	The site is currently in multiple ownership. The main landowners have not expressed an interest in redeveloping the site at the current time. The site currently provides a large number of parking spaces, which although not utilised to its full capacity is still a useful resource for the town centre. It is not clear as to what level of this provision will need to be retained and/or provided at an alternative location.
Environmental impacts	No known environmental impacts.
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION	
Land Uses	Retail uses on this site are considered appropriate and would contribution to the expansion of the core retail area in the town centre.
Development Costs	Demolition, relocation of existing uses and potential temporary provision of car parking would add to the overall development cost.
Timescale	Medium to long-term.
Commercial Attractiveness	The site is, in principle, a commercially attractive location with access to the primary retail core and the newly regenerated Big Lamp Corner. However, multiple ownerships and high existing land uses will undermine its overall commercial attractiveness and development viability
F. ADDITIONAL CONSIDERATIONS	
Ability to Meet Identified Need	Whilst it is likely to be a medium to longer term development opportunity, this site has the potential to accommodate part of the identified need for additional comparison goods floorspace in Weston.
Trade Draw	If new retail development can be provided on this site, then it has the potential to provide a positive impact upon the health of the town centre. However, the loss of car parking from this location could have a knock-on effect on the overall parking provision in the town centre.
CONCLUSIONS	

Overall Conclusions:
The site is currently dated and its redevelopment provides a significant opportunity for improving the attractiveness of the town centre. However, the site is currently in use within multiple ownerships and there is no current interest in redeveloping the site. Therefore, this is likely to be, at best, a medium to longer term redevelopment opportunity.

SITE 5: TESCO SITE, WESTON-SUPER-MARE		
ASSESSMENT CRITERIA	COMMENTS	
A. SITE DESCRIPTION		
Location	The site is bound to the north by Regent Street, Francis Fox Rd to the east, Walliscote Road to the west and Station Road leading to the flyover and the A370 to its east.	
Site area / size	Approximately 3ha site.	
Existing land-uses	The site is currently occupied by a Tesco supermarket with two levels of residential accommodation above. Elsewhere on the site there is customer car parking, a Tesco petrol filling station and along the site's western frontage there are terraced retail units with residential accommodation above the store and the Odeon cinema in the north western corner of the site.	
Adjoining land-uses	To the west of the site are retail and commercial uses and the Council Offices. To the south is a combination of commercial, community and residential units. To the east is the A370 and land uses are dominated by retail sheds and industrial uses. To the north is Alexandra Parade, secondary retail uses and residential beyond.	
B. PLANNING POLICY ISSUES		
Planning Policy Status	The Replacement Local Plan identifies the site as falling wholly within the defined town centre. The draft TCAAP sets out a preferred option for the site which seeks to: • Retain a food store through expansion and reconfiguration of the exiting food store along with design and environmental enhancements to improve the appearance and connectivity of the site; • Increase the size of the food store to include approximately 4,500 sqm of net additional retail floorspace incorporating a minimum of 2,250sqm of convenience retail.	
C. ACCESSIBILITY		
Accessibility by private car	The site acts as a gateway site to the town centre should people drive along the A370. Therefore, accessibility by private car is considered to be good albeit for congestion along Station Road and Regent Street.	
Accessibility by public transport	The site lies on the edge of the town centre within easy walking distance of the primary shopping area. The train station is also within easy walking distance (300m) to the south east of the site. Bus stops are located along Regent Street.	
D. CONSTRAINTS TO DEVELOPMENT		
Access	Access by private car into the site is currently from Station Road. There is scope to change this to its northern boundary if necessary. The draft TCAAP looks to create a main entrance fronting Alexandra Parade with an attractive and animated frontage along this elevation.	
Parking	Currently the site accommodates car parking for shoppers using the Tesco store. It is anticipated that this provision of parking will need to be retained should a food retailer remain on the site.	
Impacts on neighbouring properties / land	This is a large site and has the ability to accommodate development with limited impact on neighbouring properties. The majority of impact will fall upon properties on the western boundary and residential uses above the Tesco store.	
Visual Impact	The existing buildings on the site and the large surface level car park do not contribute to the overall attractiveness of the town centre. Redevelopment offers potential to enhance the retail frontage along its western and northern boundary and improve the visual appearance of the site and the wider gateway into the town centre.	
Servicing	No known constraints.	
Difficulties with displacing existing uses	Tesco are the predominant landowner although there are multiple landowners for the units fronting Walliscote Road. It is anticipated that Tesco will want to remain on the site.	
Environmental impacts	No known constraints.	
E. DEVELOPMENT CHARACTERISTICS & IMPLEMENTATION		
Land Uses	As a town centre site, retail and wider mixed use development is appropriate. The retention of a large convenience retailer draws retail trade into the town centre and therefore should be retained on site if possible.	
Development Costs	Redevelopment will necessitate demolition of the existing building, implementation of possible CPO powers and is likely to require wider highway improvements.	
Timescale	Medium to long term.	
Commercial Attractiveness	This is focus on the ability to expand the existing Tesco supermarket	
F. ADDITIONAL CONSIDERATIONS		
Ability to Meet Identified Need	This site has the ability to meet the identified short term need for additional convenience goods floorspace in Weston, plus some of the identified comparison goods floorspace capacity.	
Trade Draw	Expansion of the Tesco store will have a positive impact upon the health of the town centre.	
CONCLUSIONS		
Overall Conclusions: The site does provide a significant opportunity for improving the gateway into the town centre and accommodating an extension to existing convenience provision. Comprehensive redevelopment is unlikely to be achieved, given the number of existing uses in this site and it is likely that new development will concentrate upon an expansion of the existing Tesco store. Given its physical constraints, it is possible that expansion of the supermarket could lead to pressure on the car parking area, with a need for a decked solution.		

