APPENDIX 1

The Household Telephone Survey

APPENDIX 1A

Survey Methodology
Sampling

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STRATFORD ON AVON HOUSEHOLD SHOPPING SURVEY

JANUARY 2008

Presented to: Colliers CRE
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STRATFORD ON AVON HOUSEHOLD SURVEY (JANUARY 2008)

BACKGROUND & METHODOLOGY

The client, Colliers CRE, wished to conduct a telephone shopping survey within the Stratford on Avon District Council area. This was to establish the following:

- Where respondents go for their general non-food shopping such as clothing, footwear and household goods.
- How frequently they visit their main and secondary centre.
- How their expenditure on such goods is divided between main and secondary centres.
- Why they choose their main centres, how they travel and the length of their journey from home.
- Similar information regarding food & grocery shopping.

A total of 750 interviews were targeted, in eight different zones, each zone defined by Postal Geography. Interviews were conducted over a period of two weeks, between January 23rd and February 9^{th} 2008.

In order to provide meaningful and reliable data in each of the zones an equal number of interviews (94) were allocated to each of the 6 zones. The results were then weighted, at the analysis stage to take account of the different populations in each zone and their importance to the overall survey area.

STRATFORD ON AVON SAMPLE BREAKDOWN

ZONE	Popn	%	Achieved Sample	Weighted Sample	Weight
1	19,164	13.0	94	98	1.037
2	15,595	10.6	94	79	0.844
3	21,286	14.4	94	108	1.152
4	16,926	11.5	94	86	0.916
5	12,056	8.2	92	61	0.667
6	18,495	12.5	94	94	1.001
7	19,072	12.9	94	97	1.032
8	24,810	16.8	94	126	1.343
TOTAL	**147404**	**100**	**750**	**750**	**-**

The sample used for making telephone calls was obtained by Beacon Research from Datalinx, who supplied names, addresses and telephone numbers by electoral geography.

Full details of the samples achieved in each zone and the weightings subsequently applied within the analysis, are shown in the preceding table.

The following table summaries the details of calls made and interview outcome.

	Number	**%**
Initial Sample	1800	100.0
Completed interviews	750	41.7
Refusals	79	4.4
Wrong numbers / Unobtainable / Answer phone	160	8.9
No reply (after 4 calls)	288	16.0
Not used	523	29.1

STATEMENT OF RELIABILITY

Assessment of the standard error:

1. The Stratford on Avon Household Shopping Survey has been undertaken by a series of individual sample surveys for a combination of zones.
2. The results are subject to the following sampling error, of which there follows an analysis.
3. The following analysis indicates the methodology used to calculate the standard error, with the standard 95% probability of being correct. The formulae for these calculations are as follows:

$$SE\% = \sqrt{\frac{p\% * q\%}{n}}$$

Where p% = sample value recorded

q% = 100% - p%

n = sample size

And where:

1.96*(SE%) = 95% probability that the correct answer lies in the range calculated.

4. Using the above formulae, we can predict the variation between the sample results and the 'true' values from our knowledge of the size of sample on which the results are based and the number of times that a particular answer is given. The table below illustrates the predicted ranges for the total sample and percentage results at the 95% confidence level.

Approximate sampling tolerances applicable to percentages at or near these levels.

Size of sample on which survey result is based	10% or 90% ±	20% or 80% ±	30% or 70% ±	40% or 60% ±	50% ±
750 interviews	2.15	2.86	3.28	3.51	3.58

For example, with a sample of 750 where 30% give a particular answer, the chances are 19 in 20 that the 'true' value (which would have been obtained if the whole population had been interviewed) will fall within the range of ± 3.28 percentage points from the sample results.

APPENDIX 1B

Copy of Survey Questionnaire

Job No: GW/07/362

ZONE

STRICTLY CONFIDENTIAL
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STRATFORD ON AVON DISTRICT RETAIL STUDY
HOUSEHOLD TELEPHONE SURVEY
ON BEHALF OF COLLIERS CRE (Jan 2008)

Name: ____________________

Address: ____________________

____________________ Postcode:________‘

C1 Age:

16-24	1
25-34	2
35-44	3
45-54	4
55-64	5
65 +	6

C2 Sex:

Male	1
Female	2

C3 Do you have the use of a car for shopping?

Yes	1
No	2

C4 What is the occupation of the chief wage earner in your household?

Full/Part time employed	1
Retired	2
Unemployed	3

Occupation ____________________

Rank/Status ____________________

No. of Employees ________________

Qualifications ____________________

Supervisor/Manager/Self Employed
Size of company ____________________
No. of employees ____________________

If Retired
Company pension–ask previous occupation
State pension only – code 5 below

If Unemployed
Less than 2 months – ask about previous occupation
Over 2 months – code 6 below

Now Assess Social Grade

AB	1
C1	2
C2	3
D	4
E1 (Retired)	5
E2 (Unemployed)	6
Refused	7

C5 Day / Time of interview

Weekday	1	Morning	1
Weekend	2	Afternoon	2
		Evening	3

Interviewer Name: ____________________ Date:____________________

Interviewer Signature: ____________________

Good morning / afternoon, my name is ....

We are doing some research on behalf of Stratford on Avon District Council about shopping facilities and shopping behaviour in this area and I'd like to ask you a few questions.

Are you / May I speak to the person responsible for the majority of your household shopping?

