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Lawrence Weston Retail Study

Bristol City Council

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1. Introduction

Scope and Purpose

- 1.1 This report has been prepared by GVA following an instruction by Bristol City Council ('BCC') to prepare a retail study for the Lawrence Weston area of north-west Bristol. Following the closure of the City of Bristol College premises adjacent to Ridingleaze district centre ('the College site'), BCC is examining opportunities to redevelopment site, which include the opportunities for retail land uses. BCC wishes the scope of this study to concentrate specifically the potential for a foodstore use on the former College site.
- 1.2 The College site abuts the north-eastern edge of Ridingleaze, which is defined as a 'district centre' in the Bristol Core Strategy (2011). Therefore, new retail development has the potential to act as an extension to the centre. However, in order to understand the potential effects of providing a new foodstore on the surrounding area, BCC has commissioned this retail study to investigate the following:
- A survey of household shopping patterns in Lawrence Weston and the surrounding area of north-west Bristol;
 - A survey of the current usage of Ridingleaze district centre;
 - A review of the retail hierarchy in the local area, including existing distribution of convenience (food) goods stores;
 - An assessment of the available retail expenditure to support new convenience goods floorspace in the Lawrence Weston area;
 - An assessment of the likely positive and negative impacts associated with the introduction a new foodstore or supermarket on to the College site.
- 1.3 In order to investigate the above issues, the following tasks have been undertaken:
- A new bespoke telephone survey of household shopping patterns has been commissioned for the purposes of this study. The survey, which covers the Lawrence Weston area, as well as the surrounding areas of Henbury, Sea Mills,

Shirehampton and Avonmouth, has sought information on main and top-up food shopping patterns of local residents. Further information on the scope of this survey is outlined below.

- On-street surveys of visitors to Ridingleaze local centre have been undertaken by BCC. These surveys has sought information on the reasons for visiting the centre, the frequency of visits and general attitudes towards the goods and services offered by the centre.
- We have prepared a quantitative assessment of food shopping patterns in the local area, using the results of the household shopping survey. This assessment forms the basis for the assessment of the level of convenience goods expenditure which is available to support new convenience goods floorspace within the local area. It has also formed the basis for an assessment of the pattern of trade draw and trade diversion to a new foodstore/supermarket at the College site.

The Household Survey

- 1.4 A key aspect of this study has been the commissioning of a new telephone survey of household shopping patterns across a large area of north-west Bristol. A plan of the survey area is contained at Appendix B to this report and an extract is provided below in Figure 1.1.

Figure 1.1: plan showing extent of household survey



1.5 As can be seen from the plan above, the survey area has been divided into four zones:

- Zone 1 – Lawrence Weston (green)
- Zone 2 – Avonmouth (yellow)
- Zone 3 – Sea Mills (pink)
- Zone 4 – Henbury (orange)

1.6 The need for a new household survey arises as a consequence of the lack of robust and up to date data on food shopping patterns in the local area. Recent shopping patterns surveys in north Bristol for the proposed Sainsburys store at the Memorial Stadium in Horfield and the proposed Sainsburys store in Portishead have either not covered enough of the Lawrence Weston area or have not provided sufficiently robust data. Therefore, a decision was taken from the outset of this study to commission a new survey in order that a robust assessment could be made of current convenience goods expenditure flows and which could form the basis for assessments of retail expenditure capacity and the financial impact of a new foodstore on the former College site. A copy of the household survey results are contained at Appendix H to this report.

Contents of Report

1.7 The remainder of this report is structured in the following manner:

- Section 2 outlines the structure of the local retail hierarchy in north-west Bristol with particular focus upon the defined centres of Rodingleaze, Shirehampton, Shirehampton Road, Avonmouth and Crow Lane. In addition, Section 2 summaries the local and national planning policy context facing retail development proposals on the former City of College site.
- Section 3 provides an assessment of the need for new convenience goods floorspace within north-west Bristol, focusing upon both qualitative and quantitative indicators of need. In particular, this section provides a detailed assessment of shopping patterns in the local area and an assessment of retail expenditure capacity to support existing and new convenience goods floorspace.

- In Section 4 we explore the likely impact of a new foodstore on the former City of Bristol College site, including pattern of trade diversion from local facilities and its ability to clawback trade from the wider area.
- We provide a summary of the findings of this report in Section 5.

1.8 The text of this advice report refers to a number of appendices and these can be found at the rear of this document.

2. Ridingleaze District Centre and the Surrounding Retail Hierarchy

Ridingleaze Local Centre and the City of Bristol College site

- 2.1 Ridingleaze district centre lies within the Lawrence Weston area of north-west Bristol. Ridingleaze is the name of the street upon which the centre sits, with the centre being linear in form, stretching from its junction with Shortlands Road in the south to its junction with Stile Acres in the north. The former City of Bristol College site lies on the northern edge of the centre, separated from the retail area by Stile Acres, which is a low-trafficked highway.
- 2.2 All of the shops, services and other uses within the centre lie to the south of Ridingleaze, apart from a church and community centre. The centre is a purpose-built mixed use terraced development block with active uses on the ground floor and residential and other accommodation on the upper two floors. There is a relatively wide pavement area adjacent to the shops and services, with a further (narrower) pavement on the opposite side of Ridingleaze. There is also on-street parking along both sides of Ridingleaze for the majority of the length of the centre.

2.3 Experian GOAD conduct land use surveys all of the main defined retail centres within Bristol and the latest survey of Ridingleaze took place in the summer of 2012. The results of the survey are summarised below.

Table 2.1 – land use composition, Ridingleaze centre (2012)

Retail Sector	Units		Floorspace	
	No.	%	No.	%
Convenience	4	19.0% (8.5%)	13,700	43.4% (17.1%)
Comparison	4	19.0% (41.5%)	4,900	15.5% (46.5%)
Service	8	38.1% (35.2%)	6,800	21.5% (23.3%)
Other	0	0.0% (1.1%)	0	0.0% (1.0%)
Vacant	5	23.8% (13.6%)	6,200	19.6% (12.0%)
Total	21	100%	31,600	100%

Source: Experian GOAD data

2.4 It will be noted that one fifth of all of the units in the centre are convenience goods operators, these being: Co-op, Premier and Costcutter convenience stores and a Greggs bakery. All of the units are small by modern foodstore/supermarket standards, although the Co-op is clearly the largest of the stores present, lying at the northern edge of the centre very close to the former College site. The Costcutter lies at the opposite end of the centre, occupying the southern edge. Visits to the centre have observed that the four existing convenience goods stores serve a mainly top-up / basket shopping function, which is unsurprising given their size.

2.5 Other retail and service uses in the centre include:

- Cafes;
- Second hand goods store;
- Take-aways;
- Solicitors;
- Household goods store;
- Betting office;
- Hair salon; and

- Pawnbroker.

- 2.6 Given its size and current uses, Ridingleaze local centre is very much a top-up / day-to-day retail destination with a dominant service and basket food shopping role. As will be seen from our review of other local centres below, such a role is not uncommon within this part of north-west Bristol.
- 2.7 The former College site is well related to the centre, being clearly visible from most parts of the centre and a short walk. Existing pedestrian linkages exist and the separation of the College site from the centre by the highway does not present insurmountable constraints. Whilst linkages between the two locations would need to be improved if a retail use were to be placed on the College site, it is entirely possible in our view for the College site to act as an extension to the local centre.

The local retail hierarchy

- 2.8 In order to establish the likely impact of a new foodstore on the former City of Bristol College site, it is important that the content and function of surrounding local centres is also established as part of the baseline review. Therefore, we have examined the land use content of four other town/district/local centres in the surrounding area, these being: Crow Lane, Avonmouth, Shirehampton Road and Shirehampton.

Crow Lane District Centre

- 2.9 Crow Lane district centre lies to the east of Lawrence Weston, on the eastern edge of the study area shown in Appendix B. The centre lies along the northern side of Crow Lane and has a very similar appearance to Ridingleaze: a purpose built terrace with retail and service uses on the ground floor with residential and service uses above, along with on-street parking along the length of the centre.
- 2.10 The obvious difference between Crow Lane and Ridingleaze is that the former lies on a much busier route, linking the A4018 (one of the main routes into Bristol from the M5) to the suburban areas of Henbury and Brentry. This characteristic is likely to benefit Crow Lane and potentially lead to a better trading performance.
- 2.11 The latest land use survey conducted by GOAD was in summer 2012 and can be summarised as follows:

Table 2.2 – land use composition, Crow Lane centre (2012)

Retail Sector	Units		Floorspace	
	No.	%	No.	%
Convenience	5	25.0% (8.5%)	17,000	51.1% (17.1%)
Comparison	6	30.0% (41.5%)	8,400	25.2% (46.5%)
Service	8	40.0% (35.2%)	7,100	21.3% (23.3%)
Other	0	0.0% (1.1%)	0	0.0% (1.0%)
Vacant	1	5.0% (13.6%)	800	2.4% (12.0%)
Total	20	100%	33,300	100%

Source: Experian GOAD data

- 2.12 The survey reveals that Crow Lane is a small centre of a similar size to Ridingleaze, with one quarter of the units occupied by convenience goods stores. Stores include a Co-op, Iceland, baker, off-licence and newsagent. The largest store is the Co-op at 628sq m, followed by the Iceland at 266sq m net. Given their size, these stores are orientated towards top-up / basket shopping, which is reinforced by the short-stay on-street parking area and walk-in / pass-by nature of the catchment area.
- 2.13 In addition to the uses within the defined centre, an Aldi deep discount store has recent been built on the western edge of the centre (outside of the defined shopping frontages). The store is a relatively short walk from the centre and has a net sales area of 990sq m, along with a dedicated surface level customer car park. Visits to this store reveal that it is not able to fulfil many main/bulk food shopping trips, although the scale of products being purchased in the Aldi store is clearly larger than the Co-op and Iceland stores within the centre.
- 2.14 A copy of the GOAD plan for the district centre can be found at Appendix C to this report.

Shirehampton Road Local Centre

- 2.15 Shirehampton Road is the smallest of the five defined centres within this part of north-west Bristol, located on the border of Sea Mills and Stoke Bishop. The summer 2012 land use survey, conducted by GOAD, is summarised below and indicates that the centre is

dominated by service uses which account for almost half of all units within the centre. Service uses include a dental surgery, hair salons, restaurants and take-aways. A copy of the GOAD plan for Shirehampton Road is contained at Appendix D to this report.

Table 2.3 – land use composition, Shirehampton Road centre (2012)

Retail Sector	Units		Floorspace	
	No.	%	No.	%
Convenience	1	9.1% (8.5%)	3,500	20.2% (17.1%)
Comparison	2	18.2% (41.5%)	5,900	34.1% (46.5%)
Service	5	45.5% (35.2%)	4,500	26.0% (23.3%)
Other	0	0.0% (1.1%)	0	0.0% (1.0%)
Vacant	3	27.3% (13.6%)	3,400	19.7% (12.0%)
Total	11	100%	17,300	100%

Source: Experian GOAD data

- 2.16 There is only one convenience goods store and that is a Co-op extending to 325sq m net, located at 55-57 Shirehampton Road on the eastern edge of the centre and serving a small scale top-up food shopping role.

Shirehampton Town Centre

- 2.17 Shirehampton is the largest defined retail centre within this part of north-west Bristol, with the adopted Local Plan defining primary and secondary shopping frontages along High Street, between Waverley Road and The Green, plus a small section of frontage along The Parade.
- 2.18 Shirehampton is a popular traditional suburban shopping centre, comprising a mixture of 2/3 storey converted property and purpose-built retail units. High Street is a busy highway linking Shirehampton to the surrounding areas of Avonmouth and Lawrence Weston and also the Portway, which is one the two main vehicle routes into Bristol from the west. There are pavement areas on either side of High Street which vary in width and our visits to Shirehampton centre over recent years has found it to be a popular and vibrant centre.

2.19 Table 2.4 below summarises the findings of the latest land use survey of Shirehampton, conducted by GOAD in summer 2012. A copy of the latest GOAD plan for the centre can be found at Appendix F.

Table 2.4 – land use composition, Shirehampton centre (2012)

Retail Sector	Units		Floorspace	
	No.	%	No.	%
Convenience	9	15.3% (8.5%)	15,600	18.7% (17.1%)
Comparison	18	30.5% (41.5%)	24,300	29.1% (46.5%)
Service	21	35.6% (35.2%)	20,500	24.6% (23.3%)
Other	1	1.7% (1.1%)	800	1.0% (1.0%)
Vacant	10	16.9% (13.6%)	22,300	26.1% (12.0%)
Total	59	100%	83,500	100%

Source: Experian GOAD data

2.20 At 59 units, Shirehampton has the largest collection of retail and service uses in north-west Bristol. 9 (or 15% of all) units are occupied by convenience goods retailers and these include:

- A Co-op foodstore, of 604 sq m net, at 45-49 High Street towards the western end of the centre.
- Another (smaller) Co-op store located within a petrol filling station.;
- Butcher;
- Two newsagents;
- A convenience store;
- Bakery;
- Greengrocer; and
- Off-licence

2.21 These stores indicate the relatively wide range of facilities on offer, from the niche/specialist butcher/greengrocer stores to the larger Co-op store which is the largest facility foodstore within the centre. The Co-op store may attract some main food shopping trips, although the size of the existing stores is likely to lead to

Shirehampton attracting a mix of main and top-up food shopping trips with the balance probably in favour of the latter.

Avonmouth Local Centre

- 2.22 The defined shopping centre within Avonmouth lies along parts of Gloucester Road and Avonmouth Road. The majority of secondary shopping frontages lie on Gloucester Road, whilst the small section of primary frontages lies on Avonmouth Road separated from the remainder of the centre.
- 2.23 The latest land use survey of Avonmouth was conducted by GOAD in summer 2012 and found the following diversity of uses and floorspace. A copy of the GOAD plan for Avonmouth can be found at Appendix G.

Table 2.5 – land use composition, Avonmouth village centre (2012)

Retail Sector	Units		Floorspace	
	No.	%	No.	%
Convenience	4	14.8% (8.5%)	8,000	24.4% (17.1%)
Comparison	2	7.4% (41.5%)	1,800	5.5% (46.5%)
Service	10	37.0% (35.2%)	10,600	32.3% (23.3%)
Other	1	3.7% (1.1%)	500	1.5% (1.0%)
Vacant	9	33.3% (13.6%)	11,900	36.3% (12.0%)
Total	27	100%	32,800	100%

Source: Experian GOAD data

- 2.24 There are four units in Avonmouth occupied by convenience goods retailers including: a Co-op convenience store, a bakery, a health food store (associated with a gym) and a further convenience store. Both convenience stores are circa 200sq m net in size and concentrate upon pass-by / top-up food shopping trips.

Other Convenience Goods Stores within the Study Area

- 2.25 Beyond the five defined centres described above, there are very few further convenience goods stores within the study area. The only store of note is a 287sq m net Co-op store on Station Road in Henbury. Therefore, local residents who wish to use larger foodstore and supermarkets must travel further afield to stores such as the ASDA

at Patchway, the Morrisons at Cribbs Causeway, the Tesco at Lime Trees Road and Sainsburys at Fox Den Road in Filton.

Planning Policy Context

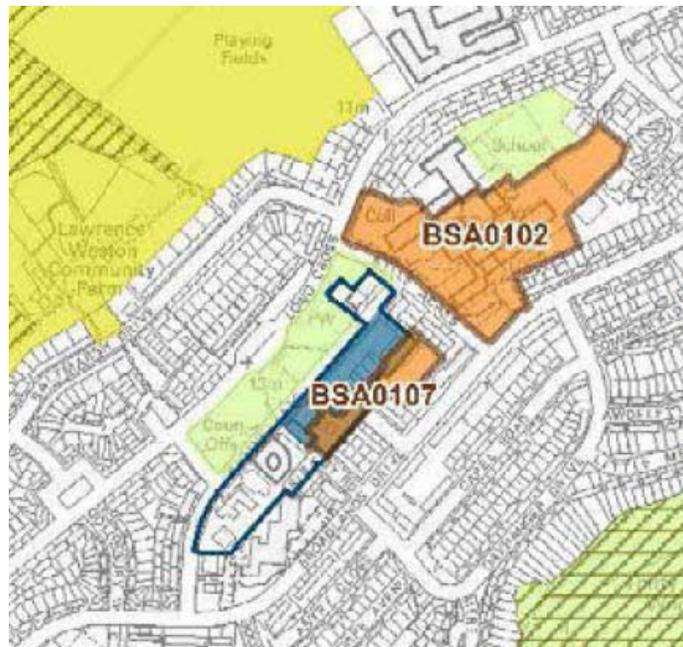
- 2.26 The development plan for the area comprises the Bristol Core Strategy (June 2011) and a number of saved policies in the 1997 Bristol Local Plan.
- 2.27 The Core Strategy is necessarily strategic in nature and does not provide any specific site allocations. The key policy in the Core Strategy which would be of relevance to a foodstore proposal on the former City of Bristol College site is BCS7 which deals with retailing and centres across Bristol. BCS7 directs retail development within or, where appropriate, adjoining defined centres and notes that development will be of a scale and intensity which is appropriate to the position of the centre in the hierarchy.
- 2.28 In terms of the hierarchy, Ridingleaze is classified as a District Centre by BCS7, which is the same as Crow Lane. Above Ridingleaze in the hierarchy is Shirehampton, which is a Town Centre, whilst Shirehampton Road and Avonmouth are ranked lower as Local Centres.
- 2.29 Until the Site Allocations and Development Management document is adopted, the proposals map in the 1997 Local Plan remains adopted policy. The former College site is not allocated for a specific purpose on the proposals map and lies on the northern edge (and outside) of Ridingleaze centre. The distance between the site and the defined centre classifies it as an edge of centre site under NPPF guidance¹. An extract from the Local Plan proposals map is shown in Figure 2.1 below.

¹ The definition of edge of centre as outlined in the NPPF is as follows: For retail purposes, a location that is well connected and up to 300 metres of the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge of centre, account should be taken of local circumstances.

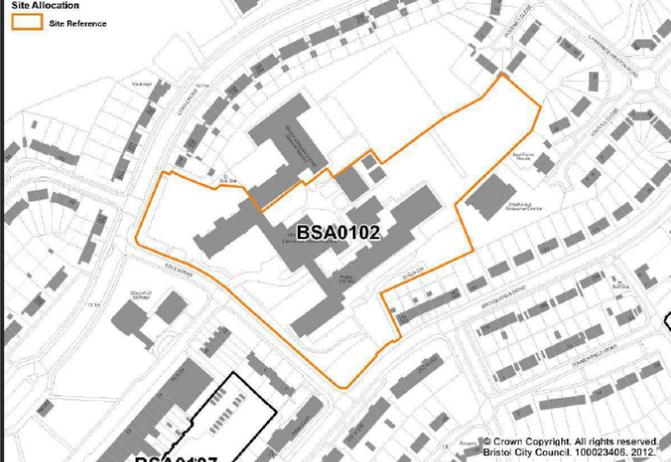
Figure 2.1 – extract from 1997 Local Plan proposals map for Rodingleaze



- 2.30 On the extract from the Local Plan proposals map above, it can be seen that there are two blue shaded areas: one to the rear of the existing centre and another on an area of open space. Saved Policy S3 of the Local Plan identifies these areas of land for retail development, although no further specific details are provided.
- 2.31 As noted above, the remaining saved policies within the 1997 Local Plan are due to be replaced by the Site Allocations and Development Management document. Within the draft version of that document, approved by the Council for consultation in January 2013, the extent of Rodingleaze centre is defined and the former College site is allocated for residential, community and retail use. An extract from the draft proposals map is contained below, which shows the site again outside of the district centre boundary.