E:

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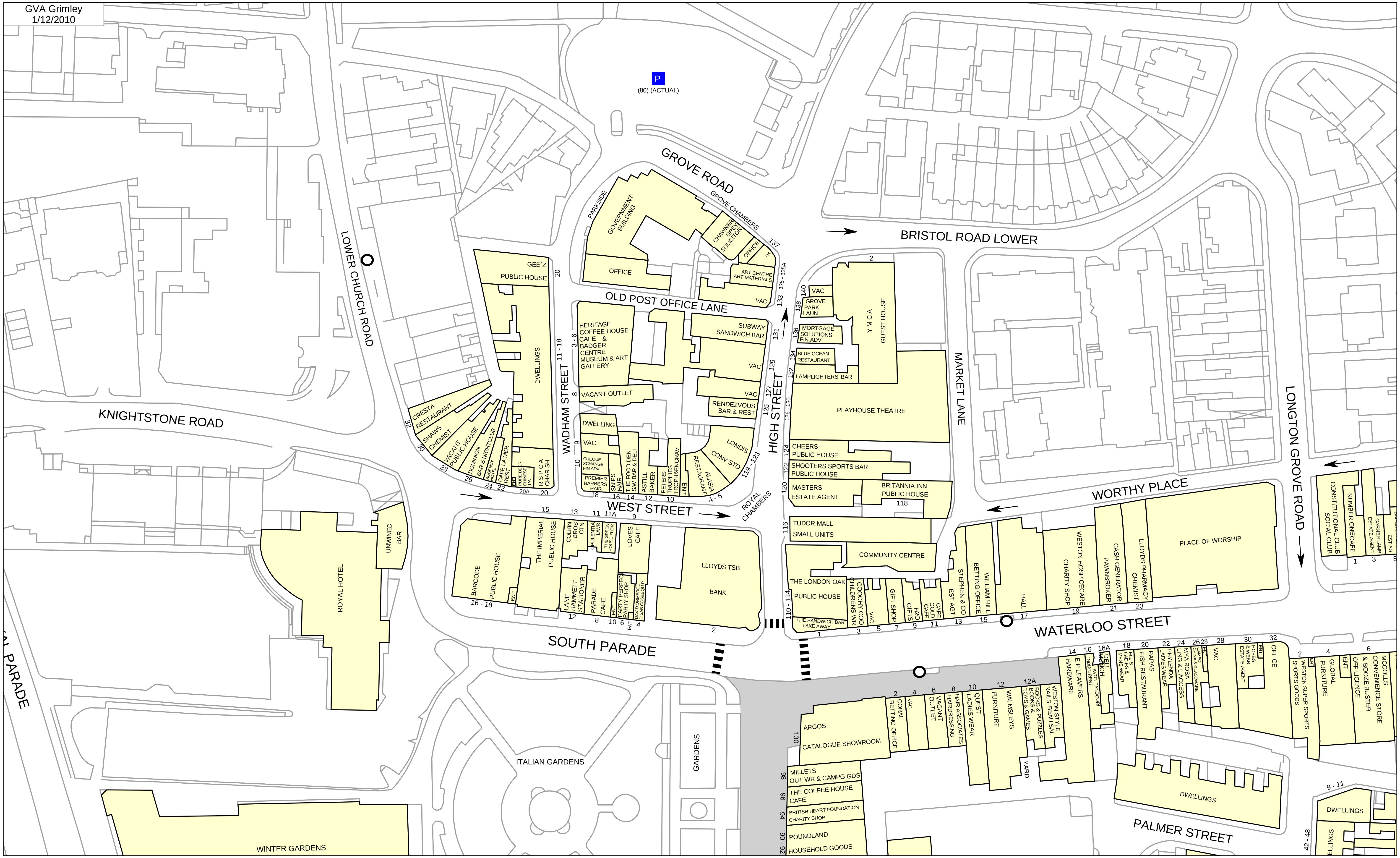

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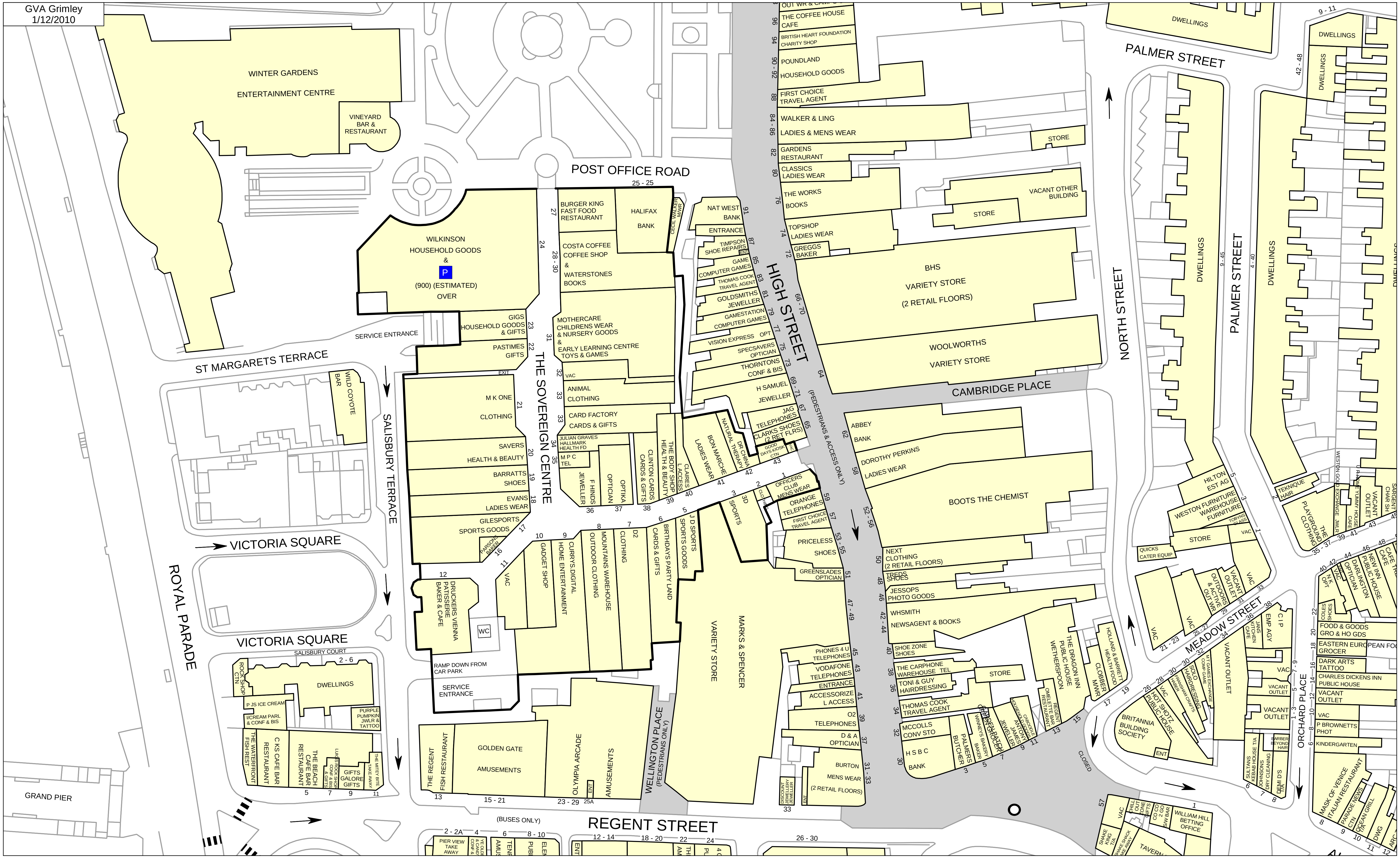

