Bath & North East Somerset Retail Strategy

Annex A:
Quantitative Need for New Retail Development

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Report

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1 Introduction

1.1 DTZ, working in partnership with Urban Practitioners and The Retail Group, has been instructed by Bath and North East Somerset Council to assist with producing a comprehensive Retail Strategy for the Council's area.

1.2 The Retail Strategy includes full retail assessments of Bath, Keynsham, Midsomer Norton and Radstock in aspects such as vitality and viability, leisure provision, retailer demand, and the evening economy. It also includes consultations with major stakeholders. A key element of the Retail Strategy is an assessment of quantitative need for new retail floorspace in each town. This report sets out our forecasts of that need. The findings are a major input to the comprehensive Retail Strategy for Bath and North East Somerset.

1.3 This report identifies the future quantitative need for retail floorspace in Bath City Centre, Bath non-central locations, Keynsham, Midsomer Norton and Radstock for both convenience and comparison goods. It provides an evidence based, quantitative need assessment for new floorspace as required by PPS6. We have forecast the likely amount of retail floorspace needed within the four towns up to 2026. The study is PPS6 compliant as it explicitly includes a realistic assessment of population forecasts, expenditure forecasts for convenience and comparison goods, and forecast improvements in productivity in the use of floorspace. A full explanation of our method and our retail capacity forecasts are set out in Section 2 of this report. The last section concentrates on the strategic issues which arise from the results of our retail capacity forecasts and summarises our main conclusions.

1.4 Being based on more up-to-date and reliable information, the retail capacity forecasts set out in this report supersede and replace all previous retail capacity forecasts for Bath and North East Somerset.

2 Quantitative Need for Retail Development

2.1 In this section, we examine the current retail performance of Bath City Centre, out of centre main food stores and retail warehouses in Bath, Keynsham Town Centre, Midsomer Norton Town Centre and Radstock Town Centre. We have also assessed the quantitative expenditure capacity available to support further convenience and comparison goods retail floorspace within the District. This study therefore includes the preparation of up-to-date forecasts of the capacity for additional retail floorspace in the District, which will be supportable by increases in the population and expenditure of catchment area residents and visitors. In this section, we describe our RECAP forecasting Model, and set out our forecasts of the additional retail floorspace which will be supportable by growth in available expenditure in the period up to 2026.

THE DTZ RECAP MODEL

2.2 There are a number of possible approaches to forecasting the amount of additional shop floorspace supportable in any town, and the retail impact of proposed retail development. Some use driving time isochrones to define catchment areas, whilst others use some form of gravity model of retail attraction; or a crude assessment of overall market share of available expenditure, which is considered appropriate for the proposed retail development. All need an assessment of existing shopping facilities in the area, and the amount of expenditure available in the catchment area.

2.3 The effectiveness of the various forecasting methods varies considerably. Conventional gravity models base the extent of the trade draw of different centres on their size, and on theoretical measures of attractiveness and accessibility. In reality, other important factors, including the type and quality of retailers, shoppers' perceptions, the level of parking provision, and the retail environment, can also influence the trading pattern. Forecasts based on driving time isochrones to determine catchment areas rely heavily on assumptions and judgement rather than measures of the actual pattern of shopping visits from residential areas to shopping centres, foodstores and retail warehouses. Overall market share based methods are inherently unreliable because they rely on estimates derived from one location being applied to another with different catchment area characteristics; and because the result depends substantially on the assumptions about the extent of the catchment area in each location.

2.4 To overcome these and other problems of such approaches, DTZ uses its RECAP retail capacity forecasting Model. The main difference between our approach and now out-dated gravity models is that the RECAP Model uses the results of a Household Interview Survey to identify the actual shopping patterns in the catchment area. By this means, it is possible to model realistically existing flows of catchment area expenditure to town centres, foodstores and retail warehouses; as the basis for predicting the existing and future capacity for further retail development. It is therefore an empirical model not a theoretical model.

2.5 In summary, the RECAP Model uses the results of the Household Interview Survey as its objective measured 'baseline', using a conventional and widely accepted step by step approach, to complete the following tasks:-

- Calculate the total amount of convenience and comparison goods expenditure which is available within the 10 zones comprising the catchment area (Appendix 2);

- Allocate the available expenditure to Bath City Centre, Bath non-central stores, Keynsham Town Centre, Midsomer Norton Town Centre and Radstock Town Centre, based on the results of the Household Interview Survey of shopping patterns (Appendix 3); so as to obtain estimates of current sales and forecast future sales in each;

- Compare the estimated sales in the city centre, town centres, and non-town centre foodstores and retail warehouses, with existing floorspace (and in the case of main foodstores and retail warehouses, with sales based on estimated company average performance); so as to assess the current trading performance of each shopping destination, and the capacity to support further growth in floorspace.

2.6 The RECAP Model is a very useful tool for retail planning, which avoids the potential inaccuracies arising from assumptions about existing trade draw patterns and market shares which are often inherent in other forecasting methods. It is based on forecasting methods which have been used and refined in a large number of retail studies on behalf of public sector clients. In particular, forecasts made using the method on which the RECAP Model is based have been accepted by Planning Inspectors and the Secretary of State at many Public Inquiries. The Model has been used to prepare the expenditure and retail capacity forecasts set out in this report.

2.7 It is important to remember that the RECAP Model (like any other forecasting model of this type) is an exploratory tool, rather than a prescriptive mechanism. Thus, for example, in preparing forecasts for future shop floorspace capacity, the Model is usually run iteratively to explore the changes in the forecasting variables, such as in the pattern of attraction of expenditure (the market shares) or in sales densities, which would be necessary to support different levels of new development. Use of the Model in this way illuminates sensitivities in variables, and assists in making judgements about the realism of any given growth or impact scenario.

2.8 When using the RECAP Model capacity forecasts as a guide to future planning policy, it is also important to remember that the further ahead the forecasting date, the less certain the forecast. Thus the forecasts for 2011 are more reliable than those for 2021 and 2026. In particular for these later dates, we suggest that forecasts such as these should be treated with some caution, since they only indicate the broad order of magnitude of retail capacity at those dates, if all of the forecast trends occur. For this reason we recommend that the forecasts should be reviewed and revised by not later than about 2011 in the light of events, based on a new Household Interview Survey of shopping patterns, so as to take account of the effects of any development which has occurred in the meantime (in particular the new Southgate Centre in Bath City Centre). Furthermore, the long term growth in the use of internet shopping is as yet unknown (although it has to a substantial degree been taken into account in this report), and reinforces the need to revise the forecasts of retail floorspace capacity well in advance of 2026. An overview of the RECAP Model process is set out in Appendix 1.

2.9 The detailed RECAP Model tables are set out in Appendix 4, and this section should be read in conjunction with that Appendix.

PRINCIPAL DATA INPUTS

Catchment Area and Household Interview Survey

2.10 The catchment area for the purposes of the retail capacity forecasts was defined by reference to postcode districts and sectors, taking account of the location of Bath and the three smaller towns, the location of the principal competing towns, the principal road pattern, and significant topographical features. This catchment area was divided into 10 zones for the purposes of the Household Interview Survey and subsequent forecasting. The catchment area map is provided in Appendix 2

2.11 This catchment area for the Household Interview Survey extended to Chippenham and Kingswood in the north, just beyond Trowbridge in the east, Frome in the south and just beyond the A37 in the west. Zone 1 contains Bath and Zone 2 contains Keynsham. Zone 3 includes the Kingswood area of Bristol. Zones 4, 5 and 6 are located on the north-east side of the catchment area, and Zone 6 includes Chippenham. Zone 7 contains Trowbridge, Zone 8 is located adjacent to Bath on its south-east side and Zone 9 is located on the south edge of the catchment area. Zone 10 contains Midsomer Norton and Radstock. The analysed results of this survey are included at Appendix 3. Interviewing and data processing was undertaken by NEMS Market Research Ltd in

March 2007. A random sample of 1,776 households was interviewed by telephone, of which 351 were in Catchment Zone 1, 152 were in Catchment Zone 2 and 251 were in Catchment Zone 10. The other interviews were spread between the remaining zones approximately in proportion to zone population, but with a minimum of 100 interviews in any zone.

2.12 The results of the survey provide a detailed picture of where the residents of Bath and its catchment area shop for main food and top up convenience goods shopping, and for eight different categories of comparison goods shopping. They also provide some information on linked shopping trips where the primary trip generator is main food shopping; and on travel mode.

Catchment Population

2.13 Population forecasts were obtained from MapInfo as a 'Bath Area Profile Report', setting out the 2007 populations of each of the 10 catchment zones, together with trend based forecast populations for 2011 and 2016. For 2021 and 2026 the results were extrapolated from the growth in the previous years. We have adjusted these population forecasts to bring them into line as far as possible with figures emerging from the Regional Spatial Strategy (RSS), as recommended by the Panel following the RSS Examination in Public. The resulting catchment area population forecasts by zone are set out in RECAP Model Table 1 in Appendix 4. They show the population of the catchment area as a whole increasing from 451,573 in 2007 to 516,130 by 2026. This is an increase of about 14.3% over the period 2007 to 2026, or about 0.7% per annum, which is fairly substantial.

Forecasting Dates

2.14 We have prepared base year estimates of retail sales as at 2007, which is the year when the Household Interview Survey was undertaken. Our forecasts have been prepared for the years 2011, 2016, 2021 and 2026. This latter date has been chosen because it is the 'target' end date for the new Local Development Framework. As indicated above, the longer ahead of these forecasts i.e. 2021 and 2026 should be treated as a broad guide only, and reviewed and updated well before those dates.

Price Basis

2.15 All monetary values in this report are in 2004 prices, unless otherwise indicated.

Per Capita Expenditure

2.16 We obtained from MapInfo average per capita expenditure on convenience and comparison goods in the catchment area in 2004 (which were the most up-to-date available). Before deducting expenditure on special forms of trading, these amount to £1,626 for convenience goods and £3,077 for comparison goods. These base figures are set out in RECAP Model Table 2 in Appendix 4. We then deducted expenditure on Special Forms of Trading (SFT). This is principally mail order, vending machines, party plan retailing and on-line shopping via the internet and interactive TV; and is mainly expenditure not made in retail shops, so needs to be removed from the Model before forecasting the capacity for additional shop floorspace. Table 2 shows the growing deductions which we have made, based on information published by Verdict Research Limited on growth in internet shopping and forecast trends[1].

2.17 Table 2 also indicates the breakdown of per capita comparison goods expenditure into the eight different categories of comparison goods expenditure covered by Questions 5 to 12 in the Household Interview Survey; and the different deductions for each category which we have made to account for SFT, again based on information published by Verdict Research Limited.

2.18 The base figures for the year 2004 in Table 2 have been increased to allow for actual and expected growth over the forecasting period to 2026. For convenience goods, we have applied the actual growth 2004 to 2006 indicated in MapInfo Brief 07/02 (1.77%), followed by the MapInfo 'best fit' trend rate of 1.00% per annum, for the period 2006 to 2026. For comparison goods, we have applied the actual growth 2004 to 2006 of 8.76%, followed by the ultra-long term trend rate of 3.9% per annum for the period 2006 to 2026. Reflecting the recent downturn in the rate of growth of comparison goods expenditure, this is somewhat below the econometric forecast of 4.9% per annum for the period 2005 to 2017 by Oxford Economics set out in MapInfo Brief 07/02 (prepared before the recent 'credit crunch' and warnings by the Bank of England in May 2008 of national economic slowdown); and below the long term trend rate, also 4.9% per annum. It is well below the medium trend rate of growth of 5.6% per annum.

2.19 We consider that the ultra-long term trend based growth rate of 3.9% per annum realistically takes account of the current downturn in growth of retail expenditure, and the medium term economic outlook. It is significantly below the historically very high rates of growth of the last few years, which are exceptional in relation to the trend. It would be unrealistic to assume that the recent high level of growth will continue annually

[1] 'e-Retail 2007', Verdict Research Limitied, May 2006

throughout the 19 year forecasting period. The ultra-long term trend spans the period 1964 to 2006, thus covering several economic cycles.

2.20 It should also be noted that we have applied the ultra-long term trend rate of growth in comparison goods expenditure to the actual 2006 expenditure, which was significantly above the ultra-long term trend at that date. Thus we have implicitly allowed for above ultra-long term trend growth in per capita expenditure, despite applying the ultra-long term trend rate of growth.

2.21 The combined effect of the forecast growth in population and in per capita expenditure is that we expect total catchment expenditure on convenience goods (set out in Table 3 in Appendix 4) to increase by about £240 m (32.4%) over the period 2007 to 2026; and total catchment area expenditure on comparison goods to increase by about £1,695m (116%) over the same period. This compares with growth in total catchment area population of approximately 14.3% over the period. Thus just under half of the growth in catchment area expenditure on convenience goods is due to expected growth in population; but only a small proportion of the growth in catchment area expenditure on comparison goods is accounted for by forecast growth in population. This means that the convenience goods retail capacity forecasts are insensitive to the population growth assumptions, which would be likely to vary by only a very small proportion of total catchment area population. The comparison goods capacity forecasts are very insensitive to the population growth assumptions and much more sensitive to the assumptions about growth in per capita expenditure and growth in SFT, particularly in the later part of the forecasting period. Thus if the RSS eventually results in marginally different planned population increases from those already allowed for in RECAP Model Table 1, there will be very little practical effect on the retail capacity forecasts, particularly for comparison goods.

Shopping Patterns in the Catchment Area

2.22 As indicated above, on behalf of Bath and North East Somerset Council we commissioned a Household Interview Survey of shopping patterns in March 2007. We have included the unweighted tables[2] of results in Appendix 3. We have used the results as a key input to our RECAP Forecasting Model in Appendix 4. Thus for Bath City Centre for example, in Table 5 we have combined the results of the question about main food shopping with those of the question about top up food and convenience goods shopping, to provide a weighted average market share of total convenience goods expenditure in each zone which is attracted to main foodstores and other convenience goods shops in Bath City Centre. These weighted averages are then rounded to the nearest integer and used (with a correction factor described below) in Table 7 to indicate

[2] Because the results for each zone are not weighted according to zone populations, the results in the Totals columns may not be statistically representative of the survey area as a whole. This does not affect the results for individual zones which have been used in the RECAP Model. The unweighted Totals have not been used in any way in the retail capacity forecasting.

the pattern of attraction of convenience goods expenditure to shops and stores in Bath City Centre. A similar approach has been used for the non-central foodstores (Tables 13 and 15) and the main foodstores in Keynsham Town Centre (Tables 22 and 24) Midsomer Norton Town Centre (Tables 30 and 32) and Radstock Town Centre (Tables 38 and 41), in Appendix 4.

2.23 In the case of comparison goods, for Bath City Centre for example, we have applied the results of the Household Interview Survey for each of the eight categories of comparison goods, weighting the market shares for each according to per capita expenditure on each category (as indicated by MapInfo); to provide a weighted average market share of all comparison goods expenditure which is attracted from each zone by shops and stores in the city centre. The market shares for each individual goods category and the weighted averages are set out in Table 6; the final column (weighted average), of which is rounded to the nearest integer, and applied (with the correction factor described below) in Table 7 to indicate the market shares of all comparison goods expenditure attracted from each zone by shops in Bath City Centre. Similar tables apply to the other comparison goods shopping destinations in Bath, i.e. Tables 14 and 15 for non-central superstores and retail warehouses in Bath. A similar pattern of tables has been used to model comparison goods in Keynsham, Midsomer Norton and Radstock town centres with Tables 23 and 24, Table 31 and 32, and Tables 39 and 40 respectively.

2.24 As is common in retail studies of this type, it has been necessary to apply market share correction factors in the case of comparison goods for Bath City Centre, non-central stores in Bath, and Midsomer Norton and Radstock town centres. The market share correction factors correct anomalies which occur as a result of some respondents' misinterpretation of the Household Interview Survey questions. The application of each correction factor brings sales densities of shops and stores in that location to a more realistic level than that which is shown as a direct result of the Household Interview Survey. It therefore rebalances the RECAP Model, to make it reflect reality more accurately.

2.25 To arrive at average comparison goods sales densities for Bath City Centre which are broadly in line with those we would expect for a town centre of this size, and in line with current rental values, it has been necessary to apply market share corrections to both the city centre and non-central comparison goods stores. Using the results of the Household Interview Survey for Bath City Centre in the RECAP Model without correction would result in an unrealistically high average sales density, which would be significantly above the sales densities assessed in other town centres of similar size and type. There is an approximate correlation between centre size and average sales density, with larger town centres generally having higher sales densities than smaller centres. This is the main reason why shop rental values are higher in larger centres than in smaller. The market share correction factor that has been chosen reflects this correlation. Whilst we consider that the comparison goods shops are trading well, we do not think that there is any reliable evidence for trading at the level indicated by using the uncorrected survey results in the Model. We have therefore reduced the market shares indicated by the Household Interview Survey by applying a correction factor of 70% to the Survey indicated market shares for each catchment zone. Thus for example a survey-indicted market share of 50% would be reduced to 35% in the Model by the application of the correction factor of 70%.

2.26 We believe the results of the Household Interview Survey result in over-estimation of Bath City Centre comparison goods sales because some respondents have misinterpreted the questions about comparison goods shopping habits. Because of the proximity of the survey area to the competing major magnet centres of Bristol City Centre and Cribbs Causeway, people are likely to have a propensity to spend larger sums in these magnet centres, but visit them less frequently than they visit Bath City Centre. Whilst they answer the questions about comparison goods shopping by stating Bath City Centre as the place where they do most such shopping (because of their greater frequency of use of that centre), this over-represents their expenditure in that centre

2.27 For similar reasons, a correction has also been applied to non-central comparison goods stores in Bath, where a correction factor of 85% has been applied; and in Midsomer Norton town centre where a correction factor of 60% has been applied. Again, this is because the Survey results suggest that some respondents have confused frequency of visits with volume of expenditure, and that greater than indicated expenditure actually takes place in more distant but much larger centres and retail parks. This is not uncommon in such surveys, in towns where there are much larger centres and large retail parks nearby. For comparison goods in Radstock the market shares have been boosted by a correction factor of 175%. This is because the sales densities indicated by the uncorrected results of the Household Interview Survey were too low for the existing shops and the Radco store to be viable, because the comparison goods stores within the centre were under-represented in the Household Interview Survey results. This is not uncommon for such small centres with surveys of this type. It has not been necessary to apply any market share correction factors to convenience goods in any of the centres modelled.

Visitor Expenditure

2.28 We have allowed for some expenditure in Bath by visitors who live outside the area covered by the Household Interview Survey, because it is a World Heritage Site and attracts substantial numbers of visitors. For the purposes of this allowance, we have defined visitors as anyone who lives outside the area covered by our Household Interview Survey of residents. This definition has been used because expenditure by the residents of this catchment area is already included in our RECAP Model. The definition is not visitors from outside the City of Bath itself, because the catchment area covered by the Household Interview Survey extends well beyond the City boundary. As a result, the number of visitors as we define it is substantially less than as defined by South West Tourism, for example.

2.29 Estimation of the expenditure by visitors as defined above is notoriously difficult, and subject to judgements involving a variety of data sources. In this case, we have relied upon the number of visitors estimated by South West Tourism, but have reduced this substantially, based on the results of the Bath City Centre On-street Interview Survey of shoppers (conducted by the Council), to exclude shoppers who live outside Bath itself but within the catchment area covered by the Household Interview Survey and RECAP Model. The On-street Interview Survey has also provided average retail expenditure per visitor for convenience and comparison goods (which was not available in this disaggregated form from the South West Tourism study). Using this data, for convenience goods we have increased the expenditure from catchment area residents by 10%, and for comparison goods we have also (coincidently) increased it by 10%. This uplift implicitly takes account of the socio-economic characteristics of the visitors. The calculation of visitor expenditure is set out in Table 2.1. In the case of Scenario 2 (described below), we have assumed that this uplift for visitor expenditure on comparison goods will increase to 11% from 2011, as a result of the new Southgate Centre.

2.30 For the remaining three towns we have not added in any uplift for visitor expenditure. This is because Keynsham, Midsomer Norton and Radstock are not noted as substantial destinations for tourists and other visitors. Whilst we would expect some such expenditure by visitors to occur in these three towns, we would also expect some expenditure by catchment area residents in other locations outside the catchment area, in addition to that which is indicated by the results of the Household Interview Survey. To a substantial degree, this additional outflowing expenditure would be likely to offset any inflowing visitor expenditure.

Table 2.1. Calculation of Visitor Expenditure in Bath City Centre

Total number of visits per annum (1)		4,179,500
Total Respondents to B&NES On-street Interview Survey (2)	1,309	
Number of Respondents who live outside residents' catchment area (3)	325	
Proportion of visitors who live outside residents' catchment area	24.8%	24.8%
Number of visitors per annum who live outside residents' catchment area		1,036,516
Average spend per visitor on convenience goods (2)		£8.10
Total visitor spending on convenience goods		£8,395,780
Total catchment area residents' spending on convenience goods (RECAP Model Table 12)		£86,876,000
Uplift for visitor spending – convenience goods (rounded)		**10%**
Average spend per visitor on comparison goods (2)		£30.60
Total visitor spending on comparison goods		£31,717,390
Total catchment area residents' spending on comparison goods (RECAP Model Table 12)		£318,174,000
Uplift for visitor spending – comparison goods (rounded)		**10%**

Sources:

(1) Economic Impact Survey 2003 – South West Tourism

(2) BANESC Bath City Centre On-Street Interview Survey, April 2004

(3) Defined as respondents who live outside the area covered by the Household Interview Survey

Existing Shop Floorspace

2.31 For main food stores in Bath City Centre, the non-town centre main food stores in Bath and other the town centres, we have used Council data supplemented where necessary with floorspace data published by the Institute of Grocery Distribution (IGD). Details of these shops and stores in Bath are set out in Table 10 (City Centre) and 18 (non-central). Details of these shops and stores in Keynsham, Midsomer Norton and Radstock are set out in Table 27 (Keynsham), Table 35 (Midsomer Norton) and Table 43 (Radstock).

2.32 For comparison goods floorspace in Bath City Centre, we have used the results of the most recent Council floorspace data survey, carried out in 2006 and validated by Nathaniel Lichfield and Partners. To this we have added the net comparison good sales area in the relevant main food stores, and subtracted demolition of floorspace due to the Southgate Centre. The resulting total comparison goods shop floorspace in Bath City Centre is estimated as 56,167 sq m net. The new Southgate Centre itself has been included in the RECAP Model as a committed development, so the forecasts of the capacity for more retail floorspace in Bath City Centre are for new floorspace in addition to the Southgate Centre. This figure is included in RECAP Model Table 12, Appendix 4. A similar method has been used with respect to the other town centres. The comparison goods shop floorspace in Keynsham is estimated to be 6,165 sq m net (as shown in Table 29); for Midsomer Norton this figure is 5,733 sq m net (as shown in Table 37); and for Radstock the comparison goods floorspace figure is 4,934 sq m net (as shown in Table 45).

Sales Densities in Main Food Stores

2.33 For the existing main food stores in Bath City Centre, the non-central main food stores in Bath, and the main food stores in Keynsham, Midsomer Norton and Radstock Town Centres we have applied estimated company average space allocations and convenience goods sales densities based on information published by Verdict Research Limited. These are set out in Tables 10, 18, 27, 35 and 43 for Bath City Centre, Bath non-central stores, Keynsham Town Centre, Midsomer Norton Town Centre and Radstock Town Centre respectively.

Retail Destinations

2.34 In the case of Bath, which contains moderately substantial out-of-centre retailing (in the retail warehouses and main foodstores combined), we have distinguished between Bath City Centre, and Bath Non-central foodstores and retail warehouses. This is both for forecasting convenience, and because it provides a more reliable set of forecasts than if city centre and out-of-centre shopping was lumped together. The Household Interview Survey provides detailed information on shopping patterns, distinguishing between use of the city centre and of the non-central stores. This enables us to distinguish between the retail performance of the city centre and that of the non-central shopping, for example in our Retail Sector Analysis described below. It is one of the reasons why our RECAP Model is more reliable and provides more information on retail performance than other, less disaggregated approaches. However, as discussed below, the location of all new retail development should be in accordance with the sequential approach and in retail formats appropriate to its location; even though the capacity for some of it is calculated as non-central shopping for forecasting convenience and reliability.

2.35 In the case of Midsomer Norton we have included the out-of-centre Tesco with Midsomer Norton town centre, because this is the only out-of-centre convenience store in that town. Similarly in Keynsham, we have included the out-of-centre Pioneer Co-op store with the town centre for the same reason. In these small towns with their very limited out-of-centre shopping, there would be fewer benefits in terms of forecasting reliability in separately forecasting capacity for non-central shopping. However as in Bath, the location of all new retail development should be in accordance with the sequential approach, and in formats appropriate to its location.

Development Scenarios Assessed

2.36 We have assessed two scenarios for development, as follows:

- Scenario 1 – the 'baseline' scenario, which assumes that there will be no change in the market shares of available expenditure attracted from the catchment area through the period to 2026, despite the future Southgate development in Bath City centre. This effectively assumes that improvement in the attractiveness of Bath as a result of the new Southgate Centre will be exactly matched by improvement in the attractiveness of the other centres particually Bristol City Centre as a result of the Broadmead Redevelopment.

- Scenario 2 – increases in market shares attracted by Bath City Centre as a result of the Southgate development. As a consequence of this uplift in market shares attracted by the city centre it is likely that market shares in non-central stores will decrease slightly; therefore Scenario 2 has also been modelled for non-central comparison goods stores. Scenario 2 also includes market share increases for Keynsham as a result of a potential new foodstore and comparison goods retail development in the town centre. We have also tested in Scenario 2 redevelopment of the Radstock Cooperative store in Radstock for a new supermarket. This would affect market shares attracted to Radstock, and will also affect market shares attracted to Midsomer Norton (town centre and Tesco) because the close proximity of the two towns means their shopping catchments overlap.

Format of the RECAP Model Tables

2.37 The detailed RECAP Model Tables are set out in Appendix 4. Table 1 sets out the population forecast for each of the 10 catchment zones. Table 2 indicates per capita expenditure, growth in that expenditure, and growth in SFT. Table 3 is total catchment area expenditure by zone for convenience and comparison goods over the period 2007 to 2026. Table 4 indicates total catchment area expenditure by zone in 2007 in each of the 8 categories of comparison goods.