2.32 Within the Annex to the draft Site Allocations and Development Management document, the allocation of the former College site is explained as follows:

<p>Site reference:</p> <h2>BSA0102</h2> <p>Site address / location: Land at former Lawrence Weston Campus of City of Bristol College, Lawrence Weston</p> <p>Site Area: 2.4 hectares</p> <p>Ward: Kingsweston</p> 	<ul style="list-style-type: none"> of Ridingleaze as a District Centre identified by the Core Strategy; ensure that the town centre uses are well-connected to the Ridingleaze district centre; be informed by a site-specific flood risk assessment as the area of the site is greater than 1 hectare. This is a requirement of the Government's National Planning Policy Framework. <p>A small element of office use would also be acceptable alongside the housing, community use and retail to reflect the edge of centre location of the site.</p> <p>The estimated number of homes for this site is 80.</p> <p>The site falls within a location being considered as a neighbourhood planning area. A neighbourhood development plan for the area may be brought forward by a designated neighbourhood planning forum in due course.</p>
<p>Site Allocation</p> <p>Site Reference</p>  <p>© Crown Copyright. All rights reserved. Bristol City Council, 100023406, 2012.</p>	<p>Explanation</p> <p>A housing, community use and retail allocation is appropriate as:</p> <ul style="list-style-type: none"> The site is no longer required by the City of Bristol College and the playing field is no longer required by the Gateway School. It is in a sustainable location for mixed-use development being close to Ridingleaze District Centre and close to shops and public transport stops on Long Cross. It will therefore reinforce the vitality and viability of Ridingleaze District Centre and make good use of land in accordance with Core Strategy Policies BCS3 Northern Arc and Inner East Bristol – Regeneration Areas, BCS7 Centres and BCS20 Effective and Efficient Use of Land. An element of retail development is considered appropriate as this site is located adjacent to the Ridingleaze District Centre. A mixed-use development including retail development will therefore be in accordance with Core Strategy Policy BCS7 Centres and Policies BCS3 Northern Arc and Inner East Bristol – Regeneration Areas. It will contribute to meeting the Core Strategy minimum target of providing 26,400 new homes in the period 2006-2026. It reflects the Core Strategy approach to the location of new housing by developing new homes on previously developed sites or on land which does not need to be retained as part of the city's green infrastructure / open space provision.
<p>Allocation: Housing, community use and retail</p> <p>Development considerations</p> <p>Development should:</p> <ul style="list-style-type: none"> take a coordinated approach to the delivery of this allocation and be guided by community involvement contribute towards meeting the recognised local need for community and health facilities on site or in the local area; be informed by a retail impact assessment if the proposed retail use is larger than 2,500m²; ensure that the scale of the retail use is appropriate to the character/hierarchy 	

Other Material Considerations

- 2.33 In March 2012, the Department of Communities and Local Government published the National Planning Policy Framework ('the NPPF'). The NPPF replaced Planning Policy Statement 4: Planning for Sustainable Economic Growth (2009) and provides a concise version of national planning policy towards retailing and town centres. Section 2 of the NPPF is relevant to proposals for new retail floorspace in Lawrence Weston, with paragraph 23 outlining the following principles for Local Plan making:

- recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;
- allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;

2.34 In relation to the determination of planning applications, paragraph 24 of the NPPF notes that:

“Local planning authorities should apply a sequential test to planning applications for main town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan. They should require applications for main town centre uses to be located in town centres, then in edge of centre locations and only if suitable sites are not available should out of centre sites be considered. When considering edge of centre and out of centre proposals, preference should be given to accessible sites that are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale”.

- 2.35 This development management policy continues with the similar general thrust of national policy established by PPS6 and PPS4, with the promotion of the 'town centres first' approach and preferring sites in defined town centres and then edge of centre locations before out of centre sites should be considered. In addition, the NPPF continues to require flexibility to be incorporated into the assessment of alternative sites.
- 2.36 At this point, it is worth noting that the Practice Guidance on need, impact and the sequential approach remains extant and Section 6 of that document provides relevant guidance on the application of the sequential approach including the assessment of the suitability, availability and viability of alternative sites and also the factors to be considered when assessing flexibility.
- 2.37 The NPPF also retains an 'impact' test for retail, leisure and office development outside of town centres which are not in accordance with an up-to-date Local Plan. The NPPF states that local planning authorities should require an impact assessment if the development is over a proportionate, locally set threshold or, if there is no locally set threshold the default threshold is 2,500sq m. The NPPF notes that impact assessments should include an assessment of:
- the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and
 - the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, the impact should also be assessed up to ten years from the time the application is made.
- 2.38 These impact assessment criteria are similar to the criteria contained within Policy EC16.1 of PPS4, although the development plan allocation impact test, the scale test and the 'local impact test' have been removed and the vitality and viability impact test has been merged with the 'impact on trade/turnover' test.
- 2.39 Importantly, the NPPF retains the clear guidance to local planning authorities: *"Where an application fails to satisfy the sequential test or is likely to have significant adverse*

impact on one or more of the above factors, it should be refused". This is a repeat of Policy EC17.1 of PPS4.

3. The Need for New Convenience Goods Floorspace in the Lawrence Weston Area

- 3.1 Whilst the test of 'need' has been removed from development management decisions it remains part of the plan-making process. With the former College site proposed to be allocated in the Site Allocations and Development Management document for mixed use development including retail uses, an assessment of need for additional convenience goods floorspace provides a useful contribution to defining this allocation. This is particularly important given that the draft policy in the site allocations document takes a particular interest in the scale of proposed retail development and a requirement for a retail impact assessment for proposals over 2,500sq m².
- 3.2 The NPPF recommends that, when assessing whether there is a need for additional retail floorspace within a particular area, an assessment should be made of quantitative and qualitative indicators. Quantitative assessments focus upon the availability of retail expenditure to support existing and new retail floorspace, whilst qualitative assessment focus upon the quality and scale of existing floorspace to meet people's shopping needs, with particular reference to the pattern of shopping behaviour in the local area.
- 3.3 Each indicator is assessed in turn below.

Qualitative Need for New Convenience Goods Floorspace in North West Bristol

- 3.4 As indicated by our review of the local retail hierarchy, north-west Bristol has a modest level of convenience goods floorspace when compared with other parts of the city. Ridingleaze and the surrounding centres in Shirehampton, Sea Mills and Avonmouth are modest in size and contain small foodstores. Within each of the five centres in the local area, there is a Co-op store although these are 200-600sq m net in size and operate as

² Which we assume, for the purposes of this study to be a gross floorspace figure.

convenience stores. Beyond these Co-op stores, there are number of other small convenience stores and niche food shops, whilst the largest foodstore in the local area is the Aldi deep discount store on Crow Lane which extends to 990sq m net. The Aldi is also the newest foodstore in the local area and the only one to possess a large dedicated customer car park.

- 3.5 Overall, the range and quality of small scale foodstores in the local area is good, with each defined centre possessing at least one store. The Co-op is obviously the dominant retailer and this may raise competition issues, although this is unlikely to feature heavily in any spatial planning argument in favour of additional floorspace.
- 3.6 Beyond the local area, there are a number of similar defined centres in Henbury, Southmead and a larger centre at Westbury-on-Trym. However, in addition to these centres, there are a number of large supermarkets. At Patchway/Cribbs Causeway to the north-east there is a 9,000sq m net ASDA store and a 3,400sq m net Morrisons. To the east is a large 4,600sq m net Sainsburys store in Filton and a 1,700sq m Waitrose store in Westbury Park. There is also a 2,800sq m Tesco store on Lime Trees Avenue, whilst Bristol City Council has recent resolved to grant planning permission for a 4,850sq m net Sainsburys store on Filton Avenue. There is also a planning permission to convert the former Woolworths/TJ Hughes units at Abbey Wood Retail Park to an ASDA store.
- 3.7 The attractiveness of these large stores to the local population is proven by the results of the January 2013 household shopping survey. Set out a below is a summary of the results for the four zones in the survey area, showing the proportion of food shopping trips which are retained in the local area (at centres such as Ridingleaze and Shirehampton) along with the proportion of trips which are lost to these larger facilities.

Table 3.1: food shopping patterns of study area residents

Centre / Store	Zone 1 Lawrence Weston	Zone 2 Avonmouth	Zone 3 Sea Mills	Zone 4 Henbury
<i>Within Study Area</i>				
Ridinglease	12.5%	0.0%	0.8%	0.0%
Crow Lane	10.4%	12.7%	3.3%	37.6%
Avonmouth	0.0%	5.6%	0.0%	0.0%
Shirehampton Road	1.3%	0.3%	3.9%	0.0%
Shirehampton	23.4%	28.3%	3.2%	0.0%
Other in Study Area	0.3	0.0	0.0	2.8
<i>Most Popular Stores Elsewhere</i>				
ASDA, Patchway	22.4%	27.2%	8.0%	13.9%
Morrisons, Cribbs Causeway	12.9%	11.0%	3.2%	15.7%
Sainsburys, Winterstoke Road	3.4%	2.7%	5.3%	0.7%
Waitrose, Henleaze	1.2%	0.5%	15.3%	3.0%
Tesco, Lime Trees Road	0.9%	0.9%	9.1%	4.2%

Notes: data taken from Table 8 at Appendix A

- 3.8 The above summary shows that only 12% of expenditure food items in Lawrence Weston (Zone 1) remains in the local area (at Ridinglease). Twice as much expenditure flows to Shirehampton and the ASDA store at Patchway, whilst the Morrisons store at Cribbs Causeway attracts the same proportion of expenditure as Ridinglease centre in Zone 1. Indeed, beyond Zone 1, foodstores in Ridinglease have very little influence, thus indicating that the centre has a very small catchment area.
- 3.9 Within Zone 2 (Avonmouth), the most population local centres are Avonmouth and Shirehampton, with the latter attracting twice as much expenditure as the former. Again, the ASDA and Morrisons stores in Patchway/Cribbs Causeway are very popular.
- 3.10 Within Zone 3 (Sea Mills), local centres do not retain much expenditure. Instead, there is leakage of expenditure to Waitrose at Henleaze, the ASDA at Patchway, the Sainsburys store on Winterstoke Road and Tesco at Limes Trees Avenue. In Zone 4 (Henbury), store along Crow Lane are the most popular local facilities, with good

market shares for the Co-op and Iceland stores within the centre and the Aldi store on the edge of centre. However, the proximity of the ASDA and Morrisons stores means that a similar amount of money which is being retained by Crow Lane is leaking to these larger stores to the north-east.

- 3.11 Overall, the picture painted by the data in Figure 3.1 is one of low retention rates for convenience goods expenditure. Whilst local facilities are able to retain some trips, larger supermarkets further afield are very popular. When the data shopping separate main food and top-up food shopping is analysed then these patterns become even more pronounced. Ridingleaze attracts only 7-8% of main food shopping trips from the local area (Zone 1), but around 22%-27% of top-up food shopping trips from the same area. Whilst Ridingleaze centre is much better at attracting top-up food shopping trips, around half of Lawrence Weston residents travel to Shirehampton for their top-up food shopping, whilst the ASDA at Patchway attracts one third of main food shopping trips. Other popular main food shopping destinations for Lawrence Weston residents include the Morrisons at Cribbs Causeway (16%) and Shirehampton (18%).
- 3.12 These shopping patterns show that residents of Lawrence Weston and the surrounding areas of Sea Mills, Shirehampton and Henbury are prepared, to varying extents, to travel beyond the local area for both main and top-up food shopping trips. The largest area of 'leakage' is in relation to main food shopping trips, with smaller stores within the defined centres unable to compete with the attractiveness of stores such as ASDA, Morrisons, Waitrose and Tesco. If weight is placed upon the attractiveness and importance of being able to obtain a large selection of convenience goods within the local area, then this could be termed a qualitative deficiency within this part of north-west Bristol. Therefore, the remedy for this deficiency is to provide a convenience goods offer in the local area which can attract a significant amount of main food and top-up food shopping trips.
- 3.13 It is not part of our current instructions to assess whether the former College site in Lawrence Weston is large enough to accommodate a foodstore which can attract main/bulk food shopping trips, although it is clear that the site is not insubstantial and has the ability to accommodate a reasonable large scale of development. In addition, it is not part of our instructions to assess alternative potential retail development sites in and around defined centres in the north-west Bristol area,

although it is clear that the former College site lies in an attractive location in planning policy terms, abutting a defined District Centre.

Quantitative Need

- 3.14 The ability to demonstrate that a quantitative need exists for additional retail floorspace relies on the ability to prove that there is sufficient available expenditure to not only support existing retail floorspace to a suitable standard but also new floorspace to that same standard. The test of 'need' has been a feature of retail planning since the 1990s, although since 2009 there is no longer a requirement to demonstrate that a need exists for retail development proposals. However, the test of 'need' does remain for plan-making purposes.
- 3.15 In order to establish whether there is potential retail expenditure capacity within this part of north-west Bristol, we have followed a step-by-step assessment methodology:
- Setting a study area for the assessment which, in this instance, is the likely primary catchment area for a new foodstore in Lawrence Weston;
 - Calculation of the total amount of available convenience goods expenditure within the study area and its constituent zones;
 - Establishing food shopping patterns and store turnover levels within the study area, with the use of a bespoke survey of household shopping patterns commissioned for this retail study;
 - Comparison of the current store turnover levels with the benchmark turnover levels of these stores to establish the current trading performance of existing facilities and whether there is a current quantitative need for additional convenience goods floorspace;
 - Forecasting future levels of quantitative need within the study area, based upon a market share approach. This approach predicts contrasting levels of future retail expenditure capacity based upon the market share which existing and new retail floorspace within the study area can realistically hope to achieve.
- 3.16 Based upon the above methodology, our quantitative assessment at Appendix A is structured as follows:

- Table 1 provides the current and future levels of population within each of the four zones of the study area. Population data has been provided by Experian Business Strategies.
- Table 2 contains average per capita expenditure levels on convenience goods within each of the four survey zones. This data has been obtained from Experian Business Strategies and has been projected into the future using forecasts provided by Experian in its Retail Planner Briefing Note 10³.
- Table 3 bring the contents of Tables 1 and 2 together to calculate the total level of available convenience goods expenditure within the study area.
- Using the results of the January 2013 household survey, Table 4a provides a detailed review of the food shopping habits of residents within each of the four survey zones. First and second choice main and top-up food shopping destinations have been ascertained and the market shares for each of these is shown in Table 4a.
- Using the market share data in Table 4a and the expenditure data in Table 3, Tables 4b/4c/4d calculate the turnover of stores and centres within the study area at 2013, 2018 and 2023 (assuming current market shares remain constant).
- Table 5 outlines the benchmark turnover of existing convenience goods floorspace within the study area, using data provided by IGD, Experian GOAD and Verdict.
- Tables 6a/6b/6c provide our retail expenditure capacity forecasts for the study area, based upon a number of contrasting forecasts. These scenarios are explained in more detail later in this section.

3.17 We have set the timeframe for our quantitative assessment as 2013-2023, with an interim year of 2018. The impact test within the NPPF suggests that the impact of a particular proposal should be tested five years after the application has been made and, in the case of significant proposals, after ten years. We consider that this is useful guidance for the assessment of quantitative need also, and therefore we have

³ September 2012

provided quantitative need forecasts within each of our three scenarios at 2013, 2018 and 2023.

- 3.18 As noted above, three contrasting retail capacity forecasts have been produced. The first of these is outlined Table 6a and comprises the baseline capacity assessment, whereby retail expenditure capacity is assessed on the basis of a constant market share over the assessment period (2013-2023). Therefore, with existing convenience goods within the study area attracting a current market share of 37% (within the study area), this level of market share is held constant over the period to up to 2018 and 2023.
- 3.19 Based upon the results of the January 2013 household survey, Table 6a indicates that stores within the study area attract £9.6m of convenience goods expenditure. In the absence of specific detailed detail regarding the wider trade draw of existing stores in Lawrence Weston, Sea Mills, Avonmouth and Shirehampton, we have made some assumptions regarding the proportion of store turnover levels which will be drawn from the study area. This leads to a forecast expenditure inflow of £7.4m at 2013 and a total turnover potential for stores in the study area of £17.0m.
- 3.20 When compared with the benchmark turnover of existing convenience goods floorspace, as calculated by Tables 5 at Appendix A, Table 6a indicates that existing stores within the study area are trading below their collective benchmark turnover level⁴. This suggests that the scale of existing convenience goods floorspace within the study area can adsorb a greater amount of expenditure before problems such as congestion and overcrowding become a factor.
- 3.21 Table 6a indicates that if this level of performance/market share is carried forward at the same rate then there will not be any surplus convenience goods expenditure arising over the assessment period (2013-2023).
- 3.22 The second scenario which we have assessed is where the market share of convenience goods shopping within the study area is increased in order to reflect the trading impact of new floorspace. Given the reasonably good provision of smaller scale and top-up food shopping provision in the study area, it is our opinion that the
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⁴ i.e. current forecast actual turnover of £17.0m is below the benchmark turnover of £29.8m.

only realistic way of achieving a significant improvement in market share is via a store which can attract main/bulk food shopping trips. Section 4 outlines our assessment of the impact of a new foodstore in Lawrence Weston and tests a scenario where by a store of 1,800sq m net sales (1,440sq m net convenience goods sales) store is provided. In order to show consistency between the two analyses, the results of the impact assessment have been used to guide how the market share within the study area will change (i.e. the larger the proportion of trade diverted from stores outline of the study area, the larger the increase in market share).

- 3.23 In the case of a foodstore containing 1,440sq m of convenience goods sales, Table 6b at Appendix A indicates that the study area market share will rise from 37% in 2013 to 76% by 2018 (assuming that a new store was provided during this period). This is a significant increase in the market share of the local area and is reflective of the significant clawback in convenience goods expenditure which could occur.
- 3.24 However, despite the significant increase in market share, Table 6b indicates that, in addition to the benchmark turnover of existing stores, there is insufficient surplus expenditure to accommodate a new foodstore containing 1,440sq m of convenience goods floorspace. Table 6b indicates that there will be capacity for only 180sq m of additional floorspace by 2018, rising to 456sq m net by 2023.
- 3.25 One reason for this low level of additional capacity, despite such a large increase in market share, is the low level of performance of existing facilities and their ability to absorb additional expenditure before the need for new capacity kicks in. Therefore, as a sensitivity test, we have run a third scenario in Table 6c which assumes a hypothetical situation whereby there is no under-performance in existing facilities. Therefore, Table 6c assumes that the total turnover potential of existing stores matches their benchmark turnover at 2013 (i.e. £29.8m) and they have a current market share of 87% within the study area. Notwithstanding the likelihood that a better performance level of existing stores in the local area will change the pattern of trade diversion to the new foodstore, we consider that a market share close to 90-100% is likely if a new larger store it provided.
- 3.26 Whilst a 100% market share itself may not achieved due to the strength of supermarkets at Cribbs Causeway, Table 6c models this market share to examine, as a best case scenario, what level of additional convenience goods could be accommodated.

Within this scenario, as with Table 6b, it has been assumed that 20% of the new store's turnover will be derived from outside of the study area. We consider that this to be a reasonable allowance and any greater proportion is likely to be unrealistic given the location of Lawrence Weston and the attractiveness of surrounding facilities (including commitments) in Cribbs Causeway, Filton, Horfield and Henleaze.