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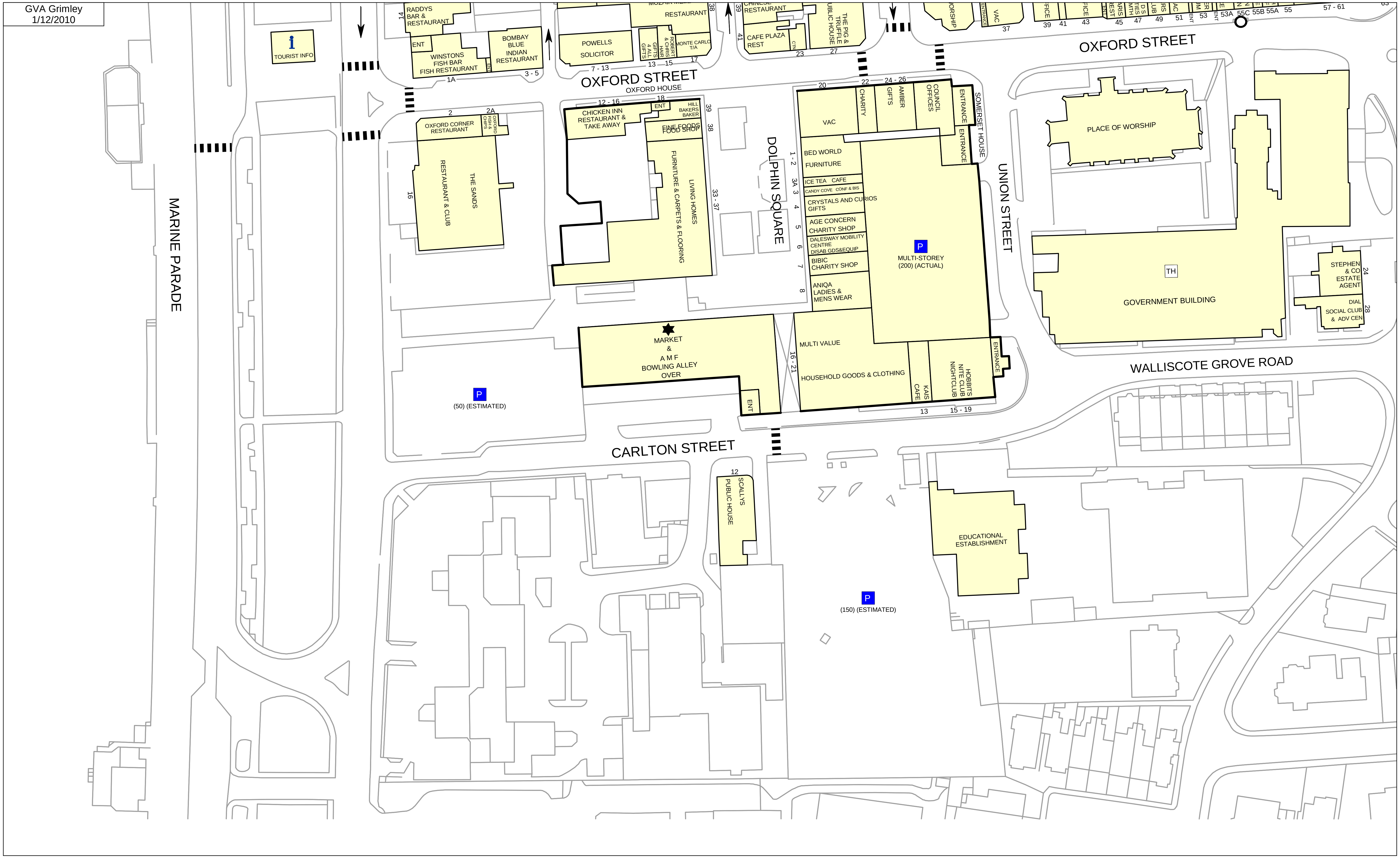