2.38 In Scenario 1, for Bath City Centre, Tables 5 and 6 set out the pattern of market shares of catchment area convenience and comparison goods expenditure respectively, and the weighted averages of each, which are attracted from the catchment area to that destination. The market shares in Table 7 are based on the weighted averages set out in Tables 5 for convenience goods, and 6 for comparison goods. Table 8 shows the expenditure attracted on each of the 8 comparison goods categories, together with the resulting overall market shares of such expenditure currently attracted by the town centre. It is the product of Table 4 (catchment area expenditure by comparison goods product group) and Table 7 (detailed market shares by comparison goods product group). Table 9 is the product of Table 3 (catchment area expenditure) and Table 7. It indicates the convenience and comparison goods expenditure attracted from each catchment zone by Bath City Centre at each date. Table 10 sets out the sales potential of the existing main food stores at estimated company average levels; whilst Table 11 indicates the sales potential of committed (or nearly committed) new developments in the town centre, in this case the Southgate redevelopment.

2.39 Table 12 compares the expenditure attracted by Bath City Centre and hence sales, with existing and committed shop floorspace (including Southgate). The top line of Table 12 (spending by catchment area residents) is taken from the bottom line of Table 9. As appropriate, an allowance (of 1.5% pa for comparison goods) is made for the average sales density of the existing shops to increase in real terms from 2011 onwards, following the long term trend towards higher town centre sales densities.

2.40 A similar arrangement of tables for Scenario 1 applies to the non-central shops and stores in Bath (Tables 13 to 21 in Appendix 4); Keynsham Town Centre (Tables 22 to 29); Midsomer Norton Town Centre (Tables 30 to 37) and Radstock Town Centre (Tables 38 to 45).

2.41 The Tables for Scenario 2 are simpler. Thus for Bath City Centre, Table 46 indicates the revised pattern of market shares of comparison goods expenditure attracted, taking account of the committed and potential developments outlined above (and indicated in the table heading). It shows the increases in market shares which we expect the Southgate development to effect by 2011, allowing also for the effects of new developments in competing towns. Table 47 is the product of Table 3 and Table 46, and indicates the revised amounts of expenditure attracted to Bath City Centre at each date. Table 47 compares this with existing shop floorspace and the sales capacity of the Southgate development (in a similar way to Table 12 in Scenario 1) to indicate the revised capacity for additional shop floorspace in the city centre.

2.42 As a likely result of increasing the market shares in the city centre, the market shares in the non-central stores have been decreased very slightly. Table 49 indicates the revised pattern of market shares as a consequence of the new city centre scheme. Table 50 is the product of Table 3 and Table 49, and indicates the revised amounts of expenditure attracted to the non-central stores at each date. Table 50 indicates the revised capacity for additional shop floorspace in non-central stores. Similar tables (52 to 54) apply to Scenario 2 for Keynsham Town Centre, Midsomer Norton Town Centre (55 to 57) and Radstock Town Centre (58 to 60).

2.43 As with Scenario 1 (Table 12), the comparison goods capacity forecasts are for new floorspace additional to the Southgate scheme. That scheme includes a new foodstore, which we have included in the RECAP Model as a committed development.

2.44 In Scenario 2, the adjustments in market shares which we have made for 2011, 2016, 2021 and 2026 are our professional judgements, based on the results of the Household Interview Survey, the local retailing geography and our experience elsewhere. However, when the Southgate development has been fully open for at least one year, it would be desirable to undertake a new Household Interview Survey to measure its actual effects; and then to update the RECAP Model forecasts based on the results. This would enable future retail planning to take account of the actual effects of this large scheme, rather than just the predicted effects, as in this report. This would also enable the estimated increases in population, expected from 2011, to be updated; together with the growth in per capita expenditure and expenditure on SFT.

The RECAP Model Forecasts

2.45 In the remainder of this section, we set out our retail capacity forecasts for Bath, Keynsham, Midsomer Norton and Radstock; and discuss the relationship between Bath City Centre and existing potential new retail developments. The forecasts are summarised in Table 2.2. We also comment on the implications for future development strategy. In setting out our forecasts, we distinguish between convenience goods and comparison goods, defined as follows:

- Convenience goods: Food, alcoholic drink, tobacco products, newspapers and periodicals, non-durable household goods.

- Comparison goods: Clothing and footwear; household textiles and soft furnishings; furniture and floor coverings; household appliances; audio visual equipment; hardware, DIY goods, decorating supplies; chemist and medical goods, cosmetics and beauty products; books, jewellery, watches, china, glassware and kitchen utensils, recreational, personal and luxury goods.

Table 2.2 Summary of Retail Capacity Forecasts

Scenario/Goods/Location	2011 (sq m net)	2016 (sq m net)	2021 (sq m net)	2026 (sq m net)	RECAP Model Table (Appendix 4)
Scenario 1					
Convenience Goods					
Bath City Centre	2,800	3,450	4,200	4,900	12
Bath Non-Central	450	700	950	1,200	21
Keynsham	-300	-50	150	450	29
Midsomer Norton	1,200	1,600	2,000	2,350	37
Radstock	-250	-200	-150	-150	45
Comparison Goods					
Bath City Centre	-13,000	-1,500	11,800	26,650	12
Bath Non-Central	1,500	3,450	5,800	8,300	21
Keynsham	350	1,500	2,900	4,500	29
Midsomer Norton	300	1,150	2,100	3,100	37
Radstock	-400	50	600	1,150	45
Scenario 2					
Convenience Goods					
Keynsham	1,600	2,050	2,550	3,100	54
Midsomer Norton	350	650	1,000	1,300	57
Radstock	2,100	2,300	2,450	2,600	60
Comparison Goods					
Bath City Centre	-6,550	5,950	20,450	36,550	48
Bath Non-Central	600	2,450	4,650	6,950	51
Keynsham	3,250	5,100	7,200	9,700	54
Midsomer Norton	300	1,150	2,100	3,100	57
Radstock	750	1,150	1,700	2,250	60

Source:

RECAP Model Tables in Appendix 4 as indicated, rounded to the nearest 50 sq m net.

Notes:

The forecasts in Table 2.2 are cumulative, i.e. the forecasts for each date include the forecasts for the previous dates and are not additional to those earlier forecasts. The forecasts are for further floorspace in addition to the Bath City Centre development at Southgate.

For convenience goods in Bath, the Scenario 2 forecasts are the same as for Scenario 1; and for comparison goods in Midsomer Norton, the Scenario 2 forecasts are the same as for Scenario 1.

The forecasts for Radstock assume that the committed development of 695 sq gross on the railway lands will be implemented for comparison goods retailing. If it was to be implemented as a foodstore, it would reduce the above Radstock capacity forecasts for convenience goods, and increase those for comparison goods. The magnitude of these changes would depend upon the retailer and store format.

Convenience Goods

2.46 It is important to note that the convenience goods retail capacity forecasts for the town centres and non-central locations set out in Table 2.2 are theoretical maxima. This is because they are based on the assumption that sales densities in the existing main foodstores will all rise or fall to currently estimated company average levels, as a result of the competition from new developments. However, an average is only an average; and the more attractive stores will continue to trade at levels above the company average, whilst others may trade successfully below the average. In addition, company average sales densities may well rise as food retailers become more efficient. It would therefore not be realistic to plan on the basis that such an across the board reduction in sales densities should or would occur.

2.47 It is also important to note that the capacity for non-central floorspace in Bath was forecast separately from that for the city centre for forecasting convenience and reliability. In deciding how these forecast needs should be accommodated therefore, the sequential approach should be applied as indicated in PPS6. This gives priority to city centre and edge of centre locations over out-of-centre locations. Thus some or all of the forecast capacity for additional non-central floorspace in Bath should be accommodated by means of city centre or edge-of-centre development, if a suitable site or sites exist or could be assembled. If no such sites exist, locations in or on the edge of existing district or local centres could be considered, the designation of a new district or local centre, or failing that, an out-of-centre location. As discussed in Section 3 below, we consider that much of the forecast capacity for new convenience goods floorspace could in practice be used to support a new superstore anchoring a new mixed use district centre, located to serve the main housing growth areas.

Bath City Centre

2.48 Scenario 1, Recap Model Table 12 shows that in 2007, we estimate that the main foodstores and other conveniences goods shops in Bath City Centre were achieving combined sales of £96.1m; at a combined average sales density of £13,903 per sq m net. Table 10 shows that based on estimated 2004/05 company average sales densities, the combined sales density of these stores in 2007 was £8,983 per sq m net. Thus, these stores as a group (including Sainsburys at Green Park) are estimated to be trading at well above the level based on published company averages.

2.49 In Table 12, we have allowed for sales in the existing convenience goods shops as a group, to fall to the level based on estimated 2004/05 company averages. This is a conventional approach in retail studies of this type. On this basis, summary Table 2.2

above shows that there will be capacity for about 2,800 sq m net of additional convenience goods floorspace in 2011 in Bath City Centre (in addition to the committed new supermarket in the Southgate Centre. This should rise to about 4,900 sq m in 2026, if forecast trends occur. A Scenario 2 has not been modelled for convenience goods in Bath City Centre because no further significant convenience goods development is currently committed or proposed.

2.50 These forecasts are on the basis that the additional floorspace would be provided in the form of modern food superstore floorspace, trading at a 'generic' average for such floorspace of £12,000 per sq m. Some operators trade at above this figure and some below, so the format of the store(s) and identity of the operator(s) would alter the forecast capacity. In the event that some of the additional floorspace is provided in the form of discount supermarkets, for example, the capacity would be significantly greater, because of the lower sales densities achieved by such retailers.

Bath Non-Central Stores

2.51 Scenario 1, Table 21 shows that in 2007, the main non-central foodstores in Bath were estimated to be achieving combined sales of £35.8m; at a combined average sales density of £8,842 per sq m net. This is marginally above the level based on published 2004/05 company average sales densities of £7,989 per sq m net, indicated in Table 18. Thus, these stores as a group are estimated to be trading at slightly above the level based on estimated company averages.

2.52 In Table 21, we have again allowed for sales in the existing convenience goods shops as a group, to fall to the level based on estimated 2004/05 company averages. On this basis, summary Table 2.2 above shows that there will be capacity for about 450 sq m net in 2011, which should increase throughout the forecasting period to about 1,200 sq m net by 2026, if forecast trends occur.

Keynsham

2.53 Scenario 1, Table 27 shows that in 2007, the main convenience foodstores (principally Pioneer Co-op, Somerfield and Iceland) in Keynsham were estimated to be achieving combined sales of £19.1m; at a combined average sales density of £4,559 per sq m net. This is somewhat below the level based on published 2004/05 company average sales densities of £5,629 per sq m net, indicated in Table 29. Thus, these stores as a group are estimated to be trading at somewhat below the level based on estimated company averages.

2.54 In Table 29, we have allowed for sales in the existing convenience goods shops as a group, to increase to the level based on estimated 2004/05 company averages. On this basis, summary Table 2.2 above shows that there will be no significant capacity arising until close to the end of the forecasting period. The negative capacity (theoretical oversupply of floorspace) shown in Table 2.2 under Scenario 1 simply means that the existing foodstores will trade at slightly below the level based on estimated company average sales densities until about 2016. This is not unusual or particularly significant.

2.55 We have tested a Scenario 2 for Keynsham, in which we assumed that there would be a substantial new food/non-food superstore developed in Keynsham town centre, together with other comparison goods shops. A potentially suitable site exists for such a development. Its purpose would be to 'clawback' the substantial leakage of convenience goods expenditure which is currently attracted to the Asda superstore at Longwell Green, Bristol. That store currently attracts 25.7% of the total convenience goods expenditure by the residents of catchment Zone 2, in which Keynsham is located; and other food stores in Bristol attract 16.4% of the convenience good expenditure in Zone 2. There is therefore an opportunity to retain a substantial part of that expenditure within the zone by means of a new food superstore in Keynsham town centre.

2.56 Scenario 2 assumes a substantial increase in the market share of convenience goods expenditure attracted to Keynsham from Zone 2 (up from 28% to 60%) and from the catchment area as a whole (from 2.6% to 5.4%). Table 2.2 shows that on this basis, there would be capacity for additional convenience goods floorspace (i.e. additional to the currently existing floorspace) of about 1,650 sq m net by 2011, rising to about 2,900 sq m net by 2021 and further to about 3,100 sq m net by 2026, if forecast trends occur. This again assumes that such floorspace trades at a generic average for food superstores of £12,000 per sq m net. This would not be sufficient to support a new food superstore large enough to achieve the assumed clawback of expenditure, until about 2021. However, if Somerfield or the Pioneer Co-op store was to close, it would release sufficient expenditure to support a new superstore in the town centre, of a size large enough to achieve the clawback of expenditure needed for its support, at an earlier date. Alternatively, there would be capacity for a town centre format food store earlier in the forecast period.

Midsomer Norton

2.57 Scenario 1, Table 38 shows that in 2007, the main convenience foodstores in Midsomer Norton (Tesco, Sainsburys and Lidl) were estimated to be achieving combined sales of £56.0m; at a combined average sales density of £11,962 per sq m net. This is higher than the level based on published 2004/05 company average sales densities of £9,444 per sq m net, indicated in table 38. Thus, these stores as a group are estimated to be trading at above estimated company averages. Much of this overtrading is due to the out-of-centre Tesco store, which is achieving about four times the market share of the town centre Sainsburys, despite having only 57% more floorspace.

2.58 In Table 38, we have again allowed for sales in the existing convenience goods shops as a group, to fall to the level based on estimated 2004/05 company averages. On this basis, summary Table 2.2 above shows that there should be capacity for 1,200 sq m net of floorspace in 2011, increasing throughout the forecasting period to approximately 2,350 sq m net floorspace by 2026, if forecast trends occur. This would be sufficient to support a town centre format supermarket (e.g Marks & Spencer Simply Food, Waitrose) or an extension to Sainsburys, by early in the forecasting period, without any increase in market shares.

2.59 Scenario 2 has been modelled for Midsomer Norton, as we were asked to investigate the market shares needed to support a redevelopment and replacement of the Radstock Cooperative store at Radstock with a substantial new supermarket. This would directly affect Midsomer Norton, as some of the expenditure would be transferred from Midsomer Norton stores (particularly the out-of-centre Tesco) to Radstock, to support the replacement store. In Table 57, we have again allowed for sales in the existing convenience goods shops as a group, to fall to the level based on estimated 2004/05 company averages. On this basis, summary Table 2.2 above shows that there would be capacity for about 350 sq m net in 2011, which would increase throughout the forecasting period to about 1,300 sq m net by 2026. This is a reduction in floorspace capacity, which would result from a new supermarket being developed at Radstock. However, it should still leave sufficient expenditure in Midsomer Norton for a small new town centre format supermarket (or extension to Sainsburys) from about 2016 onwards, depending on its size and operator.

Radstock

2.60 Scenario 1, Table 45 shows that in 2007, the main convenience foodstore in Radstock (Radstock Cooperative) and other convenience goods shops were estimated to be achieving combined sales of £5.0m; at a combined average sales density of £3,407 per sq m net. This is below the level based on published 2004/05 company average sales densities of £5,428 per sq m net, indicated in Table 43. Thus, these stores as a group are estimated to be trading at below estimated company averages. We consider that this is mainly due to the outdated nature and poor internal layout of the Radstock Cooperative store; which is perceived as unattractive compared with the more modern Tesco store at Midsomer Norton, for example.

2.61 In Table 45, we have allowed for sales in the existing convenience goods shops as a group, to rise to the level based on estimated 2004/05 company averages. This would probably require refurbishment of the Radstock Cooperative store, or its replacement with a similar size new store, either on the same site or elsewhere in Radstock. Thus Scenario 1 implicitly assumes such a refurbishment or replacement, with Radstock Cooperative as the operator of the refurbished or replacement store. On this basis, summary Table 2.2 above shows that there will be no capacity for additional convenience goods floorspace throughout the forecasting period. As with Keynsham, the forecast negative capacity means that the existing stores would trade at somewhat below the level based on estimated company averages. Again, this is not particularly significant; as an average is just that, and many stores are able to trade successfully at below company average levels, just as others trade at above the average.

2.62 For Scenario 2, we have modelled the likely effects of the replacement of the Radstock Cooperative store by a store operated by one of the principal food retailers (excluding Tesco, which already has an out-of-centre superstore at Midsomer Norton, and Asda, for whom Radstock is likely to be too small a town). We have therefore applied a 'generic' average sales density for the replacement store based on the sales densities of Morrisons, Sainsburys and Waitrose. Fairly significant increases in market shares have been assumed, to achieve the 'target' retail floorspace figure of approximately 2,000 sq m net in 2011. The market share attracted from Zone 10 has been increased from 5% to 22% to support this level of floorspace. We consider this market share increase to be achievable, particularly in the case of a branded supermarket being developed such as Morrisons, Sainsburys or Waitrose. As discussed above, this will reduce the retail capacity available for Midsomer Norton. In effect, it means that some of the capacity in Midsomer Norton forecast under Scenario 1 for that town, would be transferred to Radstock, as a result of providing new modern floorspace in Radstock rather than in Midsomer Norton. From increasing the market share from 2011 there should be capacity for about 2,100 sq m net of additional convenience goods floorspace in Radstock at that date, which should increase throughout the forecasting period to about 2,600 sq m by 2026, if forecast trends occur.

2.63 We have not modelled a third scenario which involves the existing Radstock Cooperative store remaining without refurbishment, and a new large foodstore operated by one of the major food retailers being developed in Radstock. This is because we consider such a scenario to be unrealistic in commercial terms. If a large modern supermarket was developed in Radstock, we would expect the Radstock Cooperative store to close; as with its limitations it would be unlikely to compete successfully with the new foodstore. The most likely outcomes in Radstock are therefore either refurbishment or replacement by Radstock Cooperative of its existing foodstore; or its replacement (on the existing site or another site) by a modern foodstore operated by one of the major food retailers. In the former case, there would be no significant impact on the foodstores in Midsomer Norton (other than short-term transitional impacts). In the latter case, the potential for new convenience goods floorspace in Midsomer Norton would be significantly reduced, but not eliminated, as indicated above.

2.64 We have tested with the RECAP Model a theoretically potential third scenario in which by 2011, Radstock Cooperative refurbishes or redevelops its existing store (without increasing the convenience goods net sales area), and a modern new foodstore of about 2,000 sq m net convenience goods floorspace is developed in Radstock by one of the major national food retailers. This would require transfer from Midsomer Norton to Radstock of all the growth potential in the former. It would mean that sales in the existing foodstores in Midsomer Norton would all fall to the level based on estimated company averages; and capacity for more convenience goods floorspace would not start to arise until about 2016, thereafter rising modestly through the remainder of the forecasting period. There would therefore be a fairly substantial impact on the existing foodstores in Midsomer Norton (particularly Tesco); and no opportunity of developing additional convenience goods floorspace there until very late in the forecasting period. In view of the geographical distribution of population (which is biased in favour of Midsomer Norton), we consider that such a scenario would be somewhat unlikely in commercial terms. However, it might be possible if forecast need in Midsomer Norton could not be accommodated there, and a retailer is willing to provide it in Radstock instead.

Comparison Goods

Bath City Centre

2.65 In Appendix 4, Scenario 1, Table 12 shows that we estimate Bath to be achieving an average sales density for comparison goods in 2007 of about £6,351 per sq m net. Based on our retail studies of a number of other town centres, we consider that this is a realistic sales density for a centre the size and nature of Bath. On this basis, Table 2.2 shows that in Scenario 1 (ie. no increase in market shares), after allowing for the Southgate development there will be more comparison goods floorspace (about 13,000 sq m net in 2011, falling to a balance between supply and demand by soon after 2016 if forecast trends occur) than would be theoretically justified by available expenditure. Capacity for additional comparison goods floorspace in Bath City centre will start to arise soon after 2016, and will reach about 25,350 sq m net by 2026 in addition to the comparison goods floorspace in the Southgate development, if forecast trends occur.

2.66 Scenario 2 is based on the more realistic assumption that the city centre’s market shares will increase by 2011, as a result of the Southgate development. These increases in market share from each Zone are shown in RECAP Model Table 46. The increases indicated in Table 46 are our experienced professional judgements. They would result in an overall increase in catchment area expenditure attracted from 22.2% at present to 23.8% by 2026. We consider that this is realistic, because the Southgate development will provide a range of mid-market retailers and a new department store which are not in

Bath at present. In Scenarios 1 and 2, we have allowed for sales in the existing shops to increase at 1.5% per annum from 2011 onwards, before forecasting capacity for additional retail floorspace in Bath City Centre. On this basis, there would be a much reduced theoretical excess of floorspace when the new Southgate centre opens (about 6,550 sq m net) with forecast capacity for additional floorspace starting to arise from about 2014 and reaching about 36,550 sq m net by 2026, if forecast trends occur. Thus, whilst there will be a theoretical short term surplus supply of floorspace, the deficit will soon be made good by rising expenditure; and capacity for further floorspace will grow rapidly thereafter.

2.67 Apparent short-term discrepancies between forecast capacity based on expenditure and provision of floorspace are not uncommon when major new retail developments are opened. This is because expenditure is forecast as a steadily rising curve, whilst new floorspace is usually provided at irregular intervals in the form of major new developments. This creates a stepped increase in floorspace which initially rises above the curve of expenditure growth for a short period. Before the provision of new floorspace, unmet need will in part be met by overtrading of existing floorspace. There is therefore a settling down period as the new floorspace is added. This will be the case with Southgate, which is clearly a vital addition to enhance Bath's retail offer and position in relation to competing centres.

Bath Non-central Locations

2.68 Table 2.2 shows that under Scenario 1, i.e. no increases in the market shares of catchment area expenditure attracted to non-central food stores and retail warehouses, there would be capacity in 2011 of about 1,500 sq m net, rising to about 3,450 sq m net in 2016 and 8,300 sq m by 2026, if forecast trends occur.

2.69 Under Scenario 2, we make the realistic assumption that there will be a very slight decrease in market shares from retail warehouses as a result of the new Southgate scheme attracting expenditure away from non-central locations. This is because some of the expected new shops in the Southgate Centre will be likely to sell small electrical goods such as audio-visual equipment; and homewares and 'lifestyle' goods (for example in the new department store), which are currently sold by the retail warehouses in the city. In Scenario 2, we forecast capacity for additional non-central floorspace of up to about 600 sq m net by 2011, rising to about 6,950 sq m net by 2026 (RECAP Table 51), if forecast trends occur.

2.70 This does not mean that this additional floorspace should be located out-of-centre, or provided in the format of low sales density retail warehouses. The sequential approach should be applied to site selection. If developed in or on the edge of the city centre (for example at Green Park), the format may well be of higher density buildings without immediately adjacent surface car parking. In such a development the sales densities would be likely to be somewhat greater than we have assumed for new floorspace forecast as non-central, resulting in a somewhat reduced capacity for new floorspace from that indicated in Table 2.2. As with all retail development, the supportable capacity will depend upon the format in which the new floorspace is provided, and the identities of the likely retailers which occupy it.

Keynsham

2.71 Table 2.2 shows that under Scenario 1, i.e. no increases in the market shares of catchment area expenditure attracted to Keynsham, there would be capacity in 2011 for about 350 sq m net, rising to about 1,500 sq m net by 2016 and 3,100 sq m net by 2026, if forecast trends occur.

2.72 We have tested a Scenario 2, for Keynsham, in which there is assumed to be some new comparison goods retail development associated with a potential new food store. We have therefore increased the market shares slightly (from 1.6% of total catchment area expenditure to 2.4%) to reflect the additional attractiveness of the town centre. On this basis, Table 2.1 shows that there would be capacity for about 3,250 sq m net additional floorspace by 2011, rising to about 9,700 sq m net by 2026, if forecast trends occur. This would be sufficient to support the comparison goods element of a new food/non-food superstore together with modest additional comparison goods floorspace, opening in the period 2016 to 2021 (subject to retailer demand and financial viability).

Midsomer Norton

2.73 Table 2.2 shows that under Scenario 1, i.e. no increases in the market shares of catchment area expenditure attracted to Midsomer Norton, there would be capacity in 2011 of about 300 sq m net, rising to about 1,140 sq m net in 2016 and 3,100 sq m by 2026, if forecast trends occur. We have not modelled a Scenario 2 for Midsomer Norton, because we consider that there are very limited prospects for substantial new comparison goods retail development in this small town centre.

Radstock

2.74 Table 2.2 shows that under Scenario 1, i.e. no increases in the market shares of catchment area expenditure attracted to Radstock, in addition to the small retail development already permitted on the railway land, capacity for additional comparison goods floorspace would not start to arise until 2016. Thereafter it should rise to about 1,150 sq m net by 2026, if forecast trends occur. For Scenario 2, the amount of existing comparison goods floorspace would be reduced, as the Radstock Cooperative store is approximately 60% comparison goods. This would be demolished to make way for the replacement supermarket, thus releasing expenditure to support new comparison goods floorspace. Therefore, if the current market shares can be maintained as a result of the comparison goods floorspace in the potential replacement supermarket (and other possible related new shops), there will be greater capacity for comparison goods floorspace. This explains why the Scenario 2 forecasts for Radstock are only slightly lower than those for Midsomer Norton. Table 2.2 shows that on this basis, by 2011 there would be capacity for about 750 sq m net of comparison goods floorspace, which would rise to about 2,250 sq m by 2026, if forecast trends occur.

Comparison Goods Retail Sector Analysis

Bath

2.75 To assist with assessing the need for additional retail floorspace in Bath and the surrounding town centres we have undertaken an analysis of the market shares of catchment area expenditure on each of the eight sub-categories of comparison goods, which each shopping destination was attracting from the catchment area in 2007. RECAP Model Table 4 in Appendix 4 sets out the available catchment area expenditure on each of the eight comparison goods categories. Tables 6 and 14 indicate the uncorrected pattern of market shares of such goods which the Household Interview Survey indicates as being attracted from the catchment area by Bath City Centre, and by retail warehouses and non-central food stores respectively. The product of these Tables with Table 4 (incorporating also the market share correction factors) is set out in Tables 8 and 16. These latter tables also indicate the overall market share of expenditure on each comparison goods sub-category, which is estimated to be attracted by each shopping destination.

2.76 Table 8 shows that there is some variation between the market shares attracted by Bath City Centre for each of the eight comparison goods categories. The highest is clothing and footwear, for which the City Centre attracts 35% of catchment area expenditure; followed by ‘Other Comparison Goods’ with 28% of expenditure attracted. 20% of household textiles expenditure is attracted; and 15% of expenditure on furniture and floorcoverings, and chemists, medical and beauty goods. The City Centre accounts for 14% of catchment area expenditure on audio visual equipment and 12% on household appliances. For hardware, DIY and garden products, the City Centre attracts 8% of catchment area expenditure. Table 8 therefore shows the strength of the City Centre for non-bulky comparison goods; and its limited role (in common with most town centres of this size and type) as a location for ‘bulky goods’ shopping.