- 3.27 Based upon a hypothetical 100% market share, and allowing for existing convenience goods floorspace to trade at benchmark turnover levels, Table 6c indicates that there would be £8.8m of surplus expenditure by 2018, rising to £12.8m in 2023. Based upon a sales density associated with a national full-line grocery operator, this equates to a floorspace capacity of 737sq m net at 2018 and 1,069sq m net at 2023.
- 3.28 The results of the three capacity scenarios are summarised in Figure 3.2 below.

Table 3.2: summary of retail floorspace capacity assessment

Scenario	Floorspace Capacity (sq m net sales)		
	2013	2018	2023
Constant market share	-	-	-
Increased market share (no alternative to performance of existing stores)	-	181sq m	456sq m
100% market share	-	737sq m	1,069sq m

Notes: data taken from Tables 6a, 6b and 6c at Appendix A.

Conclusions

- 3.29 Overall, it is clear that there is insufficient capacity within the study area to accommodate existing stores (at average trading performance levels) along with 1,440sq m of additional convenience goods floorspace occupied by a full-line national grocery retail operator. There are two main reasons for this conclusion. First, existing convenience goods are performing at levels before their respective benchmark levels and, as a consequence, there is an opportunity for these existing stores to absorb greater levels of expenditure before difficult trading conditions arise. Second, there is a finite level of available expenditure within the study area and also a realistic limit to the amount of expenditure which stores can attract from beyond the study area. As a

consequence, even if current under-trading of stores is excluded, it is unlikely that there will be sufficient available expenditure to accommodate 1,440sq m of new net sales floorspace alongside existing stores.

- 3.30 So what is the consequence of this situation? In relation to the City Council's development management function and its role in determining planning applications for retail development, the lack of an identifiable quantitative need for additional retail floorspace is no longer a reason in itself to withhold planning permission. Instead, the lack of an identifiable level of retail expenditure capacity suggests that the impacts on existing retailers will be higher and possibly more severe than they would have been in a situation where greater levels of expenditure were available.
- 3.31 Therefore, this increases the focus upon the assessment of impact of a new store and also prompts us to raise the likelihood that provision of a new foodstore will have a detrimental impact upon existing facilities, possibly to the extent that store closures will arise. Therefore, in considering the potential for a new foodstore at Lawrence Weston, the City Council may face a choice between retaining existing stores but not being able to change the current low level of provision in the local area, or planning for a new large foodstore but accepting that this may mean a reduction in convenience goods facilities elsewhere in the local area.

4. Trading Impact of a New Foodstore in Lawrence Weston

4.1 A key planning policy test for any proposal for a foodstore on the former City of Bristol College site in Lawrence Weston will be an assessment of its impact upon the health of nearby defined centres. This test applies equally to the promotion of the former College site within a development plan document and a specific planning application for a foodstore use.

4.2 Traditionally, the assessment of impact has concentrated on the scale of financial impact on existing facilities and has involved an assessment of the pattern of trade draw to a proposed retail facility and the pattern of expenditure diverted from existing stores. This has been the focus for our assessment of a new foodstore on the former College site and we have adopted the following approach:

- Using data on existing shopping patterns gained from the 2013 household survey, we have estimated the likely pattern of proportionate trade diversion from existing facilities to the proposed store. This assessment is based upon the principle that the pattern of trade diversion to the proposed store will follow existing shopping patterns, weighted to take account of the location and trading style of existing (competing) facilities. The weighting of existing shopping patterns is based upon the general rule of thumb that 'like competes with like' i.e. large foodstores will compete directly with other large foodstores and supermarkets. However, this approach should not ignore competition that foodstores will provide for smaller convenience goods stores, particularly where they are in close proximity. See Table 9 at Appendix A for the pattern of proportionate trade diversion to the proposed store.
- Following the establishment of the likely proportionate pattern of trade diversion, we have estimated the trade draw to new foodstore on the former College site. We have assumed that, in light of the location and strength of competing facilities in North Bristol, 80% of the turnover of the foodstore will be drawn from within the study area (as shown on the plan at Appendix B). This is shown in Table 10.

- By applying the proportionate trade diversion data by zone in Table 9 to the trade draw data in Table 1, Table 11 is able to predict the pattern of expenditure which will be diverted to the proposed store and the overall loss of trade from existing facilities.
- 4.3 Table 12 at Appendix A takes forward the trade diversion estimates outlined in Table 11 places them alongside the current and future pre-impact 2018 and 2023 turnovers of existing facilities in the local area. The focus in Table 12 is on the local retail centres of Ridingleaze, Shirehampton, Shirehampton Road, Avonmouth and Crow Lane, along with a selection of the stores which are currently popular with residents of the study area.
- 4.4 In order to establish the trading impact of the proposed supermarket, the scale of trade diversion has been expressed as a percentage of the pre-impact turnover of existing stores at both 2018 and 2023 in order to reflect the potential differences in trade loss depending on when the new store is delivered. The results are summarised in Table 4.1 below.

Table 4.1: convenience goods retail impact of proposal foodstore on local facilities, 2018 and 2023

Centre / Store	Trade Diversion to Lawrence Weston Foodstore (£m)	Impact (% loss of trade)	
		2018	2023
Ridingleaze	£0.86m	-65%	-58%
Crow Lane	£0.78m	-9%	-8%
Avonmouth	£0.04m	-8%	-7%
Shirehampton Road	£0.06m	-10%	-9%
Shirehampton	£1.42m	-26%	-23%
ASDA, Patchway	£4.3m		
Co-op, Westbury-on-Trym	£0.1m		
Morrisons, Cribbs Causeway	£2.45m		
Sainsburys, Winterstoke Road	£0.9m		
Sainsburys, Filton	£0.2m		
Tesco Extra, Bradley Stoke	£0.1m		
Tesco, Lime Trees Road	£1.1m		

Notes: data taken from Table 12, Appendix A

- 4.5 As can be seen from the above, the two centres in the local area which are likely to receive the largest impact are Ridingleaze and Shirehampton. The significant impact upon the convenience goods sector in Ridingleaze is unsurprising given the close proximity of the centre to the former College site. Existing convenience goods stores within the centre are due to lose around two-thirds of their collective turnover at 2018, falling to 58% by 2023. This level of trade loss, combined with the modest trading performance of existing stores, indicates that all existing stores are unlikely to be able to continue to trade into the future should a new 1,800sq m net foodstore be provided. The close proximity of the new store to the centre, whilst offering good connectivity, will inevitably result in strong competition and, with it being attractive to both main and top-up food shopping trips, it will compete directly with the smaller existing stores.

4.6 Overall, the existing convenience goods sector within Rodingleaze district centre is unlikely to remain the same after the effects of the new foodstore have been felt. There is every likelihood that this sector will shrink and the new foodstore will surely become the anchor store. This will result in a change in way in which the district centre is considered, with competition being affected in order to obtain a widening in the range of convenience goods on offer to the local population. Therefore, a distinction may need to be made between the inevitable commercial competition which would result and the opportunities that a new foodstore may present to improve the overall attractiveness of the centre.

4.7 Alongside the likely shrinkage in the size of the existing convenience goods sector, which may be considered a negative aspect, a new store could provide a range of positive benefits to the district centre depending on its retail offer. For example, at present, there is considerable leakage of expenditure from the local area and a limited range of facilities within the centre. Should a suitably sized foodstore be provided, it is likely that a considerably greater number of people will be attracted into the district centre, some of whom may not currently be using the centre for any purpose. Therefore, this presents an opportunity for the district centre to capitalise on these new visitors and provide an expanded range of services within the centre and also reinforce the viability of existing traders. In order to do this, we recommend that the following are considered:

- Limit the amount of floorspace devoted to the sale of non-food goods, in order to limit competition with existing and future tenants of the district centre;
- Limit the range of specialist counters within the new foodstore, such as bakery, butcher, fishmonger etc;
- Ensure that any new foodstore is located and designed so as to act as a seamless extension to the district centre and that considerable improvements are made to the district centre itself. The district centre will not benefit from the new visitors attracted to the store if the linkages between the two are poor and/or the centre itself is unattractive.

4.8 Turning to the impact on other centres, the financial impact of a new foodstore in Lawrence Weston is likely to have an impact of under 10% on the convenience goods

sectors in Avonmouth, Shirehampton Road and Crow Lane. Whilst these levels of impact should not be easily dismissed, it is likely that these centres will be able to withstand the impact of a new store, particularly given that local residents already have a choice between shopping within the centres or travelling further afield to larger foodstores and supermarkets. This is the likely difference between the impact on Ridingleaze and the impact on Avonmouth, Shirehampton Road and Crow Lane: they are far enough away from the new store to withstand its trading impact.

- 4.9 There will, however, be a larger impact upon Shirehampton town centre. Shirehampton is the most popular of the five defined centres in the local hierarchy and attracts a relatively equal measure of main and top-up food shopping expenditure according to our quantitative analysis. Whilst the majority of trade diversion will come from larger stores outside of the study area, the popularity of Shirehampton, and the Co-op store in particular, will lead the centre losing around one quarter of its 2018 pre-impact turnover. The majority of this impact will fall upon the Co-op store although we do not consider, based upon the results of our quantitative analysis, that there is a high risk of this store closing as a consequence of a new foodstore in Lawrence Weston. However, the loss of one quarter of convenience goods turnover is likely to lead to an adverse impact upon Shirehampton and the Council will need to balance this negative impact against the potentially positive impacts associated with improving Ridingleaze district centre and shortening the length of some convenience goods shopping trips.

Conclusions

- 4.10 Overall, our assessment of the trading impacts of a new foodstore, of circa 1,800sq m net sales, adjacent to Ridingleaze district centre is that it will greatly improve the proportion of convenience goods expenditure which can be retained within the local area. However, alongside this significant clawback in expenditure, two defined shopping centres within the local area will experience a significant loss of trade. The first is, unsurprisingly, Ridingleaze given the close relationship of the site of the proposed foodstore and the existing shops and services within the centre. It is entirely possible that existing convenience goods stores will lose up to two-thirds of their turnover by 2018 and this part of the centre is likely to shrink in size as the new foodstore takes over as an anchor to the centre. As a consequence, the Council is likely to be faced with a choice regarding the future of Ridingleaze: keep the centre in its current form and

allow existing shopping patterns to remain broadly the same, or plan to provide larger retail facilities and plan for change within the centre.

- 4.11 Given this potential shift in gravity for the district centre, it will be important for the Council, if it is contemplating the provision of a new foodstore at Riddinglease, to carefully consider how it can act as a complementary extension to the centre. We consider that this is best achieved through limiting the range of non-food goods and services offered by the store, substantially improving linkages between the former College site and the centre and making improvements to the existing centre itself.
- 4.12 The other centre which is likely to experience a noticeable drop in convenience goods turnover is Shirehampton, whose convenience goods stores could collectively lose up to one quarter of their trade by 2018. This loss of trade is likely to be concentrated upon the Co-op store on High Street in Shirehampton and is a product of the town centre being the largest and most popular centre within this part of north-west Bristol. We do not consider that the Co-op store will be in danger of closure as a consequence of a new foodstore in Lawrence Weston, although Shirehampton town centre will experience a negative impact which is likely consequence of wherever a new foodstore is placed within the Shirehampton, Sea Mills, Henbury and Lawrence Weston area.

5. Summary and Conclusions

Scope and Purpose

- 5.1 This report has been prepared by GVA following an instruction by Bristol City Council ('BCC') to prepare a retail study for the Lawrence Weston area of north-west Bristol. Following the closure of the City of Bristol College premises adjacent to Ridingleaze district centre ('the College site'), BCC has proposed to allocate the College site, which lies in an edge of centre location, for a mixed use redevelopment site include residential, community and retail use.
- 5.2 The focus of this study has been on the potential impacts associated with the provision of a foodstore on the College site. Such considerations are important in the light of the proposed allocation of the College site for retail uses, which seeks to ensure that retail uses are of an appropriate scale and also requires the submission of a retail impact assessment to accompany any future planning applications.
- 5.3 In order to assess the likely impacts associated with the provision of a foodstore on the College site, this study has: commissioned a new survey of household shopping patterns, undertaken an assessment of the level of convenience goods expenditure to support new convenience goods floorspace in north-west Bristol; assessed the relationship between the College site and Ridingleaze district centre and assessed the likely financial impact of a 1,800sq m net foodstore (with 1,440sq m convenience goods sales) on existing centres/stores in the local area.
- 5.4 Based on the results of the household shopping survey commissioned in January 2013, the area of north-west Bristol encompassing the areas of Lawrence Weston, Sea Mills, Avonmouth, Shirehampton and Henbury, is only able to retain one third of convenience goods expenditure generated by local residents. It is clear from the results of the survey that whilst local store provided popular top-up food shopping destinations, the retention of main/bulk-food shopping trips is limited and larger foodstores/supermarkets further afield are particularly attractive to local residents. Therefore, whilst there is a good supply of smaller scale convenience goods stores within defined shopping areas, it could be argued that a qualitative deficiency exists in relation to main/bulk food shopping facilities. The weight which can be attracted to

this indicator will ultimately be based upon the desire to provide a larger foodstore within north-west Bristol which a wide product range 'under one roof'.

- 5.5 Using the results of the results of the household survey it has been possible to assess the likely current trading performance of current convenience goods facilities within north-west Bristol and the likely capacity to provide additional floorspace. Our assessment has found that whilst there is significant potential to increase the market share of foodstores within north-west Bristol, two factors are likely to constrain the ability to demonstrate that there is sufficient expenditure to accommodate a large new foodstore and existing facilities trading at a reasonable level. First, our quantitative assessment indicates that existing stores may be performing before average levels with the opportunity to absorb additional expenditure before trading conditions become difficult. Second, notwithstanding the current performance of existing stores, the level of available convenience goods expenditure is such that it cannot accommodate both existing stores (trading at a reasonable level) and a new foodstore of circa 1,440sq m net convenience goods sales.
- 5.6 Therefore, without the ability to demonstrate a quantitative need for a significant levels of additional convenience goods floorspace, it is likely that the provision of a new large foodstore will have an adverse impact upon existing stores. Our financial impact analysis indicates that the largest impact will, unsurprisingly, be on the convenience goods sector in Ridingleaze district centre, which could lose up to two-thirds of its 2018 pre-impact turnover level. If a new large foodstore is provided then we would expect a significant shift in convenience goods retail provision in Ridingleaze with shrinkage within the existing centre and the need to ensure that a new foodstore provides positive benefits back to the centre, as a way of mitigating this loss. We consider that this should happen with particular attention paid to the following matters: seamless links between the new store and centre, controlling the range of non-food goods and services provided by the store and improvements to the existing centre.
- 5.7 Whilst not as large as the impacts experienced by Ridingleaze, other nearby centres will also experience negative financial impacts. The centre which should be particularly highlighted is Shirehampton, which could lose one quarter of its convenience goods turnover by 2018. Other centres, such as Crow Lane, Avonmouth and Shirehampton Road, will experience impacts on 10% or less.

- 5.8 Overall, the issues surrounding the provision of a new large foodstore on the former City of Bristol College site will require choices to be made in relation to the future of convenience goods shopping in north-west Bristol. A new large store will affect the ability of existing smaller scale retailers to continue to trade and a potential consequence of a new store could be a reduced smaller scale retail offer in some centres. These negatives will need to be balanced against the potential positive impact, such as increased local choice, short shopping journeys and the positive benefits for Ridingleaze centre itself.

Appendix A:

Retail expenditure capacity and financial impact analysis

TABLE 1: POPULATION OF STUDY AREA, BY ZONE

ZONE	POSTCODE SECTORS	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
1	BS11 0	4379					4753					5124
2	BS11 8 & BS11 9	3325					3518					3754
3	BS9 2	2922					3057					3247
4	BS10 7	3703					3815					3966
TOTAL		14329	0	0	0	0	15143	0	0	0	0	16091

Notes:

Population data provided by Experian Business Strategies.

TABLE 2: PER CAPITA CONVENIENCE GOODS EXPENDITURE, BY ZONE

ZONE	POSTCODE SECTORS	2013	2018	2023
1	BS11 0	£1,666	£1,707	£1,772
2	BS11 8 & BS11 9	£1,766	£1,809	£1,879
3	BS9 2	£2,016	£2,065	£2,145
4	BS10 7	£1,796	£1,840	£1,911

Notes:

Per capita expenditure data provided by Experian Business Strategies.

Data provided for 2011 and projected forward up to 2023 using forecasts provided by Experian within Retail Planner Briefing Note 10.

2011 PRICES

TABLE 3: TOTAL CONVENIENCE GOODS EXPENDITURE, BY ZONE

ZONE	POSTCODE SECTORS	2013	2018	2023
1	BS11 0	£7.3	£8.1	£9.1
2	BS11 8 & BS11 9	£5.9	£6.4	£7.1
3	BS9 2	£5.9	£6.3	£7.0
4	BS10 7	£6.7	£7.0	£7.6
TOTAL		£25.7	£27.8	£30.7

Notes:

Per capita expenditure data provided by Experian Business Strategies.

Data provided for 2011 and projected forward up to 2023 using forecasts provided by Experian within Retail Planner Briefing Note 10.