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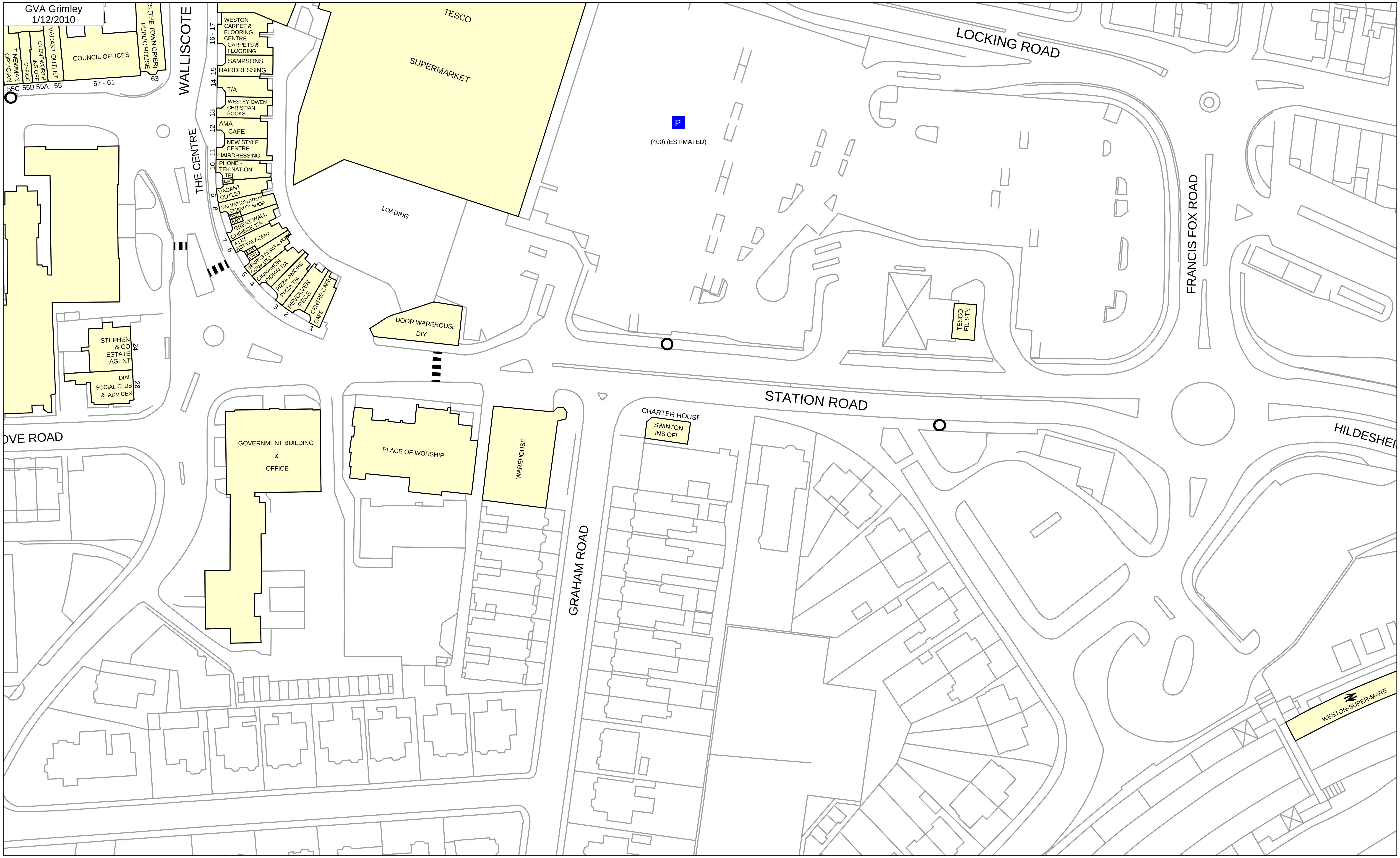

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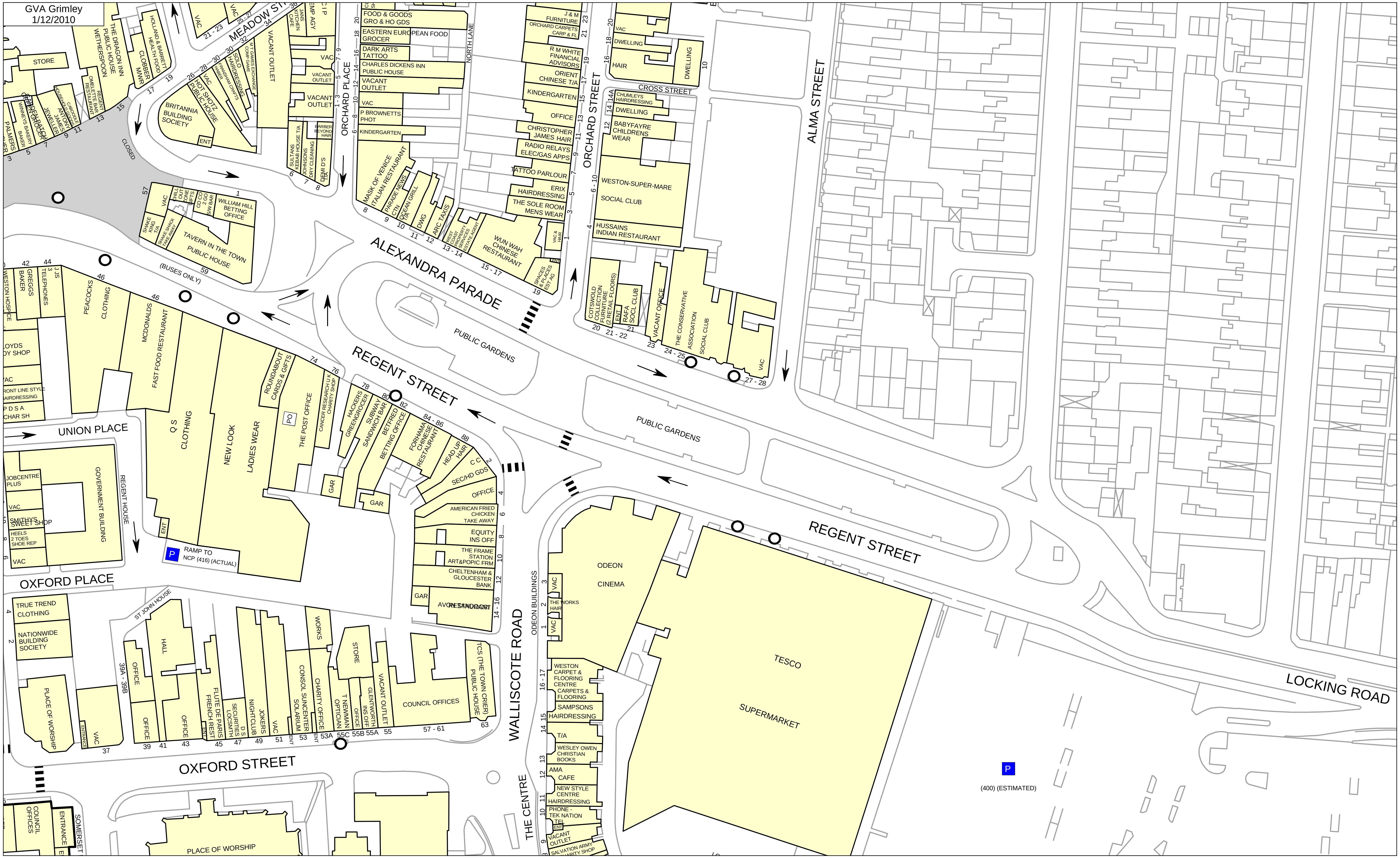