YES	1
NO	2 - CLOSE INTERVIEW

As we need to speak to people across a number of areas, could you please tell me your full postcode?

WRITE IN POST CODE HERE ______________________

Refer to quota and check that respondent is eligible for interview - if not, thank and close.

Q1a Can I ask you first of all, <u>excluding Mail Order and shopping over the Internet</u> at which Town, Centre or Retail Park do you do <u>most</u> of your shopping for non-food goods such as clothing & footwear, books, gifts and jewellery?(SINGLE CODE

Q1b And how often do you visit...................... Town, Centre or Retail Park, for this type of non-food shopping?

Q1c And <u>excluding Mail Order and shopping over the Internet</u>, what percentage or proportion of your total expenditure on non-food goods such as clothing & footwear, books, gifts and jewellery would you say that you do in ....Town, Centre or Retail Park?

Q2a <u>Excluding Mail Order and shopping over the Internet</u> what is your <u>second most important</u> Town, Centre or Retail Park for non-food shopping such as clothing & footwear, Books, gifts and Jewellery? (SINGLE CODE)

Q2b And how often do you visit..................... Town, Centre or Retail Park, for this type of non-food shopping?

Q2c And <u>excluding Mail Order and shopping over the Internet</u> what percentage or proportion of your total expenditure on non-food goods such as clothing & footwear, books, gifts and jewellery would you say that you do in .... Town, Centre or Retail Park?

RECORD ANSWERS BELOW & OPPOSITE - CHECK PERCENTAGES ADD TO 100% AT Q1c/2c

A	**CENTRE**	**Q1**	**Q2**
	CODE FROM LIST 'A'		
	Local shops / local village shop	29	29
	Other (Write In)		
	No Particular Centre / Varies	30	30
	None / Don't buy these goods / Internet / Mail Order only	31	31
	No second centre		32
	DK / Can't remember	33	33
B	**FREQUENCY OF VISIT**		
	More than once a week	1	1
	Once a week	2	2
	2-3 times a month	3	3
	Once a month	4	4
	Once every 2-3 months	5	5
	Once every 4-6 months	6	6
	Less often	7	7
	DK / Can't remember / Varies	8	8
C	**% In Location (Write In)**	%	%

Q3a You said that .... is the Town, Centre /Retail Park, where you do most of your non-food shopping? What is your main reason for choosing that Centre?

Close to home/convenient	1	Good/Cheap Public Transport	7
Close to work	2	Ease of parking	8
Good choice of shops/range of good stores	3	Free/cheap parking	9
Good range of major stores	4	Good quality goods/products	10
Pedestrianised streets/attractive environment	5	Part of joint trip to other facility/centre	11
Good prices/Good value for money	6	Other (Write In)	

Q3b How do you normally travel, to / from this Town, Centre / Retail Park? (If more than one mode of transport used, code transport used for longest part of journey)

Car (Driver)	1	Park & Ride	5	Taxi	9
Car (Passenger)	2	Walk	6	Other	10
Bus	3	Cycle	7		
Train	4	Motor Cycle	8		

Q3c Where does your journey usually start from?

Home	1 (Go to Q3d)	Other *write in* (Go to Q4)
Work	2 (Go to Q4)	

Q3d On average, how long does it take you to travel to this Town, Centre / Retail Park from home?

10 minutes or less	1	31 – 40 minutes	4	51 – 60 minutes	6
11 – 20 minutes	2	41 – 50 minutes	5	Over 60 minutes	7
21 – 30 minutes	3				

Q4 At which Town, Centre or Retail Park do you normally undertake most of your Christmas or special occasion shopping? (Write in)

____

Q5a **<u>Excluding Mail Order and shopping over the Internet</u> at which Town, Centre or Retail Park do you do <u>most</u> of your shopping for bulky non-food goods such as DIY, large electrical goods, furniture and carpets (SINGLE CODE)**

Q5b **And how often do you visit ………. Town, Centre / Retail Park, for your <u>main</u> bulky non-food goods shopping?**

Q5c **And <u>excluding Mail Order and shopping over the Internet</u> what percentage or proportion of your total expenditure on bulky non-food goods shopping would you say that you do, in .... Town, Centre / Retail Park?**

Q6a **<u>Excluding Mail Order and shopping over the Internet</u> which is your <u>second most important</u> Town, Centre / Retail Park for bulky non-food goods such as DIY, large electrical goods, furniture and carpets? (SINGLE CODE)**

Q6b **And how often do you visit ………. Town, Centre / Retail Park, for your <u>main</u> bulky non-food goods shopping?**

Q6c **And <u>Excluding Mail Order and shopping over the Internet</u> what percentage or proportion of your total expenditure on bulky non-food goods shopping, would you say that you do in .... Town, Centre / Retail Park?**

RECORD ANSWERS BELOW & OPPOSITE - CHECK PERCENTAGES ADD TO 100% AT Q5c/6c

A	CENTRE	Q5	Q6
	CODE FROM LIST 'A'		
	Local shops / local village shop	29	29
	Other (Write In)		
	No Particular Centre / Varies	30	30
	None / Don't buy these goods / Internet / Mail Order only	31	31
	No second centre		32
	DK / Can't remember	33	33
B	**FREQUENCY OF VISIT**		
	More than once a week	1	1
	Once a week	2	2
	2-3 times a month	3	3
	Once a month	4	4
	Once every 2-3 months	5	5
	Once every 4-6 months	6	6
	Less often	7	7
	DK / Can't remember / Varies	8	8
C	**% In Location (Write In)**	%	%

Q7a You said that .... is the Town, Centre /Retail Park, where you do <u>most</u> of your bulky non-food goods shopping? What is your main reason for choosing that Centre?