2.77 The pattern of attraction of expenditure by non-central stores is approximately a ‘mirror image’ of that for the City Centre, with zero and negligible market shares for the non-bulky goods categories of clothing and footwear, and ‘other comparison goods’ respectively; and higher market shares for the ‘bulky goods’ categories. However, market shares across all categories of goods are very small, including the ‘bulky goods’ categories widely sold from retail warehouses. This reflects the limited number of retail warehouses in Bath. Thus Table 16 shows that non-central stores in Bath attract 10% of catchment area expenditure on audio visual goods, 9% of expenditure on household appliances, and 8% on hardware, DIY and garden products. For chemists, medical and beauty goods, non-central stores (which includes main foodstores) attract a market share of only 4%; whilst for furniture and floorcoverings their market share is 3%, and for household textiles 2%.

2.78 When the market shares attracted by the city centre are combined with those attracted by retail warehouses and non-central superstores, the overall market shares attracted by the city as a whole vary from 15% (Hardware, DIY and garden products) to 35% (clothing and footwear). The market shares attracted by Bath as a whole are conspicuously low for the ‘bulky goods’ categories. This indicates a need for more such ‘bulky goods’ retail outlets in the city (in particular an additional DIY goods store), to reduce the need for Bath’s residents to travel to more distant such facilities elsewhere. This does not necessarily imply that low density retail warehouse formats should be developed. In particular, the Retail Sector Analysis identifies a need for more outlets in the home improvements categories. There is also a need for more outlets selling chemists’, medical and beauty products. However, we would expect this latter need to be met to some degree by shops and stores in the new Southgate Centre.

Keynsham

2.79 Table 25 shows that Keynsham attracts very small market shares across each of the eight comparison goods categories. The highest is chemists’, medical and beauty goods, for which Keynsham attracts 5% of catchment area expenditure. For ‘other comparison goods’, and furniture and floorcoverings, 2% of expenditure is attracted. For clothing and footwear, audio-visual equipment, and hardward, DIY goods and garden products, the town attracts 1% of catchment area expenditure. No significant market shares of expenditure on household textiles and household appliances is attracted. Keynsham therefore attracts people from the local area to shop for everyday items such as toiletries. For other non-bulky goods and bulky goods, residents travel elsewhere, particularly to Bristol City Centre, the mall at Cribbs Causeway, or retail parks in Bristol. This indicates both a need and an opportunity for new comparison goods retail development in Keynsham, if retailer support can be attracted and development made financially viable.

Midsomer Norton

2.80 Table 33 shows that Midsomer Norton also attracts very small market shares across each of the eight comparison goods categories. The category attracting the highest market share of catchment area expenditure (3%) is chemists', medical and beauty goods. For household appliances, audio visual equipment and 'other comparison goods', 2% of total catchment area expenditure is attracted. For hardware, DIY and garden products, household textiles, and furniture and floorcoverings, market shares of 1% are attracted. Clothing and footwear does not attract any significant market share of catchment area expenditure. As with Keynsham, local people use Midsomer Norton for small everyday items. The presence of the out-of-centre Tesco store means that people buy a wider variety of goods, but market shares are still very small.

Radstock

2.81 Table 41 shows that Radstock Local Centre attracts very small market shares of catchment area expenditure across each of the eight comparison goods categories. The highest categories are household appliances which attract 2% market share (attributable to the Radstock Cooperative Store which sells a range of white goods); and chemists' medical and beauty products. For furniture and floorcoverings, household textiles, audio visual equipment, hardware, DIY and garden products Radstock attracts market shares of 1% each. For clothing and footwear and 'other comparison goods' no significant market shares of expenditure are attracted from the catchment area. However, Radstock Cooperative in Radstock sells most of the goods within the eight comparison goods categories.

USE AND REVIEW OF THE FORECASTS

2.82 Finally, we must emphasise that all expenditure based forecasts of future shop floorspace capacity are based on imperfect data and contain a number of assumptions. Our forecasts set out in this report are based on the most up-to-date and reliable information currently available to us. However, they are intended as an indication of the likely order of magnitude of future shop floorspace capacity (if forecast trends are realised) rather than as growth targets or rigid limits to future growth. The forecasts should be periodically revised as necessary in the light of actual population and expenditure growth, and as development proceeds and its effects become measurable.

3 Conclusions for the Retail Strategy

3.1 In this section, we summarise the principal conclusions arising from our quantitative retail capacity forecasts, and set out the implications for the Bath and North East Somerset Retail Strategy.

Convenience Goods

3.2 From the retail capacity forecasts, it is clear that there will be capacity for the equivalent of one new food superstore in Bath from about 2011 or earlier. This floorspace could be in a single large superstore of around 3,000 sq m , or could consist of a combination of city and district centre format supermarkets within the of 10-20,000 sq m size range, plus extensions to existing stores and/or a new discount supermarket. A sequential approach should be applied in selecting a suitable site or sites. This means that if there are suitable and available sites in or on the edge of the city centre or an existing district centre, they should be preferred to out-of-centre sites. If the need cannot be met in full or in part within the city centre, there will be a need to make provision elsewhere in the city. This could be in the form of a new store to form the 'anchor' for a new district centre (which would also need to include a range of services and community facilities) close to areas of major new housing, or areas which are currently deficient in access to major food stores and local services.

3.3 In Keynsham, there will only be sufficient capacity for a new food superstore in the town centre at an early date if the existing Somerfield or Pioneer Co-op food store closes. Such a new store would have to be large in order to achieve the degree of clawback of expenditure leakage necessary to ensure its support. A store of this size would carry the risk of causing closure of one of the existing food stores – but if such a closure did occur, it would result in overall modernisation and improvement of the town's food shopping facilities. Otherwise, capacity for a new town centre format supermarket will start to arise from about 2011. Whilst this would not achieve the same degree of clawback, it would also improve food shopping facilities in Keynsham town centre.

3.4 In Midsomer Norton, the existing out-of-centre Tesco is heavily overtrading. This creates capacity for additional foodstore floorspace. We consider that there will be capacity for a new town centre format supermarket from 2011, or extension of the existing Sainsburys store. However, if the Radstock Cooperative store in Radstock is replaced with a new modern supermarket operated by one of the major food retailers, or if such a store is developed in addition to the existing Radstock Cooperative store, this would reduce substantially the scope for such retail development in Midsomer Norton in the short to medium term.

3.5 In Radstock, with no increases in the market share of convenience goods expenditure attracted from the catchment area, we are unable to identify capacity for additional food store floorspace throughout the forecasting period. However, this should not preclude modernisation of the Radstock Cooperative store, or its replacement by a large modern supermarket or small superstore, so as to improve the retail attractions in this Local Centre. A replacement supermarket for the Radstock Cooperative store will need, and be likely to attract higher market shares from the surrounding area, particularly from the out-of-centre Tesco store at Midsomer Norton. A replacement foodstore in Radstock would be likely to reduce the prospects of a new foodstore being developed in Midsomer Norton in the short to medium term. However, it need not inhibit extension and improvement of the Sainsburys store or development of a small new town centre format supermarket, because there would still be modest capacity for additional convenience goods floorspace in Midsomer Norton under this scenario. An additional foodstore in Radstock would eliminate the prospects of new foodstore floorspace in Midsomer Norton until very late in the forecasting period. However, it may be a way of providing for forecast needs in the two towns combined, if new convenience goods floorspace cannot realistically be accommodated in Midsomer Norton.

Comparison Goods

3.6 In the case of comparison goods in Bath City Centre, the new Southgate Centre will result in modest more such floorspace than would be theoretically supportable by forecast growth in expenditure when it opens. However, rising expenditure will quickly overcome the theoretical forecast deficit, if forecast trends occur. The new Southgate Centre will therefore provide a ‘breathing space’ in which to plan for and work up proposals for the next phase of City Centre retail development. Such new developments can take many years from inception to completion, so it will be important that the Council is pro-active in using this time to prepare such proposals. From about 2021 onwards, rising expenditure should support a substantial new comparison goods shopping development on a similar scale to the new Southgate Centre, or a number of smaller but still substantial comparison goods developments in and on the edge of the city centre. The Retail Sector Analysis indicates that these should be particularly focused on the home improvements sector, including furniture, household textiles, domestic appliances, and fittings and fixtures for the home.

3.7 There will also be a significant and growing capacity for additional retail warehouse floorspace and comparison goods floorspace in main foodstores in Bath over the forecasting period. However, this should be located in accordance with the sequential approach, and not necessarily in the format of low density retail warehouses. In the case of ‘bulky goods’ in the homewares sectors, this need could potentially be met in the form of higher density buildings on site such as at Green Park or elsewhere on the western edge of the city centre. In addition, there is a conspicuous need for a new DIY goods store, which could probably only be on an out-of-centre site.

3.8 Keynsham and Midsomer Norton town centres both have similar levels of forecast capacity for comparison goods in Scenario 1, although Keynsham has greater potential if a new food superstore can be attracted to a town centre site. Only small scale comparison goods development will be supportable in these two town centres (particularly in Midsomer Norton) over the forecasting period. This is also true of Radstock, where if a new supermarket replaced the existing Radstock Cooperative store as discussed in Scenario 2, the capacity for comparison goods floorspace would increase, however not to any substantial level.

APPENDICES

Appendix 1 **Description of the RECAP Model**

Appendix 2 **Catchment Area Map**

Appendix 3 **Household Interview Survey Results**

Appendix 4 **Bath and North East Somerset RECAP Model 2008**

Appendix 1 – Description of the RECAP Model

Appendix 2 – Catchment Area Map

Appendix 3 – Household Interview Survey Results

Appendix 4 – Bath and North East Somerset RECAP Model 2008

What is the RECAP Model?

The acronym RECAP stands for Retail Capacity. The RECAP Model is an empirical retail expenditure allocation model, which allocates available shopping catchment area expenditure to town centres and other shopping destinations (such as food superstores and retail warehouse parks) on the basis of the results of a specially designed Household Interview Survey of shopping patterns within the catchment area. It is not a theoretical gravity model. It does not use driving time isochrones as the basis for catchment area analysis (except that in some cases a driving time isochrone may be used to define the outer limits of the area to be covered by the household interview survey).

It is a *growth allocation model* , in that it calculates the capacity for additional retail floorspace principally from the growth in expenditure attracted to each shopping destination, as a result of growth in population and per capita expenditure, and changes in market shares of catchment area expenditure attracted. It does not therefore rely on detailed and precise information of existing shop floorspace for its reliability. The RECAP Model is based on a method which has been widely used and tested at many Public Inquiries; and has been accepted by Planning Inspectors and the Secretary of State.

The main purposes of the RECAP Model are:

- To estimate current retail sales in town centres, food superstores, retail warehouse parks, and other main shopping destinations, as a means of assessing current retail performance, and setting a 'baseline' for forecasting.

- To produce forecasts of future retail sales in each shopping destination.

- To produce forecasts of the amount of additional retail floorspace, which will be supportable in each shopping destination by growth in population and retail expenditure.

- To explore the implications and realism of alternative strategies for new town centre and other retail developments.

- To produce forecasts of the impact (in terms of retail sales diverted) on existing shopping destinations of proposed new retail developments;

How does the RECAP Model work?

In summary, use of the RECAP Model involves the following steps:

1. Define the likely maximum catchment area, by means of a driving time isochrone; and/or by reference to physical barriers, communications, and the locations of competing shopping centres; and/or reference to other existing survey data.

2. Divide this area into postcode districts or sectors, or groups of postcode districts or sectors, so as to form catchment area zones; according to the distribution of population, communications, barriers to movement, and location of competing centres.

3. Undertake a detailed household interview survey by telephone of a random sample of households in the defined catchment area, to establish shopping habits for each of 10 different (and precisely defined) categories of retail goods.

4. Obtain estimates and forecasts of the population of each catchment zone.

5. Obtain an estimate of average per capita expenditure on convenience and comparison goods in the defined catchment area, adjusted to remove expenditure on special forms of trading (mail order, vending machines, internet, etc).

6. Apply ultra long term trend based rates of growth in per capital expenditure on convenience and comparison goods to the estimated average per capita expenditure.

7. Multiply base year and forecast future per capita expenditure by base year and forecast population of each catchment zone, to obtain base year estimates and future forecasts of available expenditure on convenience and comparison goods in each catchment zone.

8. Combine together the results from the questions in the Household Interview Survey on each sub-category of goods, weighting the answers according to average per capita expenditure on each sub-category, to form proportions of available catchment area expenditure in each zone which are attracted to each shopping destination (eg, town centre and out-of-centre locations).

9. Multiply these market shares for each zone by the available expenditure in each zone to obtain the amounts of expenditure flowing from each zone to each shopping destination for convenience and comparison goods.

10. Add these flows of expenditure together to provide current estimates and future forecasts of sales of convenience and comparison goods attracted by each shopping destination.

11. If appropriate, add in estimates of expenditure by visitors by outside the defined catchment area.

12. Compare estimated and forecast sales with current shop floor space to obtain average sales densities, allowing for growth or decline in these as appropriate.

13. Calculate future 'residual' expenditure which will be available to support additional retail floorspace.

14. Convert this to floorspace capacity forecasts by applying realistic average sales densities for new retail floorspace.

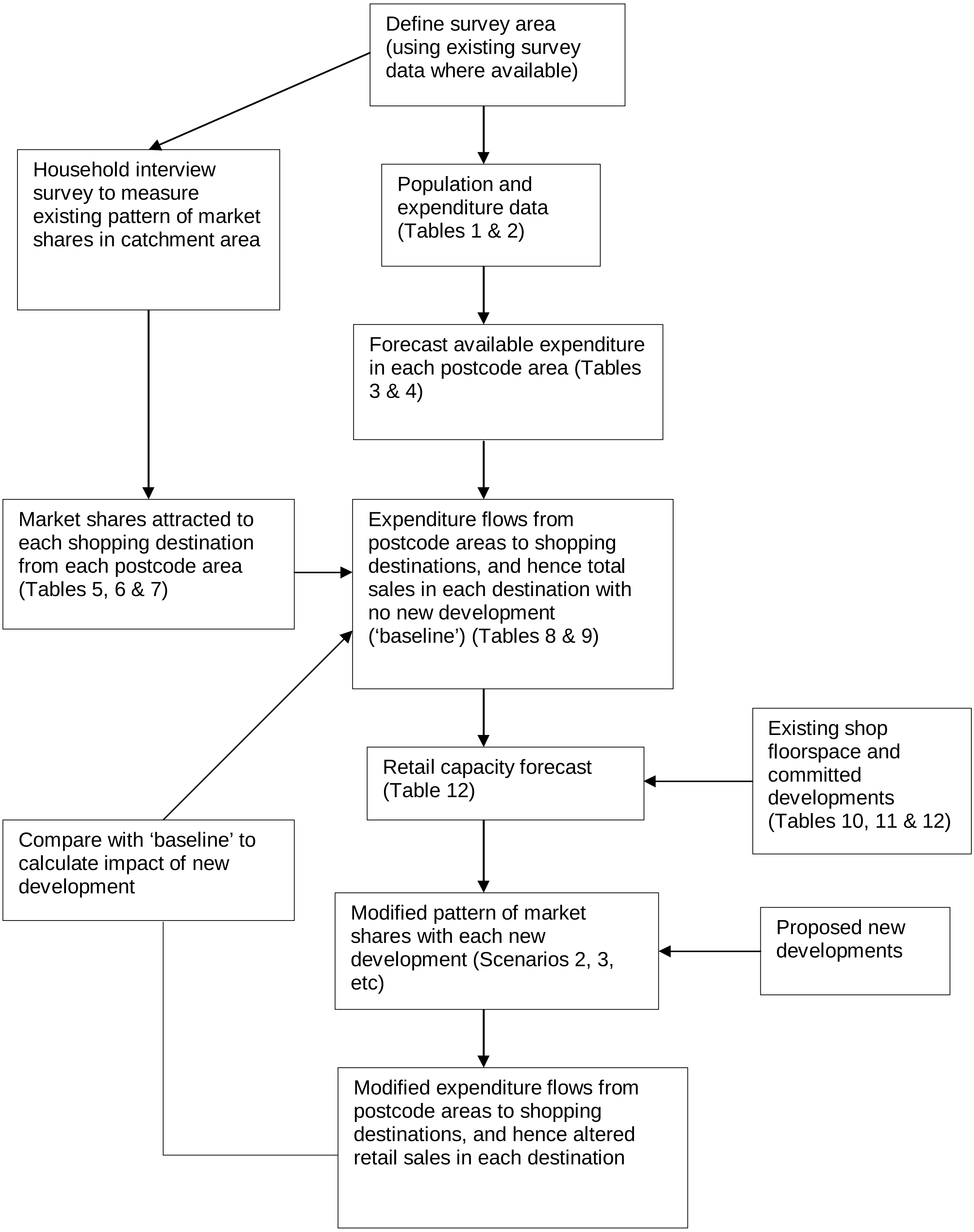
15. In the case of impact testing, insert the proposed new developments into the model; amend the pattern of market shares in future years on the basis of judgements about relative attractiveness; recalculate expenditure flows and hence retail sales in existing shopping destinations; and express as percentages of trade diverted from existing shopping destinations.

16. In the case of cumulative impact assessments, repeat the previous step by adding in each new development to be assessed, and thereby obtaining a new impact forecast for each such scenario.

Donaldsons
June 2007

RECAP Model Flowchart

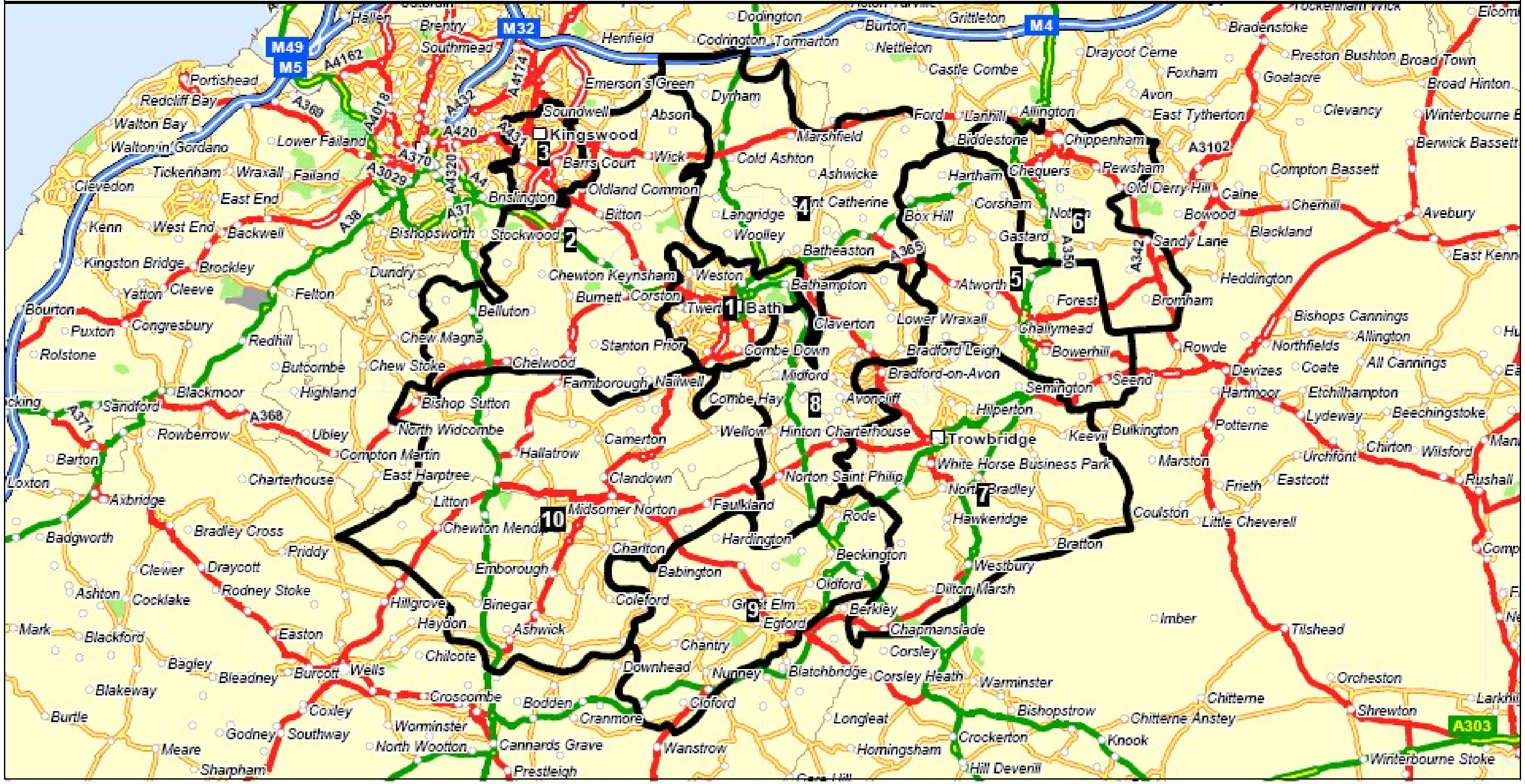
This chart summarises the steps involved in using the RECAP Model to forecast the capacity for new retail floorspace and the impact of proposed new retail developments.



MapInfo

TargetPro® Report Map

Study name : **Bath**
Prepared for : **Donaldsons**
Area name : **Bath Postcode Selection**



MapInfo Limited
Minton Place
Victoria Street
Windsor SL4 1EG

13/03/2007

Q01 At which food store do you do most of your household's main food shopping, and where is that ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Base:		1776		351		152		202		101		136		131		252		100		100		251
Bath CC																						
Iceland, Ham Gardens, Southgate, Bath City Centre	0.11%	2	0.60%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
M&S Food Hall, Bath City Centre	0.51%	9	1.70%	6	0.00%	0	0.00%	0	0.00%	0	0.70%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.80%	2
Sainsburys Local, Seven Dials, Bath City Centre	0.11%	2	0.30%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.00%	1	0.00%	0	0.00%	0
Sainsburys, Green Park Station, Green Park Road, Bath City Centre	9.12%	162	37.00%	130	7.20%	11	0.50%	1	4.00%	4	0.00%	0	0.80%	1	0.00%	0	12.00%	12	1.00%	1	0.80%	2
Waitrose, The Podium, Northgate Street, Bath City Centre	4.00%	71	14.00%	49	3.30%	5	0.00%	0	6.90%	7	0.00%	0	0.00%	0	0.40%	1	8.00%	8	0.00%	0	0.40%	1
Other convenience goods stores within Bath City Centre	0.45%	8	2.00%	7	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.40%	1
Total Bath City Centre	**14.30%**	**254**	**55.56%**	**195**	**10.53%**	**16**	**0.50%**	**1**	**10.89%**	**11**	**0.74%**	**1**	**0.76%**	**1**	**0.40%**	**1**	**21.00%**	**21**	**1.00%**	**1**	**2.39%**	**6**
Bath O-o-C																						
Costcutter, 72 Newton Road, Twerton, Bath	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Morrisons, Kensington Place, London Road, Bath	3.94%	70	12.00%	42	0.70%	1	0.00%	0	18.80%	19	0.70%	1	0.00%	0	0.00%	0	4.00%	4	1.00%	1	0.80%	2
Somerfield, High Street, Weston, Bath	0.28%	5	1.40%	5	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Somerfield, St Saviours Road, Larkhill, Bath	0.23%	4	0.00%	0	0.00%	0	0.00%	0	4.00%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Tesco Express Combe Down, Bath	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other out-of-centre convenience goods stores in Bath	0.34%	6	1.10%	4	0.00%	0	0.00%	0	1.00%	1	0.00%	0	0.00%	0	0.00%	0	1.00%	1	0.00%	0	0.00%	0
Co-Op, Oldfield Park, Bath BA2 3LF	0.17%	3	0.90%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Co-Op, Mount Road, Bath, BA2 1LN	0.06%	1	0.30%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Co-Op, Bearflat, Bath BA2 4QL	0.11%	2	0.30%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.40%	1
Co-Op, Moorland Road, Bath BA2 3LF	0.56%	10	2.60%	9	0.70%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Total Bath O-o-C	**4.79%**	**85**	**14.53%**	**51**	**0.66%**	**1**	**0.00%**	**0**	**23.76%**	**24**	**0.74%**	**1**	**0.00%**	**0**	**0.00%**	**0**	**5.00%**	**5**	**1.00%**	**1**	**0.80%**	**2**
Midsomer Norton																						
Lidl, 39 High Street, Midsomer Norton	0.39%	7	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	2.80%	7
Sainsburys, The Hollies, Midsomer Norton, Radstock	1.69%	30	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	12.00%	30
Other food / convenience goods stores in Midsomer Norton	0.28%	5	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	2.00%	5
Tesco, Old Mills, Paulton	7.10%	126	1.10%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.00%	1	0.00%	0	48.20%	121
Total Midsomer Norton	**9.46%**	**168**	**1.14%**	**4**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**1.00%**	**1**	**0.00%**	**0**	**64.94%**	**163**
Keynsham																						
Iceland, 14 – 18, Temple Street, Keynsham, Bristol	0.39%	7	0.30%	1	3.90%	6	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Pioneer Co-Op, Ashmead Roundabout, Keynsham	0.68%	12	0.30%	1	6.60%	10	0.50%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Somerfield, 63 High Street, Keynsham, Bristol	0.90%	16	0.00%	0	9.90%	15	0.00%	0	0.00%	0	0.70%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other convenience goods stores in Keynsham town centre	0.28%	5	0.00%	0	3.30%	5	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Total Keynsham	**2.25%**	**40**	**0.57%**	**2**	**23.68%**	**36**	**0.50%**	**1**	**0.00%**	**0**	**0.74%**	**1**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**
Radstock																						
Radco (Co–op), 3 Wells Road, Radstock	0.62%	11	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.00%	1	0.00%	0	4.00%	10
Other convenience goods stores in Radstock	0.06%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.40%	1
Total Radstock	**0.68%**	**12**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**1.00%**	**1**	**0.00%**	**0**	**4.38%**	**11**
L & F Jones Cash and Carry, Midsomer Norton	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Local convenience shops	0.56%	10	1.10%	4	0.70%	1	0.00%	0	1.00%	1	0.00%	0	0.00%	0	0.40%	1	2.00%	2	0.00%	0	0.40%	1
Bath Farmers' Market, Bath City Centre	0.23%	4	0.90%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.00%	1	0.00%	0	0.00%	0
Co-Op, Frome Road, Oddown, Bath	0.06%	1	0.30%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Asda superstore at Longwell Green, Bristol	10.02%	178	7.10%	25	25.70%	39	50.00%	101	4.00%	4	0.00%	0	0.00%	0	0.40%	1	1.00%	1	0.00%	0	2.80%	7
Other foodstore at Longwell Green, Bristol	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Bristol	4.84%	86	2.30%	8	16.40%	25	23.30%	47	3.00%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.20%	3
Chippenham	10.30%	183	0.60%	2	0.70%	1	0.00%	0	30.70%	31	26.50%	36	84.00%	110	0.40%	1	0.00%	0	0.00%	0	0.80%	2
Cirencester	0.06%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.80%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Frome	7.55%	134	0.30%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	6.30%	16	9.00%	9	87.00%	87	8.40%	21
Stroud	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Swindon	0.06%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.80%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Trowbridge	13.74%	244	1.40%	5	0.00%	0	0.00%	0	5.90%	6	9.60%	13	1.50%	2	70.20%	177	36.00%	36	5.00%	5	0.00%	0
Wells	0.06%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.40%	1
Westbury	1.18%	21	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	8.30%	21	0.00%	0	0.00%	0	0.00%	0
Weston-super-Mare	0.06%	1	0.00%	0	0.70%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Yate	0.17%	3	0.00%	0	0.00%	0	1.00%	2	1.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Internet	1.30%	23	2.00%	7	2.00%	3	1.50%	3	1.00%	1	0.00%	0	3.80%	5	0.80%	2	0.00%	0	0.00%	0	0.80%	2
Other	11.37%	202	2.30%	8	14.50%	22	18.80%	38	5.00%	5	53.70%	73	6.90%	9	8.70%	22	9.00%	9	0.00%	0	6.40%	16
Tesco, Longwell Green	0.06%	1	0.00%	0	0.00%	0	0.50%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Tesco, Shepton Avenue	0.23%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.60%	4
(Don't know / no answer / varies)	5.80%	103	6.00%	21	3.90%	6	4.00%	8	13.90%	14	8.10%	11	1.50%	2	4.00%	10	14.00%	14	6.00%	6	4.40%	11

The Totals colums are the totals of the unweighted results for each zone, so may not be representative of the survey area as a whole.