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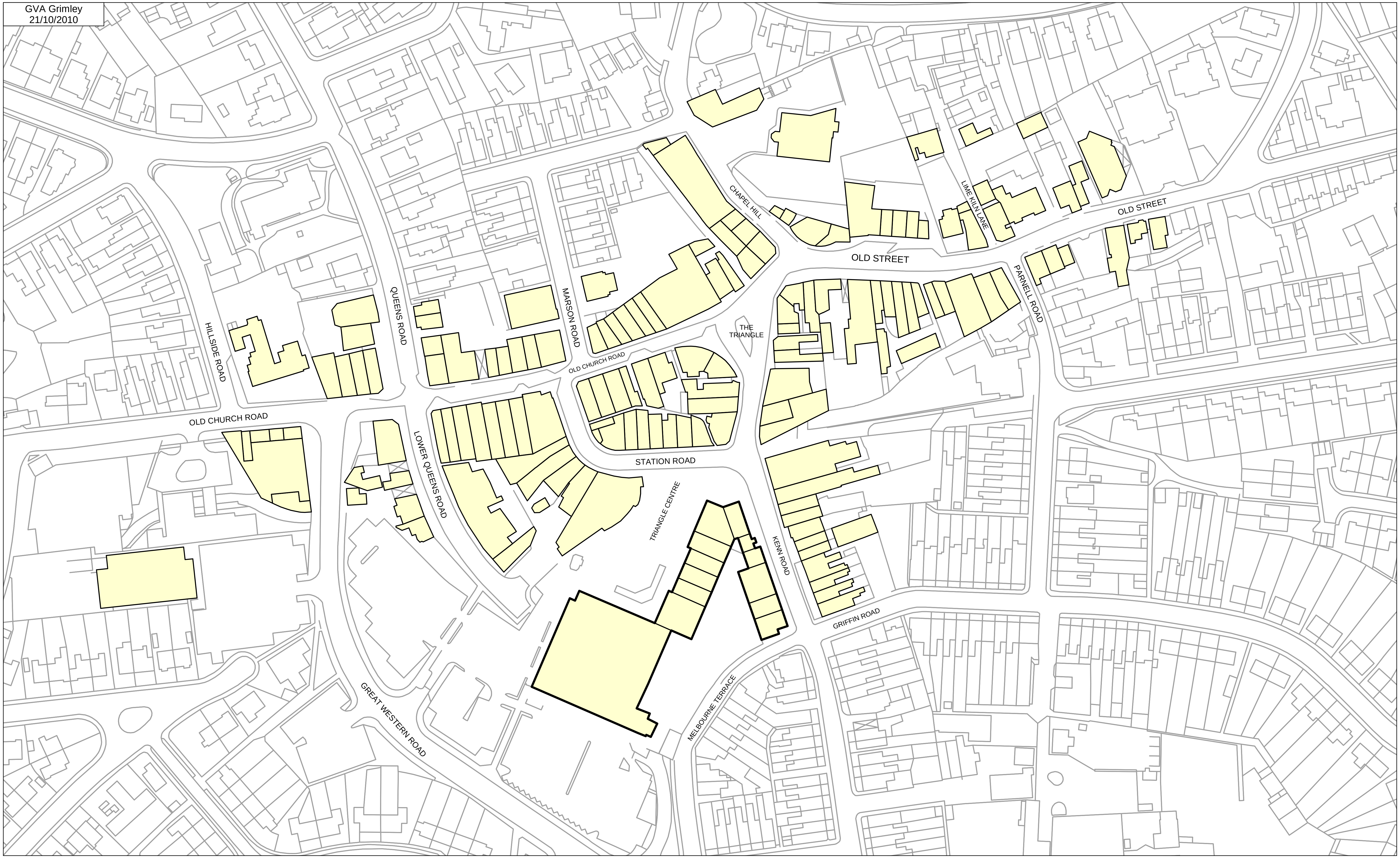