Close to home/convenient	1	Good/Cheap Public Transport	7
Close to work	2	Ease of parking	8
Good choice of shops/range of good stores	3	Free/cheap parking	9
Good range of major stores	4	Good quality goods/products	10
Pedestrianised streets/attractive environment	5	Part of joint trip to other facility/centre	11
Good prices/Good value for money	6	Other (Write In)	

Q7b How do you normally travel to / from this Town, Centre / Retail Park? (If more than one mode of transport used, code transport used for longest part of journey)

Car (Driver)	1	Park & Ride	5	Taxi	9
Car (Passenger)	2	Walk	6	Other	10
Bus	3	Cycle	7		
Train	4	Motor Cycle	8		

Q7c Where does your journey usually start from?

Home	1	(Go to Q7d)
Work	2	(Go to Q8a)
Other (write in)______________________		(Go to Q8a)

Q7d On average, how long does it take you to travel to this Town, Centre / Retail Park from home?

10 minutes or less	1	41 – 50 minutes	5
11 – 20 minutes	2	51 – 60 minutes	6
21 – 30 minutes	3	Over 60 minutes	7
31 – 40 minutes	4		

Q8a At which <u>store and centre</u> do you usually do <u>most</u> or all of your main food and grocery shopping? (Store and Centre needed - Single code)

Q8b And when during the week, would you normally shop at your main food store?

Q9 And at which <u>Store and Centre</u> do you usually do your remaining top-up food and grocery shopping? (Store and Centre needed)

RECORD ANSWERS BELOW AND OPPOSITE

		Q8a Main Store / Centre	Q9 Second Store / Centre
A	**CODE FROM LIST 'A'**		
	Local shops / Village store	58	58
	Other (Write In)		
	Varies / No particular store	59	59
	DK / Cant remember	60	60
	No second Centre		61
B	**WHEN SHOP**		
	Weekdays (Mon- Fri) Daytime	1	
	Weekdays (Mon – Fri) Evening	2	
	Saturday	3	
	Sunday	4	
	Varies / No particular time	5	

Q10a On average, how much in total do you and your household spend on food and groceries <u>each week</u>?

Q10b And how much on average do you spend on food and groceries <u>each week</u> in your <u>main food store</u>?

RECORD BELOW	**£**	**p**
(a) Total weekly total expenditure		
(b) ' Main' store weekly total expenditure		
(c) 'Top up' store weekly food expenditure		

[NOTE: (c) is calculated as (a - b)]

Q11a You said that................ is your main store for food/grocery shopping. How often do you visit that store for food and grocery shopping?

Three times a week or more often	1
Twice a week	2
Once a week	3
Once a fortnight	4
Once a month	5
Once every two months	6
Less often	7

Q11b What is the main reason why you and your household choose to shop at the store where you do your main food / grocery shopping? (SINGLE CODE)

Close to home / convenient	1	Wide choice of goods / products	6
Close to work	2	Close to other shops	7
Ease of parking	3	Good prices/value for money	8
Free / cheap parking	4	Good quality goods / products	9
Good / cheap public transport	5		

Other (WRITE IN) ____ 10

Q11c How do you normally travel to / from this store? (If more than one mode of transport used, code transport used for longest part of journey)

Car (Driver)	1	Walk	6
Car (Passenger)	2	Cycle	7
Bus	3	Motor Cycle	8
Train	4	Taxi	9
Park & Ride	5	Other	10

Q11d Where does your journey usually start from?

Home	1	(Go to Q11e)
Work	2	(Go to Q12a)
Other (write in)______________________		(Go to Q12a)

Q11e On average, how long does it take you to travel to this Store from home?

10 minutes or less	1	41 – 50 minutes	5
11 – 20 minutes	2	51 – 60 minutes	6
21 – 30 minutes	3	Over 60 minutes	7
31 – 40 minutes	4		

Q12a When you do your <u>main</u> food and grocery shopping at………………………do you or your household usually visit any <u>other</u> shops/service outlets in the <u>same</u> area as part of that trip?

Yes	1	(Ask Q12b – Q12d)
No	2	(Go to Q13)

Q12b Which town/centre is this?

(Write In) ____

Q12c And do you drive to the other shops/service outlets, or walk or use another form of transport?