Q04 Where do you do most of your household's shopping for small scale 'top-up' food and convenience goods items, including newspapers and tobacco products ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Base:		1776		351		152		202		101		136		131		252		100		100		251
Bath CC																						
Iceland, Ham Gardens, Southgate, Bath City Centre	0.17%	3	0.90%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
M&S Food Hall, Bath City Centre	0.96%	17	2.80%	10	1.30%	2	0.50%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	2.00%	2	0.00%	0	0.80%	2
Sainsburys Local, Seven Dials, Bath City Centre	0.23%	4	1.10%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Sainsburys, Green Park Station, Green Park Road, Bath City Centre	2.03%	36	8.00%	28	0.70%	1	0.00%	0	1.00%	1	0.00%	0	0.00%	0	0.40%	1	4.00%	4	0.00%	0	0.40%	1
Waitrose, The Podium, Northgate Street, Bath City Centre	2.14%	38	8.30%	29	1.30%	2	0.50%	1	5.00%	5	0.00%	0	0.00%	0	0.00%	0	1.00%	1	0.00%	0	0.00%	0
Other convenience goods stores within Bath City Centre	1.97%	35	8.00%	28	0.00%	0	0.00%	0	4.00%	4	0.00%	0	0.00%	0	0.80%	2	0.00%	0	0.00%	0	0.40%	1
Total Bath City Centre	**69.63%**	**133**	**29.06%**	**102**	**3.29%**	**5**	**0.99%**	**2**	**9.90%**	**10**	**0.00%**	**0**	**0.00%**	**0**	**1.19%**	**3**	**7.00%**	**7**	**0.00%**	**0**	**1.59%**	**4**
Bath OC																						
Costcutter, 72 Newton Road, Twerton, Bath	0.06%	1	0.30%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Morrisons, Kensington Place, London Road, Bath	1.75%	31	7.10%	25	0.00%	0	0.00%	0	5.90%	6	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Somerfield, High Street, Weston, Bath	1.01%	18	5.10%	18	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Somerfield, St Saviours Road, Larkhill, Bath	0.28%	5	0.60%	2	0.00%	0	0.00%	0	3.00%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Tesco Express Combe Down, Bath	0.56%	10	2.00%	7	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	2.00%	2	0.00%	0	0.40%	1
Other out-of-centre convenience goods stores in Bath	2.53%	45	10.30%	36	0.00%	0	0.50%	1	4.00%	4	0.00%	0	0.00%	0	0.00%	0	1.00%	1	0.00%	0	1.20%	3
Co-Op, Bearflat, Bath	0.34%	6	1.70%	6	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Co-Op, Moorland Road, Bath	0.90%	16	4.00%	14	1.30%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Co-Op, Mount Road, Bath	0.11%	2	0.60%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Total Bath O-o-C	**7.55%**	**134**	**31.62%**	**111**	**1.32%**	**2**	**0.50%**	**1**	**12.87%**	**13**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**3.00%**	**3**	**0.00%**	**0**	**1.59%**	**4**
Midsomer Norton																						
Lidl, 39 High Street, Midsomer Norton	0.45%	8	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	3.20%	8
Sainsburys, The Hollies, Midsomer Norton, Radstock	0.79%	14	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	5.60%	14
Other food / convenience goods stores in Midsomer Norton	0.79%	14	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	5.60%	14
Tesco, Old Mills, Paulton	2.20%	39	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	15.50%	39
Total Midsomer Norton	**4.22%**	**75**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**29.88%**	**75**
Keynsham																						
Other convenience goods stores in Keynsham town centre	1.58%	28	0.00%	0	18.40%	28	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Pioneer Co-Op, Ashmead Roundabout, Keynsham	0.62%	11	0.00%	0	6.60%	10	0.50%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Iceland, 14 – 18, Temple Street, Keynsham, Bristol	0.34%	6	0.00%	0	2.60%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.80%	2
Somerfield, 63 High Street, Keynsham, Bristol	1.30%	23	0.30%	1	13.20%	20	0.50%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.40%	1
Total Keynsham	**3.83%**	**68**	**0.28%**	**1**	**40.79%**	**62**	**0.99%**	**2**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**1.20%**	**3**
Radstock																						
Radco (Co–op), 3 Wells Road, Radstock	0.90%	16	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	6.40%	16
Other convenience goods stores in Radstock	0.28%	5	0.00%	0	0.00%	0	0.50%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.00%	1	0.00%	0	1.20%	3
Total Radstock	**1.18%**	**21**	**0.00%**	**0**	**0.00%**	**0**	**0.50%**	**1**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**1.00%**	**1**	**0.00%**	**0**	**7.57%**	**19**
Local convenience shops	10.76%	191	9.40%	33	14.50%	22	12.90%	26	9.90%	10	12.50%	17	3.80%	5	11.50%	29	19.00%	19	3.00%	3	10.80%	27
Bath Farmers' Market, Bath City Centre	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
L & F Jones Cash and Carry, Midsomer Norton	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Co-Op, Bradford Road, Combe Down, Bath	0.28%	5	1.40%	5	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Co-Op, Frome Road, Bath	0.06%	1	0.30%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Co-Op, Julian Road, Bath	0.23%	4	1.10%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Co-Op, Peasedown St John, Bath	0.39%	7	0.00%	0	1.30%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	2.00%	5
Co-Op, Southdown Road, Bath	0.06%	1	0.30%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Asda superstore at Longwell Green, Bristol	2.70%	48	0.60%	2	3.90%	6	18.80%	38	1.00%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.40%	1
Other foodstore at Longwell Green, Bristol	0.28%	5	0.00%	0	0.70%	1	2.00%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Bristol	1.80%	32	0.60%	2	4.60%	7	10.90%	22	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.40%	1
Chippenham	6.36%	113	0.00%	0	0.70%	1	0.00%	0	4.00%	4	5.10%	7	64.10%	84	6.00%	15	2.00%	2	0.00%	0	0.00%	0
Cirencester	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Frome	4.84%	86	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	2.00%	5	5.00%	5	69.00%	69	2.80%	7
Stroud	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Swindon	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Trowbridge	6.08%	108	0.00%	0	0.00%	0	0.00%	0	2.00%	2	1.50%	2	1.50%	2	36.10%	91	8.00%	8	3.00%	3	0.00%	0
Wells	0.06%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.40%	1
Westbury	1.75%	31	0.30%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	11.90%	30	0.00%	0	0.00%	0	0.00%	0
Weston-super-Mare	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Yate	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Internet	0.17%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.40%	1	1.00%	1	0.00%	0	0.40%	1
Other	13.91%	247	0.00%	0	7.20%	11	28.70%	58	18.80%	19	55.10%	75	5.30%	7	7.90%	20	12.00%	12	2.00%	2	17.10%	43
Co-Op, Upper Bloomfield, Odd Down	0.28%	5	1.40%	5	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
(Don't know / no answer / varies)	9.18%	163	10.30%	36	7.20%	11	8.90%	18	8.90%	9	11.80%	16	4.60%	6	7.90%	20	22.00%	22	7.00%	7	7.20%	18
(Don't do top-up shopping)	16.55%	294	13.40%	47	14.50%	22	14.90%	30	32.70%	33	14.00%	19	20.60%	27	15.10%	38	20.00%	20	16.00%	16	16.70%	42

The Totals colums are the totals of the unweighted results for each zone, so may not be representative of the survey area as a whole.

Q05 Where do you do most of your household's shopping for clothes, footwear and other fashion goods ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Base:		1776		351		152		202		101		136		131		252		100		100		251
Less SFT Etc (%s calculated from Base)																						
Internet	1.58%	28	1.10%	4	0.00%	0	3.00%	6	2.00%	2	2.20%	3	2.30%	3	0.40%	1	0.00%	0	4.00%	4	2.00%	5
Mail order / catalogue	5.63%	100	4.30%	15	11.20%	17	5.90%	12	1.00%	1	7.40%	10	4.60%	6	7.10%	18	4.00%	4	5.00%	5	4.80%	12
Abroad	0.28%	5	0.30%	1	0.00%	0	0.00%	0	2.00%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.80%	2
(Don't know / varies)	4.96%	88	4.80%	17	4.60%	7	4.00%	8	7.90%	8	4.40%	6	4.60%	6	6.00%	15	7.00%	7	1.00%	1	5.20%	13
(Don't buy these items)	1.80%	32	2.80%	10	0.70%	1	0.50%	1	4.00%	4	1.50%	2	3.10%	4	1.20%	3	1.00%	1	1.00%	1	2.00%	5
New Base		**1523**		**304**		**127**		**175**		**84**		**115**		**112**		**215**		**88**		**89**		**214**
(%s calculated from New Base hereafter)																						
Bath City Centre	**53.18%**	**810**	**84.21%**	**256**	**40.94%**	**52**	**6.29%**	**11**	**64.29%**	**54**	**41.74%**	**48**	**33.93%**	**38**	**47.44%**	**102**	**77.27%**	**68**	**62.92%**	**56**	**58.41%**	**125**
Bath O-o-C																						
Retail Parks in Bath	0.20%	3	0.99%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Bath	0.07%	1	0.33%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Bath	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Total Bath O-o-C	**0.26%**	**4**	**1.32%**	**4**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**
Midsomer Norton Town centre	**0.85%**	**13**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**6.07%**	**13**
Keynsham Town Centre	**1.18%**	**18**	**0.33%**	**1**	**10.24%**	**13**	**0.57%**	**1**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**1.40%**	**3**
Radstock Town Centre (inc Radco store)	**0.13%**	**2**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.93%**	**2**
Retail warehouses in Midsomer Norton	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail warehouses in Keynsham	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail warehouses in Radstock	0.07%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.47%	1
Trowbridge Town Centre	8.93%	136	0.99%	3	0.00%	0	0.00%	0	7.14%	6	14.78%	17	0.00%	0	36.28%	78	14.77%	13	12.36%	11	3.74%	8
Retail Parks in Trowbridge	0.26%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.14%	1	3.37%	3	0.00%	0
Other retail warehouses in Trowbridge	0.07%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.14%	1	0.00%	0	0.00%	0
Food superstores in Trowbridge	0.20%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.40%	3	0.00%	0	0.00%	0	0.00%	0
Chippenham Town Centre	4.53%	69	0.00%	0	0.00%	0	0.00%	0	15.48%	13	20.87%	24	28.57%	32	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Chippenham	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Chippenham	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Chippenham	0.07%	1	0.00%	0	0.00%	0	0.00%	0	1.19%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Swindon Town Centre	2.50%	38	0.33%	1	0.00%	0	0.00%	0	1.19%	1	7.83%	9	16.07%	18	3.72%	8	0.00%	0	1.12%	1	0.00%	0
Retail Parks in Swindon	0.53%	8	0.66%	2	0.79%	1	0.00%	0	1.19%	1	0.00%	0	3.57%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Swindon	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Swindon	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Cirencester Town Centre	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Cirencester	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Cirencester	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Cirencester	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Stroud Town Centre	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Stroud	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Stroud	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Stroud	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Bristol City Centre (includes Broadmead)	11.75%	179	4.93%	15	33.07%	42	51.43%	90	2.38%	2	1.74%	2	3.57%	4	2.33%	5	0.00%	0	3.37%	3	7.48%	16
Cribbs Causeway Regional Shopping Centre	4.66%	71	0.66%	2	4.72%	6	18.29%	32	1.19%	1	5.22%	6	12.50%	14	1.40%	3	1.14%	1	0.00%	0	2.80%	6
Retail Parks in Bristol	0.53%	8	0.00%	0	2.36%	3	2.29%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.47%	1
Other retail warehouses in Bristol	0.33%	5	0.00%	0	0.00%	0	2.29%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.47%	1
Food superstores in Bristol	0.26%	4	0.00%	0	0.79%	1	1.71%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Asda superstore at Longwell Green, Bristol	1.44%	22	1.97%	6	1.57%	2	6.29%	11	0.00%	0	0.00%	0	0.00%	0	0.47%	1	0.00%	0	0.00%	0	0.93%	2
Weston-super-Mare Town Centre	0.46%	7	0.66%	2	0.79%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.47%	1	0.00%	0	0.00%	0	1.40%	3
Retail Parks in Weston-super-Mare	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Weston-super-Mare	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Weston-super-Mare	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Yate Town Centre	0.07%	1	0.00%	0	0.00%	0	0.00%	0	1.19%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Yate	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Yate	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Yate	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Westbury Town Centre	0.26%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.86%	4	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Westbury	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Westbury	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Westbury	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Wells	0.13%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.93%	2
Other retail warehouses in Wells	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Wells	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Frome	0.07%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.12%	1	0.00%	0
Other retail warehouses in Frome	0.13%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.12%	1	0.47%	1
Food superstores in Frome	0.46%	7	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	2.25%	2	2.34%	5
Other	6.70%	102	3.95%	12	4.72%	6	10.86%	19	4.76%	4	7.83%	9	1.79%	2	4.65%	10	4.55%	4	12.36%	11	11.68%	25

The Totals colums are the totals of the unweighted results for each zone, so may not be representative of the survey area as a whole.

Q06 Where do you do most of your household's shopping for furniture, carpets and other floor coverings ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Base:		1776		351		152		202		101		136		131		252		100		100		251
Less SFT Etc (%s calculated from Base)																						
Internet	1.24%	22	1.10%	4	0.70%	1	0.50%	1	0.00%	0	2.20%	3	1.50%	2	1.60%	4	1.00%	1	1.00%	1	2.00%	5
Mail order / catalogue	1.41%	25	0.90%	3	0.70%	1	2.50%	5	2.00%	2	2.20%	3	3.80%	5	0.80%	2	1.00%	1	1.00%	1	0.80%	2
(Don't know / varies)	12.56%	223	10.00%	35	14.50%	22	13.40%	27	11.90%	12	7.40%	10	10.70%	14	10.70%	27	25.00%	25	15.00%	15	14.30%	36
(Don't buy these items)	20.10%	357	23.90%	84	19.10%	29	14.40%	29	19.80%	20	25.70%	35	17.60%	23	17.90%	45	18.00%	18	22.00%	22	20.70%	52
New Base		**1149**		**225**		**99**		**140**		**67**		**85**		**87**		**174**		**55**		**61**		**156**
(%s calculated from New Base hereafter)																						
Bath City Centre	**23.15%**	**266**	**54.67%**	**123**	**14.14%**	**14**	**0.71%**	**1**	**41.79%**	**28**	**8.24%**	**7**	**16.09%**	**14**	**14.37%**	**25**	**45.45%**	**25**	**13.11%**	**8**	**13.46%**	**21**
Bath O-o-C																						
Retail Parks in Bath	2.26%	26	4.89%	11	2.02%	2	0.00%	0	8.96%	6	1.18%	1	0.00%	0	0.00%	0	1.82%	1	3.28%	2	1.92%	3
Other retail warehouses in Bath	1.31%	15	4.00%	9	0.00%	0	0.71%	1	2.99%	2	0.00%	0	0.00%	0	0.00%	0	1.82%	1	1.64%	1	0.64%	1
Food superstores in Bath	0.09%	1	0.44%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Total Bath O-o-C	**3.66%**	**42**	**9.33%**	**21**	**2.02%**	**2**	**0.71%**	**1**	**11.94%**	**8**	**1.18%**	**1**	**0.00%**	**0**	**0.00%**	**0**	**3.64%**	**2**	**4.92%**	**3**	**2.56%**	**4**
Midsomer Norton Town centre	**1.83%**	**21**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**13.46%**	**21**
Keynsham Town Centre	**1.74%**	**20**	**0.00%**	**0**	**19.19%**	**19**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.64%**	**1**
Radstock Town Centre (inc Radco store)	**0.78%**	**9**	**0.44%**	**1**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**5.13%**	**8**
Retail warehouses in Midsomer Norton	1.04%	12	0.00%	0	1.01%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	7.05%	11
Retail warehouses in Keynsham	0.17%	2	0.00%	0	2.02%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail warehouses in Radstock	0.26%	3	0.44%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.28%	2
Trowbridge Town Centre	5.22%	60	0.44%	1	0.00%	0	0.00%	0	2.99%	2	5.88%	5	1.15%	1	25.29%	44	5.45%	3	6.56%	4	0.00%	0
Retail Parks in Trowbridge	7.75%	89	0.44%	1	0.00%	0	0.00%	0	1.49%	1	14.12%	12	0.00%	0	32.76%	57	12.73%	7	11.48%	7	2.56%	4
Other retail warehouses in Trowbridge	0.17%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.15%	2	0.00%	0	0.00%	0	0.00%	0
Food superstores in Trowbridge	0.09%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.57%	1	0.00%	0	0.00%	0	0.00%	0
Chippenham Town Centre	3.05%	35	0.00%	0	0.00%	0	0.00%	0	5.97%	4	9.41%	8	26.44%	23	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Chippenham	1.83%	21	0.00%	0	0.00%	0	0.00%	0	4.48%	3	7.06%	6	13.79%	12	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Chippenham	0.26%	3	0.00%	0	0.00%	0	0.00%	0	1.49%	1	2.35%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Chippenham	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Swindon Town Centre	0.87%	10	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.18%	1	8.05%	7	1.15%	2	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Swindon	0.96%	11	0.00%	0	0.00%	0	0.00%	0	0.00%	0	2.35%	2	8.05%	7	0.57%	1	0.00%	0	0.00%	0	0.64%	1
Other retail warehouses in Swindon	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Swindon	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Cirencester Town Centre	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Cirencester	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Cirencester	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Cirencester	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Stroud Town Centre	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Stroud	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Stroud	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Stroud	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Bristol City Centre (includes Broadmead)	9.05%	104	5.33%	12	18.18%	18	27.14%	38	5.97%	4	1.18%	1	2.30%	2	5.75%	10	5.45%	3	3.28%	2	8.97%	14
Cribbs Causeway Regional Shopping Centre	9.83%	113	11.11%	25	10.10%	10	15.00%	21	10.45%	7	4.71%	4	11.49%	10	4.60%	8	9.09%	5	8.20%	5	11.54%	18
Retail Parks in Bristol	10.18%	117	9.78%	22	21.21%	21	21.43%	30	1.49%	1	3.53%	3	4.60%	4	2.87%	5	9.09%	5	4.92%	3	14.74%	23
Other retail warehouses in Bristol	1.83%	21	2.22%	5	4.04%	4	5.71%	8	1.49%	1	1.18%	1	1.15%	1	0.00%	0	1.82%	1	0.00%	0	0.00%	0
Food superstores in Bristol	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Asda superstore at Longwell Green, Bristol	0.35%	4	0.44%	1	0.00%	0	2.14%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Weston-super-Mare Town Centre	0.26%	3	0.44%	1	1.01%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.64%	1
Retail Parks in Weston-super-Mare	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Weston-super-Mare	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Weston-super-Mare	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Yate Town Centre	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Yate	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Yate	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Yate	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Westbury Town Centre	0.44%	5	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	2.87%	5	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Westbury	0.26%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.72%	3	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Westbury	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Westbury	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Wells	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Wells	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Wells	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Frome	2.26%	26	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.15%	2	5.45%	3	31.15%	19	1.28%	2
Other retail warehouses in Frome	0.70%	8	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.57%	1	0.00%	0	6.56%	4	1.92%	3
Food superstores in Frome	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other	11.84%	136	4.89%	11	7.07%	7	26.43%	37	10.45%	7	37.65%	32	5.75%	5	4.60%	8	1.82%	1	9.84%	6	14.10%	22
Allied Carpets, Longwell Green	0.09%	1	0.00%	0	0.00%	0	0.71%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
K4 Kitchens, Swindon	0.09%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.15%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0

The Totals colums are the totals of the unweighted results for each zone, so may not be representative of the survey area as a whole.

Q07 **Where do you do most of your household's shopping for household textiles and soft furnishings, including bedding ?**

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Base:		1776		351		152		202		101		136		131		252		100		100		251
Less SFT Etc (%s calculated from Base)																						
(Don't know / varies)	9.97%	177	6.60%	23	8.60%	13	13.40%	27	9.90%	10	8.10%	11	9.90%	13	7.50%	19	13.00%	13	16.00%	16	12.70%	32
(Don't buy these items)	8.73%	155	10.80%	38	10.50%	16	5.00%	10	10.90%	11	5.90%	8	4.60%	6	6.30%	16	10.00%	10	10.00%	10	12.00%	30
Internet	1.69%	30	2.30%	8	0.00%	0	1.00%	2	1.00%	1	2.20%	3	0.80%	1	2.00%	5	2.00%	2	5.00%	5	1.20%	3
Mail order / catalogue	6.59%	117	2.80%	10	9.90%	15	7.90%	16	5.00%	5	11.80%	16	9.90%	13	6.30%	16	5.00%	5	5.00%	5	6.40%	16
New Base		**1297**		**272**		**108**		**147**		**74**		**98**		**98**		**196**		**70**		**64**		**170**
(%s calculated from New Base hereafter)																						
Bath City Centre	**31.15%**	**404**	**70.22%**	**191**	**22.22%**	**24**	**2.72%**	**4**	**44.59%**	**33**	**12.24%**	**12**	**10.20%**	**10**	**16.33%**	**32**	**50.00%**	**35**	**32.81%**	**21**	**24.71%**	**42**
Bath OC																						
T.R Hayes, Bath	0.08%	1	0.37%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Bath	1.31%	17	3.68%	10	0.93%	1	0.00%	0	2.70%	2	1.02%	1	0.00%	0	0.00%	0	2.86%	2	0.00%	0	0.59%	1
Other retail warehouses in Bath	0.46%	6	0.37%	1	0.00%	0	0.00%	0	2.70%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.56%	1	1.18%	2
Food superstores in Bath	0.54%	7	1.47%	4	0.93%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.18%	2
Total Bath O-o-C	**2.39%**	**31**	**5.88%**	**16**	**1.85%**	**2**	**0.00%**	**0**	**5.41%**	**4**	**1.02%**	**1**	**0.00%**	**0**	**0.00%**	**0**	**2.86%**	**2**	**1.56%**	**1**	**2.94%**	**5**
Midsomer Norton Town centre	**1.70%**	**22**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**12.94%**	**22**
Keynsham Town Centre	**0.39%**	**5**	**0.37%**	**1**	**2.78%**	**3**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.59%**	**1**
Radstock Town Centre (inc Radco store)	**0.85%**	**11**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**1.43%**	**1**	**0.00%**	**0**	**5.88%**	**10**
Retail warehouses in Midsomer Norton	0.23%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.76%	3
Retail warehouses in Keynsham	0.08%	1	0.00%	0	0.93%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail warehouses in Radstock	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Trowbridge Town Centre	11.33%	147	0.37%	1	0.00%	0	0.00%	0	4.05%	3	15.31%	15	2.04%	2	53.06%	104	15.71%	11	10.94%	7	2.35%	4
Retail Parks in Trowbridge	2.00%	26	0.00%	0	0.00%	0	0.00%	0	0.00%	0	2.04%	2	0.00%	0	10.71%	21	0.00%	0	3.13%	2	0.59%	1
Other retail warehouses in Trowbridge	0.31%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.53%	3	1.43%	1	0.00%	0	0.00%	0
Food superstores in Trowbridge	0.62%	8	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.02%	1	0.00%	0	3.06%	6	1.43%	1	0.00%	0	0.00%	0
Chippenham Town Centre	5.47%	71	0.37%	1	0.00%	0	0.00%	0	9.46%	7	21.43%	21	42.86%	42	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Chippenham	0.77%	10	0.00%	0	0.00%	0	0.00%	0	0.00%	0	7.14%	7	3.06%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Chippenham	0.08%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.02%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Chippenham	0.15%	2	0.00%	0	0.00%	0	0.00%	0	1.35%	1	0.00%	0	1.02%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Swindon Town Centre	1.08%	14	0.00%	0	0.00%	0	0.00%	0	1.35%	1	2.04%	2	8.16%	8	0.51%	1	0.00%	0	1.56%	1	0.59%	1
Retail Parks in Swindon	0.54%	7	0.00%	0	0.00%	0	0.00%	0	0.00%	0	2.04%	2	4.08%	4	0.51%	1	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Swindon	0.15%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	2.04%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Swindon	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Cirencester Town Centre	0.08%	1	0.00%	0	0.00%	0	0.00%	0	1.35%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Cirencester	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Cirencester	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Cirencester	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Stroud Town Centre	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Stroud	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Stroud	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Stroud	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Bristol City Centre (includes Broadmead)	7.79%	101	2.94%	8	27.78%	30	29.25%	43	1.35%	1	2.04%	2	2.04%	2	1.53%	3	1.43%	1	1.56%	1	5.88%	10
Cribbs Causeway Regional Shopping Centre	9.18%	119	9.19%	25	17.59%	19	10.20%	15	12.16%	9	7.14%	7	15.31%	15	3.06%	6	11.43%	8	4.69%	3	7.06%	12
Retail Parks in Bristol	7.48%	97	6.99%	19	15.74%	17	19.05%	28	6.76%	5	5.10%	5	4.08%	4	1.53%	3	4.29%	3	3.13%	2	6.47%	11
Other retail warehouses in Bristol	1.77%	23	1.10%	3	0.93%	1	7.48%	11	1.35%	1	1.02%	1	0.00%	0	1.02%	2	1.43%	1	0.00%	0	1.76%	3
Food superstores in Bristol	0.46%	6	0.37%	1	0.93%	1	2.04%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.59%	1
Asda superstore at Longwell Green, Bristol	1.54%	20	0.37%	1	2.78%	3	8.84%	13	0.00%	0	0.00%	0	0.00%	0	0.51%	1	0.00%	0	0.00%	0	1.18%	2
Weston-super-Mare Town Centre	0.23%	3	0.00%	0	0.00%	0	0.68%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.18%	2
Retail Parks in Weston-super-Mare	0.69%	9	0.00%	0	0.93%	1	1.36%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	3.53%	6
Other retail warehouses in Weston-super-Mare	0.15%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.18%	2
Food superstores in Weston-super-Mare	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Yate Town Centre	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Yate	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Yate	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Yate	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Westbury Town Centre	0.08%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.51%	1	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Westbury	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Westbury	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Westbury	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Wells	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Wells	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Wells	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Frome	1.08%	14	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.51%	1	0.00%	0	20.31%	13	0.00%	0
Other retail warehouses in Frome	0.31%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.51%	1	0.00%	0	3.13%	2	0.59%	1
Food superstores in Frome	0.69%	9	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.02%	2	0.00%	0	4.69%	3	2.35%	4
Other	9.18%	119	1.84%	5	5.56%	6	18.37%	27	10.81%	8	20.41%	20	4.08%	4	4.08%	8	8.57%	6	12.50%	8	15.88%	27

The Totals colums are the totals of the unweighted results for each zone, so may not be representative of the survey area as a whole.