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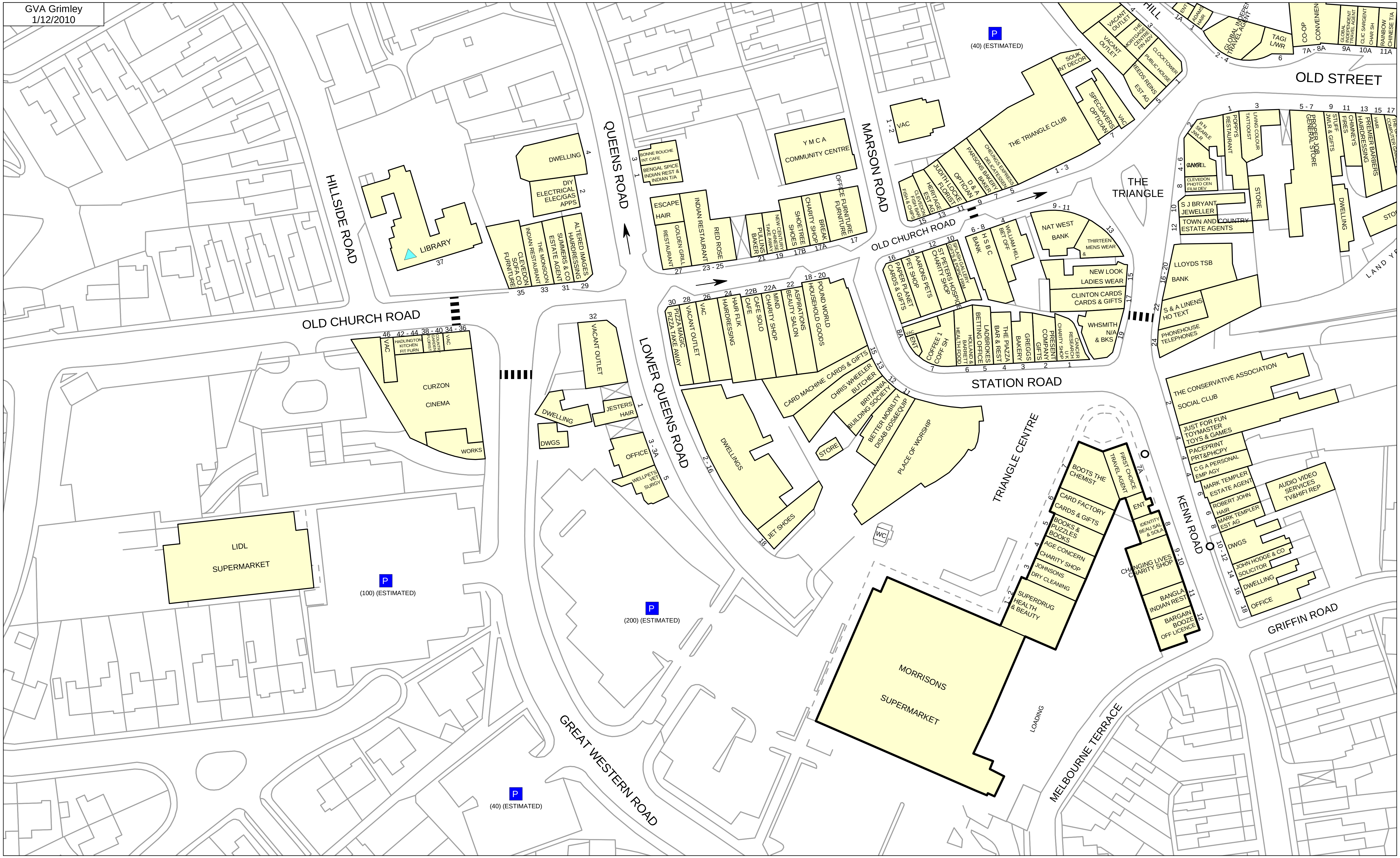

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G:

Nailsea GOAD Plan

Nailsea

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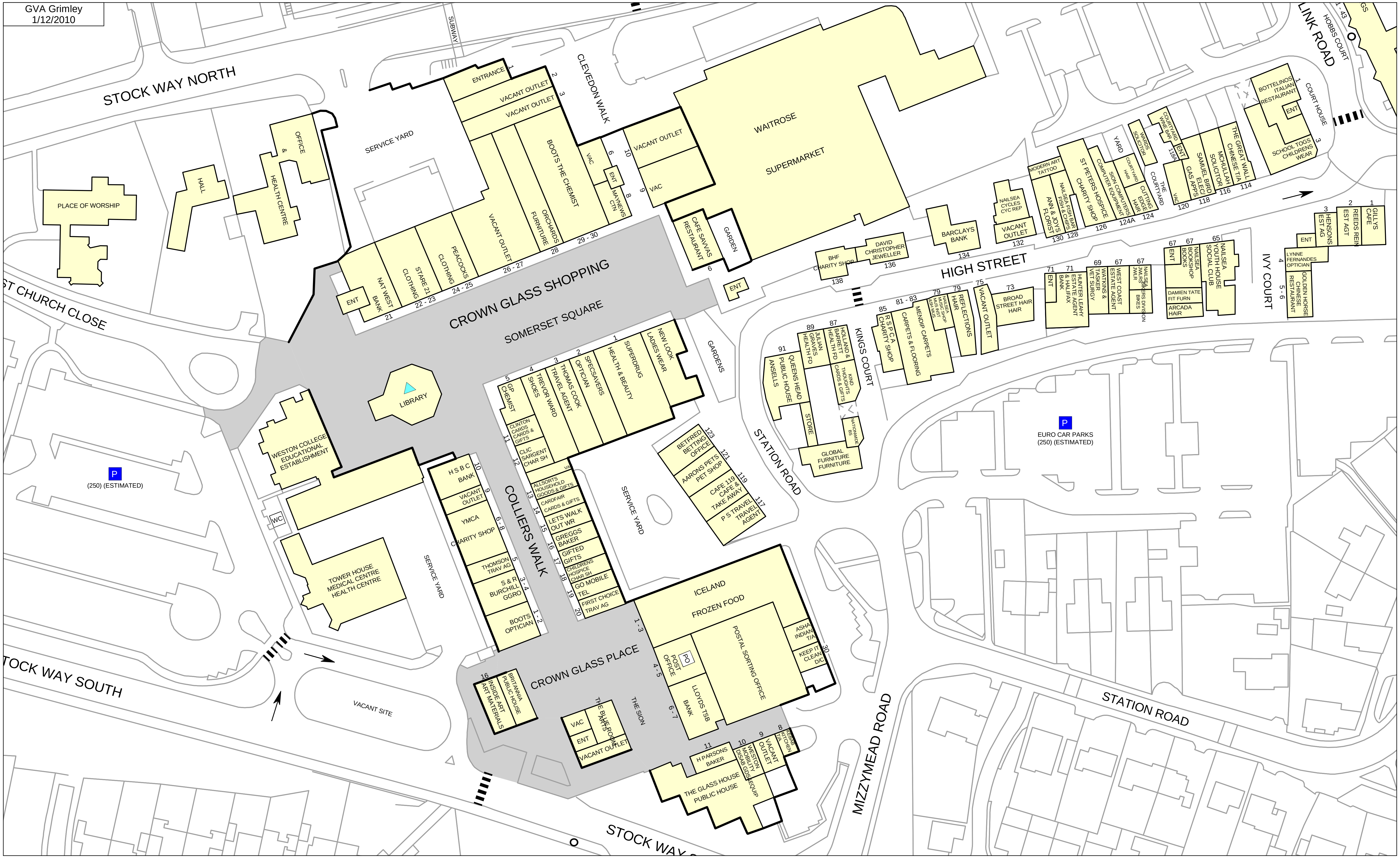