2011 PRICES

TABLE 4b: TURNOVER OF CONVENIENCE GOODS SHOPPING FACILITIES, 2013

STORE / CENTRE	MAIN FOOD SHOPPING								TOP-UP FOOD SHOPPING								STUDY AREA TOTAL (\$m)	% FROM STUDY AREA	TOTAL TURNOVER (\$m)
	FIRST CHOICE				SECOND CHOICE				FIRST CHOICE				SECOND CHOICE						
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4			
	\$7.3	\$5.9	\$5.9	\$5.7					\$2.0	\$1.5	\$2.0	\$2.2	\$0.8	\$0.6	\$0.8	\$0.9			
	72%	74%	66%	67%															
	\$5.3	\$4.3	\$3.9	\$4.5	\$1.6	\$1.3	\$1.2	\$1.3											
	\$3.7	\$3.0	\$2.7	\$3.1					\$1.2	\$0.9	\$1.2	\$1.3							
Ridgelyze																			
Premier, Ridgelyze, Lawrence Weston	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.02	80%	\$0.03
Co-op, Ridgelyze, Lawrence Weston	\$0.1	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.40	80%	\$0.50
Costcutter, Ridgelyze, Lawrence Weston	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.16	80%	\$0.20
Ridgelyze (Lawrence Weston)	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.29	80%	\$0.36
Local stores, Lawrence Weston	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.09	80%	\$0.11
Sub-Total	\$0.3	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.3	\$0.0	\$0.0	\$0.0	\$0.2	\$0.0	\$0.0	\$0.0	\$1.0		\$1.2
Crow Lane																			
Iceland, Crow Lane, Henbury	\$0.0	\$0.0	\$0.0	\$0.1	\$0.1	\$0.1	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.1	\$0.64	50%	\$1.28
Aldi, Crow Lane, Henbury	\$0.2	\$0.4	\$0.0	\$0.2	\$0.2	\$0.1	\$0.0	\$0.3	\$0.1	\$0.0	\$0.0	\$0.1	\$0.1	\$0.0	\$0.0	\$0.1	\$1.86	40%	\$4.66
Co-op, Crow Lane, Henbury	\$0.0	\$0.0	\$0.0	\$0.3	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.4	\$0.0	\$0.0	\$0.0	\$0.2	\$1.04	50%	\$2.08
Crow Lane (Henbury)	\$0.0	\$0.0	\$0.0	\$0.3	\$0.0	\$0.1	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.1	\$0.66	50%	\$1.32
Sub-Total	\$0.2	\$0.4	\$0.1	\$0.8	\$0.3	\$0.3	\$0.0	\$0.5	\$0.1	\$0.1	\$0.1	\$0.7	\$0.1	\$0.0	\$0.0	\$0.5	\$4.2		\$9.3
Avonmouth																			
Co-op, Avonmouth Road, Avonmouth	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.26	80%	\$0.32
Local stores, Avonmouth	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.08	90%	\$0.08
Sub-Total	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.2	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.3		\$0.4
Shirehampton Road																			
Shirehampton Road (Sea Mills)	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.11	65%	\$0.17
Co-op, Shirehampton Road, Sea Mills	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.20	65%	\$0.31
Local stores, Sea Mills	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.03	65%	\$0.04
Sub-Total	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.3		\$0.5
Shirehampton																			
Co-op, High Street, Shirehampton	\$0.6	\$0.6	\$0.0	\$0.0	\$0.1	\$0.1	\$0.0	\$0.0	\$0.4	\$0.4	\$0.1	\$0.0	\$0.1	\$0.2	\$0.1	\$0.0	\$2.78	70%	\$3.97
Local stores, Shirehampton	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.2	\$0.1	\$0.0	\$0.0	\$0.78	70%	\$1.12
Sub-Total	\$0.7	\$0.6	\$0.0	\$0.0	\$0.2	\$0.2	\$0.0	\$0.0	\$0.6	\$0.5	\$0.1	\$0.0	\$0.3	\$0.3	\$0.1	\$0.0	\$3.6		\$5.1
Co-op, Station Road, Henbury	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.1	\$0.19	50%	\$0.38
Local stores, Kingsweston	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.02	80%	\$0.03
Other (Outside Study Area)																			
Aldi, Brock Way, Bradley Stoke	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.02		
Aldi, Church Road, Redfield	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.02		
Aldi, Greystoke Avenue, Southmead	\$0.0	\$0.0	\$0.2	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.31		
Aldi, Horseshoe Lane, Thornbury	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.05		
Aldi, North Street, Bedminster	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.08		
Asda, East Street, Bedminster, Bristol	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.17		
Asda, Highwood Lane, Patchway Supercentre, Cibbs Causeway	\$1.3	\$1.3	\$0.3	\$0.8	\$0.2	\$0.2	\$0.1	\$0.1	\$0.1	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$4.62		
Co-op, 106 - 114 Gloucester Road, Bishopston (In Texaco Petrol S)	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.00		
Co-op, 117 - 121 Gloucester Road, Bishopston (Close to Barclays)	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.00		
Co-op, Henleaze Road, Henleaze	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.02		
Co-op, Filton Road, Horfield, Bristol	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.00		
Co-op, Filton Avenue, Horfield, Bristol	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.00		
Co-op, 335 Gloucester Road, Horfield (Next to Btreed)	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.00		
Co-op, Station Road, Hill	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.03		
Co-op, Wyncham Way, Portishead	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.04		
Co-op, Cantford Lane, Westbury-on-Trym	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.07		
Co-op, Falcondale Road, Westbury-on-Trym	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.02		
Co-op, Stoke Lane, Westbury-on-Trym	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.2	\$0.0	\$0.0	\$0.0	\$0.3	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.72		
Costco, St Brendans Way, Avonmouth	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.04		
Costcutter, Sandypark Road, Brislington	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.02		
Farmfoods, Locking Road, Weston-super-Mare	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.03		
Iceland, Arniside Road, Southmead	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.07		
Lidl, Sheene Road, Bedminster	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.00		
Lidl, Great Western Road, Clevedon	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.03		
Lidl, Harbour Road, Portishead	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.02		
Lidl, Southmead Road, Westbury on Trym	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.21		
M&S Food Hall, Broadmead, Bristol	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.09		
M&S Food Hall, Cibbs Causeway	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.07		
Morrisons, Pier Street, Burnham On Sea	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.04		
Morrisons, Lysander Road, Cibbs Causeway	\$0.6	\$0.2	\$0.1	\$0.7	\$0.3	\$0.3	\$0.0	\$0.3	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.1	\$2.82		
Sainsbury's Local, Broad Quay, Bristol	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.05		
Sainsbury's Local, Broadmead, Bristol	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.02		
Sainsbury's Local, 2 - 4 Gloucester Road, Bishopston, Bristol (Opp)	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.05		
Sainsbury's Local, Whiteladies Road, Clifton Down	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.28		
Sainsbury's Local, 256 - 258 Gloucester Road, Horfield (Down from	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.05		
Sainsbury's, Winterstoke Road, Ashton Vale	\$0.2	\$0.1	\$0.2	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.76		
Sainsbury's, St. Philips Causeway, Amos Vale	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.04		
Sainsbury's, Queens Road, Dingles, Clifton	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.07		

TABLE 4c: TURNOVER OF CONVENIENCE GOODS SHOPPING FACILITIES, 2018

STORE / CENTRE	MAIN FOOD SHOPPING								TOP-UP FOOD SHOPPING								STUDY AREA TOTAL (\$m)	% FROM STUDY AREA	TOTAL TURNOVER (\$m)
	FIRST CHOICE				SECOND CHOICE				FIRST CHOICE				SECOND CHOICE						
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4			
	\$8.1	\$4.4	\$6.3	\$7.0					\$2.3	\$1.7	\$2.1	\$2.3	\$0.9	\$0.7	\$0.9	\$0.9			
	72%	74%	66%	67%					\$1.4	\$1.0	\$1.3	\$1.4							
	\$5.8	\$4.7	\$4.2	\$4.7															
	\$4.1	\$3.3	\$2.9	\$3.3	\$1.8	\$1.4	\$1.2	\$1.4											
Ridgingleaze																			
Premier, Ridgingleaze, Lawrence Weston	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.03	80%	\$0.03
Co-op, Ridgingleaze, Lawrence Weston	\$0.1	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.2	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.44	80%	\$0.55
Costcutter, Ridgingleaze, Lawrence Weston	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.18	80%	\$0.18
Ridgingleaze (Lawrence Weston)	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.32	80%	\$0.40
Local stores, Lawrence Weston	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.10	80%	\$0.13
Sub-Total	\$0.3	\$0.0	\$0.0	\$0.0	\$0.2	\$0.0	\$0.0	\$0.0	\$0.4	\$0.0	\$0.0	\$0.0	\$0.2	\$0.0	\$0.0	\$0.0	\$1.1		\$1.3
Crow Lane																			
Iceland, Crow Lane, Henbury	\$0.0	\$0.0	\$0.0	\$0.1	\$0.1	\$0.1	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.1	\$0.69	50%	\$1.38
Aldi, Crow Lane, Henbury	\$0.2	\$0.4	\$0.0	\$0.2	\$0.2	\$0.1	\$0.1	\$0.3	\$0.1	\$0.1	\$0.0	\$0.1	\$0.1	\$0.0	\$0.0	\$0.1	\$2.02	50%	\$4.04
Co-op, Crow Lane, Henbury	\$0.0	\$0.0	\$0.0	\$0.3	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.4	\$0.0	\$0.0	\$0.0	\$0.2	\$1.10	50%	\$2.20
Crow Lane (Henbury)	\$0.0	\$0.0	\$0.0	\$0.3	\$0.0	\$0.1	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.2	\$0.70	50%	\$1.40
Sub-Total	\$0.2	\$0.4	\$0.1	\$0.9	\$0.3	\$0.3	\$0.1	\$0.5	\$0.1	\$0.1	\$0.1	\$0.8	\$0.1	\$0.0	\$0.0	\$0.5	\$4.5		\$9.0
Avonmouth																			
Co-op, Avonmouth Road, Avonmouth	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.28	80%	\$0.35
Local stores, Avonmouth	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.08	90%	\$0.09
Sub-Total	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.2	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.4		\$0.4
Shirehampton Road																			
Shirehampton Road (Sea Mills)	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.12	65%	\$0.19
Co-op, Shirehampton Road, Sea Mills	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.22	65%	\$0.33
Local stores, Sea Mills	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.04	65%	\$0.04
Sub-Total	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.4		\$0.6
Shirehampton																			
Co-op, High Street, Shirehampton	\$0.6	\$0.7	\$0.0	\$0.0	\$0.2	\$0.1	\$0.0	\$0.0	\$0.5	\$0.4	\$0.1	\$0.0	\$0.2	\$0.2	\$0.1	\$0.0	\$3.04	70%	\$4.35
Local stores, Shirehampton	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.2	\$0.1	\$0.0	\$0.0	\$0.86	70%	\$1.23
Sub-Total	\$0.7	\$0.7	\$0.0	\$0.0	\$0.2	\$0.2	\$0.0	\$0.0	\$0.7	\$0.6	\$0.1	\$0.0	\$0.3	\$0.3	\$0.1	\$0.0	\$3.9		\$5.6
Co-op, Station Road, Henbury	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.1	\$0.20	50%	\$0.40
Local stores, Kingsweston	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.03	80%	\$0.03
Other (Outside Study Area)																			
Aldi, Brock Way, Bradley Stoke	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.03		
Aldi, Church Road, Redfield	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.03		
Aldi, Greystoke Avenue, Southmead	\$0.0	\$0.0	\$0.3	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.34		
Aldi, Hoshoe Lane, Thornbury	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.05		
Aldi, North Street, Bedminster	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.09		
Asda, East Street, Bedminster, Bristol	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.08		
Asda, Highwood Lane, Patchway Supercentre, Cibbs Causeway	\$1.4	\$1.4	\$0.3	\$0.9	\$0.3	\$0.2	\$0.2	\$0.1	\$0.1	\$0.0	\$0.0	\$0.1	\$0.1	\$0.1	\$0.0	\$0.0	\$5.02		
Co-op, 106 - 114 Gloucester Road, Bishopston (In Texaco Petrol S	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.00		
Co-op, 117 - 121 Gloucester Road, Bishopston (Close to Barclays	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.00		
Co-op, Henleaze Road, Henleaze	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.03		
Co-op, Filton Road, Horfield, Bristol	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.00		
Co-op, Filton Avenue, Horfield, Bristol	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.00		
Co-op, 335 Gloucester Road, Horfield (Next to Btreed)	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.00		
Co-op, Station Road, Filton	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.03		
Co-op, Wyncham Way, Portishead	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.05		
Co-op, Cantford Lane, Westbury-on-Trym	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.18		
Co-op, Falcondale Road, Westbury-on-Trym	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.00		
Co-op, Stoke Lane, Westbury-on-Trym	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.2	\$0.0	\$0.0	\$0.0	\$0.4	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.77		
Costco, St Brendans Way, Avonmouth	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.04		
Costcutter, Sandypark Road, Brislington	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.02		
Farmfoods, Locking Road, Weston-super-Mare	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.03		
Iceland, Arniside Road, Southmead	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.00		
Lidl, Sheene Road, Bedminster	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.00		
Lidl, Great Western Road, Clevedon	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.03		
Lidl, Harbour Road, Portishead	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.03		
Lidl, Southmead Road, Westbury on Trym	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.23		
M&S Food Hall, Broadmead, Bristol	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.10		
M&S Food Hall, Cibbs Causeway	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.00		
Morrisons, Pier Street, Burnham On Sea	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.05		
Morrisons, Lysander Road, Cibbs Causeway	\$0.6	\$0.2	\$0.1	\$0.8	\$0.4	\$0.4	\$0.1	\$0.3	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.1	\$0.0	\$0.1	\$3.05		
Sainsbury's Local, Broad Quay, Bristol	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.05		
Sainsbury's Local, Broadmead, Bristol	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.03		
Sainsbury's Local, 2 - 4 Gloucester Road, Bishopston, Bristol (Opp	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.00		
Sainsbury's Local, Whiteladies Road, Clifton Down	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.30		
Sainsbury's Local, 256 - 258 Gloucester Road, Horfield (Down fro	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.05		
Sainsbury's, Winterstoke Road, Ashton Vale	\$0.2	\$0.1	\$0.3	\$0.0	\$0.0	\$0.1	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.83		
Sainsbury's, St. Philips Causeway, Amos Vale	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.04		
Sainsbury's, Queens Road, Dingles, Clifton	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.07		
Sainsbury's, Clifton Down Shopping Centre, Whiteladies Road, Cl	\$0.0	\$0.0	\$0.3	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.3	\$0.0	\$0.0	\$0.0	\$0.0					

TABLE 4d: TURNOVER OF CONVENIENCE GOODS SHOPPING FACILITIES, 2023

STORE / CENTRE	MAIN FOOD SHOPPING								TOP-UP FOOD SHOPPING								STUDY AREA TOTAL (\$m)	% FROM STUDY AREA	TOTAL TURNOVER (\$m)
	FIRST CHOICE				SECOND CHOICE				FIRST CHOICE				SECOND CHOICE						
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4			
	\$9.1	\$7.1	\$7.0	\$7.6					\$2.5	\$1.8	\$2.4	\$2.5	\$1.0	\$0.7	\$0.9	\$1.0			
	72%	74%	66%	67%					\$1.5	\$1.1	\$1.4	\$1.5							
	\$4.6	\$3.7	\$3.2	\$3.6	\$2.0	\$1.6	\$1.4	\$1.5											
Ridgingleaze																			
Premier, Ridgingleaze, Lawrence Weston	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.03	80%	\$0.04
Co-op, Ridgingleaze, Lawrence Weston	\$0.2	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.2	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.49	80%	\$0.62
Costcutter, Ridgingleaze, Lawrence Weston	\$0.1	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.20	80%	\$0.25
Ridgingleaze (Lawrence Weston)	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.2	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.36	80%	\$0.45
Local stores, Lawrence Weston	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.11	80%	\$0.14
Sub-Total	\$0.3	\$0.0	\$0.0	\$0.0	\$0.2	\$0.0	\$0.0	\$0.0	\$0.4	\$0.0	\$0.0	\$0.0	\$0.2	\$0.0	\$0.0	\$0.0	\$1.2		\$1.5
Crow Lane																			
Iceland, Crow Lane, Henbury	\$0.1	\$0.0	\$0.0	\$0.1	\$0.1	\$0.1	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.1	\$0.76	50%	\$1.51
Aldi, Crow Lane, Henbury	\$0.2	\$0.4	\$0.0	\$0.2	\$0.3	\$0.2	\$0.1	\$0.3	\$0.1	\$0.1	\$0.1	\$0.1	\$0.1	\$0.0	\$0.0	\$0.1	\$2.22	50%	\$4.45
Co-op, Crow Lane, Henbury	\$0.0	\$0.0	\$0.0	\$0.3	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.5	\$0.0	\$0.0	\$0.0	\$0.2	\$1.19	50%	\$2.38
Crow Lane (Henbury)	\$0.0	\$0.0	\$0.0	\$0.3	\$0.0	\$0.1	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.2	\$0.75	50%	\$1.51
Sub-Total	\$0.3	\$0.4	\$0.1	\$0.9	\$0.4	\$0.4	\$0.1	\$0.6	\$0.2	\$0.1	\$0.1	\$0.8	\$0.1	\$0.0	\$0.0	\$0.5	\$4.9		\$9.9
Avonmouth																			
Co-op, Avonmouth Road, Avonmouth	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.31	80%	\$0.38
Local stores, Avonmouth	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.07	90%	\$0.10
Sub-Total	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.2	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.4		\$0.5
Shirehampton Road																			
Shirehampton Road (Sea Mills)	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.14	65%	\$0.21
Co-op, Shirehampton Road, Sea Mills	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.24	65%	\$0.37
Local stores, Sea Mills	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.03	65%	\$0.05
Sub-Total	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.4		\$0.6
Shirehampton																			
Co-op, High Street, Shirehampton	\$0.7	\$0.8	\$0.0	\$0.0	\$0.2	\$0.2	\$0.0	\$0.0	\$0.5	\$0.5	\$0.1	\$0.0	\$0.2	\$0.2	\$0.1	\$0.0	\$3.39	70%	\$4.84
Local stores, Shirehampton	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.2	\$0.1	\$0.0	\$0.0	\$0.96	70%	\$1.37
Sub-Total	\$0.8	\$0.8	\$0.0	\$0.0	\$0.2	\$0.2	\$0.0	\$0.0	\$0.7	\$0.7	\$0.1	\$0.0	\$0.4	\$0.4	\$0.1	\$0.0	\$4.3		\$6.2
Co-op, Station Road, Henbury	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.1	\$0.22	50%	\$0.43
Local stores, Kingsweston	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.03	80%	\$0.04
Other (Outside Study Area)																			
Aldi, Brock Way, Bradley Stoke	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.03		
Aldi, Church Road, Redfield	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.03		
Aldi, Greystoke Avenue, Southmead	\$0.1	\$0.0	\$0.3	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.37		
Aldi, Horseshoe Lane, Thornbury	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.05		
Aldi, North Street, Bedminster	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.10		
Asda, East Street, Bedminster, Bristol	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.06		
Asda, Highwood Lane, Patchway Supercentre, Cibbs Causeway	\$1.6	\$1.6	\$0.3	\$0.9	\$0.3	\$0.3	\$0.2	\$0.1	\$0.1	\$0.0	\$0.0	\$0.1	\$0.1	\$0.1	\$0.0	\$0.0	\$5.56		
Co-op, 106 - 114 Gloucester Road, Bishopston (In Texaco Petrol S	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.00		
Co-op, 117 - 121 Gloucester Road, Bishopston (Close to Barclays	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.00		
Co-op, Henleaze Road, Henleaze	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.03		
Co-op, Filton Road, Horfield, Bristol	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.00		
Co-op, Filton Avenue, Horfield, Bristol	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.00		
Co-op, 335 Gloucester Road, Horfield (Next to Btreed)	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.00		
Co-op, Station Road, Filton	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.03		
Co-op, Wyncham Way, Portishead	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.05		
Co-op, Cantford Lane, Westbury-on-Trym	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.20		
Co-op, Falcondale Road, Westbury-on-Trym	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.00		
Co-op, Stoke Lane, Westbury-on-Trym	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.2	\$0.0	\$0.0	\$0.0	\$0.4	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.85		
Costco, St Brendan's Way, Avonmouth	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.05		
Costcutter, Sandypark Road, Brislington	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.03		
Farmfoods, Locking Road, Weston-super-Mare	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.03		
Iceland, Arniside Road, Southmead	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.00		
Lidl, Sheene Road, Bedminster	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.00		
Lidl, Great Western Road, Clevedon	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.03		
Lidl, Harbour Road, Portishead	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.03		
Lidl, Southmead Road, Westbury on Trym	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.25		
M&S Food Hall, Broadmead, Bristol	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.11		
M&S Food Hall, Cibbs Causeway	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.00		
Morrisons, Pier Street, Burnham On Sea	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.05		
Morrisons, Lysander Road, Cibbs Causeway	\$0.7	\$0.3	\$0.1	\$0.8	\$0.4	\$0.4	\$0.1	\$0.3	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.1	\$0.0	\$0.0	\$3.36		
Sainsbury's Local, Broad Quay, Bristol	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.05		
Sainsbury's Local, Broadmead, Bristol	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.03		
Sainsbury's Local, 2 - 4 Gloucester Road, Bishopston, Bristol (Opp	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.06		
Sainsbury's Local, Whiteladies Road, Clifton Down	\$0.0	\$0.1	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.32		
Sainsbury's Local, 256 - 258 Gloucester Road, Horfield (Down fro	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.05		
Sainsbury's, Winterstoke Road, Ashton Vale	\$0.3	\$0.1	\$0.3	\$0.1	\$0.0	\$0.1	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.92		
Sainsbury's, St. Philips Causeway, Amos Vale	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.05		
Sainsbury's, Queens Road, Dingles, Clifton	\$0.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.08		
Sainsbury's, Clifton Down Shopping Centre, Whiteladies Road, C	\$0.0	\$0.0	\$0.3	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.3	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.34		
Sainsbury's, The Village, Emerson Way, Emersons Green	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0</													

TABLE 5: BENCHMARK TURNOVER OF CONVENIENCE GOODS STORES IN STUDY AREA

	FLOORSPACE (sq m)			SALES DENSITY (£/sq m)	TOTAL BENCHMARK TURNOVER (£m)
	Gross	Net	Convenience		
Ridingleaze					
Co-op, Ridingleaze, Lawrence Weston		275	248	£7,530	£1.9
Local stores, Lawrence Weston	557	362	326	£4,500	£1.5
Sub-Total					£3.3
Crow Lane					
Iceland, Crow Lane, Henbury		266	266	£6,412	£1.7
Aldi, Crow Lane, Henbury		990	842	£7,273	£6.1
Co-op, Crow Lane, Henbury		628	565	£7,530	£4.3
Crow Lane (Henbury)	251	163	147	£4,500	£0.7
Sub-Total					£12.7
Avonmouth					
Co-op, Avonmouth Road, Avonmouth		199	179	£7,530	£1.3
Local stores, Avonmouth	548	356	321	£4,500	£1.4
Sub-Total					£2.8
Shirehampton Road					
Co-op, Shirehampton Road, Sea Mills		325	293	£7,530	£2.2
Sub-Total					£2.2
Shirehampton					
Co-op, High Street, Shirehampton		604	543	£7,530	£4.1
Local stores, Shirehampton	725	471	424	£4,500	£1.9
Sub-Total					£6.0
Co-op, Station Road, Henbury		287	258	£7,530	£1.9
Local stores, Kingsweston		200	180	£4,500	£0.8
TOTAL					£29.8

Notes:

Floorspace data provided by IGD and GOAD.