Drive	1	Taxi	4
Walk	2	Other Form of Transport	5
Bus	3		

Q12d And what other shops/services do you normally visit (MULTI-CODE)

Financial outlets (eg Banks, Building Societies)	1
Professional Services (eg Solicitors, Accountants)	2
Post Office	3
Cafe/Restaurant/Pub/Take-Away	4
Specialist food shops (eg Baker, Greengrocer, Butcher)	5
Chemist	6
Newsagents/Confectioners/Tobacconists	7
Fashion Shops (eg for clothing, footwear etc)	8
Charity Shops	9
Department/Variety Store	10

Other type of shop (WRITE IN) ______________________________

____

Q13a From what you know about <u>Alcester</u> Town Centre how would you describe the food shopping in the Town Centre, in terms of the balance between large and small shops? (READ OUT)

Too many small shops/not enough large stores	1
Too many large stores/not enough small shops	2
About right	3
Don’t know	4

Q13b From what you know about <u>Southam</u> Town Centre how would you describe the food shopping in the Town Centre, in terms of the balance between large and small shops? (READ OUT)

Too many small shops/not enough large stores	1
Too many large stores/not enough small shops	2
About right	3
Don’t know	4

Q13c From what you know about <u>Shipston upon Stour</u> Town Centre how would you describe the food shopping in the Town Centre, in terms of the balance between large and small shops? (READ OUT)

Too many small shops/not enough large stores	1
Too many large stores/not enough small shops	2
About right	3
Don't know	4

Q13d From what you know about Stratford upon Avon Town Centre how would you describe the food shopping in the Town Centre, in terms of the balance between large and small shops? (READ OUT)

Too many small shops/not enough large stores	1
Too many large stores/not enough small shops	2
About right	3
Don't know	4

Q14 What other major change, if any, would you like to see in Stratford upon Avon Town Centre for you and your household to visit it more often for shopping? ***(SINGLE CODE ONLY)***

None / Quite happy	1	Better security / Make the centre safer	13
None / DK / Can't think of any	2	A bigger / better weekly market	14
More car parking	3	Make Centre more attractive (e.g. better shop fronts, planting, paving etc.)	15
More covered shopping opportunities	4	More / better signage	16
Wider variety of stores	5	More / better information displays	17
Better quality stores / Goods	6	Less traffic congestion	18
More / better places to eat or drink	7	More Pedestrianisation	19
More / better toilets	8	More Street entertainment / More things going on	20
More / better parking facilities	9	More shops open on Sunday	21
Better public transport	10	More shops open in the evenings	22
Better cleanliness / Make the centre tidier	11	Other (Write In)	
Cleaner air / Less traffic pollution	12		

Q15 Finally, are there any particular food retailers that you would like to see in Stratford upon Avon, which are not here at present, or are you quite happy? ***(WRITE IN UP TO THREE)***

None / Quite happy	1
None / DK / Can't think of any	2
Other (Write In) ______________________________	

CLOSE INTERVIEW - COMPLETE CLASSIFICATION

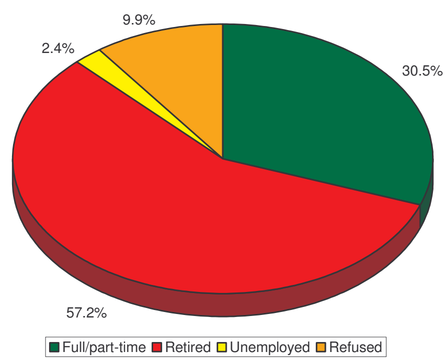
APPENDIX 1C

Key Results

STRATFORD ON AVON DISTRICT RETAIL STUDY
HOUSEHOLD TELEPHONE SURVEY
KEY RESULTS: CONVENIENCE GOODS SHOPPING

- The household telephone survey was carried out during February 2008.
- In total 750 interviews were carried out over 8 zones.
- 258 interviewees were male (34.4%) and 492 (65.6%) were female.
- 60% of respondents were retired and unemployed, while 31% were workers (**Figure 1**).
- The respondent was the person responsible for the majority of the household shopping.

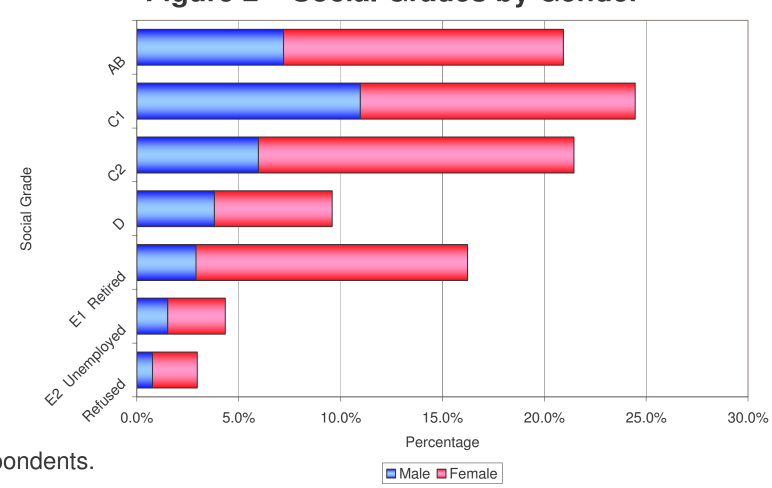
Figure 1 – Employment Status



Sample size: 750 respondents.

- In terms of social grades, it can be seen that the most common grade for respondents was the C1 bracket, lower middle class – see **Figure 2**.

Figure 2 – Social Grades by Gender



Sample size: 750 respondents.

- In all zones, apart from Zone 4, the survey shows that households tend to do their main food shopping during the day on weekdays, this being most popular in Zone 3 with 80.5%.
- For Zone 4 most respondents (70.5%) do not shop at a particular time and are more varied.

- **Table 1** shows the results for the more popular stores[1] among respondents. The majority fit the same pattern as the zonal results, with most stores attracting shoppers during weekday daytimes. However, for Tesco and Morrisons in Stratford upon Avon almost 11% of respondents shop there on weekday evenings.
- Southam's largest store, Budgens, also saw a higher proportion of people preferring to shop on weekday evenings.