Q08 **Where do you do most of your household's shopping for household appliances, such as fridges, washing machines, kettles or hairdryers ?**

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Base:		1776		351		152		202		101		136		131		252		100		100		251
Less SFT Etc (%s calculated from Base)																						
(Don't know / varies)	6.31%	112	4.00%	14	7.20%	11	6.90%	14	7.90%	8	2.90%	4	4.60%	6	5.60%	14	15.00%	15	5.00%	5	8.40%	21
(Don't buy these items)	5.41%	96	9.40%	33	3.90%	6	1.50%	3	7.90%	8	5.90%	8	3.80%	5	3.60%	9	3.00%	3	5.00%	5	6.40%	16
Internet	7.94%	141	6.80%	24	7.20%	11	5.40%	11	12.90%	13	9.60%	13	9.90%	13	6.00%	15	12.00%	12	4.00%	4	10.00%	25
Mail order / catalogue	1.58%	28	0.90%	3	2.00%	3	1.50%	3	3.00%	3	0.70%	1	3.10%	4	0.00%	0	1.00%	1	2.00%	2	3.20%	8
New Base		**1399**		**277**		**121**		**171**		**69**		**110**		**103**		**214**		**69**		**84**		**181**
(%s calculated from New Base hereafter)																						
Bath City Centre	**19.01%**	**266**	**58.84%**	**163**	**7.44%**	**9**	**1.17%**	**2**	**28.99%**	**20**	**2.73%**	**3**	**0.97%**	**1**	**5.61%**	**12**	**33.33%**	**23**	**7.14%**	**6**	**14.92%**	**27**
Bath O-o-C																						
Retail Parks in Bath	8.51%	119	25.63%	71	4.96%	6	0.58%	1	5.80%	4	1.82%	2	0.00%	0	0.93%	2	5.80%	4	1.19%	1	15.47%	28
Other retail warehouses in Bath	0.79%	11	1.81%	5	0.00%	0	0.00%	0	4.35%	3	0.00%	0	0.00%	0	0.00%	0	2.90%	2	0.00%	0	0.55%	1
Food superstores in Bath	0.14%	2	0.72%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Total Bath O-o-C	**9.44%**	**132**	**28.16%**	**78**	**4.96%**	**6**	**0.58%**	**1**	**10.14%**	**7**	**1.82%**	**2**	**0.00%**	**0**	**0.93%**	**2**	**8.70%**	**6**	**1.19%**	**1**	**16.02%**	**29**
Midsomer Norton Town centre	**3.57%**	**50**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**27.62%**	**50**
Keynsham Town Centre	**0.43%**	**6**	**0.00%**	**0**	**4.13%**	**5**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.55%**	**1**
Radstock Town Centre (inc Radco store)	**1.64%**	**23**	**0.36%**	**1**	**0.83%**	**1**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**11.60%**	**21**
Retail warehouses in Midsomer Norton	0.36%	5	0.36%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	2.21%	4
Retail warehouses in Keynsham	0.29%	4	0.00%	0	3.31%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail warehouses in Radstock	0.07%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.55%	1
Trowbridge Town Centre	6.00%	84	0.00%	0	0.83%	1	0.00%	0	2.90%	2	2.73%	3	0.97%	1	28.50%	61	11.59%	8	9.52%	8	0.00%	0
Retail Parks in Trowbridge	13.08%	183	0.36%	1	0.00%	0	0.58%	1	4.35%	3	20.91%	23	1.94%	2	50.47%	108	26.09%	18	28.57%	24	1.66%	3
Other retail warehouses in Trowbridge	0.36%	5	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.87%	4	0.00%	0	1.19%	1	0.00%	0
Food superstores in Trowbridge	0.71%	10	0.72%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	2.34%	5	4.35%	3	0.00%	0	0.00%	0
Chippenham Town Centre	3.79%	53	0.00%	0	0.00%	0	0.00%	0	7.25%	5	14.55%	16	31.07%	32	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Chippenham	6.22%	87	0.00%	0	0.00%	0	0.00%	0	18.84%	13	24.55%	27	45.63%	47	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Chippenham	0.36%	5	0.00%	0	0.00%	0	0.00%	0	1.45%	1	0.00%	0	3.88%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Chippenham	0.07%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.91%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Swindon Town Centre	0.29%	4	0.00%	0	0.00%	0	0.00%	0	1.45%	1	0.00%	0	2.91%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Swindon	0.07%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.97%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Swindon	0.07%	1	0.00%	0	0.00%	0	0.00%	0	1.45%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Swindon	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Cirencester Town Centre	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Cirencester	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Cirencester	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Cirencester	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Stroud Town Centre	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Stroud	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Stroud	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Stroud	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Bristol City Centre (includes Broadmead)	2.36%	33	0.72%	2	9.09%	11	8.77%	15	1.45%	1	0.00%	0	0.97%	1	0.47%	1	0.00%	0	0.00%	0	1.10%	2
Cribbs Causeway Regional Shopping Centre	5.50%	77	5.42%	15	11.57%	14	9.36%	16	10.14%	7	2.73%	3	4.85%	5	0.47%	1	5.80%	4	0.00%	0	6.63%	12
Retail Parks in Bristol	7.51%	105	2.89%	8	33.06%	40	22.81%	39	5.80%	4	0.91%	1	0.00%	0	0.93%	2	1.45%	1	0.00%	0	5.52%	10
Other retail warehouses in Bristol	1.00%	14	0.00%	0	1.65%	2	6.43%	11	0.00%	0	0.00%	0	0.00%	0	0.47%	1	0.00%	0	0.00%	0	0.00%	0
Food superstores in Bristol	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Asda superstore at Longwell Green, Bristol	0.71%	10	0.00%	0	0.83%	1	5.26%	9	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Weston-super-Mare Town Centre	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Weston-super-Mare	0.14%	2	0.00%	0	0.00%	0	0.58%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.55%	1
Other retail warehouses in Weston-super-Mare	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Weston-super-Mare	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Yate Town Centre	0.07%	1	0.00%	0	0.00%	0	0.00%	0	1.45%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Yate	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Yate	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Yate	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Westbury Town Centre	0.86%	12	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	5.14%	11	1.45%	1	0.00%	0	0.00%	0
Retail Parks in Westbury	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Westbury	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Westbury	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Wells	0.07%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.55%	1
Other retail warehouses in Wells	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Wells	0.07%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.55%	1
Retail Parks in Frome	0.71%	10	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.47%	1	1.45%	1	9.52%	8	0.00%	0
Other retail warehouses in Frome	0.21%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	3.57%	3	0.00%	0
Food superstores in Frome	0.07%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.19%	1	0.00%	0
Other	14.80%	207	2.17%	6	22.31%	27	44.44%	76	4.35%	3	28.18%	31	4.85%	5	2.34%	5	5.80%	4	38.10%	32	9.94%	18
K4 Kitchens, Swindon	0.07%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.97%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0

The Totals colums are the totals of the unweighted results for each zone, so may not be representative of the survey area as a whole.

Q09 Where do you do most of your household's shopping for audio-visual equipment, such as radio, TV, HiFi, telephones, photographic goods and computer products ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Base:		1776		351		152		202		101		136		131		252		100		100		251
Less SFT Etc (%s calculated from Base)																						
Internet	10.08%	179	10.50%	37	10.50%	16	5.40%	11	9.90%	10	12.50%	17	10.70%	14	10.70%	27	13.00%	13	7.00%	7	10.80%	27
Mail order / catalogue	1.07%	19	0.00%	0	2.00%	3	0.50%	1	3.00%	3	0.70%	1	2.30%	3	0.40%	1	1.00%	1	2.00%	2	1.60%	4
(Don't know / varies)	7.26%	129	4.80%	17	8.60%	13	10.90%	22	5.90%	6	5.10%	7	6.10%	8	5.20%	13	11.00%	11	5.00%	5	10.80%	27
(Don't buy these items)	8.22%	146	9.70%	34	11.20%	17	4.00%	8	11.90%	12	10.30%	14	9.20%	12	5.60%	14	2.00%	2	7.00%	7	10.40%	26
New Base		**1303**		**263**		**103**		**160**		**70**		**97**		**94**		**197**		**73**		**79**		**167**
(%s calculated from New Base hereafter)																						
Bath City Centre	**21.72%**	**283**	**64.26%**	**169**	**7.77%**	**8**	**1.25%**	**2**	**31.43%**	**22**	**4.12%**	**4**	**1.06%**	**1**	**5.58%**	**11**	**36.99%**	**27**	**10.13%**	**8**	**18.56%**	**31**
Bath OC																						
Retail Parks in Bath	10.28%	134	25.10%	66	4.85%	5	0.63%	1	12.86%	9	1.03%	1	1.06%	1	2.03%	4	9.59%	7	3.80%	3	22.16%	37
Other retail warehouses in Bath	0.61%	8	0.76%	2	0.00%	0	0.00%	0	4.29%	3	0.00%	0	0.00%	0	0.00%	0	2.74%	2	0.00%	0	0.60%	1
Food superstores in Bath	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Total Bath O-o-C	**10.90%**	**142**	**25.86%**	**68**	**4.85%**	**5**	**0.63%**	**1**	**17.14%**	**12**	**1.03%**	**1**	**1.06%**	**1**	**2.03%**	**4**	**12.33%**	**9**	**3.80%**	**3**	**22.75%**	**38**
Midsomer Norton Town centre	**2.69%**	**35**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**20.96%**	**35**
Keynsham Town Centre	**0.61%**	**8**	**0.00%**	**0**	**7.77%**	**8**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**
Radstock Town Centre (inc Radco store)	**0.84%**	**11**	**0.38%**	**1**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**5.99%**	**10**
Retail warehouses in Midsomer Norton	0.08%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.60%	1
Retail warehouses in Keynsham	0.23%	3	0.00%	0	2.91%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail warehouses in Radstock	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Trowbridge Town Centre	5.37%	70	0.38%	1	0.00%	0	0.00%	0	2.86%	2	3.09%	3	1.06%	1	23.86%	47	15.07%	11	6.33%	5	0.00%	0
Retail Parks in Trowbridge	13.05%	170	0.00%	0	0.97%	1	0.63%	1	4.29%	3	26.80%	26	5.32%	5	47.72%	94	17.81%	13	30.38%	24	1.80%	3
Other retail warehouses in Trowbridge	0.31%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	2.03%	4	0.00%	0	0.00%	0	0.00%	0
Food superstores in Trowbridge	1.23%	16	0.38%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	5.08%	10	5.48%	4	0.00%	0	0.60%	1
Chippenham Town Centre	3.38%	44	0.00%	0	0.00%	0	0.00%	0	12.86%	9	11.34%	11	24.47%	23	0.51%	1	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Chippenham	5.37%	70	0.00%	0	0.00%	0	0.00%	0	12.86%	9	16.49%	16	47.87%	45	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Chippenham	0.15%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	2.13%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Chippenham	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Swindon Town Centre	0.15%	2	0.00%	0	0.00%	0	0.00%	0	1.43%	1	0.00%	0	1.06%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Swindon	0.15%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	2.13%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Swindon	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Swindon	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Cirencester Town Centre	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Cirencester	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Cirencester	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Cirencester	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Stroud Town Centre	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Stroud	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Stroud	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Stroud	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Bristol City Centre (includes Broadmead)	3.38%	44	1.14%	3	14.56%	15	11.88%	19	0.00%	0	0.00%	0	2.13%	2	0.00%	0	0.00%	0	0.00%	0	2.99%	5
Cribbs Causeway Regional Shopping Centre	5.60%	73	3.80%	10	11.65%	12	11.88%	19	11.43%	8	4.12%	4	8.51%	8	1.02%	2	1.37%	1	0.00%	0	5.39%	9
Retail Parks in Bristol	6.37%	83	2.28%	6	29.13%	30	20.63%	33	0.00%	0	2.06%	2	0.00%	0	1.02%	2	1.37%	1	0.00%	0	5.39%	9
Other retail warehouses in Bristol	0.77%	10	0.00%	0	0.97%	1	4.38%	7	0.00%	0	0.00%	0	0.00%	0	0.51%	1	0.00%	0	0.00%	0	0.60%	1
Food superstores in Bristol	0.08%	1	0.00%	0	0.00%	0	0.63%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Asda superstore at Longwell Green, Bristol	1.77%	23	0.38%	1	0.97%	1	12.50%	20	0.00%	0	1.03%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Weston-super-Mare Town Centre	0.08%	1	0.00%	0	0.97%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Weston-super-Mare	0.15%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.20%	2
Other retail warehouses in Weston-super-Mare	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Weston-super-Mare	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Yate Town Centre	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Yate	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Yate	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Yate	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Westbury Town Centre	0.92%	12	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	6.09%	12	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Westbury	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Westbury	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Westbury	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Wells	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Wells	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Wells	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Frome	0.92%	12	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.51%	1	1.37%	1	12.66%	10	0.00%	0
Other retail warehouses in Frome	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Frome	0.31%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	3.80%	3	0.60%	1
Other	13.43%	175	1.14%	3	17.48%	18	35.63%	57	5.71%	4	29.90%	29	3.19%	3	4.06%	8	8.22%	6	32.91%	26	12.57%	21

The Totals colums are the totals of the unweighted results for each zone, so may not be representative of the survey area as a whole.

Q10 **Where do you do most of your household's shopping for hardware, DIY goods, decorating supplies and garden products ?**

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Base:		1776		351		152		202		101		136		131		252		100		100		251
Less SFT Etc (%s calculated from Base)																						
(Don't know / varies)	4.00%	71	4.00%	14	6.60%	10	2.00%	4	2.00%	2	2.90%	4	3.10%	4	2.80%	7	7.00%	7	3.00%	3	6.40%	16
(Don't buy these items)	6.14%	109	8.00%	28	7.20%	11	4.00%	8	5.00%	5	5.90%	8	4.60%	6	6.00%	15	3.00%	3	4.00%	4	8.40%	21
Internet	0.45%	8	0.00%	0	0.00%	0	0.50%	1	2.00%	2	0.00%	0	0.00%	0	0.00%	0	2.00%	2	2.00%	2	0.40%	1
Mail order / catalogue	0.34%	6	0.60%	2	0.70%	1	0.50%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.80%	2
New Base		**1582**		**307**		**130**		**188**		**92**		**124**		**121**		**230**		**88**		**91**		**211**
(%s calculated from New Base hereafter)																						
Bath City Centre	**12.71%**	**201**	**51.14%**	**157**	**2.31%**	**3**	**0.00%**	**0**	**11.96%**	**11**	**0.81%**	**1**	**0.00%**	**0**	**0.87%**	**2**	**20.45%**	**18**	**2.20%**	**2**	**3.32%**	**7**
Bath OC																						
Retail Parks in Bath	5.88%	93	20.85%	64	5.38%	7	0.00%	0	8.70%	8	0.00%	0	0.00%	0	0.00%	0	7.95%	7	0.00%	0	3.32%	7
Other retail warehouses in Bath	2.34%	37	6.84%	21	0.77%	1	0.00%	0	5.43%	5	0.00%	0	0.00%	0	0.43%	1	5.68%	5	0.00%	0	1.90%	4
Green Park, Bath	0.13%	2	0.33%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.43%	1	0.00%	0	0.00%	0	0.00%	0
Oldfield Park, bath	0.25%	4	1.30%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Bath	0.51%	8	2.28%	7	0.00%	0	0.00%	0	1.09%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Total Bath O-o-C	**9.10%**	**144**	**31.60%**	**97**	**6.15%**	**8**	**0.00%**	**0**	**15.22%**	**14**	**0.00%**	**0**	**0.00%**	**0**	**0.87%**	**2**	**13.64%**	**12**	**0.00%**	**0**	**5.21%**	**11**
Midsomer Norton Town centre	**2.02%**	**32**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**15.17%**	**32**
Keynsham Town Centre	**0.82%**	**13**	**0.00%**	**0**	**8.46%**	**11**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.95%**	**2**
Radstock Town Centre (inc Radco store)	**0.51%**	**8**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**3.79%**	**8**
Retail warehouses in Midsomer Norton	4.24%	67	0.33%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	31.28%	66
Retail warehouses in Keynsham	0.32%	5	0.00%	0	3.08%	4	0.53%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail warehouses in Radstock	0.06%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.47%	1
Trowbridge Town Centre	5.06%	80	0.00%	0	0.00%	0	0.00%	0	2.17%	2	3.23%	4	0.00%	0	26.09%	60	12.50%	11	3.30%	3	0.00%	0
Retail Parks in Trowbridge	13.02%	206	0.98%	3	0.00%	0	0.00%	0	2.17%	2	27.42%	34	0.83%	1	56.52%	130	32.95%	29	6.59%	6	0.47%	1
Other retail warehouses in Trowbridge	1.20%	19	0.00%	0	0.00%	0	0.00%	0	1.09%	1	0.81%	1	0.00%	0	6.52%	15	1.14%	1	1.10%	1	0.00%	0
Food superstores in Trowbridge	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Chippenham Town Centre	2.40%	38	0.00%	0	0.00%	0	0.00%	0	9.78%	9	0.81%	1	22.31%	27	0.43%	1	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Chippenham	9.73%	154	0.00%	0	0.00%	0	0.00%	0	33.70%	31	36.29%	45	64.46%	78	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Chippenham	1.33%	21	0.33%	1	0.00%	0	0.00%	0	4.35%	4	6.45%	8	6.61%	8	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Chippenham	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Swindon Town Centre	0.06%	1	0.00%	0	0.00%	0	0.00%	0	1.09%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Swindon	0.06%	1	0.00%	0	0.00%	0	0.00%	0	1.09%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Swindon	0.06%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.81%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Swindon	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Cirencester Town Centre	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Cirencester	0.06%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.81%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Cirencester	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Cirencester	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Stroud Town Centre	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Stroud	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Stroud	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Stroud	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Bristol City Centre (includes Broadmead)	1.14%	18	0.33%	1	6.92%	9	2.66%	5	1.09%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.95%	2
Cribbs Causeway Regional Shopping Centre	0.32%	5	0.33%	1	0.00%	0	0.53%	1	1.09%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.95%	2
Retail Parks in Bristol	6.19%	98	4.23%	13	26.92%	35	15.96%	30	2.17%	2	0.00%	0	0.00%	0	0.43%	1	1.14%	1	2.20%	2	6.64%	14
Other retail warehouses in Bristol	1.20%	19	0.33%	1	4.62%	6	4.79%	9	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.42%	3
Food superstores in Bristol	0.06%	1	0.00%	0	0.77%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Asda superstore at Longwell Green, Bristol	1.14%	18	0.65%	2	0.00%	0	6.38%	12	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.14%	1	0.00%	0	1.42%	3
Weston-super-Mare Town Centre	0.06%	1	0.33%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Weston-super-Mare	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Weston-super-Mare	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Weston-super-Mare	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Yate Town Centre	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Yate	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Yate	0.06%	1	0.00%	0	0.00%	0	0.00%	0	1.09%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Yate	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Westbury Town Centre	0.51%	8	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	3.48%	8	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Westbury	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Westbury	0.06%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.43%	1	0.00%	0	0.00%	0	0.00%	0
Food superstores in Westbury	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Wells	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Wells	0.06%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.10%	1	0.00%	0
Food superstores in Wells	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Frome	4.42%	70	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	3.04%	7	4.55%	4	51.65%	47	5.69%	12
Other retail warehouses in Frome	1.33%	21	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.43%	1	1.14%	1	16.48%	15	1.90%	4
Food superstores in Frome	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other	20.67%	327	9.45%	29	40.77%	53	69.15%	130	11.96%	11	22.58%	28	5.79%	7	0.87%	2	11.36%	10	15.38%	14	20.38%	43

The Totals colums are the totals of the unweighted results for each zone, so may not be representative of the survey area as a whole.

Q11 Where do you do most of your household's shopping for chemists and medical goods, cosmetics and other beauty products ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Base:		1776		351		152		202		101		136		131		252		100		100		251
Less SFT Etc (%s calculated from Base)																						
(Don't know / varies)	3.32%	59	1.70%	6	1.30%	2	4.00%	8	5.90%	6	2.90%	4	2.30%	3	2.40%	6	10.00%	10	0.00%	0	5.60%	14
(Don't buy these items)	1.75%	31	2.00%	7	2.00%	3	2.50%	5	4.00%	4	2.90%	4	1.50%	2	0.00%	0	2.00%	2	0.00%	0	1.60%	4
Internet	0.23%	4	0.60%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.80%	2
Mail order / catalogue	1.01%	18	0.30%	1	2.00%	3	1.00%	2	1.00%	1	2.20%	3	0.80%	1	1.20%	3	1.00%	1	0.00%	0	1.20%	3
New Base		**1664**		**335**		**144**		**187**		**90**		**125**		**125**		**243**		**87**		**100**		**228**
(%s calculated from New Base hereafter)																						
Bath City Centre	**23.38%**	**389**	**71.94%**	**241**	**13.89%**	**20**	**4.28%**	**8**	**37.78%**	**34**	**4.80%**	**6**	**0.80%**	**1**	**6.17%**	**15**	**42.53%**	**37**	**4.00%**	**4**	**10.09%**	**23**
Bath OC																						
Retail Parks in Bath	0.78%	13	2.99%	10	1.39%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.15%	1	0.00%	0	0.00%	0
Other retail warehouses in Bath	0.84%	14	3.58%	12	1.39%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Bath	1.74%	29	6.87%	23	0.00%	0	0.00%	0	1.11%	1	0.00%	0	0.00%	0	0.00%	0	5.75%	5	0.00%	0	0.00%	0
Total Bath O-o-C	**3.37%**	**56**	**13.43%**	**45**	**2.78%**	**4**	**0.00%**	**0**	**1.11%**	**1**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**6.90%**	**6**	**0.00%**	**0**	**0.00%**	**0**
Midsomer Norton Town centre	**5.05%**	**84**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**36.84%**	**84**
Keynsham Town Centre	**5.23%**	**87**	**0.00%**	**0**	**54.86%**	**79**	**1.07%**	**2**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**2.63%**	**6**
Radstock Town Centre (inc Radco store)	**1.14%**	**19**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**8.33%**	**19**
Chelsea Road, Bath	0.24%	4	1.19%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Ilford Park, Bath	0.06%	1	0.30%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Local chemist, Bear Flat, Bath	0.06%	1	0.30%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Local chemist, Bradford Road, Bath	0.12%	2	0.60%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Local shops, Brook Street, Bath	0.06%	1	0.30%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Moreland Road, Bath	0.24%	4	1.19%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Oldfield Park, bath	0.12%	2	0.60%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail warehouses in Midsomer Norton	0.24%	4	0.30%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.32%	3
Retail warehouses in Keynsham	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail warehouses in Radstock	0.06%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.44%	1
Trowbridge Town Centre	9.86%	164	0.00%	0	0.00%	0	0.00%	0	1.11%	1	0.80%	1	0.80%	1	58.44%	142	14.94%	13	4.00%	4	0.88%	2
Retail Parks in Trowbridge	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Trowbridge	0.18%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.23%	3	0.00%	0	0.00%	0	0.00%	0
Food superstores in Trowbridge	1.74%	29	0.30%	1	0.00%	0	0.00%	0	1.11%	1	0.00%	0	0.80%	1	8.23%	20	6.90%	6	0.00%	0	0.00%	0
Chippenham Town Centre	6.49%	108	0.00%	0	0.00%	0	0.00%	0	13.33%	12	6.40%	8	70.40%	88	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Chippenham	0.12%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.60%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Chippenham	0.12%	2	0.00%	0	0.00%	0	0.00%	0	1.11%	1	0.00%	0	0.80%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Chippenham	1.62%	27	0.00%	0	0.00%	0	0.00%	0	7.78%	7	4.00%	5	12.00%	15	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Swindon Town Centre	0.06%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.80%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Swindon	0.06%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.80%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Swindon	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Swindon	0.12%	2	0.00%	0	0.00%	0	0.00%	0	1.11%	1	0.00%	0	0.80%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Cirencester Town Centre	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Cirencester	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Cirencester	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Cirencester	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Stroud Town Centre	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Stroud	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Stroud	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Stroud	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Bristol City Centre (includes Broadmead)	2.46%	41	0.30%	1	9.03%	13	13.37%	25	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.88%	2
Cribbs Causeway Regional Shopping Centre	0.54%	9	0.00%	0	0.00%	0	2.14%	4	0.00%	0	0.80%	1	0.80%	1	0.41%	1	0.00%	0	0.00%	0	0.88%	2
Retail Parks in Bristol	0.72%	12	0.00%	0	2.08%	3	4.28%	8	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.44%	1
Other retail warehouses in Bristol	0.78%	13	0.00%	0	0.00%	0	6.95%	13	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Bristol	0.72%	12	0.30%	1	2.08%	3	3.74%	7	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.44%	1
Asda superstore at Longwell Green, Bristol	1.56%	26	0.90%	3	4.86%	7	8.02%	15	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.44%	1
Weston-super-Mare Town Centre	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Weston-super-Mare	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Weston-super-Mare	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Weston-super-Mare	0.06%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.44%	1
Yate Town Centre	0.06%	1	0.00%	0	0.00%	0	0.00%	0	1.11%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Yate	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Yate	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Yate	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Westbury Town Centre	2.40%	40	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	16.05%	39	1.15%	1	0.00%	0	0.00%	0
Retail Parks in Westbury	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Westbury	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Westbury	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Wells	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Wells	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Wells	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Frome	0.96%	16	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	2.30%	2	12.00%	12	0.88%	2
Other retail warehouses in Frome	0.36%	6	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	4.00%	4	0.88%	2
Food superstores in Frome	0.96%	16	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.41%	1	1.15%	1	8.00%	8	2.63%	6
Other	28.55%	475	8.06%	27	10.42%	15	56.15%	105	34.44%	31	82.40%	103	10.40%	13	8.64%	21	24.14%	21	68.00%	68	31.14%	71
West Road Shops, West Road	0.06%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.44%	1
Widcombe Parade	0.06%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.41%	1	0.00%	0	0.00%	0	0.00%	0

The Totals colums are the totals of the unweighted results for each zone, so may not be representative of the survey area as a whole.