Sales densities for named operators taken from Verdict research data. Densities for other stores are GVA assumptions.

2011 PRICES

TABLE 6a: CONVENIENCE GOODS FLOORSPACE WITHIN STUDY AREA, 2013-2023 (constant market share)

	2013	2018	2023
Available convenience goods expenditure	£25.7	£27.8	£30.7
Expenditure drawn from study area	£9.6	£10.4	£11.5
Market share	37.4%	37.4%	37.4%
Expenditure inflow	£7.4	£8.0	£8.8
Total turnover potential	£17.0	£18.3	£20.2
Benchmark turnover of existing stores	£29.8	£29.8	£29.8
Residual expenditure	-£12.9	-£11.5	-£9.6
Indicative sales density for new convenience goods floorspace (£/sq m)	12000	12000	12000
Floorspace capacity (sq m net)	-1071	-956	-799

Notes:

Available convenience goods expenditure taken from Table 3.

Expenditure drawn from study area in 2013 taken from Table 4. For 2018 and 2023, expenditure drawn from the study area is dictated by market share level.

Expenditure inflow taken from Table 4 and assumed to remain at a constant proportion over the assessment period.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover of existing stores taken from Table 5.

Residual expenditure is total turnover potential minus benchmark turnover.

Sales density for new convenience goods floorspace is indicative of a large grocery operator such as Tesco, Sainsburys or Morrisons.

2011 PRICES

TABLE 6b: CONVENIENCE GOODS FLOORSAPCE WITHIN STUDY AREA, 2013-2023 (increase in market share)

	2013	2018	2023
Available convenience goods expenditure	£25.7	£27.8	£30.7
Expenditure drawn from study area	£9.6	£21.1	£23.3
Market share	37.4%	76.0%	76.0%
Expenditure inflow	£7.4	£10.9	£12.0
Total turnover potential	£17.0	£32.0	£35.3
Benchmark turnover of existing stores	£29.8	£29.8	£29.8
Residual expenditure	-£12.9	£2.2	£5.5
Indicative sales density for new convenience goods floorspace (£/sq m)	12000	12000	12000
Floorspace capacity (sq m net)	-1071	181	456

Notes:

Available convenience goods expenditure taken from Table 3.

Expenditure drawn from study area in 2013 taken from Table 4. For 2018 and 2023, expenditure drawn from the study area is dictated by market share level.

Market share of convenience goods shopping facilities within study area increased to reflect trading impact of new store at Ridingleaze.

Expenditure inflow taken from Table 4 and assumed to remain at a constant proportion over the assessment period.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover of existing stores taken from Table 5.

Residual expenditure is total turnover potential minus benchmark turnover.

Sales density for new convenience goods floorspace is indicative of a large grocery operator such as Tesco, Sainsburys or Morrisons.

2011 PRICES

TABLE 6c: CONVENIENCE GOODS FLOORSAPCE WITHIN STUDY AREA, 2013-2023 (increase in market share & 2013 equilibrium trading for existing stores)

	2013	2018	2023
Available convenience goods expenditure	£25.7	£27.8	£30.7
Expenditure drawn from study area	£22.4	£27.8	£30.7
Market share	87.1%	100%	100%
Expenditure inflow	£7.4	£10.9	£12.0
Total turnover potential	£29.8	£38.7	£42.7
Benchmark turnover of existing stores	£29.8	£29.8	£29.8
Residual expenditure	-£0.1	£8.8	£12.8
Indicative sales density for new convenience goods floorspace (£/sq m)	12000	12000	12000
Floorspace capacity (sq m net)	-5	737	1069

Notes:

Available convenience goods expenditure taken from Table 3.

Expenditure drawn from study area in 2013 taken from Table 4. For 2018 and 2023, expenditure drawn from the study area is dictated by market share level.

Market share of convenience goods shopping facilities within study area increased to reflect trading impact of new store at Ridingleaze.

Expenditure inflow taken from Table 4 and assumed to remain at a constant proportion over the assessment period.

Total turnover potential is the study area derived turnover plus expenditure inflow.

Benchmark turnover of existing stores taken from Table 5.

Residual expenditure is total turnover potential minus benchmark turnover.

Sales density for new convenience goods floorspace is indicative of a large grocery operator such as Tesco, Sainsburys or Morrisons.

2011 PRICES

TABLE 7: COMBINED TURNOVER OF CONVENIENCE GOODS SHOPPING FACILITIES, 2013

STORE / CENTRE	ZONE				STUDY AREA TOTAL (£m)	% FROM STUDY AREA	TOTAL TURNOVER (£m)
	1	2	3	4			
Ridingleaze							
Premier, Ridingleaze, Lawrence Weston	£0.0	£0.0	£0.0	£0.0	£0.02	80%	£0.03
Co-op, Ridingleaze, Lawrence Weston	£0.4	£0.0	£0.0	£0.0	£0.40	80%	£0.50
Costcutter, Ridingleaze, Lawrence Weston	£0.2	£0.0	£0.0	£0.0	£0.16	80%	£0.20
Ridingleaze (Lawrence Weston)	£0.3	£0.0	£0.0	£0.0	£0.29	80%	£0.36
Local stores, Lawrence Weston	£0.1	£0.0	£0.0	£0.0	£0.09	80%	£0.11
Sub-Total	£0.9	£0.0	£0.0	£0.0	£1.0		£1.2
Crow Lane							
Iceland, Crow Lane, Henbury	£0.2	£0.1	£0.0	£0.4	£0.64	50%	£1.28
Aldi, Crow Lane, Henbury	£0.6	£0.5	£0.1	£0.6	£1.86	50%	£3.73
Co-op, Crow Lane, Henbury	£0.0	£0.0	£0.0	£0.9	£1.04	50%	£2.08
Crow Lane (Henbury)	£0.0	£0.1	£0.0	£0.6	£0.66	50%	£1.32
Sub-Total	£0.8	£0.7	£0.2	£2.5	£4.2		£8.4
Avonmouth							
Co-op, Avonmouth Road, Avonmouth	£0.0	£0.3	£0.0	£0.0	£0.26	80%	£0.32
Local stores, Avonmouth	£0.0	£0.1	£0.0	£0.0	£0.07	90%	£0.08
Sub-Total	£0.0	£0.3	£0.0	£0.0	£0.3		£0.4
Shirehampton Road							
Shirehampton Road (Sea Mills)	£0.1	£0.0	£0.0	£0.0	£0.11	80%	£0.14
Co-op, Shirehampton Road, Sea Mills	£0.0	£0.0	£0.2	£0.0	£0.20	80%	£0.25
Local stores, Sea Mills	£0.0	£0.0	£0.0	£0.0	£0.03	80%	£0.03
Sub-Total	£0.1	£0.0	£0.2	£0.0	£0.3		£0.4
Shirehampton							
Co-op, High Street, Shirehampton	£1.3	£1.3	£0.2	£0.0	£2.78	70%	£3.97
Local stores, Shirehampton	£0.4	£0.3	£0.0	£0.0	£0.78	70%	£1.12
Sub-Total	£1.7	£1.7	£0.2	£0.0	£3.6		£5.1
Co-op, Station Road, Henbury	£0.0	£0.0	£0.0	£0.2	£0.19	60%	£0.31
Local stores, Kingsweston	£0.0	£0.0	£0.0	£0.0	£0.02	80%	£0.03
Other (Outside Study Area)							
Aldi, Brook Way, Bradley Stoke	£0.0	£0.0	£0.0	£0.0	£0.02		
Aldi, Church Road, Redfield	£0.0	£0.0	£0.0	£0.0	£0.02		
Aldi, Greystoke Avenue, Southmead	£0.0	£0.0	£0.2	£0.0	£0.31		
Aldi, Hosseshoe Lane, Thornbury	£0.0	£0.0	£0.0	£0.0	£0.05		
Aldi, North Street, Bedminster	£0.0	£0.0	£0.0	£0.0	£0.08		
Asda, East Street, Bedminster, Bristol	£0.0	£0.1	£0.0	£0.0	£0.11		
Asda, Highwood Lane, Patchway Supercentre, Cribbs Causeway	£1.6	£1.6	£0.5	£0.9	£4.62		
Co-op, 105 - 114 Gloucester Road, Bishopston (In Texaco Petrol St	£0.0	£0.0	£0.0	£0.0	£0.00		
Co-op, 117 - 121 Gloucester Road, Bishopston (Close to Barclays B	£0.0	£0.0	£0.0	£0.0	£0.00		
Co-op, Henleaze Road, Henleaze	£0.0	£0.0	£0.0	£0.0	£0.02		
Co-op, Filton Road, Horfield, Bristol	£0.0	£0.0	£0.0	£0.0	£0.00		
Co-op, Filton Avenue, Horfield, Bristol	£0.0	£0.0	£0.0	£0.0	£0.00		
Co-op, 335 Gloucester Road, Horfield (Next to Bettred)	£0.0	£0.0	£0.0	£0.0	£0.00		
Co-op, Station Road, Pill	£0.0	£0.0	£0.0	£0.0	£0.03		
Co-op, Wymaham Way, Portishead	£0.0	£0.0	£0.0	£0.0	£0.04		
Co-op, Canford Lane, Westbury-on-Trym	£0.0	£0.0	£0.0	£0.1	£0.17		
Co-op, Falcondale Road, Westbury-on-Trym	£0.0	£0.0	£0.0	£0.0	£0.02		
Co-op, Stoke Lane, Westbury-on-Trym	£0.0	£0.0	£0.7	£0.0	£0.72		
Costco, St Brendan's Way, Avonmouth	£0.0	£0.0	£0.0	£0.0	£0.04		
Costcutter, Sandypark Road, Brislington	£0.0	£0.0	£0.0	£0.0	£0.02		
Farmfoods, Locking Road, Weston-super-Mare	£0.0	£0.0	£0.0	£0.0	£0.03		
Iceland, Arnscliffe Road, Southmead	£0.0	£0.0	£0.1	£0.0	£0.07		
Lidl, Sheene Road, Bedminster	£0.0	£0.0	£0.0	£0.0	£0.00		
Lidl, Great Western Road, Clevedon	£0.0	£0.0	£0.0	£0.0	£0.03		
Lidl, Harbour Road, Portishead	£0.0	£0.0	£0.0	£0.0	£0.02		
Lidl, Southmead Road, Westbury on Trym	£0.0	£0.1	£0.1	£0.0	£0.21		
M&S Food Hall, Broadmead, Bristol	£0.0	£0.0	£0.0	£0.0	£0.09		
M&S Food Hall, Cribbs Causeway	£0.1	£0.0	£0.1	£0.1	£0.31		
Morrison's, Pier Street, Burnham-On-Sea	£0.0	£0.0	£0.0	£0.0	£0.04		
Morrison's, Lysander Road, Cribbs Causeway	£0.9	£0.6	£0.2	£1.0	£2.82		
Sainsbury's Local, Broad Quay, Bristol	£0.0	£0.0	£0.0	£0.0	£0.05		
Sainsbury's Local, Broadmead, Bristol	£0.0	£0.0	£0.0	£0.0	£0.02		
Sainsbury's Local, 2 - 4 Gloucester Road, Bishopston, Bristol (Oppos	£0.0	£0.0	£0.0	£0.0	£0.05		
Sainsbury's Local, Whitehills Road, Clifton Down	£0.0	£0.1	£0.1	£0.1	£0.28		
Sainsbury's Local, 255 - 258 Gloucester Road, Horfield (Down from	£0.0	£0.0	£0.0	£0.0	£0.05		
Sainsbury's, Winterstoke Road, Ashton Vale	£0.2	£0.2	£0.3	£0.0	£0.76		
Sainsbury's, St. Phillips Causeway, Arnos Vale	£0.0	£0.0	£0.0	£0.0	£0.04		
Sainsbury's, Queens Road, Dingles, Clifton	£0.0	£0.0	£0.0	£0.0	£0.07		
Sainsbury's, Clifton Down Shopping Centre, Whitehills Road, Clif	£0.0	£0.0	£0.3	£0.1	£0.45		
Sainsbury's, The Village, Emerson Way, Emersons Green	£0.0	£0.0	£0.0	£0.0	£0.04		
Sainsbury's, Kings Chase Shopping Centre, Regent Street, Kingswa	£0.0	£0.0	£0.0	£0.0	£0.02		
Sainsbury's, The Shires Retail Park, Tachbrook Park Drive, Learning	£0.0	£0.0	£0.0	£0.0	£0.02		
Sainsbury's, Fox Den Road, Stoke Gifford	£0.1	£0.0	£0.1	£0.0	£0.13		
Tesco Extra, Bradley Stoke District Centre, Bradley Stoke	£0.1	£0.1	£0.0	£0.0	£0.14		
Tesco Extra, Callington Road, Brislington	£0.0	£0.0	£0.0	£0.0	£0.02		
Tesco Extra, Eastgate Road, Bristol	£0.0	£0.0	£0.0	£0.0	£0.02		
Tesco Superstore, Lime Tree Road, Bristol	£0.1	£0.1	£0.5	£0.3	£0.93		
Tesco Superstore, Kenn Road, Clevedon	£0.0	£0.0	£0.1	£0.0	£0.11		
Tesco Express, 171 Gloucester Road, Bishopston	£0.0	£0.0	£0.0	£0.0	£0.00		
Tesco Express, Filton Avenue, Horfield	£0.1	£0.0	£0.0	£0.1	£0.26		
Tesco Express, Greystoke Avenue, Southmead	£0.0	£0.0	£0.0	£0.0	£0.07		
Tesco Metro, Broadmead, Bristol	£0.0	£0.0	£0.1	£0.0	£0.09		
Waitrose, The Pavilion, Queens Road, Clifton	£0.0	£0.0	£0.0	£0.0	£0.03		
Waitrose, Harbour Road, Portishead	£0.1	£0.0	£0.0	£0.0	£0.14		
Waitrose, Northumbria Drive, Henleaze / Westbury Park	£0.1	£0.0	£0.9	£0.2	£1.22		
Bedminster	£0.0	£0.0	£0.0	£0.0	£0.03		
Bristol city centre	£0.0	£0.0	£0.0	£0.0	£0.03		
Bristol Docks	£0.0	£0.0	£0.0	£0.0	£0.00		
Cabot Circus	£0.0	£0.0	£0.0	£0.0	£0.00		
Clifton	£0.0	£0.0	£0.0	£0.0	£0.00		
Cribbs Causeway	£0.0	£0.0	£0.0	£0.0	£0.05		
Henleaze	£0.0	£0.0	£0.0	£0.1	£0.14		
Westbury Park (North View)	£0.0	£0.0	£0.0	£0.0	£0.00		
Arneside Road (Southmead)	£0.0	£0.0	£0.0	£0.0	£0.00		
Coldharbour Road (Westbury Park)	£0.0	£0.0	£0.0	£0.0	£0.00		
Filton Avenue	£0.0	£0.0	£0.0	£0.0	£0.00		
Filton Road	£0.0	£0.0	£0.0	£0.0	£0.00		
Gloucester Road	£0.0	£0.0	£0.1	£0.0	£0.09		
Southmead Road	£0.0	£0.0	£0.0	£0.0	£0.00		
Stoke Lane (Westbury on Trym)	£0.0	£0.0	£0.1	£0.0	£0.05		
Temple Meads	£0.0	£0.0	£0.0	£0.0	£0.00		
Whitehills Road	£0.0	£0.0	£0.0	£0.0	£0.00		
Local stores, Barton Hill	£0.0	£0.0	£0.0	£0.0	£0.02		
Local stores, Bradley Stoke	£0.0	£0.0	£0.0	£0.0	£0.00		
Local stores, Brentley	£0.0	£0.0	£0.0	£0.0	£0.00		
Local stores, Clevedon	£0.0	£0.0	£0.0	£0.0	£0.00		
Local stores, Clifton Down	£0.0	£0.0	£0.0	£0.0	£0.03		
Local stores, Coombe Dingle	£0.0	£0.0	£0.0	£0.0	£0.04		
Local stores, Golden Hill	£0.0	£0.0	£0.0	£0.0	£0.05		
Local stores, Henbury	£0.0	£0.0	£0.0	£0.4	£0.41		
Local stores, Portishead	£0.0	£0.0	£0.0	£0.0	£0.00		
Local stores, Redcliffe	£0.0	£0.0	£0.0	£0.0	£0.00		
Local stores, Southmead	£0.0	£0.0	£0.0	£0.0	£0.02		
Local stores, Stoke Bishop	£0.0	£0.0	£0.0	£0.0	£0.02		
Local stores, Westbury-on-Trym	£0.0	£0.0	£0.1	£0.1	£0.21		