Table 1 – Filtered Results – When Do You Do Your Main Food Shop by Store

	Weekday Day	Weekday Evening	Saturday	Sunday	Varies
Stratford Morrisons	62.3%	10.8%	7.8%	0.9%	18.1%
Stratford Somerfield	45.7%	0.0%	5.4%	10.9%	38.0%
Stratford Tesco	42.1%	10.7%	7.7%	9.0%	30.5%
Alcester Somerfield	88.6%	4.4%	0.0%	0.0%	7.0%
Shipston Somerfield	78.8%	6.0%	0.0%	0.0%	15.1%
Southam Budgens	42.8%	28.5%	7.2%	0.0%	21.5%

- Linked to the subject of when people shop is how frequently they visit their main food store. Overall most respondents said that they visit their main store once a week (66.6%). This was the same for all zones apart from Zone 4 where more people shop twice a week (45.3%).
- The results for popular stores against frequency of shop are broadly similar.
- For the smaller stores, people are more inclined to visit more frequently probably because they tend to attract more top up food shopping . For example, over 75% of respondents visit Stratford upon Avon Somerfield more than once a week. This could also reflect its central location.
- **Table 2** overleaf shows the reason for choosing main food store by filtered popular store. It can be seen that convenience is the most important factor for the majority of respondents. However, this dips for the bigger stores where understandably the wider choice of goods becomes more significant.

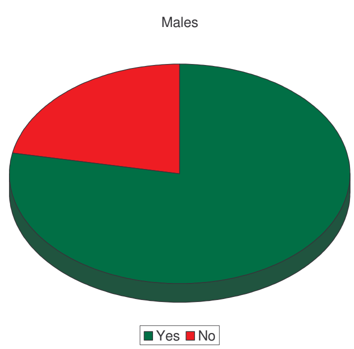
[1] The results have been filtered to include only those stores in the main towns in Stratford on Avon District with more than 10 responses. This filter has also been applied elsewhere in the report where popular shops are discussed.

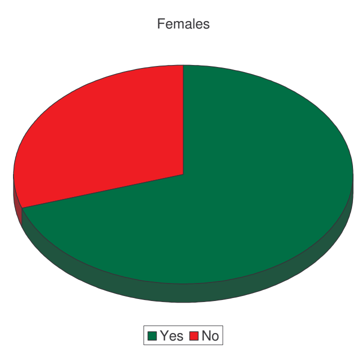
Table 2 – Filtered Results – Reason for Choosing Main Food Store by Store

	Startford Morrisons	Stratford Somerfield	Stratford Tesco	Alcester Somerfield	Shipston Somerfield	Southam Budgens
Convenient	72.9%	100.0%	80.2%	80.3%	97.0%	92.8%
Close to Work	0.0%	0.0%	0.7%	0.0%	0.0%	7.2%
Easy Parking	0.9%	0.0%	0.7%	0.0%	0.0%	0.0%
Good Public Transport	0.0%	0.0%	0.0%	0.0%	3.0%	0.0%
Wide Choice of Goods	7.6%	0.0%	4.7%	11.4%	0.0%	0.0%
Close to Other Shops	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Good Prices	5.2%	0.0%	0.8%	0.0%	0.0%	0.0%
Quality of Goods	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	9.9%	0.0%	4.6%	3.5%	0.0%	0.0%
Home Delivery	0.0%	0.0%	6.3%	0.0%	0.0%	0.0%
No Reason	1.0%	0.0%	2.1%	4.8%	0.0%	0.0%

- The vast majority of respondents use a car for shopping (73%), while men are slightly more inclined to drive to the shops than women (see **Figure 3a and 3b**).

Figure 3a and 3b – Car Use for Main Food Shopping by Gender





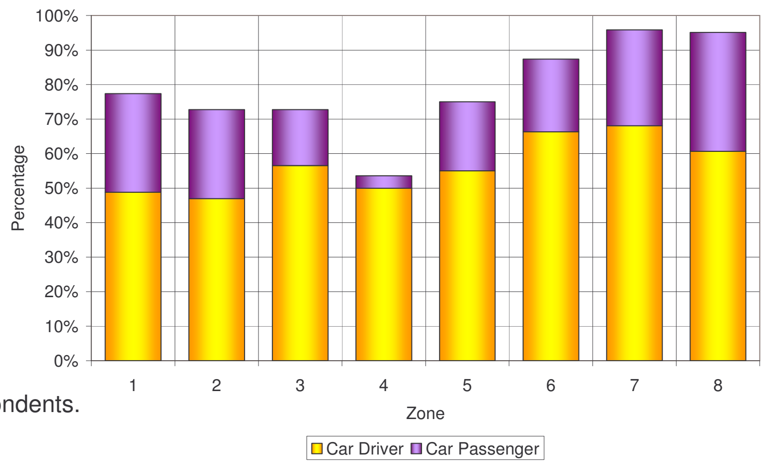
Sample size: 750 respondents.

- The high percentage of people who use a car for shopping is reflected by the results for the mode of travel to main food store. Combined car travel accounts for 80% of trips, while 9% walk, 7% use the bus and 1% take a taxi.
- When combined car travel is analysed by zone (**Figure 4** overleaf) it can be seen that a

number of zones (Zones 6, 7 and 8) have higher than average car usage. This could be because of their location towards the edge of the survey area and their relatively long distance from a large food store.