Q12 **Where do you do most of your household's shopping for books; jewellery and watches; china, glassware and kitchen utensils; recreational and luxury goods ?**

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10	
Base:		1776		351		152		202		101		136		131		252		100		100		251
Less SFT Etc (%s calculated from Base)																						
(Don't know / varies)	11.21%	199	7.10%	25	12.50%	19	13.90%	28	15.80%	16	13.20%	18	6.90%	9	9.90%	25	14.00%	14	11.00%	11	13.50%	34
(Don't buy these items)	14.64%	260	13.40%	47	11.80%	18	12.40%	25	16.80%	17	20.60%	28	17.60%	23	14.30%	36	8.00%	8	11.00%	11	18.70%	47
Internet	6.53%	116	7.70%	27	7.90%	12	4.50%	9	7.90%	8	8.10%	11	4.60%	6	6.30%	16	8.00%	8	8.00%	8	4.40%	11
Mail order / catalogue	1.91%	34	1.40%	5	4.60%	7	1.00%	2	1.00%	1	1.50%	2	0.80%	1	2.40%	6	4.00%	4	0.00%	0	2.40%	6
New Base		**1167**		**247**		**96**		**138**		**59**		**77**		**92**		**169**		**66**		**70**		**153**
(%s calculated from New Base hereafter)																						
Bath City Centre	**43.62%**	**509**	**87.85%**	**217**	**38.54%**	**37**	**7.97%**	**11**	**69.49%**	**41**	**23.38%**	**18**	**11.96%**	**11**	**21.30%**	**36**	**60.61%**	**40**	**35.71%**	**25**	**47.71%**	**73**
Bath OC																						
Retail Parks in Bath	0.51%	6	2.43%	6	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Bath	0.51%	6	2.43%	6	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Bath	0.26%	3	1.21%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Total Bath O-o-C	**1.29%**	**15**	**6.07%**	**15**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**
Midsomer Norton Town centre	**2.57%**	**30**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**19.61%**	**30**
Keynsham Town Centre	**1.71%**	**20**	**0.00%**	**0**	**20.83%**	**20**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**
Radstock Town Centre (inc Radco store)	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**	**0.00%**	**0**
Moreland Road, Bath	0.09%	1	0.40%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail warehouses in Midsomer Norton	0.17%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.31%	2
Retail warehouses in Keynsham	0.09%	1	0.00%	0	1.04%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail warehouses in Radstock	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Trowbridge Town Centre	12.94%	151	0.40%	1	0.00%	0	0.00%	0	5.08%	3	11.69%	9	2.17%	2	64.50%	109	24.24%	16	11.43%	8	1.96%	3
Retail Parks in Trowbridge	0.09%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.65%	1
Other retail warehouses in Trowbridge	0.09%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.59%	1	0.00%	0	0.00%	0	0.00%	0
Food superstores in Trowbridge	0.77%	9	0.00%	0	0.00%	0	0.00%	0	1.69%	1	1.30%	1	0.00%	0	3.55%	6	1.52%	1	0.00%	0	0.00%	0
Chippenham Town Centre	7.28%	85	0.00%	0	0.00%	0	0.00%	0	15.25%	9	20.78%	16	65.22%	60	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Chippenham	0.09%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.30%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Chippenham	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Chippenham	0.17%	2	0.00%	0	0.00%	0	0.00%	0	1.69%	1	0.00%	0	1.09%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Swindon Town Centre	0.26%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	3.26%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Swindon	0.17%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.30%	1	1.09%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Swindon	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Swindon	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Cirencester Town Centre	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Cirencester	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Cirencester	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Cirencester	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Stroud Town Centre	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Stroud	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Stroud	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Stroud	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Bristol City Centre (includes Broadmead)	6.86%	80	0.00%	0	17.71%	17	34.06%	47	0.00%	0	1.30%	1	0.00%	0	1.18%	2	3.03%	2	0.00%	0	7.19%	11
Cribbs Causeway Regional Shopping Centre	4.97%	58	1.21%	3	6.25%	6	16.67%	23	1.69%	1	5.19%	4	9.78%	9	1.18%	2	3.03%	2	1.43%	1	4.58%	7
Retail Parks in Bristol	1.20%	14	0.00%	0	6.25%	6	3.62%	5	0.00%	0	1.30%	1	0.00%	0	0.59%	1	0.00%	0	0.00%	0	0.65%	1
Other retail warehouses in Bristol	0.26%	3	0.00%	0	0.00%	0	2.17%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Bristol	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Asda superstore at Longwell Green, Bristol	3.00%	35	2.43%	6	5.21%	5	15.22%	21	0.00%	0	0.00%	0	0.00%	0	0.59%	1	0.00%	0	0.00%	0	1.31%	2
Weston-super-Mare Town Centre	0.17%	2	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.31%	2
Retail Parks in Weston-super-Mare	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Weston-super-Mare	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Weston-super-Mare	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Yate Town Centre	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Yate	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Yate	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Yate	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Westbury Town Centre	0.34%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	2.37%	4	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Westbury	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Other retail warehouses in Westbury	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Westbury	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Wells	0.09%	1	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.43%	1	0.00%	0
Other retail warehouses in Wells	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Food superstores in Wells	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0
Retail Parks in Frome	0.43%	5	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.52%	1	4.29%	3	0.65%	1
Other retail warehouses in Frome	0.26%	3	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	1.43%	1	1.31%	2
Food superstores in Frome	0.34%	4	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	5.71%	4	0.00%	0
Other	10.71%	125	1.62%	4	4.17%	4	20.29%	28	5.08%	3	32.47%	25	5.43%	5	4.14%	7	6.06%	4	38.57%	27	11.76%	18

The Totals colums are the totals of the unweighted results for each zone, so may not be representative of the survey area as a whole.

RECAP

The Retail Capacity forecasting Model

Project:	**Bath Retail Study**	Number:	129526
Client:	Bath and North East Somerset Council		
Date of Latest Revision:	08-Aug-08	File:	B&NES RECAP Model 2008

Retail Locations Modelled:

- Bath City Centre
- Non-central shopping in Bath
- Keynsham Town Centre (and out-of-centre Pioneer Co-op)
- Midsomer Norton Town Centre (and out-of-centre Tesco)
- Radstock Local Centre

Scenarios Modelled:

1	Baseline - Market Shares indicated by the Household Interview Survey remain unchanged.
2	Increases in comparison goods market shares from 2011 for Bath City Centre due to the new Southgate development, and smaller reductions in market shares for Bath non-central stores. Increases in Keynsham's market shares (convenience and comparison goods) due to potential new food store and other town centre retail development. Redevelopment of Radco in Radstock for a new supermarket also considered in this scenario.

Notes:

Catchment Area Population and Expenditure

Table: **1**

CATCHMENT AREA POPULATION FORECASTS

Zone	Postcodes	Base Year	Forecasting Years			
		2007	2011	2016	2021	2026
1	BA21-25, BA11-16, BA26	88,530	90,343	93,238	96,716	99,343
2	BA29, BS39 4, BS31 1-3, BS30 5-6, BA19	34,692	35,532	39,058	42,597	46,134
3	BS30 7-9, BS15 1,3-4,8-9	68,394	70,510	73,182	75,839	78,499
4	BA17-18, SN13 8, SN14 8	14,255	14,607	15,050	15,491	15,933
5	SN12 6-8, SN13 0,9	37,637	39,142	39,985	40,417	41,702
6	SN14 0, SN15 1-3	35,539	36,345	36,379	35,966	36,415
7	BA13 2-4, BA14 0,6-9, BA15 1	74,400	77,946	81,153	84,053	87,782
8	BA15 2, BA27	8,993	9,362	9,825	10,287	10,749
9	BA11 1-4,6	29,671	30,445	31,490	32,492	33,504
10	BA20,28,32-35, BS39 5-7	59,462	60,689	62,609	64,814	66,069
TOTAL		451,573	464,921	481,969	498,671	516,130

Sources:

MapInfo Report for Bath and North East Somerset Catchment Area 2007. BANES Council.

Notes:

The forecasts for 2021 and 2026 are trend projections by DTZ, with additions to allow for planned urban growth, including a proposed urban extension of 3,000 dwellings in Keynsham (Zone 2)

Table: 2

PER CAPITA EXPENDITURE

Per Capita Expenditure in (year):	2004	Price Basis (Year):	2004
Including Special Forms of Trading:			
Convenience Goods (£):	1,626.00	Comparison Goods (£):	3,077.00

GROWTH IN PER CAPITA RETAIL EXPENDITURE:

Convenience Goods:	1.77	% 2004 to	2006	1.00	% pa	2006 to	2026
Comparison Goods:	8.76	% 2004 to	2006	3.90	% pa	2006 to	2026

PER CAPITA EXPENDITURE IN	Convenience Goods (£)					Comparison Goods (£)				
	2007	2011	2016	2021	2026	2007	2011	2016	2021	2026
(Including SFT)	1,671.33	1,739.19	1,827.91	1,921.15	2,019.15	3,477.06	4,052.05	4,906.28	5,940.59	7,192.96
Deduction for SFT (%)	2.0	3.0	4.0	5.0	6.0	7.0	12.0	13.0	14.0	15.0
Excluding SFT	**1,637.90**	**1,687.01**	**1,754.79**	**1,825.09**	**1,898.00**	**3,233.67**	**3,565.80**	**4,268.46**	**5,108.91**	**6,114.02**

COMPARISON GOODS PER CAPITA EXPENDITURE BY GOODS TYPE

Per Capita Comparison Goods Expenditure in 2004

	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden prdcts	Chemists, medcl & beauty goods	All other comprsn gds	Total comprsn gds
Including SFT (£)	666	301	104	81	401	289	398	837	3,077

Per Capita Comparison Goods Expenditure in 2007

Including SFT	752.59	340.13	117.52	91.53	453.14	326.57	449.75	945.82	3,477.06
Deduction for SFT (%)	8.2	4.4	10.1	7.0	12.2	5.8	2.0	6.9	7.0
Excluding SFT (£)	690.88	325.17	105.65	85.12	397.85	307.63	440.75	880.56	3,233.67

Sources:

MapInfo Report. MapInfo/Oxford Economic Forecasting Information Brief 07/2. DTZ estimates.

Notes:

Growth 2004 to 2006 is the actual national average growth. Growth projections 2006 to 2026 apply the 1998 to 2006 average annual trend to the actual 2006 expenditure (convenience goods); and the ultra-long term average annual trend 1964 to 2006 to the actual 2006 expenditure (comparison goods).

Table: **3**

CATCHMENT AREA EXPENDITURE FORECASTS

Catchment Zone	TOTAL RETAIL EXPENDITURE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2007 (£000)	2011 (£000)	2016 (£000)	2021 £0	2026 (£000)	2007 (£000)	2011 (£000)	2016 (£000)	2021 £0	2026 (£000)
1	145,003	152,410	163,613	176,515	188,552	286,276	322,145	397,983	494,111	607,382
2	56,822	59,943	68,539	77,744	87,561	112,182	126,700	166,718	217,626	282,062
3	112,023	118,951	128,419	138,413	148,992	221,163	251,425	312,375	387,454	479,947
4	23,348	24,642	26,410	28,273	30,241	46,096	52,086	64,240	79,144	97,415
5	61,646	66,033	70,165	73,764	79,151	121,705	139,573	170,674	206,485	254,968
6	58,209	61,315	63,838	65,641	69,115	114,921	129,599	155,282	183,745	222,639
7	121,860	131,496	142,407	153,404	166,611	240,585	277,940	346,398	429,420	536,703
8	14,730	15,794	17,241	18,775	20,402	29,080	33,383	41,938	52,555	65,721
9	48,598	51,361	55,258	59,300	63,590	95,946	108,561	134,414	165,998	204,843
10	97,393	102,383	109,866	118,291	125,399	192,280	216,405	267,244	331,128	403,947
TOTALS	739,632	784,329	845,755	910,120	979,613	1,460,236	1,657,816	2,057,266	2,547,666	3,155,627

Sources: RECAP Tables 1 and 2

Table: **4**

CATCHMENT AREA COMPARISON GOODS EXPENDITURE BY GOODS TYPE IN 2007

Catchment Zone	Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden prdcts (£000)	Chemists, medcl & beauty goods (£000)	All other comprsn gds (£000)	Total comprsn gds (£000)
1	61,163	28,787	9,353	7,536	35,222	27,235	39,020	77,956	286,276
2	23,968	11,281	3,665	2,953	13,802	10,672	15,291	30,548	112,182
3	47,252	22,240	7,226	5,822	27,211	21,040	30,145	60,225	221,163
4	9,848	4,635	1,506	1,213	5,671	4,385	6,283	12,552	46,096
5	26,003	12,238	3,976	3,204	14,974	11,578	16,589	33,142	121,705
6	24,553	11,556	3,755	3,025	14,139	10,933	15,664	31,294	114,921
7	51,401	24,193	7,861	6,333	29,600	22,888	32,792	65,514	240,585
8	6,213	2,924	950	766	3,578	2,767	3,964	7,919	29,080
9	20,499	9,648	3,135	2,526	11,805	9,128	13,078	26,127	95,946
10	41,081	19,335	6,282	5,062	23,657	18,292	26,208	52,360	192,280
TOTALS	311,982	146,838	47,710	38,440	179,660	138,919	199,032	397,638	1,460,236

Sources: RECAP Tables 1 and 2

Scenario 1

Bath City Centre

Table: **5**

CONVENIENCE GOODS MARKET SHARES IN 2007

2007	Allocations to		
Bath City Centre			
Indicated by household interview survey			
Zones	Main Food	Top-up convenience	**WEIGHTED AVERAGE**
	Q1	Q4	
	Expenditure weighting		
	75	25	100
	(%)	(%)	(%)
1	55.6	29.1	48.9
2	10.5	3.3	8.7
3	0.5	1.0	0.6
4	10.9	9.9	10.6
5	0.7	0.0	0.6
6	0.8	0.0	0.6
7	0.4	1.2	0.6
8	21.0	7.0	17.5
9	1.0	0.0	0.8
10	2.4	1.6	2.2

Sources: Household Interview Survey.
Expenditure weighting by DTZ.

Table: **6**

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2007

	2007 Allocations to								
	Bath City Centre								
	Indicated by Household Interview Survey								
	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemists, medcl & beauty goods	All other comparison gds	**WEIGHTED AVERAGE**
	Q5	Q6	Q7	Q8	Q9	Q10	Q11	Q12	
Zones	Expenditure weighting								
	752.59	340.13	117.52	91.53	453.14	326.57	449.75	945.82	3,477.06
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	84.2	54.7	70.2	58.8	64.3	51.1	71.9	87.9	73.9
2	40.9	14.1	22.2	7.4	7.8	2.3	13.9	38.5	24.7
3	6.3	0.7	2.7	1.2	1.3	0.0	4.3	8.0	4.4
4	64.3	41.8	44.6	29.0	31.4	12.0	37.8	69.5	49.3
5	41.7	8.2	12.2	2.7	4.1	0.8	4.8	23.4	17.9
6	33.9	16.1	10.2	1.0	1.1	0.0	0.8	12.0	12.8
7	47.4	14.4	16.3	5.6	5.6	0.9	6.2	21.3	19.8
8	77.3	45.5	50.0	33.3	37.0	20.5	42.5	60.6	52.5
9	62.9	13.1	32.8	7.1	10.1	2.2	4.0	35.7	28.0
10	58.4	13.5	24.7	14.9	18.6	3.3	10.1	47.7	32.2

Sources: Household Interview Survey.
RECAP Table 2 for expenditure weights.

Table: **7**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Bath City Centre**

Baseline - Market Shares indicated by the Household Interview Survey remain unchanged.

Market shares correction factors: Convenience Goods: 100 % of survey indicated figures
Comparison Goods: 70 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2007 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2007 (%)	2011 (%)	2016 (%)	2021	2026 (%)
1	49	49	49	49	49	52	52	52	52	52
2	9	9	9	9	9	17	17	17	17	17
3	1	1	1	1	1	3	3	3	3	3
4	11	11	11	11	11	34	34	34	34	34
5	1	1	1	1	1	13	13	13	13	13
6	1	1	1	1	1	9	9	9	9	9
7	1	1	1	1	1	14	14	14	14	14
8	18	18	18	18	18	37	37	37	37	37
9	1	1	1	1	1	20	20	20	20	20
10	2	2	2	2	2	23	23	23	23	23

Sources: RECAP Model.
DTZ for market share corrections.

Table: **8**

COMPARISON GOODS SALES BY GOODS TYPE IN 2007

Catchment Zones	2007 Sales in **Bath City Centre** By Comparison Goods Type. Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	36,054	11,017	4,598	3,104	15,844	9,750	19,650	47,939
2	6,869	1,117	570	154	751	173	1,487	8,241
3	2,081	111	138	48	238	0	903	3,360
4	4,432	1,356	470	246	1,248	367	1,662	6,106
5	7,597	706	341	61	432	66	557	5,424
6	5,832	1,302	268	21	105	0	88	2,620
7	17,069	2,434	899	249	1,156	139	1,416	9,768
8	3,361	930	333	179	926	396	1,180	3,360
9	9,029	885	720	126	837	141	366	6,531
10	16,797	1,822	1,087	529	3,074	425	1,851	17,487
TOTALS	109,120	21,678	9,422	4,716	24,610	11,456	29,160	110,836
MARKET SHARES	35%	15%	20%	12%	14%	8%	15%	28%

Sources: RECAP Model.

Table: **9**

FORECAST RETAIL SALES

Scenario: 1 Location: **Bath City Centre**

Baseline - Market Shares indicated by the Household Interview Survey remain unchanged.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE CONVENIENCE GOODS 2007 (£000)	2011 (£000)	2016 (£000)	2021 £0	2026 (£000)	COMPARISON GOODS 2007 (£000)	2011 (£000)	2016 (£000)	2021 £0	2026 (£000)
1	71,052	74,681	80,170	86,492	92,390	148,864	167,515	206,951	256,938	315,839
2	5,114	5,395	6,168	6,997	7,881	19,071	21,539	28,342	36,996	47,950
3	1,120	1,190	1,284	1,384	1,490	6,635	7,543	9,371	11,624	14,398
4	2,568	2,711	2,905	3,110	3,326	15,673	17,709	21,842	26,909	33,121
5	616	660	702	738	792	15,822	18,144	22,188	26,843	33,146
6	582	613	638	656	691	10,343	11,664	13,975	16,537	20,038
7	1,219	1,315	1,424	1,534	1,666	33,682	38,912	48,496	60,119	75,138
8	2,651	2,843	3,103	3,379	3,672	10,760	12,352	15,517	19,446	24,317
9	486	514	553	593	636	19,189	21,712	26,883	33,200	40,969
10	1,948	2,048	2,197	2,366	2,508	44,224	49,773	61,466	76,159	92,908
TOTALS	87,357	91,969	99,146	107,250	115,052	324,262	366,863	455,031	564,770	697,824

Sources: RECAP Model.

Table: **10**

SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2007

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Iceland, Ham Gardens, Bath City Centre	90	94	85	5,219	442
M&S Food Hall, Bath City Centre	836	92	769	11,848	9,113
Sainsburys Local, Seven Dials, Bath City Centre	476	95	452	9,294	4,203
Sainsburys, Green Park Station, Green Park Road, Bath	3,573	74	2,644	9,294	24,574
Waitrose, The Podium, Northgate Street, Bath City Centre	1,561	86	1,342	11,665	15,660
Other convenience goods stores in Bath City Centre	1,799	90	1,619	5,000	8,096
ALL STORES	8,335		6,912	8,983	62,086

Sources: IGD, DTZ, Verdict Research.

Table: **11**

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
Southgate supermarket (Somerfield)	1,000	83	830	6,562	5,446
ALL STORES	1,000		830	6,562	5,446
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
Debenhams, Southgate	11,600	75	8,700	3,149	27,396
Other comparison goods floorspace, Southgate	23,600	75	17,700	5,000	88,500
ALL STORES AND SCHEMES	35,200		26,400	4,390	115,896

Sources: DTZ, based on Verdict Research and Retail Rankings.

Table: **12**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Bath City Centre**

Baseline - Market Shares indicated by the Household Interview Survey remain unchanged.

Growth in sales per sq m from shop floorspace existing in 2007 Comparison Goods: 1.50 % pa 2011 to 2026

	CONVENIENCE GOODS					COMPARISON GOODS				
	2007	2011	2016	2021	2026	2007	2011	2016	2021	2026
Residents' Spending £000	87,357	91,969	99,146	107,250	115,052	324,262	366,863	455,031	564,770	697,824
Plus visitors' spending (%)	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0
Total spending (£000)	96,092	101,165	109,060	117,975	126,558	356,688	403,550	500,534	621,247	767,606
Existing shop floorspace (sq m net)	6,912	6,912	6,912	6,912	6,912	56,167	56,167	56,167	56,167	56,167
Sales per sq m net (£)	13,903	8,983	8,983	8,983	8,983	6,351	6,351	6,841	7,370	7,940
Sales from extg flrspce (£000)	96,092	62,086	62,086	62,086	62,086	356,688	356,688	384,255	413,951	445,943
Available spending to support new shops (£000)	0	39,080	46,974	55,889	64,472	0	46,861	116,279	207,296	321,663
Less sales capacity of committed new floorspace (£000)	0	5,446	5,446	5,446	5,446	0	115,896	124,853	134,502	144,897
Net available spending for new shops (£000)	0	33,633	41,528	50,443	59,026	0	(69,035)	(8,574)	72,793	176,765
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	5,000	5,307	5,717	6,159	6,635
Capacity for new shop flrspc (sq m net)	**0**	**2,803**	**3,461**	**4,204**	**4,919**	**0**	**(13,009)**	**(1,500)**	**11,819**	**26,642**

Market Share of Catchment Area Expenditure	11.8%	11.7%	11.7%	11.8%	11.7%	22.2%	22.1%	22.1%	22.2%	22.1%

Sources: RECAP Model.

Notes: Excludes vacant floorspace.

Scenario 1

Non-central shopping in Bath

Table: **13**

CONVENIENCE GOODS MARKET SHARES IN 2007

2007	Allocations to		
Non-central shopping in Bath			
Indicated by household interview survey			
Zones	Main Food Q1	Top-up convenience Q4	**WEIGHTED AVERAGE**
	Expenditure weighting		
	75	25	100
	(%)	(%)	(%)
1	14.5	31.6	18.8
2	0.7	1.3	0.8
3	0.0	0.5	0.1
4	23.8	12.9	21.0
5	0.7	0.0	0.6
6	0.0	0.0	0.0
7	0.0	0.0	0.0
8	5.0	3.0	4.5
9	1.0	0.0	0.8
10	0.8	1.6	1.0

Sources: Household Interview Survey.
Expenditure weighting by DTZ.

Table: **14**

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2007

	2007 Allocations to **Non-central shopping in Bath** Indicated by Household Interview Survey								
	Clothing & footwear Q5	Furniture/ florcvrgs etc Q6	Household Textiles Q7	Household Appliances Q8	Audio-visual equipment Q9	Hardware, DIY, garden products Q10	Chemists, medcl & beauty goods Q11	All other comparison gds Q12	**WEIGHTED AVERAGE**
Zones	Expenditure weighting								
	752.59	340.13	117.52	91.53	453.14	326.57	449.75	945.82	3,477.06
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	1.3	9.3	5.9	28.2	25.9	31.6	13.4	6.1	11.9
2	0.0	2.0	1.9	5.0	4.9	6.2	2.8	0.0	2.0
3	0.0	0.7	0.0	0.6	0.6	0.0	0.0	0.0	0.2
4	0.0	11.9	5.4	10.1	17.1	15.2	1.1	0.0	5.4
5	0.0	1.2	1.0	1.8	1.0	0.0	0.0	0.0	0.3
6	0.0	0.0	0.0	0.0	1.1	0.0	0.0	0.0	0.1
7	0.0	0.0	0.0	0.9	2.0	0.9	0.0	0.0	0.4
8	0.0	3.6	2.9	8.7	12.3	13.6	6.9	0.0	4.5
9	0.0	4.9	1.6	1.2	3.8	0.0	0.0	0.0	1.1
10	0.0	2.6	2.9	16.0	22.8	5.2	0.0	0.0	4.2

Sources: Household Interview Survey.
RECAP Table 2 for expenditure weights.

Table: **15**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Non-central shopping in Bath**

Baseline - Market Shares indicated by the Household Interview Survey remain unchanged.