Notes:

data taken from Table 4b

2011 PRICES

TABLE 8: COMBINED MARKET SHARE OF CONVENIENCE GOODS SHOPPING FACILITIES, 2013

STORE / CENTRE	ZONE			
	1	2	3	4
	57.3	15.9	55.9	56.7
Ridingleaze				
Premier, Ridingleaze, Lawrence Weston	0.3%	0.0%	0.0%	0.0%
Co-op, Ridingleaze, Lawrence Weston	4.8%	0.0%	0.8%	0.0%
Costcutter, Ridingleaze, Lawrence Weston	2.2%	0.0%	0.0%	0.0%
Ridingleaze (Lawrence Weston)	4.0%	0.0%	0.0%	0.0%
Local stores, Lawrence Weston	1.2%	0.0%	0.0%	0.0%
Sub-total	12.5%	0.0%	0.8%	0.0%
Crow Lane				
Iceland, Crow Lane, Henbury	2.2%	1.8%	0.4%	5.3%
Aldi, Crow Lane, Henbury	7.9%	9.3%	2.2%	9.2%
Co-op, Crow Lane, Henbury	0.3%	0.7%	0.7%	14.0%
Crow Lane (Henbury)	0.0%	0.0%	0.0%	9.1%
Sub-total	10.4%	12.7%	3.3%	37.6%
Avonmouth				
Co-op, Avonmouth Road, Avonmouth	0.0%	4.4%	0.0%	0.0%
Local stores, Avonmouth	0.0%	1.3%	0.0%	0.0%
Sub-total	0.0%	5.6%	0.0%	0.0%
Shirehampton Road				
Shirehampton Road (Sea Mills)	1.3%	0.3%	0.0%	0.0%
Co-op, Shirehampton Road, Sea Mills	0.0%	0.0%	3.4%	0.0%
Local stores, Sea Mills	0.0%	0.0%	0.4%	0.0%
Sub-total	1.3%	0.3%	3.9%	0.0%
Shirehampton				
Co-op, High Street, Shirehampton	17.4%	22.9%	2.8%	0.0%
Local stores, Shirehampton	6.0%	5.4%	0.4%	0.0%
Sub-total	23.4%	28.3%	3.2%	0.0%
Co-op, Station Road, Henbury	0.0%	0.0%	0.0%	2.8%
Local stores, Kingsweston	0.3%	0.0%	0.0%	0.0%
Other (Outside Study Area)				
Aldi, Brock Way, Bradley Stoke	0.0%	0.4%	0.0%	0.0%
Aldi, Church Road, Redfield	0.0%	0.0%	0.4%	0.0%
Aldi, Greystoke Avenue, Southmead	0.0%	0.0%	4.1%	0.4%
Aldi, Horseshoe Lane, Thornbury	0.0%	0.8%	0.0%	0.0%
Aldi, North Street, Bedminster	0.6%	0.0%	0.7%	0.0%
Asda, East Street, Bedminster, Bristol	0.3%	1.5%	0.0%	0.0%
Asda, Highwood Lane, Patchway Supercentre, Cribbs Causeway	22.4%	27.2%	8.0%	13.9%
Co-op, 106 - 114 Gloucester Road, Bishopston (In Texaco Petrol St)	0.0%	0.0%	0.0%	0.0%
Co-op, 117 - 121 Gloucester Road, Bishopston (Close to Barclays B)	0.0%	0.0%	0.0%	0.0%
Co-op, Henleaze Road, Henleaze	0.0%	0.4%	0.0%	0.0%
Co-op, Filton Road, Horfield, Bristol	0.0%	0.0%	0.0%	0.0%
Co-op, Filton Avenue, Horfield, Bristol	0.0%	0.0%	0.0%	0.0%
Co-op, 335 Gloucester Road, Horfield (Next to Belfred)	0.0%	0.0%	0.0%	0.0%
Co-op, Station Road, Pill	0.0%	0.0%	0.0%	0.4%
Co-op, Wyndham Way, Portishead	0.6%	0.0%	0.0%	0.0%
Co-op, Canford Lane, Westbury-on-Trym	0.4%	0.0%	0.8%	1.5%
Co-op, Falcondale Road, Westbury-on-Trym	0.0%	0.0%	0.4%	0.0%
Co-op, Stoke Lane, Westbury-on-Trym	0.0%	0.0%	12.2%	0.0%
Costco, St Brendan's Way, Avonmouth	0.0%	0.3%	0.4%	0.0%
Costcutter, Sandypark Road, Brislington	0.0%	0.0%	0.4%	0.0%
Farmfoods, Locking Road, Weston-super-Mare	0.4%	0.0%	0.0%	0.0%
Iceland, Arnside Road, Southmead	0.0%	0.0%	1.2%	0.0%
Lidl, Sheene Road, Bedminster	0.0%	0.0%	0.0%	0.0%
Lidl, Great Western Road, Clevedon	0.4%	0.0%	0.0%	0.0%
Lidl, Harbour Road, Portishead	0.3%	0.0%	0.0%	0.0%
Lidl, Southmead Road, Westbury on Trym	0.4%	1.4%	1.7%	0.0%
M&S Food Hall, Broadmead, Bristol	0.6%	0.0%	0.4%	0.4%
M&S Food Hall, Cribbs Causeway	1.1%	0.5%	1.1%	2.1%
Morrisons, Pier Street, Burnham On Sea	0.6%	0.0%	0.0%	0.0%
Morrisons, Lysander Road, Cribbs Causeway	12.9%	11.0%	3.2%	15.7%
Sainsbury's Local, Broad Quay, Bristol	0.0%	0.0%	0.8%	0.0%
Sainsbury's Local, Broadmead, Bristol	0.3%	0.0%	0.0%	0.0%
Sainsbury's Local, 2 - 4 Gloucester Road, Bishopston, Bristol (Oppos	0.0%	0.0%	0.4%	0.4%
Sainsbury's Local, Whiteladies Road, Clifton Down	0.0%	1.2%	1.9%	1.4%
Sainsbury's Local, 256 - 258 Gloucester Road, Horfield (Down from	0.0%	0.8%	0.0%	0.0%
Sainsbury's, Winterstoke Road, Ashton Vale	3.4%	2.7%	5.3%	0.7%
Sainsbury's, St. Philips Causeway, Arnos Vale	0.0%	0.0%	0.7%	0.0%
Sainsbury's, Queens Road, Dingles, Clifton	0.0%	0.0%	0.4%	0.7%
Sainsbury's, Clifton Down Shopping Centre, Whiteladies Road, Clif	0.6%	0.0%	5.7%	1.1%
Sainsbury's, The Village, Emerson Way, Emersons Green	0.0%	0.0%	0.7%	0.0%
Sainsbury's, Kings Chase Shopping Centre, Regent Street, Kingswa	0.0%	0.0%	0.4%	0.0%
Sainsbury's, The Shires Retail Park, Tachbrook Park Drive, Learningf	0.0%	0.0%	0.4%	0.0%
Sainsbury's, Fox Den Road, Stoke Gifford	1.0%	0.0%	1.1%	0.0%
Tesco Extra, Bradley Stoke District Centre, Bradley Stoke	1.0%	1.2%	0.0%	0.0%
Tesco Extra, Collington Road, Brislington	0.0%	0.0%	0.4%	0.0%
Tesco Extra, Eastgate Road, Bristol	0.0%	0.3%	0.0%	0.0%
Tesco Superstore, Lime Trees Road, Bristol	0.9%	0.9%	9.1%	4.2%
Tesco Superstore, Kenn Road, Clevedon	0.6%	0.0%	1.1%	0.0%
Tesco Express, 171 Gloucester Road, Bishopston	0.0%	0.0%	0.0%	0.0%
Tesco Express, Filton Avenue, Horfield	0.7%	0.5%	0.7%	2.0%
Tesco Express, Greystoke Avenue, Southmead	0.0%	0.0%	0.7%	0.4%
Tesco Metro, Broadmead, Bristol	0.0%	0.3%	1.2%	0.0%
Waitrose, The Pavillion, Queens Road, Clifton	0.0%	0.0%	0.4%	0.0%
Waitrose, Harbour Road, Portishead	1.0%	0.6%	0.4%	0.0%
Waitrose, Northumbria Drive, Henleaze / Westbury Park	1.2%	0.5%	15.3%	3.0%
Bedminster	0.0%	0.0%	0.0%	0.4%
Bristol city centre	0.0%	0.0%	0.0%	0.4%
Bristol Docks	0.0%	0.0%	0.0%	0.0%
Cabot Circus	0.0%	0.0%	0.0%	0.0%
Clifton	0.0%	0.0%	0.0%	0.0%
Cribbs Causeway	0.0%	0.5%	0.0%	0.4%
Henleaze	0.0%	0.0%	0.8%	1.4%
Westbury Park (North View)	0.0%	0.0%	0.0%	0.0%
Arnside Road (Southmead)	0.0%	0.0%	0.0%	0.0%
Caldharbour Road (Westbury Park)	0.0%	0.0%	0.0%	0.0%
Filton Avenue	0.0%	0.0%	0.0%	0.0%
Filton Road	0.0%	0.0%	0.0%	0.0%
Gloucester Road	0.0%	0.0%	1.5%	0.0%
Southmead Road	0.0%	0.0%	0.0%	0.0%
Stoke Lane (Westbury on Trym)	0.0%	0.0%	0.9%	0.0%
Temple Meads	0.0%	0.0%	0.0%	0.0%
Whiteladies Road	0.0%	0.0%	0.0%	0.0%
Local stores, Barton Hill	0.0%	0.0%	0.4%	0.0%
Local stores, Bradley Stoke	0.0%	0.0%	0.0%	0.0%
Local stores, Brentnry	0.0%	0.0%	0.0%	0.0%
Local stores, Clevedon	0.0%	0.0%	0.0%	0.0%
Local stores, Clifton Down	0.0%	0.0%	0.0%	0.4%
Local stores, Coomba Dingle	0.0%	0.0%	0.8%	0.0%
Local stores, Golden Hill	0.0%	0.0%	0.0%	0.7%
Local stores, Henbury	0.0%	0.0%	0.4%	5.8%
Local stores, Portishead	0.0%	0.0%	0.0%	0.0%
Local stores, Redcliffe	0.0%	0.0%	0.0%	0.0%
Local stores, Southmead	0.0%	0.0%	0.4%	0.0%
Local stores, Stoke Bishop	0.0%	0.0%	0.4%	0.0%
Local stores, Westbury-on-Trym	0.0%	0.0%	1.6%	1.8%

Notes:

Market shares calculated by expressing turnover levels in Table 7 as a proportion of total available convenience goods expenditure within each zone.

TABLE 9: % TRADE DIVERSION TO PROPOSED SUPERMARKET, RIDINGLEAZE

STORE / CENTRE	ZONE			
	1	2	3	4
Ridingleaze				
Premier, Ridingleaze, Lawrence Weston	0.4%	0.0%	0.0%	0.0%
Co-op, Ridingleaze, Lawrence Weston	6.0%	0.0%	1.5%	0.0%
Costcutter, Ridingleaze, Lawrence Weston	2.7%	0.0%	0.0%	0.0%
Ridingleaze (Lawrence Weston)	4.9%	0.0%	0.0%	0.0%
Local stores, Lawrence Weston	1.6%	0.0%	0.0%	0.0%
Sub-Total	15.6%	0.0%	1.5%	0.0%
Crow Lane				
Iceland, Crow Lane, Henbury	0.4%	0.4%	0.1%	1.5%
Aldi, Crow Lane, Henbury	3.9%	4.9%	1.7%	6.6%
Co-op, Crow Lane, Henbury	0.1%	0.2%	0.2%	4.0%
Crow Lane (Henbury)	0.0%	0.2%	0.0%	2.6%
Sub-Total	4.4%	5.7%	2.0%	14.8%
Avonmouth				
Co-op, Avonmouth Road, Avonmouth	0.0%	0.9%	0.0%	0.0%
Local stores, Avonmouth	0.0%	0.3%	0.0%	0.0%
Sub-Total	0.0%	1.2%	0.0%	0.0%
Shirehampton Road				
Shirehampton Road (Sea Mills)	0.3%	0.1%	0.0%	0.0%
Co-op, Shirehampton Road, Sea Mills	0.0%	0.0%	1.1%	0.0%
Local stores, Sea Mills	0.0%	0.0%	0.1%	0.0%
Sub-Total	0.3%	0.1%	1.2%	0.0%
Shirehampton				
Co-op, High Street, Shirehampton	13.0%	18.2%	3.2%	0.0%
Local stores, Shirehampton	1.2%	1.1%	0.1%	0.0%
Sub-Total	14.2%	19.4%	3.3%	0.0%
Co-op, Station Road, Henbury	0.0%	0.0%	0.0%	0.8%
Local stores, Kingsweston	0.1%	0.0%	0.0%	0.0%
Other (Outside Study Area)				
Aldi, Brock Way, Bradley Stoke	0.0%	0.2%	0.0%	0.0%
Aldi, Church Road, Redfield	0.0%	0.0%	0.3%	0.0%
Aldi, Greystoke Avenue, Southmead	0.3%	0.0%	3.1%	0.3%
Aldi, Horseshoe Lane, Thornbury	0.0%	0.4%	0.0%	0.0%
Aldi, North Street, Bedminster	0.3%	0.0%	0.5%	0.0%
Asda, East Street, Bedminster, Bristol	0.4%	2.5%	0.0%	0.0%
Asda, Highwood Lane, Patchway Supercentre, Cribbs Causeway	33.4%	43.2%	18.4%	30.0%
Co-op, 106 - 114 Gloucester Road, Bishopston (In Texaco Petrol St)	0.0%	0.0%	0.0%	0.0%
Co-op, 117 - 121 Gloucester Road, Bishopston (Close to Barclays B)	0.0%	0.0%	0.0%	0.0%
Co-op, Henleaze Road, Henleaze	0.0%	0.1%	0.0%	0.0%
Co-op, Filton Road, Horfield, Bristol	0.0%	0.0%	0.0%	0.0%
Co-op, Filton Avenue, Horfield, Bristol	0.0%	0.0%	0.0%	0.0%
Co-op, 335 Gloucester Road, Horfield (Next to Belfred)	0.0%	0.0%	0.0%	0.0%
Co-op, Station Road, Pill	0.0%	0.0%	0.0%	0.1%
Co-op, Wyncham Way, Portishead	0.1%	0.0%	0.0%	0.0%
Co-op, Canford Lane, Westbury-on-Trym	0.1%	0.0%	0.2%	0.4%
Co-op, Falcondale Road, Westbury-on-Trym	0.0%	0.0%	0.1%	0.0%
Co-op, Stoke Lane, Westbury-on-Trym	0.0%	0.0%	3.8%	0.0%
Costco, St Brendan's Way, Avonmouth	0.0%	0.1%	0.1%	0.0%
Costcutter, Sandypark Road, Brislington	0.0%	0.0%	0.1%	0.0%
Farmfoods, Locking Road, Weston-super-Mare	0.1%	0.0%	0.0%	0.0%
Iceland, Arnside Road, Southmead	0.0%	0.0%	0.4%	0.0%
Lidl, Sheene Road, Bedminster	0.0%	0.0%	0.0%	0.0%
Lidl, Great Western Road, Clevedon	0.1%	0.0%	0.0%	0.0%
Lidl, Harbour Road, Portishead	0.1%	0.0%	0.0%	0.0%
Lidl, Southmead Road, Westbury on Trym	0.1%	0.3%	0.5%	0.0%
M&S Food Hall, Broadmead, Bristol	0.3%	0.0%	0.3%	0.3%
M&S Food Hall, Cribbs Causeway	0.5%	0.2%	0.8%	1.5%
Morrisons, Pier Street, Burnham On Sea	0.1%	0.0%	0.0%	0.0%
Morrisons, Lysander Road, Cribbs Causeway	19.2%	17.5%	7.4%	34.0%
Sainsbury's Local, Broad Quay, Bristol	0.0%	0.0%	0.2%	0.0%
Sainsbury's Local, Broadmead, Bristol	0.1%	0.0%	0.0%	0.0%
Sainsbury's Local, 2 - 4 Gloucester Road, Bishopston, Bristol (Oppos	0.0%	0.0%	0.1%	0.1%
Sainsbury's Local, Whiteladies Road, Clifton Down	0.0%	0.3%	0.6%	0.4%
Sainsbury's Local, 256 - 258 Gloucester Road, Horfield (Down from	0.0%	0.2%	0.0%	0.0%
Sainsbury's, Winterstoke Road, Ashton Vale	5.0%	4.3%	12.1%	1.5%
Sainsbury's, St. Philips Causeway, Arnos Vale	0.0%	0.0%	1.0%	0.0%
Sainsbury's, Queens Road, Dingles, Clifton	0.0%	0.0%	0.1%	0.2%
Sainsbury's, Clifton Down Shopping Centre, Whiteladies Road, Clif	0.1%	0.0%	1.7%	0.3%
Sainsbury's, The Village, Emerson Way, Emersons Green	0.0%	0.0%	0.2%	0.0%
Sainsbury's, Kings Chase Shopping Centre, Regent Street, Kingswa	0.0%	0.0%	0.1%	0.0%
Sainsbury's, The Shires Retail Park, Tachbrook Park Drive, Leamingf	0.0%	0.0%	0.1%	0.0%
Sainsbury's, Fox Den Road, Stoke Gifford	1.5%	0.0%	2.5%	0.0%
Tesco Extra, Bradley Stoke District Centre, Bradley Stoke	1.5%	1.9%	0.0%	0.0%
Tesco Extra, Collington Road, Brislington	0.0%	0.0%	0.6%	0.0%
Tesco Extra, Eastgate Road, Bristol	0.0%	0.5%	0.0%	0.0%
Tesco Superstore, Lime Trees Road, Bristol	1.3%	1.4%	21.0%	9.1%
Tesco Superstore, Kenn Road, Clevedon	0.1%	0.0%	0.3%	0.0%
Tesco Express, 171 Gloucester Road, Bishopston	0.0%	0.0%	0.0%	0.0%
Tesco Express, Filton Avenue, Horfield	0.1%	0.1%	0.2%	0.6%
Tesco Express, Greystoke Avenue, Southmead	0.0%	0.0%	0.2%	0.1%
Tesco Metro, Broadmead, Bristol	0.0%	0.1%	0.4%	0.0%
Waitrose, The Pavillion, Queens Road, Clifton	0.0%	0.0%	0.1%	0.0%
Waitrose, Harbour Road, Portishead	0.2%	0.2%	0.1%	0.0%
Waitrose, Northumbria Drive, Henleaze / Westbury Park	0.6%	0.2%	11.7%	2.2%
Bedminster	0.0%	0.0%	0.0%	0.1%
Bristol city centre	0.0%	0.0%	0.0%	0.1%
Bristol Docks	0.0%	0.0%	0.0%	0.0%
Cabot Circus	0.0%	0.0%	0.0%	0.0%
Clifton	0.0%	0.0%	0.0%	0.0%
Cribbs Causeway	0.0%	0.1%	0.0%	0.1%
Henleaze	0.0%	0.0%	0.2%	0.4%
Westbury Park (North View)	0.0%	0.0%	0.0%	0.0%
Arnside Road (Southmead)	0.0%	0.0%	0.0%	0.0%
Caldharbour Road (Westbury Park)	0.0%	0.0%	0.0%	0.0%
Filton Avenue	0.0%	0.0%	0.0%	0.0%
Filton Road	0.0%	0.0%	0.0%	0.0%
Gloucester Road	0.0%	0.0%	0.5%	0.0%
Southmead Road	0.0%	0.0%	0.0%	0.0%
Stoke Lane (Westbury on Trym)	0.0%	0.0%	0.3%	0.0%
Temple Meads	0.0%	0.0%	0.0%	0.0%
Whiteladies Road	0.0%	0.0%	0.0%	0.0%
Local stores, Barton Hill	0.0%	0.0%	0.1%	0.0%
Local stores, Bradley Stoke	0.0%	0.0%	0.0%	0.0%
Local stores, Brentnry	0.0%	0.0%	0.0%	0.0%
Local stores, Clevedon	0.0%	0.0%	0.0%	0.0%
Local stores, Clifton Down	0.0%	0.0%	0.0%	0.1%
Local stores, Coomba Dingle	0.0%	0.0%	0.2%	0.0%
Local stores, Golden Hill	0.0%	0.0%	0.0%	0.2%
Local stores, Henbury	0.0%	0.0%	0.1%	1.7%
Local stores, Portishead	0.0%	0.0%	0.0%	0.0%
Local stores, Redcliffe	0.0%	0.0%	0.0%	0.0%
Local stores, Southmead	0.0%	0.0%	0.1%	0.0%
Local stores, Stoke Bishop	0.0%	0.0%	0.1%	0.0%
Local stores, Westbury-on-Trym	0.0%	0.0%	0.5%	0.5%

Notes:

Trade diversion levels are GVA predictions based upon existing shopping patterns, weighted to take into account location and trading style of competing facilities.