- Respondents in Zone 4 are less likely to travel by car (53.3%), possibly because they are closer to larger food stores already.
- This notion of closeness to stores is also shown when looking at popular stores and mode of travel. In this instance the smaller stores have much higher levels of walk in shoppers, up to 42.2% for Somerfield in Alcester, for example.

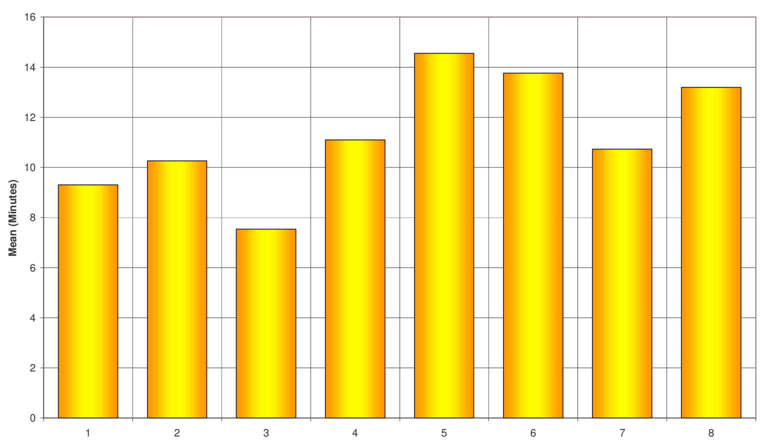
Figure 4 – Car as Mode of Travel to Main Food Store by Zone



Sample size: 567 respondents.

- For all zones and popular stores, the vast majority of respondents trips to their main food store, originated from home – 90% and over (apart from Zone 4, which was 85.6%).
- The overall mean journey time to main food store was 11 minutes. When broken down by zone, the highest mean was 14.5 minutes for Zone 5 and the lowest was 7.5 minutes for Zone 3 (**Figure 5**).

Figure 5 – Mean Journey Time in Minutes to Main Food Store by Zone

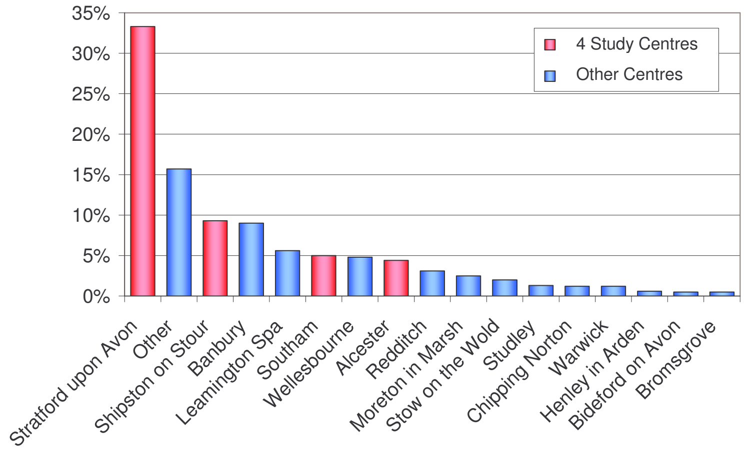


- When asked whether they combined main food shopping with other shops/services, the majority of respondents (71.9%) said that they did not. This was consistent across all zones with the exception of Zone 5, where the majority (59.1%) said they did undertake combined shopping trips.

COLLIERS CRE

- This pattern is reflected when looking at popular stores, where generally around 70% of respondents did <u>not</u> carry out linked trips.
- By far the most popular centre to visit on a linked trip was Stratford upon Avon (**Figure 6**) reflecting its dominance for main food shopping.

Figure 6 – Towns Respondents Combined Food Shopping With



Sample size: 166 respondents.

- The results for popular stores in **Table 3** indicate that respondents tend to combine trips with the centres they are already visiting for food shopping (i.e. most linked trips are very localised).

Table 3 – Filtered Towns Respondents Combined Food Shopping With by Store

	Stratford Morrisons	Stratford Tesco	Shipston Somerfield
Stratford upon Avon	100.0%	95.4%	0.0%
Shipston on Stour	0.0%	0.0%	100.0%
Other	0.0%	4.6%	0.0%

- The types of other shops or services visited by respondents on a linked main food shopping trip are listed in **Table 4** overleaf.
- Services feature quite prominently in the top five, with financial outlets, post office and restaurants all listed.

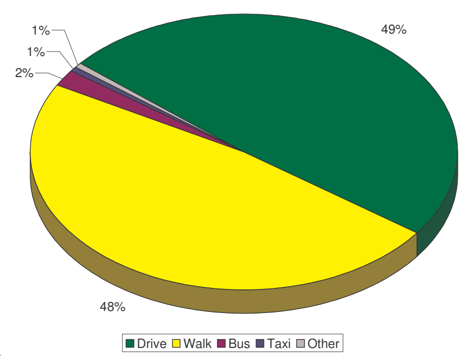
Table 4 – Type of Other Shop / Service Outlet Visited

Outlet	Number	%
Financial Outlets	60	16.4
Fashion Shops	52	14.2
Post Office	49	13.4
Other Type of Shop	40	11.0
Café / Restaurant / Pub / Take-Away	38	10.4
Chemist	34	9.3
Department / Variety Store	32	8.8
Specialist Food Shops	30	8.2
Newsagents / Confectioners / Tobacconists	17	4.7
Charity Shops	12	3.3
Professional Services	1	0.3

Sample size: 199 respondents with multiple coding.