Market shares correction factors: Convenience Goods: 100 % of survey indicated figures
Comparison Goods: 85 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2007 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2007 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	19	19	19	19	19	10	10	10	10	10
2	1	1	1	1	1	2	2	2	2	2
3	0	0	0	0	0	0	0	0	0	0
4	21	21	21	21	21	5	5	5	5	5
5	1	1	1	1	1	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0
8	5	5	5	5	5	4	4	4	4	4
9	1	1	1	1	1	1	1	1	1	1
10	1	1	1	1	1	4	4	4	4	4

Sources: RECAP Model.
DTZ for market share corrections.

Table: **16**

COMPARISON GOODS SALES BY GOODS TYPE IN 2007

Catchment Zones	2007 Sales in **Non-central shopping in Bath** By Comparison Goods Type.							
	Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	686	2,283	467	1,804	7,742	7,315	4,444	4,042
2	0	194	58	125	569	558	361	0
3	0	134	0	29	146	0	0	0
4	0	470	69	105	826	567	59	0
5	0	123	34	50	131	0	0	0
6	0	0	0	0	127	0	0	0
7	0	0	0	50	511	169	0	0
8	0	90	23	57	375	321	232	0
9	0	403	42	26	381	0	0	0
10	0	421	157	689	4,575	810	0	0
TOTALS	686	4,119	851	2,933	15,383	9,741	5,097	4,042
MARKET SHARES	0%	3%	2%	8%	9%	7%	3%	1%

Sources: RECAP Model.

Table: **17**

FORECAST RETAIL SALES

Scenario: 1 Location: **Non-central shopping in Bath**

Baseline - Market Shares indicated by the Household Interview Survey remain unchanged.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2007 (£000)	2011 (£000)	2016 (£000)	2021 £0	2026 (£000)	2007 (£000)	2011 (£000)	2016 (£000)	2021 £0	2026 (£000)
1	27,551	28,958	31,087	33,538	35,825	28,628	32,215	39,798	49,411	60,738
2	568	599	685	777	876	2,244	2,534	3,334	4,353	5,641
3	0	0	0	0	0	0	0	0	0	0
4	4,903	5,175	5,546	5,937	6,351	2,305	2,604	3,212	3,957	4,871
5	616	660	702	738	792	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0
8	736	790	862	939	1,020	1,163	1,335	1,678	2,102	2,629
9	486	514	553	593	636	959	1,086	1,344	1,660	2,048
10	974	1,024	1,099	1,183	1,254	7,691	8,656	10,690	13,245	16,158
TOTALS	35,835	37,720	40,533	43,705	46,753	42,990	48,430	60,056	74,728	92,085

Sources: RECAP Model.

Table: **18**

SALES CAPACITY OF EXISTING

MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2007

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Costcutter, Newton Road, Twerton, Bath, BA2 1RW	54	95	51	3,428	176
Morrisons, Kensington Place, London Road, Bath	2,137	77	1,645	10,768	17,719
Somerfield, 20 High Street, Weston, Bath, BA1 4BX	319	83	265	6,562	1,737
Somerfield, St Saviours Road, Larkhall, Bath	362	83	300	6,562	1,971
Tesco Express, Combe Down, Bath BA2 5RU	50	95	48	12,854	611
Co-Op, Shaftsbury Road, Oldfield Park, Bath, BA2 3LH	1,509	85	1,283	5,829	7,477
Co-Op, Mount Road, Bath, BA2 1LN	308	90	277	5,829	1,616
Co-Op, Bearflat, Bath, BA2 4QL	193	95	183	5,829	1,069
ALL STORES	4,932		4,053	7,989	32,375

Sources: IGD, DTZ, Verdict Research, VOA

Table: **19**

SALES CAPACITY OF EXISTING RETAIL WAREHOUSES & MAIN FOODSTORES*

Net to gross ratio: 85 % (unless otherwise indicated)		Date of sales densities:		2004
Store	Gross Flrspce (sq m)	Net Flrspce (sq m)	Sales Density 2004 (£per sqm net)	Sales 2004 (£000)
Carphone Warehouse, 12, Wellsway, BA2 2AA	n/a	332	n/a	1,523
K&M Furniture Bed Centre, Oldfield Park, BA2 3LH	1,835	1,560	2,500	3,899
Blockbuster Video, 105 High Street, Twerton, BA2 1DB	n/a	250	1,885	471
Homebase, Pines Way, BA2 3ET	4,433	3,768	1,568	5,908
PC World, Unit A, Weston Lock Retail Park, Lower Bristol Road, BA2 1EP	833	708	7,513	5,320
Currys, Unit B, Weston Lock Retail Park, BA2 1EP	963	819	5,451	4,462
Argos Extra, Upper Bristol Rd, BA1 3AT	n/a	1,013	n/a	6,362
Multiyork, 4 York Place, BA1 6AE	n/a	993	3,500	3,476
Helibeds, 8 Walcot Buildings, Bath, BA1 6AD	221	188	2,163	406
Ripples Bathrooms, Chelsea House, London Road, BA1 6DB	179	152	2,500	380
TR Hayes, 15 -18 London Street, Walcot, BA1 5BX	n/a	485	3,500	1,698
Allied Carpets, Unit B, Stahan House, BA1 1UN	n/a	221	1,492	330
Morrisons	n/a	492	8,172	4,017
Co-op, Shaftesbury Road	n/a	226	1,768	400
TOTALS Trading at the date of the Household Interview Survey of Shopping Patterns	8,464	11,206	**3,449**	38,652

Sources: Retail Rankings', Mintel, with VAT added for compatibility with expenditure.
DTZ. Verdict Research.

Notes:
* Comparison goods floorspace in main foodstores
Sales for Carphone Warehouse based on average sales per outlet
Argos sales based on average sales per outlet
PC World floorspace reduced by 25% to allow for trade sales

Table: **20**

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
None committed			-		-
ALL STORES	-		-	#DIV/0!	-

COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
None committed			-		-
ALL STORES AND SCHEMES	-		-	#DIV/0!	-

Sources: DTZ, based on Verdict Research and Retail Rankings.

Table: **21**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Non-central shopping in Bath**

Baseline - Market Shares indicated by the Household Interview Survey remain unchanged.

Growth in sales per sq m from shop floorspace existing in 2007 Comparison Goods: 1.50 % pa to 2026

	CONVENIENCE GOODS					COMPARISON GOODS				
	2007	2011	2016	2021	2026	2007	2011	2016	2021	2026
Residents' Spending £000	35,835	37,720	40,533	43,705	46,753	42,990	48,430	60,056	74,728	92,085
Plus visitors' spending (%)										
Total spending (£000)	35,835	37,720	40,533	43,705	46,753	42,990	48,430	60,056	74,728	92,085
Existing shop floorspace (sq m net)	4,053	4,053	4,053	4,053	4,053	11,206	11,206	11,206	11,206	11,206
Sales per sq m net (£)	8,842	7,989	7,989	7,989	7,989	3,836	3,828	4,124	4,443	4,786
Sales from extg flrspce (£000)	35,835	32,375	32,375	32,375	32,375	42,990	42,897	46,213	49,784	53,632
Available spending to support new shops (£000)	0	5,345	8,158	11,330	14,378	0	5,533	13,843	24,944	38,454
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	0	0	0	0
Net available spending for new shops (£000)	0	5,345	8,158	11,330	14,378	0	5,533	13,843	24,944	38,454
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	3,500	3,715	4,002	4,311	4,644
Capacity for new shop flrspc (sq m net)	**0**	**445**	**680**	**944**	**1,198**	**0**	**1,489**	**3,459**	**5,786**	**8,280**

Market Share of Catchment Area Expenditure	4.8%	4.8%	4.8%	4.8%	4.8%	2.9%	2.9%	2.9%	2.9%	2.9%

Sources: RECAP Model. DTZ estimates.

Notes:

Scenario 1

Keynsham Town Centre (and out-of-centre Pioneer Co-op)

Table: **22**

CONVENIENCE GOODS MARKET SHARES IN 2007

2007 Allocations to

Keynsham Town Centre (and out-of-centre Pioneer Co-op)
Indicated by household interview survey

Zones	Main Food	Top-up convenience	**WEIGHTED AVERAGE**
	Q1	Q4	
	Expenditure weighting		
	75	25	100
	(%)	(%)	(%)
1	0.6	0.3	0.5
2	23.7	40.8	28.0
3	0.5	1.0	0.6
4	0.0	0.0	0.0
5	0.7	0.0	0.5
6	0.0	0.0	0.0
7	0.0	0.0	0.0
8	0.0	0.0	0.0
9	0.0	0.0	0.0
10	0.0	1.2	0.3

Sources: Household Interview Survey.
Expenditure weighting by DTZ.

Table: **23**

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2007

2007 Allocations to

Keynsham Town Centre (and out-of-centre Pioneer Co-op)
Indicated by Household Interview Survey

Zones	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemists, medcl & beauty goods	All other comparison gds	**WEIGHTED AVERAGE**
	Q5	Q6	Q7	Q8	Q9	Q10	Q11	Q12	
	Expenditure weighting								
	752.59	340.13	117.52	91.53	453.14	326.57	449.75	945.82	3,477.06
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.3	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.1
2	10.2	19.2	2.8	4.1	7.8	8.5	54.9	20.8	18.9
3	0.6	0.0	0.0	0.0	0.0	0.5	1.1	0.0	0.3
4	0.0	0.0	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	0.0
6	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
8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
10	1.4	0.6	0.6	0.6	0.0	1.0	2.6	0.0	0.8

Sources: Household Interview Survey.
RECAP Table 2 for expenditure weights.

Table: **24**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Keynsham Town Centre (and out-of-centre Pioneer Co-op)**

Baseline - Market Shares indicated by the Household Interview Survey remain unchanged.

Market shares correction factors: Convenience Goods: 100 % of survey indicated figures
Comparison Goods: 100 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2007 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2007 (%)	2011 (%)	2016 (%)	2021	2026 (%)
1	1	1	1	1	1	0	0	0	0	0
2	28	28	28	28	28	19	19	19	19	19
3	1	1	1	1	1	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0
5	1	1	1	1	1	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	1	1	1	1	1

Sources: RECAP Model.
DTZ for market share corrections.

Table: 25

COMPARISON GOODS SALES BY GOODS TYPE IN 2007

Catchment Zones	2007 Sales in Keynsham Town Centre (and out-of-centre Pioneer Co-op) By Comparison Goods Type.							
	Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	202	0	35	0	0	0	0	0
2	2,454	2,166	103	121	1,077	907	8,388	6,354
3	269	0	0	0	0	112	323	0
4	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0
10	575	124	37	28	0	174	689	0
TOTALS	3,501	2,290	174	149	1,077	1,192	9,400	6,354
MARKET SHARES	1%	2%	0%	0%	1%	1%	5%	2%

Sources: RECAP Model.

Table: 26

FORECAST RETAIL SALES

Scenario: 1 Location: **Keynsham Town Centre (and out-of-centre Pioneer Co-op)**

Baseline - Market Shares indicated by the Household Interview Survey remain unchanged.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2007 (£000)	2011 (£000)	2016 (£000)	2021 £0	2026 (£000)	2007 (£000)	2011 (£000)	2016 (£000)	2021 £0	2026 (£000)
1	1,450	1,524	1,636	1,765	1,886	0	0	0	0	0
2	15,910	16,784	19,191	21,768	24,517	21,315	24,073	31,676	41,349	53,592
3	1,120	1,190	1,284	1,384	1,490	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0
5	616	660	702	738	792	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	1,923	2,164	2,672	3,311	4,039
TOTALS	19,097	20,158	22,813	25,655	28,684	23,237	26,237	34,349	44,660	57,631

Sources: RECAP Model.

Table: **27**

SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2007

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Iceland, 14 – 18, Temple Street, Keynsham, Bristol	536	94	504	5,219	2,630
Somerfield, 63 High Street, Keynsham, Bristol	522	90	470	6,562	3,083
Other convenience goods shops in Keynsham town centre	731	90	658	4,500	2,961
Pioneer Co-Op, Ashmead Roundabout, Keynsham	3,009	85	2,557	5,829	14,907
ALL STORES	4,798		4,189	5,629	23,580

Sources: IGD, DTZ, Verdict Research.

Table: **28**

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

CONVENIENCE GOODS

Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
None committed					
ALL STORES	-		-	#DIV/0!	-

COMPARISON GOODS

Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
None committed					
ALL STORES AND SCHEMES	-		-	#DIV/0!	-

Sources: DTZ, based on Verdict Research and Retail Rankings.

Table: **29**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Keynsham Town Centre (and out-of-centre Pioneer Co-op)**

Baseline - Market Shares indicated by the Household Interview Survey remain unchanged.

Growth in sales per sq m from shop floorspace existing in 2007 Comparison Goods: 1.50 % pa to 2026

	CONVENIENCE GOODS					COMPARISON GOODS				
	2007	2011	2016	2021	2026	2007	2011	2016	2021	2026
Residents' Spending £000	19,097	20,158	22,813	25,655	28,684	23,237	26,237	34,349	44,660	57,631
Plus visitors' spending (%)		-	-	-	-		-	-	-	-
Total spending (£000)	19,097	20,158	22,813	25,655	28,684	23,237	26,237	34,349	44,660	57,631
Existing shop floorspace (sq m net)	4,189	4,189	4,189	4,189	4,189	6,165	6,165	6,165	6,165	6,165
Sales per sq m net (£)	4,559	5,629	5,629	5,629	5,629	3,769	4,001	4,310	4,643	5,002
Sales from extg flrspce (£000)	19,097	23,580	23,580	23,580	23,580	23,237	24,663	26,569	28,623	30,835
Available spending to support new shops (£000)	0	(3,422)	(767)	2,075	5,104	0	1,574	7,779	16,037	26,796
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	0	0	0	0
Net available spending for new shops (£000)	0	(3,422)	(767)	2,075	5,104	0	1,574	7,779	16,037	26,796
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	4,500	4,776	5,145	5,543	5,971
Capacity for new shop flrspc (sq m net)	**0**	**(285)**	**(64)**	**173**	**425**	**0**	**329**	**1,512**	**2,893**	**4,488**

Market Share of Catchment Area Expenditure	2.6%	2.6%	2.7%	2.8%	2.9%	1.6%	1.6%	1.7%	1.8%	1.8%

Sources: RECAP Model.

Notes: Excludes vacant floorspace.

Scenario 1

Midsomer Norton Town Centre (and out-of-centre Tesco)

Table: **30**

CONVENIENCE GOODS MARKET SHARES IN 2007

2007 Allocations to

Midsomer Norton Town Centre (and out-of-centre Tesco)
Indicated by household interview survey

Zones	Main Food	Top-up convenience	**WEIGHTED AVERAGE**
	Q1	Q4	
	Expenditure weighting		
	75	25	100
	(%)	(%)	(%)
1	1.1	0.0	0.8
2	0.0	0.0	0.0
3	0.0	0.0	0.0
4	0.0	0.0	0.0
5	0.0	0.0	0.0
6	0.0	0.0	0.0
7	0.0	0.0	0.0
8	0.0	0.0	0.0
9	0.0	0.0	0.0
10	64.9	29.9	56.2

Sources: Household Interview Survey.
Expenditure weighting by DTZ.

Table: **31**

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2007

2007 Allocations to

Midsomer Norton Town Centre (and out-of-centre Tesco)
Indicated by Household Interview Survey

	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemists, medcl & beauty goods	All other comparison gds	**WEIGHTED AVERAGE**
	Q5	Q6	Q7	Q8	Q9	Q10	Q11	Q12	
Zones	Expenditure weighting								
	752.59	340.13	117.52	91.53	453.14	326.57	449.75	945.82	3,477.06
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
2	0.0	1.0	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
4	0.0	0.0	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	0.0
6	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
8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
10	6.1	13.5	12.9	27.6	21.0	15.2	36.8	19.6	18.1

Sources: Household Interview Survey.
RECAP Table 2 for expenditure weights.

Table: **32**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Midsomer Norton Town Centre (and out-of-centre Tesco)**

Baseline - Market Shares indicated by the Household Interview Survey remain unchanged.

Market shares correction factors: Convenience Goods: 100 % of survey indicated figures
Comparison Goods: 60 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2007 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2007 (%)	2011 (%)	2016 (%)	2021	2026 (%)
1	1	1	1	1	1	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0
10	56	56	56	56	56	11	11	11	11	11

Sources: RECAP Model.
DTZ for market share corrections.

Table: **33**

COMPARISON GOODS SALES BY GOODS TYPE IN 2007

Catchment Zones	2007 Sales in **Midsomer Norton Town Centre (and out-of-centre Tesco)** By Comparison Goods Type. Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	0	0	0	0	0	0	0	0
2	0	68	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0
10	1,496	1,566	486	838	2,981	1,668	5,787	6,158
TOTALS	1,496	1,635	486	838	2,981	1,668	5,787	6,158
MARKET SHARES	0%	1%	1%	2%	2%	1%	3%	2%

Sources: RECAP Model.

Table: **34**

FORECAST RETAIL SALES

Scenario: 1 Location: **Midsomer Norton Town Centre (and out-of-centre Tesco)**

Baseline - Market Shares indicated by the Household Interview Survey remain unchanged.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE CONVENIENCE GOODS 2007 (£000)	2011 (£000)	2016 (£000)	2021 £0	2026 (£000)	COMPARISON GOODS 2007 (£000)	2011 (£000)	2016 (£000)	2021 £0	2026 (£000)
1	1,450	1,524	1,636	1,765	1,886	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0
10	54,540	57,335	61,525	66,243	70,223	21,151	23,805	29,397	36,424	44,434
TOTALS	55,990	58,859	63,161	68,008	72,109	21,151	23,805	29,397	36,424	44,434

Sources: RECAP Model.

Table: 35

SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2007

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Lidl, 39 High Street, Midsomer Norton	800	78	624	4,226	2,637
Sainsburys, The Hollies, Midsomer Norton	1,554	85	1,321	9,294	12,276
Other food / convenience goods stores in Midsomer Norton town centre	737	90	663	4,000	2,653
Tesco at Old Mills, Paulton, Midsomer Norton	2,438	85	2,072	12,854	26,637
ALL STORES	5,529		4,681	9,444	44,204

Sources: IGD, DTZ, Verdict Research.

Table: 36

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
None committed			-		-
ALL STORES	-		-	#DIV/0!	-
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
None committed			-		-
ALL STORES AND SCHEMES	-		-	#DIV/0!	-

Sources: DTZ, based on Verdict Research and Retail Rankings.

Table: **37**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Midsomer Norton Town Centre (and out-of-centre Tesco)**

Baseline - Market Shares indicated by the Household Interview Survey remain unchanged.

Growth in sales per sq m from shop floorspace existing in 2007 Comparison Goods: 1.50 % pa to 2026

	CONVENIENCE GOODS					COMPARISON GOODS				
	2007	2011	2016	2021	2026	2007	2011	2016	2021	2026
Residents' Spending £000	55,990	58,859	63,161	68,008	72,109	21,151	23,805	29,397	36,424	44,434
Plus visitors' spending (%)	-	-	-	-	-	-	-	-	-	-
Total spending (£000)	55,990	58,859	63,161	68,008	72,109	21,151	23,805	29,397	36,424	44,434
Existing shop floorspace (sq m net)	4,681	4,681	4,681	4,681	4,681	5,733	5,733	5,733	5,733	5,733
Sales per sq m net (£)	11,962	9,444	9,444	9,444	9,444	3,690	3,916	4,219	4,545	4,896
Sales from extg flrspce (£000)	55,990	44,204	44,204	44,204	44,204	21,151	22,449	24,184	26,053	28,066
Available spending to support new shops (£000)	0	14,655	18,957	23,804	27,905	0	1,356	5,213	10,371	16,368
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	0	0	0	0
Net available spending for new shops (£000)	0	14,655	18,957	23,804	27,905	0	1,356	5,213	10,371	16,368
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	4,000	4,245	4,574	4,927	5,308
Capacity for new shop flrspc (sq m net)	**0**	**1,221**	**1,580**	**1,984**	**2,325**	**0**	**319**	**1,140**	**2,105**	**3,084**

Market Share of Catchment Area Expenditure	7.6%	7.5%	7.5%	7.5%	7.4%	1.4%	1.4%	1.4%	1.4%	1.4%

Sources: RECAP Model.

Notes: Excludes vacant floorspace.

Scenario 1

Radstock Local Centre

Table: **38**

CONVENIENCE GOODS MARKET SHARES IN 2007

2007 Allocations to

Radstock Local Centre
Indicated by household interview survey

Zones	Main Food	Top-up convenience	**WEIGHTED AVERAGE**
	Q1	Q4	
	Expenditure weighting		
	75	25	100
	(%)	(%)	(%)
1	0.0	0.0	0.0
2	0.0	0.0	0.0
3	0.0	0.5	0.1
4	0.0	0.0	0.0
5	0.0	0.0	0.0
6	0.0	0.0	0.0
7	0.0	0.0	0.0
8	1.0	1.0	1.0
9	0.0	0.0	0.0
10	4.4	7.6	5.2

Sources: Household Interview Survey.
Expenditure weighting by DTZ.

Table: **39**

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2007

2007 Allocations to

Radstock Local Centre
Indicated by Household Interview Survey

	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemists, medcl & beauty goods	All other comparison gds	**WEIGHTED AVERAGE**
	Q5	Q6	Q7	Q8	Q9	Q10	Q11	Q12	
Zones	Expenditure weighting								
	752.59	340.13	117.52	91.53	453.14	326.57	449.75	945.82	3,477.06
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.4	0.0	0.4	0.4	0.0	0.0	0.0	0.1
2	0.0	0.0	0.0	0.8	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	0.0
4	0.0	0.0	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	0.0
6	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
8	0.0	0.0	1.4	0.0	0.0	0.0	0.0	0.0	0.0
9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
10	0.9	5.1	5.9	11.6	6.0	3.8	8.3	0.0	3.4

Sources: Household Interview Survey.
RECAP Table 2 for expenditure weights.

Table: **40**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Radstock Local Centre**

Baseline - Market Shares indicated by the Household Interview Survey remain unchanged.

Market shares correction factors:			
	Convenience Goods:	100	% of survey indicated figures
	Comparison Goods:	175	% of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2007 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2007 (%)	2011 (%)	2016 (%)	2021	2026 (%)
1	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0
8	1	1	1	1	1	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0
10	5	5	5	5	5	6	6	6	6	6

Sources: RECAP Model.
DTZ for market share corrections.

Table: **41**

COMPARISON GOODS SALES BY GOODS TYPE IN 2007

Catchment Zones	2007 Sales in **Radstock Local Centre** By Comparison Goods Type. Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	0	202	0	47	234	0	0	0
2	0	0	0	43	0	0	0	0
3	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0
8	0	0	24	0	0	0	0	0
9	0	0	0	0	0	0	0	0
10	647	1,726	646	1,028	2,480	1,216	3,807	0
TOTALS	647	1,927	670	1,118	2,714	1,216	3,807	0
MARKET SHARES	0%	1%	1%	3%	2%	1%	2%	0%

Sources: RECAP Model.

Table: **42**

FORECAST RETAIL SALES

Scenario: 1 Location: **Radstock Local Centre**

Baseline - Market Shares indicated by the Household Interview Survey remain unchanged.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE CONVENIENCE GOODS 2007 (£000)	2011 (£000)	2016 (£000)	2021 £0	2026 (£000)	COMPARISON GOODS 2007 (£000)	2011 (£000)	2016 (£000)	2021 £0	2026 (£000)
1	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0
8	147	158	172	188	204	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0
10	4,870	5,119	5,493	5,915	6,270	11,537	12,984	16,035	19,868	24,237
TOTALS	5,017	5,277	5,666	6,102	6,474	11,537	12,984	16,035	19,868	24,237

Sources: RECAP Model.

Table: **43**

SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2007

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Radco, 3 Wells Road, Radstock	3,159	40	1,264	5,829	7,366
Other Convenience Goods Stores in Radstock	232	90	209	3,000	626
ALL STORES	3,391		1,472	5,428	7,992

Sources: IGD, DTZ, Verdict Research.

Table: **44**

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
None committed			-		-
ALL STORES	-		-	#DIV/0!	-
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
Railway Land (no operator indicated)	695	85.00	591	4,000	2,363
ALL STORES AND SCHEMES	695		591	4,000	2,363

Sources: DTZ, based on Verdict Research and Retail Rankings.

Table: 45

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Radstock Local Centre**

Baseline - Market Shares indicated by the Household Interview Survey remain unchanged.

Growth in sales per sq m from shop floorspace existing in 2007 Comparison Goods: 1.50 % pa to 2026

	CONVENIENCE GOODS					COMPARISON GOODS				
	2007	2011	2016	2021	2026	2007	2011	2016	2021	2026
Residents' Spending £000	5,017	5,277	5,666	6,102	6,474	11,537	12,984	16,035	19,868	24,237
Plus visitors' spending (%)	-	-	-	-	-	-	-	-	-	-
Total spending (£000)	5,017	5,277	5,666	6,102	6,474	11,537	12,984	16,035	19,868	24,237
Existing shop floorspace (sq m net)	1,472	1,472	1,472	1,472	1,472	4,934	4,934	4,934	4,934	4,934
Sales per sq m net (£)	3,407	5,428	5,428	5,428	5,428	2,338	2,482	2,674	2,880	3,103
Sales from extg flrspce (£000)	5,017	7,992	7,992	7,992	7,992	11,537	12,245	13,191	14,211	15,309
Available spending to support new shops (£000)	0	(2,715)	(2,326)	(1,890)	(1,518)	0	740	2,844	5,657	8,928
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	2,363	2,546	2,742	2,954
Net available spending for new shops (£000)	0	(2,715)	(2,326)	(1,890)	(1,518)	0	(1,623)	298	2,915	5,974
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	4,000	4,245	4,574	4,927	5,308
Capacity for new shop flrspc (sq m net)	**0**	**(226)**	**(194)**	**(157)**	**(126)**	**0**	**(382)**	**65**	**592**	**1,125**

Market Share of Catchment Area Expenditure	0.7%	0.7%	0.7%	0.7%	0.7%	0.8%	0.8%	0.8%	0.8%	0.8%

Sources: RECAP Model.

Notes: Excludes vacant floorspace.

Scenario 2

Bath City Centre

Table: **46**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 2 Location: **Bath City Centre**

Increases in comparison goods market shares from 2011 for Bath City Centre due to the new Southgate development, and smaller reductions in market shares for Bath non-central stores. Increases in Keynsham's market shares (convenience and comparison goods) due to potential new food store and other town centre retail development. Redevelopment of Radco in Radstock for a new supermarket also considered in this scenario.