TABLE 10: TRADE DRAW TO PROPOSED SUPERMARKET, RIDINGLEAZE

STORE / CENTRE	ZONE				Inflow	TOTAL
	1	2	3	4		
Floorspace (sq m net)						1800
Convenience goods sales floorspace (sq m net)						1440
Sales density (£/sq m)						£12,000
Total convenience goods turnover (£m)						£17.3
Trade draw	30%	17%	21%	12%	20%	100.0%
Trade draw (£m)	£5.2	£2.9	£3.6	£2.1	£3.5	£17.3

Notes:

Assumed that 80% of total net sales area of new foodstore is devoted to convenience goods sales.

Sales density is indicative of full-line grocery retailers such as Sainsburys and Morrisons.

Pattern of trade draw is GVA assumptions based on size of study area.

2011 PRICES

TABLE 11: 5M TRADE DIVERSION TO PROPOSED SUPERMARKET, RIDINGLEAZE

STORE / CENTRE	ZONE				TOTAL
	1	2	3	4	
Ridingleaze					
Premier, Ridingleaze, Lawrence Weston	£0.0	£0.0	£0.0	£0.0	£0.02
Co-op, Ridingleaze, Lawrence Weston	£0.3	£0.0	£0.1	£0.0	£0.37
Costcutter, Ridingleaze, Lawrence Weston	£0.1	£0.0	£0.0	£0.0	£0.14
Ridingleaze (Lawrence Weston)	£0.3	£0.0	£0.0	£0.0	£0.26
Local stores, Lawrence Weston	£0.1	£0.0	£0.0	£0.0	£0.08
Sub-Total	£0.8	£0.0	£0.1	£0.0	£0.86
Crow Lane					
Iceland, Crow Lane, Henbury	£0.0	£0.0	£0.0	£0.0	£0.07
Aldi, Crow Lane, Henbury	£0.2	£0.1	£0.1	£0.1	£0.55
Co-op, Crow Lane, Henbury	£0.0	£0.0	£0.0	£0.1	£0.10
Crow Lane (Henbury)	£0.0	£0.0	£0.0	£0.1	£0.06
Sub-Total	£0.2	£0.2	£0.1	£0.3	£0.78
Avonmouth					
Co-op, Avonmouth Road, Avonmouth	£0.0	£0.0	£0.0	£0.0	£0.03
Local stores, Avonmouth	£0.0	£0.0	£0.0	£0.0	£0.01
Sub-Total	£0.0	£0.0	£0.0	£0.0	£0.04
Shirehampton Road					
Shirehampton Road (Sea Mills)	£0.0	£0.0	£0.0	£0.0	£0.02
Co-op, Shirehampton Road, Sea Mills	£0.0	£0.0	£0.0	£0.0	£0.04
Local stores, Sea Mills	£0.0	£0.0	£0.0	£0.0	£0.00
Sub-Total	£0.0	£0.0	£0.0	£0.0	£0.06
Shirehampton					
Co-op, High Street, Shirehampton	£0.7	£0.5	£0.1	£0.0	£1.32
Local stores, Shirehampton	£0.1	£0.0	£0.0	£0.0	£0.10
Sub-Total	£0.7	£0.6	£0.1	£0.0	£1.42
Co-op, Station Road, Henbury	£0.0	£0.0	£0.0	£0.0	£0.02
Local stores, Kingsweston	£0.0	£0.0	£0.0	£0.0	£0.00
Other (Outside Study Area)					
Aldi, Brock Way, Bradley Stoke	£0.0	£0.0	£0.0	£0.0	£0.01
Aldi, Church Road, Redfield	£0.0	£0.0	£0.0	£0.0	£0.01
Aldi, Greystoke Avenue, Southmead	£0.0	£0.0	£0.1	£0.0	£0.14
Aldi, Horseshoe Lane, Thornbury	£0.0	£0.0	£0.0	£0.0	£0.01
Aldi, North Street, Bedminster	£0.0	£0.0	£0.0	£0.0	£0.03
Asda, East Street, Bedminster, Bristol	£0.0	£0.1	£0.0	£0.0	£0.09
Asda, Highwood Lane, Patchway Supercentre, Cribbs Causeway	£1.7	£1.3	£0.7	£0.6	£4.29
Co-op, 106 - 114 Gloucester Road, Bishopston (In Texaco Petrol St)	£0.0	£0.0	£0.0	£0.0	£0.00
Co-op, 117 - 121 Gloucester Road, Bishopston (Close to Barclays B)	£0.0	£0.0	£0.0	£0.0	£0.00
Co-op, Henleaze Road, Henleaze	£0.0	£0.0	£0.0	£0.0	£0.00
Co-op, Filton Road, Horfield, Bristol	£0.0	£0.0	£0.0	£0.0	£0.00
Co-op, Filton Avenue, Horfield, Bristol	£0.0	£0.0	£0.0	£0.0	£0.00
Co-op, 335 Gloucester Road, Horfield (Next to Bettred)	£0.0	£0.0	£0.0	£0.0	£0.00
Co-op, Station Road, Pill	£0.0	£0.0	£0.0	£0.0	£0.00
Co-op, Wyncham Way, Portishead	£0.0	£0.0	£0.0	£0.0	£0.01
Co-op, Canford Lane, Westbury-on-Trym	£0.0	£0.0	£0.0	£0.0	£0.02
Co-op, Falcondale Road, Westbury-on-Trym	£0.0	£0.0	£0.0	£0.0	£0.00
Co-op, Stoke Lane, Westbury-on-Trym	£0.0	£0.0	£0.1	£0.0	£0.14
Costco, St Brendan's Way, Avonmouth	£0.0	£0.0	£0.0	£0.0	£0.01
Costcutter, Sandypark Road, Brislington	£0.0	£0.0	£0.0	£0.0	£0.00
Farmfoods, Locking Road, Weston-super-Mare	£0.0	£0.0	£0.0	£0.0	£0.00
Iceland, Arnside Road, Southmead	£0.0	£0.0	£0.0	£0.0	£0.01
Lidl, Sheene Road, Bedminster	£0.0	£0.0	£0.0	£0.0	£0.00
Lidl, Great Western Road, Clevedon	£0.0	£0.0	£0.0	£0.0	£0.00
Lidl, Harbour Road, Portishead	£0.0	£0.0	£0.0	£0.0	£0.00
Lidl, Southmead Road, Westbury on Trym	£0.0	£0.0	£0.0	£0.0	£0.03
M&S Food Hall, Broadmead, Bristol	£0.0	£0.0	£0.0	£0.0	£0.03
M&S Food Hall, Cribbs Causeway	£0.0	£0.0	£0.0	£0.0	£0.10
Morrisons, Pier Street, Burnham On Sea	£0.0	£0.0	£0.0	£0.0	£0.01
Morrisons, Lysander Road, Cribbs Causeway	£1.0	£0.5	£0.3	£0.7	£2.49
Sainsbury's Local, Broad Quay, Bristol	£0.0	£0.0	£0.0	£0.0	£0.01
Sainsbury's Local, Broadmead, Bristol	£0.0	£0.0	£0.0	£0.0	£0.00
Sainsbury's Local, 2 - 4 Gloucester Road, Bishopston, Bristol (Oppos	£0.0	£0.0	£0.0	£0.0	£0.01
Sainsbury's Local, Whiteladies Road, Clifton Down	£0.0	£0.0	£0.0	£0.0	£0.04
Sainsbury's Local, 256 - 258 Gloucester Road, Horfield (Down from	£0.0	£0.0	£0.0	£0.0	£0.00
Sainsbury's, Winterstoke Road, Ashton Vale	£0.3	£0.1	£0.4	£0.0	£0.86
Sainsbury's, St. Philips Causeway, Arnos Vale	£0.0	£0.0	£0.0	£0.0	£0.04
Sainsbury's, Queens Road, Dingles, Clifton	£0.0	£0.0	£0.0	£0.0	£0.01
Sainsbury's, Clifton Down Shopping Centre, Whiteladies Road, Clif	£0.0	£0.0	£0.1	£0.0	£0.08
Sainsbury's, The Village, Emerson Way, Emersons Green	£0.0	£0.0	£0.0	£0.0	£0.01
Sainsbury's, Kings Chase Shopping Centre, Regent Street, Kingswa	£0.0	£0.0	£0.0	£0.0	£0.00
Sainsbury's, The Shires Retail Park, Tachbrook Park Drive, Learningf	£0.0	£0.0	£0.0	£0.0	£0.00
Sainsbury's, Fox Den Road, Stoke Gifford	£0.1	£0.0	£0.1	£0.0	£0.17
Tesco Extra, Bradley Stoke District Centre, Bradley Stoke	£0.1	£0.1	£0.0	£0.0	£0.13
Tesco Extra, Callington Road, Brislington	£0.0	£0.0	£0.0	£0.0	£0.02
Tesco Extra, Eastgate Road, Bristol	£0.0	£0.0	£0.0	£0.0	£0.01
Tesco Superstore, Lime Trees Road, Bristol	£0.1	£0.0	£0.8	£0.2	£1.06
Tesco Superstore, Kenn Road, Clevedon	£0.0	£0.0	£0.0	£0.0	£0.02
Tesco Express, 171 Gloucester Road, Bishopston	£0.0	£0.0	£0.0	£0.0	£0.00
Tesco Express, Filton Avenue, Horfield	£0.0	£0.0	£0.0	£0.0	£0.03
Tesco Express, Greystoke Avenue, Southmead	£0.0	£0.0	£0.0	£0.0	£0.01
Tesco Metro, Broadmead, Bristol	£0.0	£0.0	£0.0	£0.0	£0.02
Waitrose, The Pavillion, Queens Road, Clifton	£0.0	£0.0	£0.0	£0.0	£0.00
Waitrose, Harbour Road, Portishead	£0.0	£0.0	£0.0	£0.0	£0.02
Waitrose, Northumbria Drive, Henleaze / Westbury Park	£0.0	£0.0	£0.4	£0.0	£0.51
Bedminster	£0.0	£0.0	£0.0	£0.0	£0.00
Bristol city centre	£0.0	£0.0	£0.0	£0.0	£0.00
Bristol Docks	£0.0	£0.0	£0.0	£0.0	£0.00
Cabot Circus	£0.0	£0.0	£0.0	£0.0	£0.00
Clifton	£0.0	£0.0	£0.0	£0.0	£0.00
Cribbs Causeway	£0.0	£0.0	£0.0	£0.0	£0.01
Henleaze	£0.0	£0.0	£0.0	£0.0	£0.02
Westbury Park (North View)	£0.0	£0.0	£0.0	£0.0	£0.00
Arnside Road (Southmead)	£0.0	£0.0	£0.0	£0.0	£0.00
Caldharbour Road (Westbury Park)	£0.0	£0.0	£0.0	£0.0	£0.00
Filton Avenue	£0.0	£0.0	£0.0	£0.0	£0.00
Filton Road	£0.0	£0.0	£0.0	£0.0	£0.00
Gloucester Road	£0.0	£0.0	£0.0	£0.0	£0.02
Southmead Road	£0.0	£0.0	£0.0	£0.0	£0.00
Stoke Lane (Westbury on Trym)	£0.0	£0.0	£0.0	£0.0	£0.01
Temple Meads	£0.0	£0.0	£0.0	£0.0	£0.00
Whiteladies Road	£0.0	£0.0	£0.0	£0.0	£0.00
Local stores, Barton Hill	£0.0	£0.0	£0.0	£0.0	£0.00
Local stores, Bradley Stoke	£0.0	£0.0	£0.0	£0.0	£0.00
Local stores, Brentnry	£0.0	£0.0	£0.0	£0.0	£0.00
Local stores, Clevedon	£0.0	£0.0	£0.0	£0.0	£0.00
Local stores, Clifton Down	£0.0	£0.0	£0.0	£0.0	£0.00
Local stores, Coombe Dingle	£0.0	£0.0	£0.0	£0.0	£0.01
Local stores, Golden Hill	£0.0	£0.0	£0.0	£0.0	£0.00
Local stores, Henbury	£0.0	£0.0	£0.0	£0.0	£0.04
Local stores, Portishead	£0.0	£0.0	£0.0	£0.0	£0.00
Local stores, Redcliffe	£0.0	£0.0	£0.0	£0.0	£0.00
Local stores, Southmead	£0.0	£0.0	£0.0	£0.0	£0.00
Local stores, Stoke Bishop	£0.0	£0.0	£0.0	£0.0	£0.00
Local stores, Westbury-on-Trym	£0.0	£0.0	£0.0	£0.0	£0.03

Notes:

financial diversion calculated by applying % diversion rates in Table 9 to 5m trade draw levels in Table 10.

TABLE 12: FINANCIAL IMPACT OF PROPOSED SUPERMARKET AT RIDINGLEAZE ON EXISTING STORES/CENTRES

STORE / CENTRE	TURNOVER		TRADE DIVERSION TO RIDINGLEAZE SUPERMARKET	RESIDUAL TURNOVER		IMPACT	
	2018	2023		2018	2023	2018	2023
Ridingleaze							
Premier, Ridingleaze, Lawrence Weston	£0.03	£0.04	£0.02	£0.01	£0.02	-63.6%	-56.8%
Co-op, Ridingleaze, Lawrence Weston	£0.55	£0.62	£0.37	£0.19	£0.25	-66.3%	-59.4%
Costcutter, Ridingleaze, Lawrence Weston	£0.22	£0.25	£0.14	£0.08	£0.11	-63.6%	-56.8%
Ridingleaze (Lawrence Weston)	£0.40	£0.45	£0.26	£0.15	£0.20	-63.6%	-56.8%
Local stores, Lawrence Weston	£0.13	£0.14	£0.08	£0.05	£0.06	-63.6%	-56.8%
Sub-Total	£1.33	£1.49	£0.86	£0.47	£0.63	-64.7%	-57.8%
Crow Lane							
Iceland, Crow Lane, Henbury	£1.38	£1.51	£0.07	£1.31	£1.44	-5.1%	-4.6%
Aldi, Crow Lane, Henbury	£4.04	£4.45	£0.55	£3.49	£3.90	-13.6%	-12.3%
Co-op, Crow Lane, Henbury	£2.20	£2.38	£0.10	£2.10	£2.28	-4.5%	-4.2%
Crow Lane (Henbury)	£1.40	£1.51	£0.06	£1.34	£1.45	-4.3%	-4.0%
Sub-Total	£9.01	£9.85	£0.78	£8.23	£9.07	-8.6%	-7.9%
Avonmouth							
Co-op, Avonmouth Road, Avonmouth	£0.35	£0.38	£0.03	£0.32	£0.36	-7.8%	-7.1%
Local stores, Avonmouth	£0.09	£0.10	£0.01	£0.08	£0.09	-8.8%	-7.9%
Sub-Total	£0.44	£0.48	£0.04	£0.40	£0.45	-8.0%	-7.2%
Shirehampton Road							
Shirehampton Road (Sea Mills)	£0.19	£0.21	£0.02	£0.18	£0.20	-8.0%	-7.1%
Co-op, Shirehampton Road, Sea Mills	£0.33	£0.37	£0.04	£0.30	£0.33	-11.5%	-10.4%
Local stores, Sea Mills	£0.04	£0.05	£0.00	£0.04	£0.04	-11.5%	-10.4%
Sub-Total	£0.57	£0.63	£0.06	£0.51	£0.57	-10.3%	-9.3%
Shirehampton							
Co-op, High Street, Shirehampton	£4.35	£4.84	£1.32	£3.03	£3.52	-30.4%	-27.3%
Local stores, Shirehampton	£1.23	£1.37	£0.10	£1.13	£1.27	-8.2%	-7.4%
Sub-Total	£5.58	£6.21	£1.42	£4.15	£4.78	-25.5%	-22.9%
Co-op, Station Road, Henbury	£0.40	£0.43	£0.02	£0.38	£0.41	-4.3%	-3.9%
Local stores, Kingsweston	£0.03	£0.04	£0.00	£0.03	£0.03	-10.2%	-9.1%
Other (Outside Study Area)							
Asda, Highwood Lane, Patchway Supercentre, Cribbs Causeway, Bristol			£4.29				
Co-op, Stoke Lane, Westbury-on-Trym			£0.14				
Morrisons, Lysander Road, Cribbs Causeway			£2.49				
Sainsbury's, Winterstoke Road, Ashton Vale			£0.86				
Sainsbury's, Fox Den Road, Stoke Gifford			£0.17				
Tesco Extra, Bradley Stoke District Centre, Bradley Stoke			£0.13				
Tesco Superstore, Lime Trees Road, Bristol			£1.06				

Notes:

pre-impact turnovers taken from Tables 4c and 4d

trade diversion to Lawrence Weston foodstore taken from Table 11

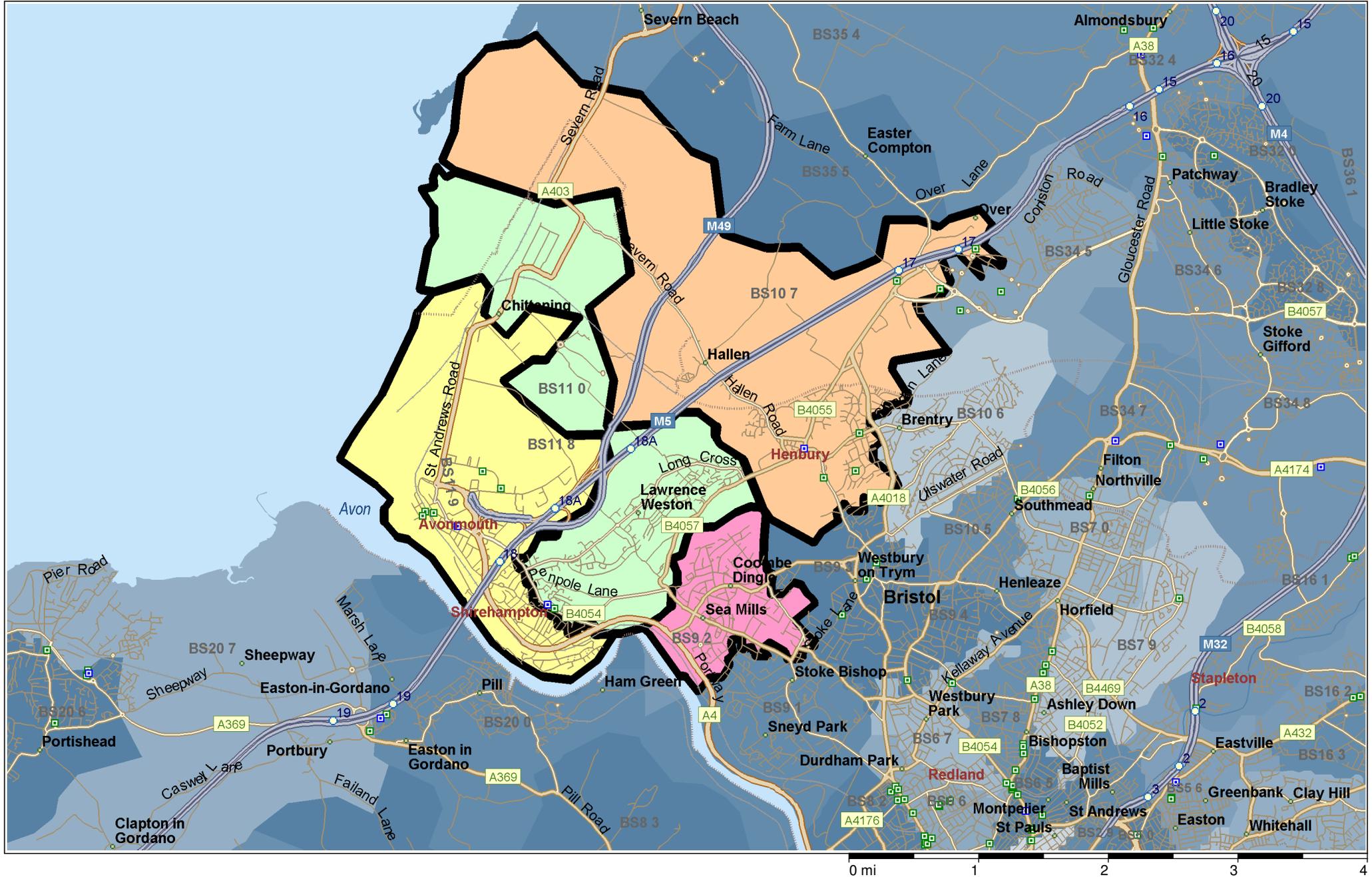
Residual turnover is pre-impact turnover minus trade diversion