- Perhaps unsurprisingly, the mode of travel to other shops/services on a linked trip (**Figure 7**) shows a far higher proportion of people walking than for mode of transport to their main food store. As these are combination trips, shoppers appear much more likely to drive to just one location and then walk to their other shops/services.

Figure 7 – Mode of Travel to Other Shops / Service Outlets on a Linked Trip



Sample size: 198 respondents.

- Tables **5**, **6**, **7**, and **8** overleaf summarise the perceptions of all respondents (base) vs respondents living in the local zone, when asked about the balance between large and small food shops in town centres.
- **Table 5** shows that 27% of the residents of the Alcester area believe there are too many small food shops, whilst just 9% feel there are too many big food stores. However, the majority (64%) think the balance is about right.
- Residents views in Shipston on Stour (**Table 6**) match very closely those of Alcester with 24% feeling there are too many small food shops.
- Generally, local people appear to be more in favour of more larger food shops in Alcester and Shipston on Stour than the sample as a whole.
- The residents of Southam unanimously agree that their balance of large and small food shops is just right (**Table 7**).
- The response for Stratford upon Avon (**Table 8**) is different. Here 27% of local residents feel there are too many large food stores, whilst just 17% think there are too many small food

shops. The findings for the whole sample are more evening matched.

Table 5 – Views on Balance Between Small and Large Food Stores in Alcester

	Base	Alcester Zone
Too Many Small Shops	14%	27%
Too Many Large Shops	7%	9%
About Right	80%	64%

Table 6 – Views on Balance Between Small and Large Food Stores in Shipston on Stour

	Base	Shipston on Stour Zone
Too Many Small Shops	14%	24%
Too Many Large Shops	11%	10%
About Right	75%	66%

Table 7 – Views on Balance Between Small and Large Food Stores in Southam

	Base	Southam Zone
Too Many Small Shops	10%	0%
Too Many Large Shops	7%	1%
About Right	83%	99%

Table 8 – Views on Balance Between Small and Large Food Stores in Stratford upon Avon

	Base	Stratford upon Avon Zone
Too Many Small Shops	14%	17%
Too Many Large Shops	11%	27%
About Right	76%	56%

- The majority (53%) of Stratford upon Avon residents living in Zones 3 and 4 do not want any changes to the town centre.
- However, potential changes that some people would like to see include more/better parking (7%), a wider variety of stores (6%) and more pedestrianisation (5%).
- When asked if there were any particular food retailers they would like to see in the town, the large majority were happy/couldn't think of any. Specifically named retailers are listed in **Table 9**.

Table 9 – Specific Food Retailers Stratford upon Avon Residents Would Like to See in Stratford upon Avon

	Percentage
None	80%
Asda	6%
Sainsbury	5%
Specialist Food Store	3%
Waitrose	3%
Iceland	2%

- **Table 10** sets out the share of locally generated convenience goods spend that is retained by each of the three rural market towns disaggregated by main and top up food shopping. This shows that Shipston on Stour and Southam attract virtually all the top up food shopping spend by local residents, whereas the towns retain only small shares of their main food spend. For Alcester, due to the close proximity of Stratford upon Avon, more top up food shopping is carried out elsewhere.

Table 10 – Market Share of Locally Generated Convenience Goods Expenditure Disaggregated by Main and Top Up Food Shopping

Zone	Main	Top Up	Overall
2 (Alcester)	27.5%	23.9%	27.1%
5 (Shipston on Stour)	25.4%	96.0%	39.2%
7 (Southam)	19.5%	100.0%	25.6%

APPENDIX 1D

Summary of Market Share Data by Centre/Zone

APPENDIX 1D - ESTIMATED CONVENIENCE GOODS CENTRE MARKET SHARES BY ZONE IN THE BASE YEAR, 2008 (COLUMN PERCENT)