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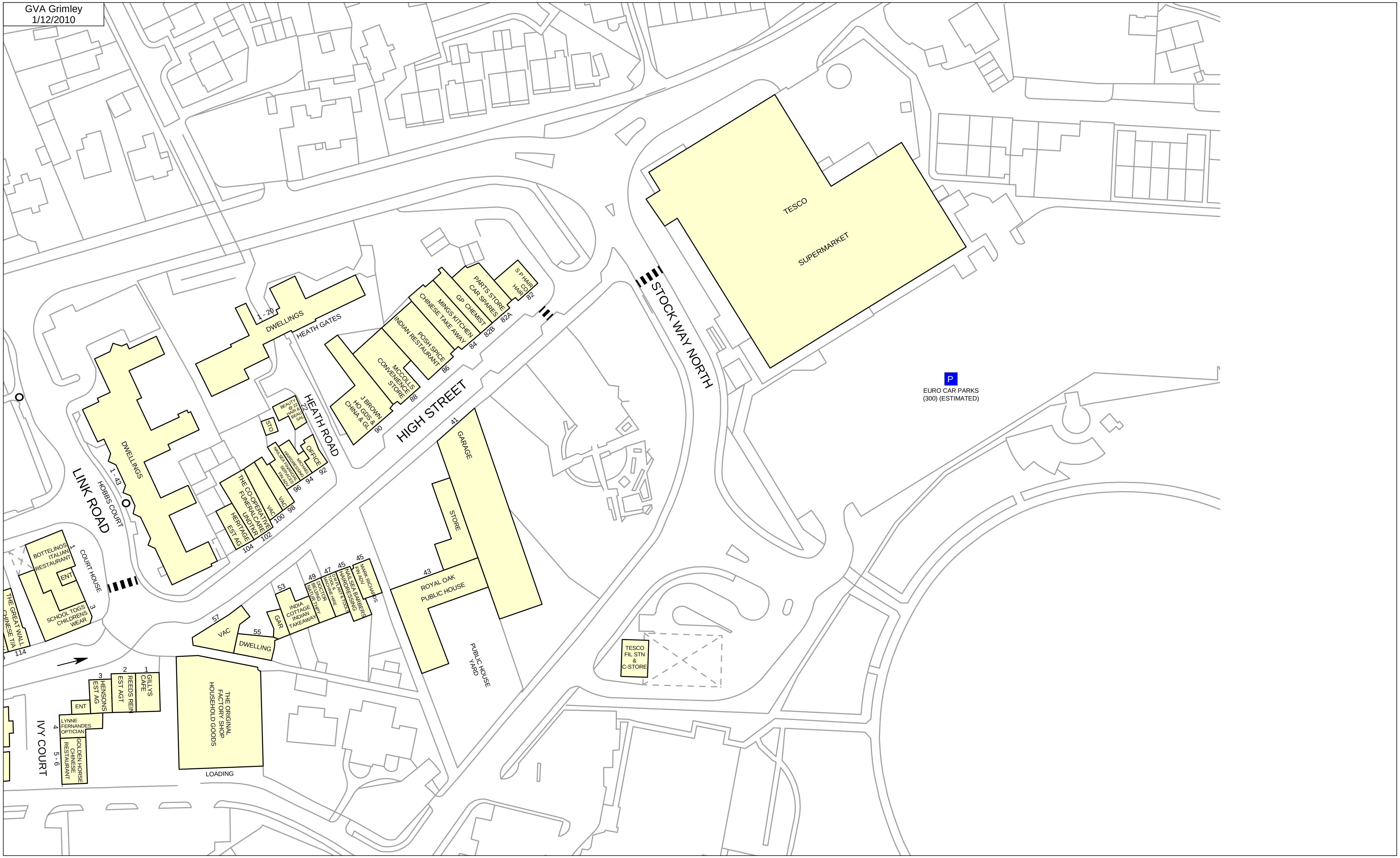