Market shares adjustment factors: Convenience Goods: 100 % of survey indicated figures
Comparison Goods: 70 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2007 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2007 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	49	49	49	49	49	52	57	57	57	57
2	9	9	9	9	9	17	19	19	19	19
3	1	1	1	1	1	3	3	3	3	3
4	11	11	11	11	11	34	37	37	37	37
5	1	1	1	1	1	13	13	13	13	13
6	1	1	1	1	1	9	9	9	9	9
7	1	1	1	1	1	14	15	15	15	15
8	18	18	18	18	18	37	41	41	41	41
9	1	1	1	1	1	20	21	21	21	21
10	2	2	2	2	2	23	24	24	24	24

Sources: RECAP Model.
DTZ for market share adjustments.

Table: **47**

FORECAST RETAIL SALES

Scenario: 2 Location: **Bath City Centre**

Increases in comparison goods market shares from 2011 for Bath City Centre due to the new Southgate development, and smaller reductions in market shares for Bath non-central stores. Increases in Keynsham's market shares (convenience and comparison goods) due to potential new food store and other town centre retail development. Redevelopment of Radco in Radstock for a new supermarket also considered in this scenario.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2007 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	2007 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	71,052	74,681	80,170	86,492	92,390	148,864	183,623	226,850	281,643	346,208
2	5,114	5,395	6,168	6,997	7,881	19,071	24,073	31,676	41,349	53,592
3	1,120	1,190	1,284	1,384	1,490	6,635	7,543	9,371	11,624	14,398
4	2,568	2,711	2,905	3,110	3,326	15,673	19,272	23,769	29,283	36,044
5	616	660	702	738	792	15,822	18,144	22,188	26,843	33,146
6	582	613	638	656	691	10,343	11,664	13,975	16,537	20,038
7	1,219	1,315	1,424	1,534	1,666	33,682	41,691	51,960	64,413	80,505
8	2,651	2,843	3,103	3,379	3,672	10,760	13,687	17,194	21,548	26,946
9	486	514	553	593	636	19,189	22,798	28,227	34,860	43,017
10	1,948	2,048	2,197	2,366	2,508	44,224	51,937	64,139	79,471	96,947
TOTALS	87,357	91,969	99,146	107,250	115,052	324,262	394,432	489,350	607,570	750,840

Sources: RECAP Model.

Table: **48**

FORECAST RETAIL CAPACITY

Scenario: 2 Location: **Bath City Centre**

Increases in comparison goods market shares from 2011 for Bath City Centre due to the new Southgate development, and smaller reductions in market shares for Bath non-central stores. Increases in Keynsham's market shares (convenience and comparison goods) due to potential new food store and other town centre retail development. Redevelopment of Radco in Radstock for a new supermarket also considered in this scenario.

Growth in sales per sq m from shop floorspace existing in 2007 Comparison Goods: 1.50 % pa 2011 to 2026

	CONVENIENCE GOODS					COMPARISON GOODS				
	2007	2011	2016	2021	2026	2007	2011	2016	2021	2026
Residents' Spending £000	87,357	91,969	99,146	107,250	115,052	324,262	394,432	489,350	607,570	750,840
Plus visitors' spending (%)	10.0	10.0	10.0	10.0	10.0	10.0	11.0	11.0	11.0	11.0
Total spending (£000)	96,092	101,165	109,060	117,975	126,558	356,688	437,819	543,178	674,403	833,433
Existing shop floorspace (sq m net)	6,912	6,912	6,912	6,912	6,912	56,167	56,167	56,167	56,167	56,167
Sales per sq m net (£)	13,903	8,983	8,983	8,983	8,983	6,351	6,351	6,841	7,370	7,940
Sales from extg flrspce (£000)	96,092	62,086	62,086	62,086	62,086	356,688	356,688	384,255	413,951	445,943
Available spending to support new shops (£000)	0	39,080	46,974	55,889	64,472	0	81,131	158,923	260,451	387,489
Less sales capacity of committed new floorspace (£000)	0	5,446	5,446	5,446	5,446	0	115,896	124,853	134,502	144,897
Net available spending for new shops (£000)	0	33,633	41,528	50,443	59,026	0	(34,766)	34,070	125,949	242,592
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	5,000	5,307	5,717	6,159	6,635
Capacity for new shop flrspc (sq m net)	**0**	**2,803**	**3,461**	**4,204**	**4,919**	**0**	**(6,551)**	**5,959**	**20,450**	**36,564**

Market Share of Catchment Area Expenditure	11.8%	11.7%	11.7%	11.8%	11.7%	22.2%	23.8%	23.8%	23.8%	23.8%

Sources: RECAP Model.

Notes: Excludes vacant floorspace.

Scenario 2

Non-central shopping in Bath

Table: **49**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 2 Location: **Non-central shopping in Bath**

Increases in comparison goods market shares from 2011 for Bath City Centre due to the new Southgate development, and smaller reductions in market shares for Bath non-central stores. Increases in Keynsham's market shares (convenience and comparison goods) due to potential new food store and other town centre retail development. Redevelopment of Radco in Radstock for a new supermarket also considered in this scenario.

Market shares adjustment factors: Convenience Goods: 100 % of survey indicated figures; Comparison Goods: 85 % of survey indicated figures

Catchment Zone	Convenience 2007 (%)	Convenience 2011 (%)	Convenience 2016 (%)	Convenience 2021 (%)	Convenience 2026 (%)	Comparison 2007 (%)	Comparison 2011 (%)	Comparison 2016 (%)	Comparison 2021 (%)	Comparison 2026 (%)
1	19	19	19	19	19	10	9	9	9	9
2	1	1	1	1	1	2	2	2	2	2
3	0	0	0	0	0	0	0	0	0	0
4	21	21	21	21	21	5	5	5	5	5
5	1	1	1	1	1	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0
8	5	5	5	5	5	4	4	4	4	4
9	1	1	1	1	1	1	1	1	1	1
10	1	1	1	1	1	4	4	4	4	4

PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED

Sources: RECAP Model.
DTZ for market share adjustments.

Table: **50**

FORECAST RETAIL SALES

Scenario: 2 Location: **Non-central shopping in Bath**

Increases in comparison goods market shares from 2011 for Bath City Centre due to the new Southgate development, and smaller reductions in market shares for Bath non-central stores. Increases in Keynsham's market shares (convenience and comparison goods) due to potential new food store and other town centre retail development. Redevelopment of Radco in Radstock for a new supermarket also considered in this scenario.

RETAIL SALES BY CATCHMENT ZONE

Catchment zone	Convenience 2007 (£000)	Convenience 2011 (£000)	Convenience 2016 (£000)	Convenience 2021 (£000)	Convenience 2026 (£000)	Comparison 2007 (£000)	Comparison 2011 (£000)	Comparison 2016 (£000)	Comparison 2021 (£000)	Comparison 2026 (£000)
1	27,551	28,958	31,087	33,538	35,825	28,628	28,993	35,818	44,470	54,664
2	568	599	685	777	876	2,244	2,534	3,334	4,353	5,641
3	0	0	0	0	0	0	0	0	0	0
4	4,903	5,175	5,546	5,937	6,351	2,305	2,604	3,212	3,957	4,871
5	616	660	702	738	792	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0
8	736	790	862	939	1,020	1,163	1,335	1,678	2,102	2,629
9	486	514	553	593	636	959	1,086	1,344	1,660	2,048
10	974	1,024	1,099	1,183	1,254	7,691	8,656	10,690	13,245	16,158
TOTALS	35,835	37,720	40,533	43,705	46,753	42,990	45,208	56,076	69,787	86,012

Sources: RECAP Model.

Table: **51**

FORECAST RETAIL CAPACITY

Scenario: 2 Location: **Non-central shopping in Bath**

Increases in comparison goods market shares from 2011 for Bath City Centre due to the new Southgate development, and smaller reductions in market shares for Bath non-central stores. Increases in Keynsham's market shares (convenience and comparison goods) due to potential new food store and other town centre retail development. Redevelopment of Radco in Radstock for a new supermarket also considered in this scenario.

Growth in sales per sq m from shop floorspace existing in 2007 Comparison Goods: 1.50 % pa to 2026

	CONVENIENCE GOODS					COMPARISON GOODS				
	2007	2011	2016	2021	2026	2007	2011	2016	2021	2026
Residents' Spending £000	35,835	37,720	40,533	43,705	46,753	42,990	45,208	56,076	69,787	86,012
Plus visitors' spending (%)	-	-	-	-	-	-	-	-	-	-
Total spending (£000)	35,835	37,720	40,533	43,705	46,753	42,990	45,208	56,076	69,787	86,012
Existing shop floorspace (sq m net)	4,053	4,053	4,053	4,053	4,053	11,206	11,206	11,206	11,206	11,206
Sales per sq m net (£)	8,842	7,989	7,989	7,989	7,989	3,836	3,828	4,124	4,443	4,786
Sales from extg flrspce (£000)	35,835	32,375	32,375	32,375	32,375	42,990	42,897	46,213	49,784	53,632
Available spending to support new shops (£000)	0	5,345	8,158	11,330	14,378	0	2,311	9,864	20,003	32,380
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	0	0	0	0
Net available spending for new shops (£000)	0	5,345	8,158	11,330	14,378	0	2,311	9,864	20,003	32,380
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	3,500	3,715	4,002	4,311	4,644
Capacity for new shop flrspc (sq m net)	**0**	**445**	**680**	**944**	**1,198**	**0**	**622**	**2,465**	**4,640**	**6,972**

Market Share of Catchment Area Expenditure	4.8%	4.8%	4.8%	4.8%	4.8%	2.9%	2.7%	2.7%	2.7%	2.7%

Sources: RECAP Model.

Notes: Excludes vacant floorspace.

Scenario 2

Keynsham Town Centre (and out-of-centre Pioneer Co-op)

Table: **52**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 2 Location: **Keynsham Town Centre (and out-of-centre Pioneer Co-op)**

Increases in comparison goods market shares from 2011 for Bath City Centre due to the new Southgate development, and smaller reductions in market shares for Bath non-central stores. Increases in Keynsham's market shares (convenience and comparison goods) due to potential new food store and other town centre retail development. Redevelopment of Radco in Radstock for a new supermarket also considered in this scenario.

Market shares adjustment factors:			
	Convenience Goods:	100	% of survey indicated figures
	Comparison Goods:	100	% of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2007 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2007 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	1	2	2	2	2	0	0	0	0	0
2	28	60	60	60	60	19	30	30	30	30
3	1	2	2	2	2	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0
5	1	2	2	2	2	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	1	1	1	1	1

Sources: RECAP Model.
DTZ for market share adjustments.

Table: **53**

FORECAST RETAIL SALES

Scenario: 2 Location: **Keynsham Town Centre (and out-of-centre Pioneer Co-op)**

Increases in comparison goods market shares from 2011 for Bath City Centre due to the new Southgate development, and smaller reductions in market shares for Bath non-central stores. Increases in Keynsham's market shares (convenience and comparison goods) due to potential new food store and other town centre retail development. Redevelopment of Radco in Radstock for a new supermarket also considered in this scenario.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2007 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	2007 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	1,450	3,048	3,272	3,530	3,771	0	0	0	0	0
2	15,910	35,966	41,123	46,646	52,537	21,315	38,010	50,015	65,288	84,618
3	1,120	2,379	2,568	2,768	2,980	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0
5	616	1,321	1,403	1,475	1,583	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	1,923	2,164	2,672	3,311	4,039
TOTALS	19,097	42,714	48,367	54,420	60,871	23,237	40,174	52,688	68,599	88,658

Sources: RECAP Model.

Table: **54**

FORECAST RETAIL CAPACITY

Scenario: 2 Location: **Keynsham Town Centre (and out-of-centre Pioneer Co-op)**

Increases in comparison goods market shares from 2011 for Bath City Centre due to the new Southgate development, and smaller reductions in market shares for Bath non-central stores. Increases in Keynsham's market shares (convenience and comparison goods) due to potential new food store and other town centre retail development. Redevelopment of Radco in Radstock for a new supermarket also considered in this scenario.

Growth in sales per sq m from shop floorspace existing in 2007 Comparison Goods: 1.50 % pa to 2026

	CONVENIENCE GOODS					COMPARISON GOODS				
	2007	2011	2016	2021	2026	2007	2011	2016	2021	2026
Residents' Spending £000	19,097	42,714	48,367	54,420	60,871	23,237	40,174	52,688	68,599	88,658
Plus visitors' spending (%)	-	-	-	-	-	-	-	-	-	-
Total spending (£000)	19,097	42,714	48,367	54,420	60,871	23,237	40,174	52,688	68,599	88,658
Existing shop floorspace (sq m net)	4,189	4,189	4,189	4,189	4,189	6,165	6,165	6,165	6,165	6,165
Sales per sq m net (£)	4,559	5,629	5,629	5,629	5,629	3,769	4,001	4,310	4,643	5,002
Sales from extg flrspce (£000)	19,097	23,580	23,580	23,580	23,580	23,237	24,663	26,569	28,623	30,835
Available spending to support new shops (£000)	0	19,134	24,787	30,840	37,291	0	15,511	26,118	39,976	57,823
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	0	0	0	0
Net available spending for new shops (£000)	0	19,134	24,787	30,840	37,291	0	15,511	26,118	39,976	57,823
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	4,500	4,776	5,145	5,543	5,971
Capacity for new shop flrspc (sq m net)	**0**	**1,594**	**2,066**	**2,570**	**3,108**	**0**	**3,248**	**5,076**	**7,212**	**9,684**

Market Share of Catchment Area Expenditure	2.6%	5.4%	5.7%	6.0%	6.2%	1.6%	2.4%	2.6%	2.7%	2.8%

Sources: RECAP Model.

Notes: Excludes vacant floorspace.

Scenario 2

Midsomer Norton Town Centre (and out-of-centre Tesco)

Table: **55**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 2 Location: **Midsomer Norton Town Centre (and out-of-centre Tesco)**

Increases in comparison goods market shares from 2011 for Bath City Centre due to the new Southgate development, and smaller reductions in market shares for Bath non-central stores. Increases in Keynsham's market shares (convenience and comparison goods) due to potential new food store and other town centre retail development. Redevelopment of Radco in Radstock for a new supermarket also considered in this scenario.

Market shares adjustment factors: Convenience Goods: 100 % of survey indicated figures
Comparison Goods: 60 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2007 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2007 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	1	1	1	1	1	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0
10	56	46	46	46	46	11	11	11	11	11

Sources: RECAP Model.
DTZ for market share adjustments.

Table: **56**

FORECAST RETAIL SALES

Scenario: 2 Location: **Midsomer Norton Town Centre (and out-of-centre Tesco)**

Increases in comparison goods market shares from 2011 for Bath City Centre due to the new Southgate development, and smaller reductions in market shares for Bath non-central stores. Increases in Keynsham's market shares (convenience and comparison goods) due to potential new food store and other town centre retail development. Redevelopment of Radco in Radstock for a new supermarket also considered in this scenario.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2007 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	2007 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	1,450	1,524	1,636	1,765	1,886	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0
10	54,540	47,096	50,538	54,414	57,684	21,151	23,805	29,397	36,424	44,434
TOTALS	55,990	48,620	52,174	56,179	59,569	21,151	23,805	29,397	36,424	44,434

Sources: RECAP Model.

Table: 57

FORECAST RETAIL CAPACITY

Scenario: 2 Location: **Midsomer Norton Town Centre (and out-of-centre Tesco)**

Increases in comparison goods market shares from 2011 for Bath City Centre due to the new Southgate development, and smaller reductions in market shares for Bath non-central stores. Increases in Keynsham's market shares (convenience and comparison goods) due to potential new food store and other town centre retail development. Redevelopment of Radco in Radstock for a new supermarket also considered in this scenario.

Growth in sales per sq m from shop floorspace existing in 2007 Comparison Goods: 1.50 % pa to 2026

	CONVENIENCE GOODS					COMPARISON GOODS				
	2007	2011	2016	2021	2026	2007	2011	2016	2021	2026
Residents' Spending £000	55,990	48,620	52,174	56,179	59,569	21,151	23,805	29,397	36,424	44,434
Plus visitors' spending (%)	-	-	-	-	-	-	-	-	-	-
Total spending (£000)	55,990	48,620	52,174	56,179	59,569	21,151	23,805	29,397	36,424	44,434
Existing shop floorspace (sq m net)	4,681	4,681	4,681	4,681	4,681	5,733	5,733	5,733	5,733	5,733
Sales per sq m net (£)	11,962	9,444	9,444	9,444	9,444	3,690	3,916	4,219	4,545	4,896
Sales from extg flrspce (£000)	55,990	44,204	44,204	44,204	44,204	21,151	22,449	24,184	26,053	28,066
Available spending to support new shops (£000)	0	4,416	7,970	11,975	15,365	0	1,356	5,213	10,371	16,368
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	0	0	0	0
Net available spending for new shops (£000)	0	4,416	7,970	11,975	15,365	0	1,356	5,213	10,371	16,368
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	4,000	4,245	4,574	4,927	5,308
Capacity for new shop flrspc (sq m net)	**0**	**368**	**664**	**998**	**1,280**	**0**	**319**	**1,140**	**2,105**	**3,084**

Market Share of Catchment Area Expenditure	7.6%	6.2%	6.2%	6.2%	6.1%	1.4%	1.4%	1.4%	1.4%	1.4%

Sources: RECAP Model.

Notes: Excludes vacant floorspace.

Scenario 2

Radstock Local Centre

Table: **58**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 2 Location: **Radstock Local Centre**

Increases in comparison goods market shares from 2011 for Bath City Centre due to the new Southgate development, and smaller reductions in market shares for Bath non-central stores. Increases in Keynsham's market shares (convenience and comparison goods) due to potential new food store and other town centre retail development. Redevelopment of Radco in Radstock for a new supermarket also considered in this scenario.

Market shares adjustment factors:

Convenience Goods:	100	% of survey indicated figures
Comparison Goods:	175	% of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2007 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2007 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0
8	1	1	1	1	1	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0
10	5	22	22	22	22	6	6	6	6	6

Sources: RECAP Model.
DTZ for market share adjustments.

Table: **59**

FORECAST RETAIL SALES

Scenario: 2 Location: **Radstock Local Centre**

Increases in comparison goods market shares from 2011 for Bath City Centre due to the new Southgate development, and smaller reductions in market shares for Bath non-central stores. Increases in Keynsham's market shares (convenience and comparison goods) due to potential new food store and other town centre retail development. Redevelopment of Radco in Radstock for a new supermarket also considered in this scenario.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2007 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)	2007 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0
8	147	158	172	188	204	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0
10	4,870	22,524	24,170	26,024	27,588	11,537	12,984	16,035	19,868	24,237
TOTALS	5,017	22,682	24,343	26,212	27,792	11,537	12,984	16,035	19,868	24,237

Sources: RECAP Model.

Table: **60**

FORECAST RETAIL CAPACITY

Scenario: 2 Location: **Radstock Local Centre**

Increases in comparison goods market shares from 2011 for Bath City Centre due to the new Southgate development, and smaller reductions in market shares for Bath non-central stores. Increases in Keynsham's market shares (convenience and comparison goods) due to potential new food store and other town centre retail development. Redevelopment of Radco in Radstock for a new supermarket also considered in this scenario.

Growth in sales per sq m from shop floorspace existing in 2007 Comparison Goods: 1.50 % pa to 2026

	CONVENIENCE GOODS					COMPARISON GOODS				
	2007	2011	2016	2021	2026	2007	2011	2016	2021	2026
Residents' Spending £000	5,017	22,682	24,343	26,212	27,792	11,537	12,984	16,035	19,868	24,237
Plus visitors' spending (%)	-	-	-	-	-	-	-	-	-	-
Total spending (£000)	5,017	22,682	24,343	26,212	27,792	11,537	12,984	16,035	19,868	24,237
Existing shop floorspace (sq m net)	1,472	209	209	209	209	4,934	3,038	3,038	3,038	3,038
Sales per sq m net (£)	3,407	5,428	5,428	5,428	5,428	2,338	2,482	2,674	2,880	3,103
Sales from extg flrspce (£000)	5,017	1,133	1,133	1,133	1,133	11,537	7,541	8,123	8,751	9,427
Available spending to support new shops (£000)	0	21,549	23,210	25,078	26,658	0	5,444	7,911	11,117	14,809
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	2,363	2,546	2,742	2,954
Net available spending for new shops (£000)	0	21,549	23,210	25,078	26,658	0	3,081	5,366	8,374	11,855
Sales per sq m net in new shops (£)	10,200	10,200	10,200	10,200	10,200	4,000	4,245	4,574	4,927	5,308
Capacity for new shop flrspc (sq m net)	**0**	**2,113**	**2,275**	**2,459**	**2,614**	**0**	**726**	**1,173**	**1,700**	**2,234**

Market Share of Catchment Area Expenditure	0.7%	2.9%	2.9%	2.9%	2.8%	0.8%	0.8%	0.8%	0.8%	0.8%

Sources: RECAP Model.

Notes: Excludes vacant floorspace.

Total Market Shares

Table: **61**

TOTAL MARKET SHARES BY COMPARISON GOODS TYPE IN 2007

SHOPPING LOCATION	COMPARISON GOODS TYPE							
	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY & garden goods	Chemists, medical & beauty goods	All other comparison goods
Bath City Centre	35%	15%	20%	12%	14%	8%	15%	28%
Non-central shopping in Bath	0%	3%	2%	8%	9%	7%	3%	1%
Bath Total	**35%**	**18%**	**22%**	**20%**	**22%**	**15%**	**17%**	**29%**
Keynsham Town Centre (and out-of-centre Pioneer	1%	2%	0%	0%	1%	1%	5%	2%
Midsomer Norton Town Centre (and out-of-centre T	0%	1%	1%	2%	2%	1%	3%	2%
Radstock Local Centre	0%	1%	1%	3%	2%	1%	2%	0%
Sub-Totals	**2%**	**4%**	**3%**	**5%**	**4%**	**3%**	**10%**	**3%**
TOTALS BATH & NORTH EAST SOMERSET	**37%**	**22%**	**24%**	**25%**	**26%**	**18%**	**27%**	**32%**

Sources: RECAP Model

Table: **62**
Scenario: **1**

TOTAL MARKET SHARES BY CATCHMENT ZONE FOR: Bath

Catchment Zones	City Centre and Non-Central Foodstores and Retail Warehouses									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2007 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2007 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	68	68	68	68	68	62	62	62	62	62
2	10	10	10	10	10	19	19	19	19	19
3	1	1	1	1	1	3	3	3	3	3
4	32	32	32	32	32	39	39	39	39	39
5	2	2	2	2	2	13	13	13	13	13
6	1	1	1	1	1	9	9	9	9	9
7	1	1	1	1	1	14	14	14	14	14
8	23	23	23	23	23	41	41	41	41	41
9	2	2	2	2	2	21	21	21	21	21
10	3	3	3	3	3	27	27	27	27	27

Sources: RECAP Model

Table: **63**
Scenario: **1**

TOTAL MARKET SHARES BY CATCHMENT ZONE FOR: Keynsham, Ms Norton & Radstock

Catchment Zones	Town Centres									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2007 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2007 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	2	2	2	2	2	0	0	0	0	0
2	28	28	28	28	28	19	19	19	19	19
3	1	1	1	1	1	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0
5	1	1	1	1	1	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0
8	1	1	1	1	1	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0
10	61	61	61	61	61	18	18	18	18	18

Sources: RECAP Model

Table: **64**
Scenario: **1**

TOTAL MARKET SHARES BY CATCHMENT ZONE FOR: Bath, Keynsham, Ms Norton & Radstock

Catchment Zones	City and Town Centres, and Non-Central Foodstores and Retail Warehouses in Bath									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2007 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2007 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	70	70	70	70	70	62	62	62	62	62
2	38	38	38	38	38	38	38	38	38	38
3	2	2	2	2	2	3	3	3	3	3
4	32	32	32	32	32	39	39	39	39	39
5	3	3	3	3	3	13	13	13	13	13
6	1	1	1	1	1	9	9	9	9	9
7	1	1	1	1	1	14	14	14	14	14
8	24	24	24	24	24	41	41	41	41	41
9	2	2	2	2	2	21	21	21	21	21
10	64	64	64	64	64	45	45	45	45	45

Sources: RECAP Model

Table: **65**
Scenario: **2**

TOTAL MARKET SHARES BY CATCHMENT ZONE FOR: Bath

Catchment Zones	City Centre and Non-Central Foodstores and Retail Warehouses									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2007 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2007 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	68	68	68	68	68	62	66	66	66	66
2	10	10	10	10	10	19	21	21	21	21
3	1	1	1	1	1	3	3	3	3	3
4	32	32	32	32	32	39	42	42	42	42
5	2	2	2	2	2	13	13	13	13	13
6	1	1	1	1	1	9	9	9	9	9
7	1	1	1	1	1	14	15	15	15	15
8	23	23	23	23	23	41	45	45	45	45
9	2	2	2	2	2	21	22	22	22	22
10	3	3	3	3	3	27	28	28	28	28

Sources: RECAP Model

Table: **66**
Scenario: **2**

TOTAL MARKET SHARES BY CATCHMENT ZONE FOR: Keynsham, Ms Norton & Radstock

Catchment Zones	Town Centres									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2007 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2007 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	2	3	3	3	3	0	0	0	0	0
2	28	60	60	60	60	19	30	30	30	30
3	1	2	2	2	2	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0
5	1	2	2	2	2	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0
8	1	1	1	1	1	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0
10	61	68	68	68	68	18	18	18	18	18

Sources: RECAP Model

Table: **67**
Scenario: **2**

TOTAL MARKET SHARES BY CATCHMENT ZONE FOR: Bath, Keynsham, Ms Norton & Radstock

Catchment Zones	City and Town Centres, and Non-Central Foodstores and Retail Warehouses in Bath									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2007 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)	2007 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	70	71	71	71	71	62	66	66	66	66
2	38	70	70	70	70	38	51	51	51	51
3	2	3	3	3	3	3	3	3	3	3
4	32	32	32	32	32	39	42	42	42	42
5	3	4	4	4	4	13	13	13	13	13
6	1	1	1	1	1	9	9	9	9	9
7	1	1	1	1	1	14	15	15	15	15
8	24	24	24	24	24	41	45	45	45	45
9	2	2	2	2	2	21	22	22	22	22
10	64	71	71	71	71	45	46	46	46	46

Sources: RECAP Model