Retail Supply: Where the Money is Spent	Consumer Demand: Where the Money Comes From (Zone)							
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
Stratford upon Avon - M&S	0.0	6.8	4.6	2.9	0.0	0.0	0.0	0.3
Stratford upon Avon - Morrisons	1.1	27.3	35.5	13.4	8.2	12.0	0.0	2.9
Stratford upon Avon - Somerfield	0.0	0.2	3.1	9.2	0.0	0.0	0.0	0.0
Stratford upon Avon - Tesco	11.4	20.5	41.3	58.0	19.3	18.3	0.0	6.9
Stratford upon Avon - Local and Other	0.0	0.0	6.5	14.6	0.6	0.0	0.0	0.0
Stratford Total	**12.4**	**54.7**	**90.9**	**98.1**	**28.1**	**30.3**	**0.0**	**10.1**
Alcester - Somerfield	0.0	9.0	2.7	0.0	0.0	0.0	0.0	0.0
Alcester - Tesco Express	0.0	2.8	0.4	0.0	0.0	0.0	0.0	0.0
Alcester - Local and Other	0.0	0.0	0.7	0.0	0.0	0.0	0.0	0.0
Alcester Total	**0.0**	**11.8**	**3.8**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**
Shipston on Stour - Somerfield	0.0	0.0	0.0	0.0	22.7	1.4	0.0	0.0
Shipston on Stour - Local and Other	0.0	0.0	0.0	0.0	16.4	0.0	0.0	0.9
Shipston on Stour Total	**0.0**	**0.0**	**0.0**	**0.0**	**39.2**	**1.4**	**0.0**	**0.9**
Southam - Co-op	0.0	0.0	0.0	0.0	0.0	0.0	3.7	0.0
Southam - Budgens	0.0	0.0	0.0	0.0	0.0	2.1	10.9	0.0
Southam - Local and Other	0.0	0.0	0.0	0.0	0.0	0.0	11.0	0.0
Southam Total	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**2.1**	**25.6**	**0.0**
Bideford on Avon - Budgens	0.0	3.2	1.7	0.0	0.0	0.0	0.0	0.4
Bideford on Avon - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Henley in Arden - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Henley in Arden - Somerfield	2.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Studley - Co-op	16.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Studley - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Studley - Tesco Express	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Within District - Local and Other	0.0	0.0	0.0	0.0	0.0	17.7	0.0	0.0
Other Within District Total	**18.7**	**3.2**	**1.7**	**0.0**	**0.0**	**17.7**	**0.0**	**0.4**
Banbury - Aldi	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Banbury - Kwik Save	0.0	0.0	0.0	0.0	1.1	0.0	0.0	0.0
Banbury - M&S	0.0	0.0	0.0	0.0	0.0	0.6	0.0	0.0
Banbury - Morrisons	0.0	0.0	0.0	0.0	6.9	3.6	1.3	0.0
Banbury - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Banbury - Sainsbury	0.0	0.0	0.0	0.0	2.9	0.0	6.8	0.0
Banbury - Tesco	0.0	0.0	0.0	0.0	9.7	9.5	2.3	0.0
Birmingham - Any	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Bishops Cleeve - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Bishops Cleeve - Tesco	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0
Broadway - Any	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Bromsgrove - Any	0.0	2.0	0.0	0.0	0.0	0.0	0.0	0.0
Cheltenham - Any	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Chipping Camden - Any	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Chipping Norton - Any	0.0	0.0	0.0	0.0	2.0	0.0	0.0	0.0
Coventry - Any	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Daventry - Aldi	0.0	0.0	0.0	0.0	1.1	0.0	0.0	0.0
Daventry - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Daventry - Tesco	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Daventry - Waitrose	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Dudley - Any	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Evesham - Aldi	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6
Evesham - M&S	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4
Evesham - Morrisons	0.0	1.8	0.0	0.0	0.0	0.0	0.0	31.9
Evesham - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2
Evesham - Somerfield	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.8
Evesham - Tesco	0.0	11.2	0.0	0.0	0.7	1.1	0.0	32.3
Kenilworth - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Kenilworth - Sainsbury	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Kenilworth - Somerfield	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Kenilworth - Tesco	0.0	0.0	0.0	0.0	0.0	2.4	0.0	0.0
Kiddlington - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Kiddlington - Sainsbury	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Outside District - Local and Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	9.0
Monkspath - Tesco	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Moreton in Marsh - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.3
Moreton in Marsh - Tesco	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1
Northampton - Any	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other	0.0	0.0	1.4	0.3	1.3	8.3	0.0	0.2
Oxford - Any	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Pershore - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Pershore - Somerfield	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Pershore - Tesco Express	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Redditch - Aldi	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Redditch - Iceland	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Redditch - Kwik Save	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Redditch - M&S	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Redditch - Morrisons	20.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Redditch - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Redditch - Sainsbury	11.6	5.2	0.0	0.0	0.0	0.0	0.0	0.0
Redditch - Tesco Extra	23.8	10.0	0.0	0.0	0.0	0.0	0.0	0.0
Royal Leamington Spa - Asda	0.0	0.0	0.2	0.0	0.0	14.7	50.7	0.0
Royal Leamington Spa - M&S	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Royal Leamington Spa - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Royal Leamington Spa - Sainsbury, Shires Retail Park	0.0	0.0	0.0	1.5	0.0	1.1	8.2	0.0
Royal Leamington Spa - Tesco Metro	0.0	0.0	0.0	0.0	0.0	1.3	4.2	0.0
Rugby - Aldi	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Rugby - Co-op	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Rugby - Iceland	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Rugby - M&S	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Rugby - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Rugby - Sainsbury	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Rugby - Tesco	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Shirley - Aldi	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Shirley - Other	1.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Shirley -Sainsbury	1.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Solihull - Any	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Solihull - M & S	1.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Solihull - Sainsbury	4.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Solihull - Tesco	3.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Solihull -Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Stow on the Wold - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1
Stow on the Wold - Tesco	0.0	0.0	0.0	0.0	7.0	0.0	0.0	4.8
Warwick - Aldi	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Warwick - Other	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Warwick - Sainsbury	0.0	0.0	2.0	0.0	0.0	2.2	0.0	0.0
Warwick - Tesco	0.0	0.0	0.0	0.0	0.0	3.5	0.9	0.0
Worcester - Any	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Outside District Total	**68.9**	**30.3**	**3.6**	**1.9**	**32.7**	**48.5**	**74.4**	**88.6**
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**