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Portishead GOAD Plan

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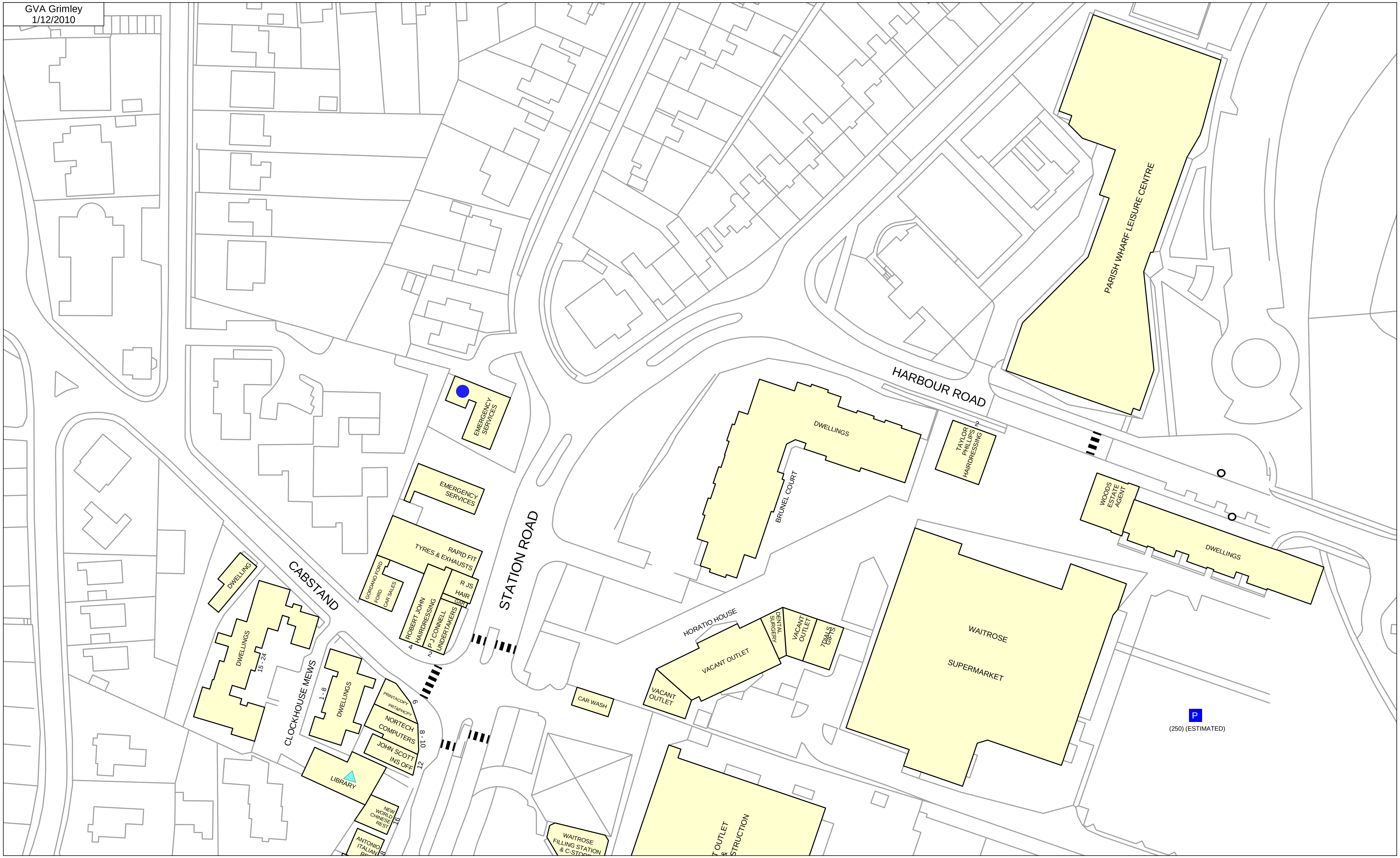

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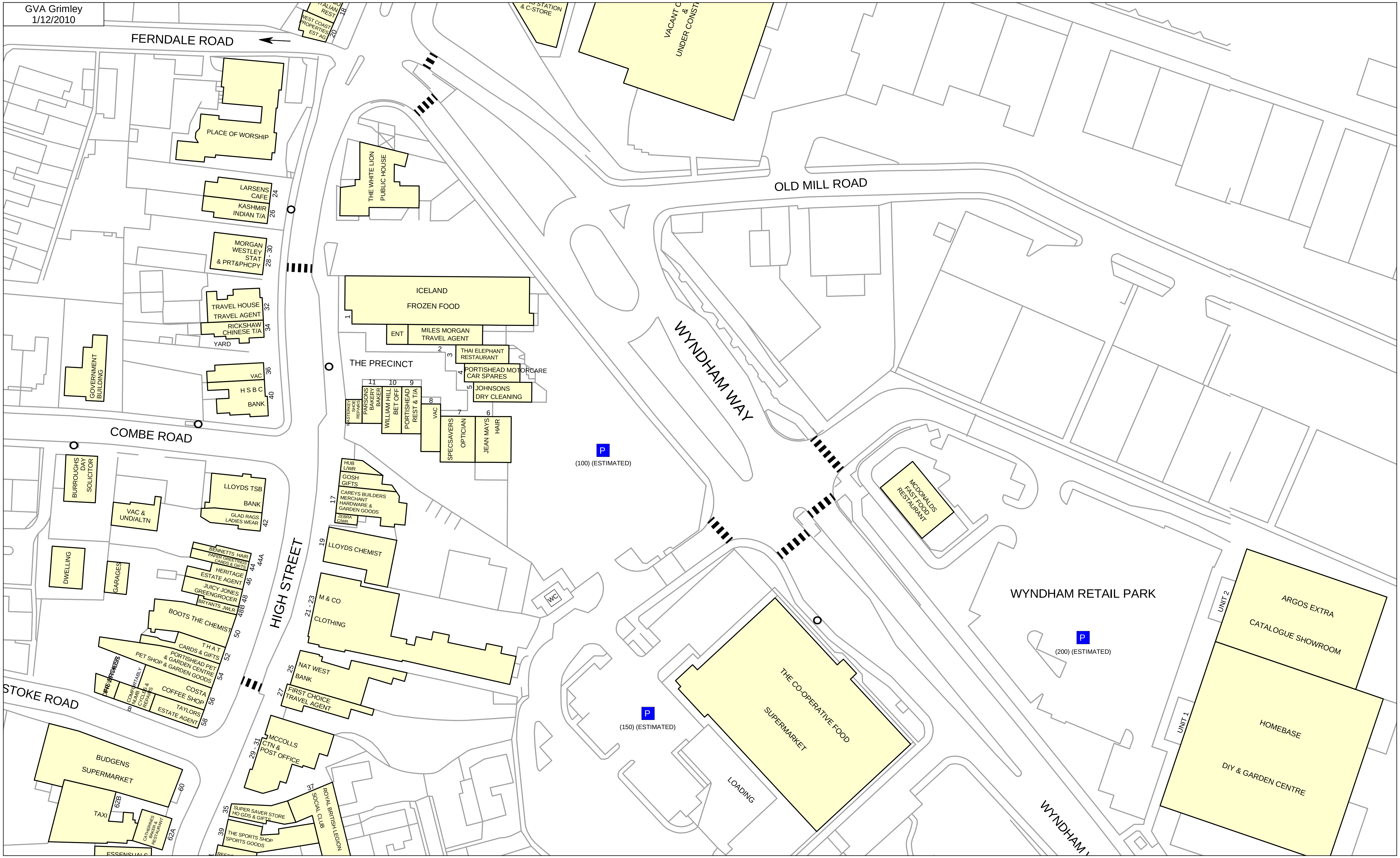

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