% impact is difference between residual turnover and pre-impact turnover expressed as a percentage of pre-impact turnover

Appendix B:

Plan of study area

Study Area v1.2

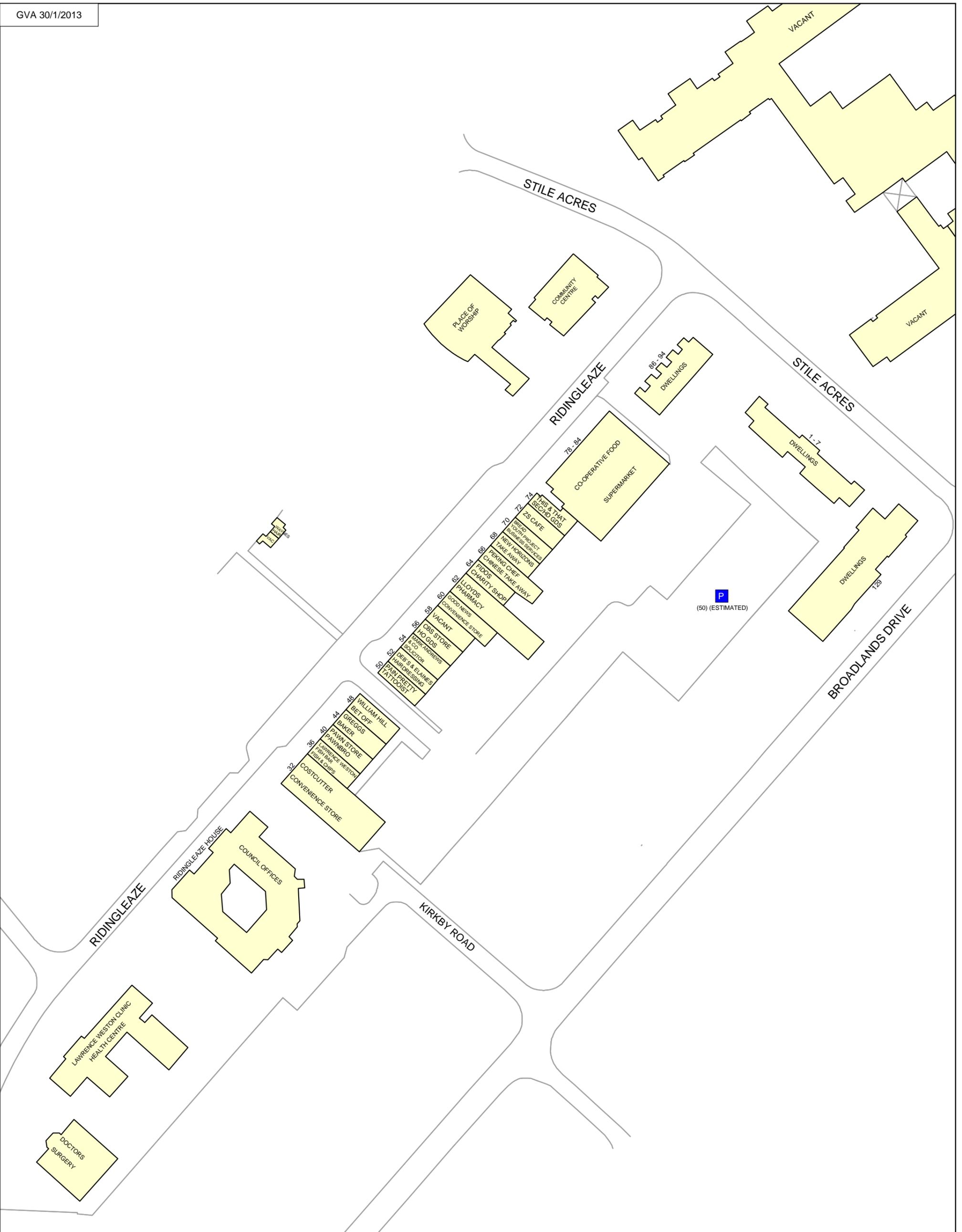




Appendix C:
GOAD plan for Ridingleaze



GVA 30/1/2013



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Appendix D:

GOAD plan for Crow Lane

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Appendix E:

GOAD plan for Shirehampton Road

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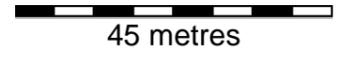
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Appendix F:

GOAD plan for Shirehampton

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45 metres



Appendix G:

GOAD plan for Avonmouth

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Appendix H:

Household survey results tabulations

Lawrence Weston Household Telephone Survey For GVA

	Total	Zone 1	Zone 2	Zone 3	Zone 4					
Q01 In which shop or shopping centre do you do most of your households main food shopping ?										
Aldi, Crow Lane, Henbury	5.7%	17	4.4%	4	11.4%	8	1.4%	1	5.7%	4
Aldi, Greystoke Avenue, Southmead	2.3%	7	1.1%	1	0.0%	0	8.6%	6	0.0%	0
Aldi, Horseshoe Lane, Thornbury	0.3%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Aldi, North Street, Bedminster	0.7%	2	1.1%	1	0.0%	0	1.4%	1	0.0%	0
Asda, East Street, Bedminster, Bristol	0.7%	2	0.0%	0	2.9%	2	0.0%	0	0.0%	0
Asda, Highwood Lane, Patchway Supercentre, Cribbs Causeway, Bristol	27.7%	83	32.2%	29	41.4%	29	10.0%	7	25.7%	18
Co-op, Avonmouth Road, Avonmouth	0.7%	2	0.0%	0	2.9%	2	0.0%	0	0.0%	0
Co-op, Crow Lane, Henbury	2.3%	7	0.0%	0	0.0%	0	1.4%	1	8.6%	6
Co-op, Ridingleaze, Lawrence Weston	1.0%	3	3.3%	3	0.0%	0	0.0%	0	0.0%	0
Co-op, Wyndham Way, Portishead	0.3%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Shirehampton Road, Sea Mills	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Co-op, High Street, Shirehampton	9.0%	27	14.4%	13	20.0%	14	0.0%	0	0.0%	0
Co-op, Canford Lane, Wesbury-on-Trym	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Co-op, Stoke Lane, Westbury-on-Trym	1.0%	3	0.0%	0	0.0%	0	4.3%	3	0.0%	0
Costcutter, Ridingleaze, Lawrence Weston	0.3%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Iceland, Crow Lane, Henbury	1.0%	3	1.1%	1	0.0%	0	0.0%	0	2.9%	2
M&S Food Hall, Cribbs Causeway	0.7%	2	0.0%	0	0.0%	0	1.4%	1	1.4%	1
Morrisons, Pier Street, Burnham On Sea	0.3%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Morrisons, Lysander Road, Cribbs Causeway	12.3%	37	14.4%	13	7.1%	5	4.3%	3	22.9%	16
Sainsbury's Local, Whiteladies Road, Clifton Down	1.3%	4	0.0%	0	1.4%	1	1.4%	1	2.9%	2
Sainsbury's Local, 256 - 258 Gloucester Road, Horfield (Down from Golden Lion Pub)	0.3%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Sainsbury's, Winterstoke Road, Ashton Vale	4.7%	14	5.6%	5	2.9%	2	8.6%	6	1.4%	1
Sainsbury's, St. Philips Causeway, Arnos Vale	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Sainsbury's, Queens Road, Dingles, Clifton	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Sainsbury's, Clifton Down Shopping Centre, Whiteladies Road, Clifton Down	2.3%	7	0.0%	0	0.0%	0	8.6%	6	1.4%	1
Sainsbury's, The Village, Emerson Way, Emersons Green	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Sainsbury's, Fox Den Road, Stoke Gifford	0.7%	2	1.1%	1	0.0%	0	1.4%	1	0.0%	0
Tesco Extra, Bradley Stoke District Centre, Bradley Stoke	0.7%	2	1.1%	1	1.4%	1	0.0%	0	0.0%	0
Tesco Superstore, Lime Trees Road, Bristol	5.7%	17	1.1%	1	0.0%	0	15.7%	11	7.1%	5
Tesco Superstore, Kenn Road, Clevedon	0.7%	2	1.1%	1	0.0%	0	1.4%	1	0.0%	0
Tesco Express, Filton Avenue, Horfield	0.7%	2	0.0%	0	0.0%	0	1.4%	1	1.4%	1
Tesco Express, Greystoke Avenue, Southmead	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Waitrose, Harbour Road, Portishead	0.7%	2	1.1%	1	1.4%	1	0.0%	0	0.0%	0

Lawrence Weston Household Telephone Survey For GVA

	Total	Zone 1	Zone 2	Zone 3	Zone 4
Waitrose, Northumbria Drive, Henleaze / Westbury Park	5.7% 17	2.2% 2	0.0% 0	18.6% 13	2.9% 2
Crow Lane (Henbury)	2.0% 6	0.0% 0	0.0% 0	0.0% 0	8.6% 6
Gloucester Road	0.3% 1	0.0% 0	0.0% 0	1.4% 1	0.0% 0
Ridingleaze (Lawrence Weston)	0.7% 2	2.2% 2	0.0% 0	0.0% 0	0.0% 0
Local stores, Golden Hill	0.3% 1	0.0% 0	0.0% 0	0.0% 0	1.4% 1
Local stores, Henbury	0.3% 1	0.0% 0	0.0% 0	0.0% 0	1.4% 1
Local stores, Shirehampton	0.7% 2	2.2% 2	0.0% 0	0.0% 0	0.0% 0
Internet / home delivery	2.7% 8	4.4% 4	1.4% 1	2.9% 2	1.4% 1
(Don't know)	0.7% 2	1.1% 1	1.4% 1	0.0% 0	0.0% 0
(Don't do this type of shopping)	0.7% 2	1.1% 1	1.4% 1	0.0% 0	0.0% 0
Base:	300	90	70	70	70

Lawrence Weston Household Telephone Survey For GVA

	Total	Zone 1		Zone 2		Zone 3		Zone 4		
Q02 Apart from the (STORE MENTIONED AT Q01) are there any other stores or place that you use regularly for a main food shopping trip?										
<i>Those who do main food shopping at Q01</i>										
Aldi, Church Road, Redfield	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Aldi, Crow Lane, Henbury	8.1%	24	9.0%	8	7.2%	5	2.9%	2	12.9%	9
Aldi, Greystoke Avenue, Southmead	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Asda, Highwood Lane, Patchway Supercentre, Cribbs Causeway, Bristol	8.4%	25	10.1%	9	11.6%	8	8.6%	6	2.9%	2
Co-op, Crow Lane, Henbury	1.3%	4	0.0%	0	1.4%	1	0.0%	0	4.3%	3
Co-op, Ridingleaze, Lawrence Weston	0.7%	2	1.1%	1	0.0%	0	1.4%	1	0.0%	0
Co-op, Shirehampton Road, Sea Mills	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Co-op, High Street, Shirehampton	3.7%	11	5.6%	5	7.2%	5	1.4%	1	0.0%	0
Co-op, Canford Lane, Wesbury-on-Trym	1.0%	3	1.1%	1	0.0%	0	1.4%	1	1.4%	1
Co-op, Stoke Lane, Westbury-on-Trym	2.3%	7	0.0%	0	0.0%	0	10.0%	7	0.0%	0
Costcutter, Ridingleaze, Lawrence Weston	0.7%	2	2.2%	2	0.0%	0	0.0%	0	0.0%	0
Farmfoods, Locking Road, Weston-super-Mare	0.3%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Iceland, Arnside Road, Southmead	1.0%	3	0.0%	0	0.0%	0	4.3%	3	0.0%	0
Iceland, Crow Lane, Henbury	3.0%	9	3.4%	3	4.3%	3	0.0%	0	4.3%	3
Lidl, Great Western Road, Clevedon	0.3%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Lidl, Southmead Road, Westbury on Trym	1.3%	4	1.1%	1	1.4%	1	2.9%	2	0.0%	0
M&S Food Hall, Cribbs Causeway	2.0%	6	2.2%	2	1.4%	1	1.4%	1	2.9%	2
Morrisons, Lysander Road, Cribbs Causeway	12.1%	36	13.5%	12	18.8%	13	2.9%	2	12.9%	9
Sainsbury's Local, Broad Quay, Bristol	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Sainsbury's Local, 2 - 4 Gloucester Road, Bishopston, Bristol (Opposite Prince of Wales Pub and Carphone Warehouse)	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Sainsbury's Local, Whiteladies Road, Clifton Down	0.7%	2	0.0%	0	1.4%	1	1.4%	1	0.0%	0
Sainsbury's, Winterstoke Road, Ashton Vale	1.7%	5	1.1%	1	2.9%	2	2.9%	2	0.0%	0
Sainsbury's, Clifton Down Shopping Centre, Whiteladies Road, Clifton Down	1.3%	4	1.1%	1	0.0%	0	4.3%	3	0.0%	0
Sainsbury's, The Shires Retail Park, Tachbrook Park Drive, Leamington Spa	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Sainsbury's, Fox Den Road, Stoke Gifford	0.7%	2	1.1%	1	0.0%	0	1.4%	1	0.0%	0
Tesco Extra, Bradley Stoke District Centre, Bradley Stoke	0.7%	2	1.1%	1	1.4%	1	0.0%	0	0.0%	0
Tesco Extra, Callington Road, Brislington	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Tesco Superstore, Lime Trees Road, Bristol	1.3%	4	0.0%	0	2.9%	2	1.4%	1	1.4%	1
Tesco Express, Filton Avenue, Horfield	1.3%	4	2.2%	2	1.4%	1	0.0%	0	1.4%	1
Tesco Express, Greystoke Avenue, Southmead	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Tesco Metro, Broadmead, Bristol	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Waitrose, Harbour Road,	0.7%	2	1.1%	1	0.0%	0	1.4%	1	0.0%	0

Lawrence Weston Household Telephone Survey For GVA

	Total	Zone 1	Zone 2	Zone 3	Zone 4					
Portishead										
Waitrose, Northumbria Drive, Henleaze / Westbury Park	3.7%	11	0.0%	0	1.4%	1	8.6%	6	5.7%	4
Bristol city centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Cribbs Causeway	0.7%	2	0.0%	0	1.4%	1	0.0%	0	1.4%	1
Henleaze	0.7%	2	0.0%	0	0.0%	0	1.4%	1	1.4%	1
Crow Lane (Henbury)	1.7%	5	0.0%	0	2.9%	2	0.0%	0	4.3%	3
Ridingleaze (Lawrence Weston)	0.3%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Shirehampton Road (Sea Mills)	0.7%	2	2.2%	2	0.0%	0	0.0%	0	0.0%	0
Local stores, Barton Hill	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Local stores, Henbury	1.0%	3	0.0%	0	0.0%	0	0.0%	0	4.3%	3
Local stores, Lawrence Weston	0.3%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Local stores, Shirehampton	0.7%	2	1.1%	1	1.4%	1	0.0%	0	0.0%	0
Local stores, Westbury-on-Trym	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Internet / home delivery	0.7%	2	0.0%	0	0.0%	0	1.4%	1	1.4%	1
(Don't know)	1.0%	3	2.2%	2	0.0%	0	0.0%	0	1.4%	1
(Nowhere else)	29.9%	89	32.6%	29	29.0%	20	28.6%	20	28.6%	20
Base:		298		89		69		70		70

Q03 When your household undertakes its main food shopping (AT STORE / CENTRE MENTIONED AT Q01), does it combine the trips with OTHER shopping, leisure or work activities? [PR]

Those who do main food shopping at Q01 AND Not those who shop via internet / home delivery

Always	4.1%	12	4.7%	4	1.5%	1	4.4%	3	5.8%	4
Normally	14.1%	41	9.4%	8	11.8%	8	19.1%	13	17.4%	12
Sometimes	15.2%	44	17.6%	15	14.7%	10	16.2%	11	11.6%	8
Rarely	10.3%	30	16.5%	14	8.8%	6	7.4%	5	7.2%	5
Never	55.9%	162	50.6%	43	63.2%	43	52.9%	36	58.0%	40
(Don't know)	0.3%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Base:		290		85		68		68		69

Lawrence Weston Household Telephone Survey For GVA

	Total	Zone 1	Zone 2	Zone 3	Zone 4					
Q04 Which town centre, freestanding store, or retail / leisure park does your household visit most often when it undertakes this combined / linked trip to OTHER facilities?										
<i>Those that do main food shopping and combine their shopping trip 'Sometimes', 'Normally' or 'Always' at Q03 AND not those that shop via internet / home delivery at Q01</i>										
Aldi, Brook Way, Bradley Stoke	1.0%	1	0.0%	0	5.3%	1	0.0%	0	0.0%	0
Aldi, Crow Lane, Henbury	1.0%	1	3.7%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Highwood Lane, Patchway Supercentre, Cribbs Causeway, Bristol	2.1%	2	0.0%	0	10.5%	2	0.0%	0	0.0%	0
Co-op, High Street, Shirehampton	1.0%	1	3.7%	1	0.0%	0	0.0%	0	0.0%	0
Morrisons, Lysander Road, Cribbs Causeway	6.2%	6	7.4%	2	15.8%	3	3.7%	1	0.0%	0
Sainsbury's Local, 2 - 4 Gloucester Road, Bishopston, Bristol (Opposite Prince of Wales Pub and Carphone Warehouse)	1.0%	1	3.7%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Fox Den Road, Stoke Gifford	1.0%	1	3.7%	1	0.0%	0	0.0%	0	0.0%	0
Waitrose, Northumbria Drive, Henleaze / Westbury Park	1.0%	1	0.0%	0	0.0%	0	3.7%	1	0.0%	0
Bedminster	1.0%	1	3.7%	1	0.0%	0	0.0%	0	0.0%	0
Bristol city centre	2.1%	2	3.7%	1	0.0%	0	0.0%	0	4.2%	1
Bristol Docks	1.0%	1	3.7%	1	0.0%	0	0.0%	0	0.0%	0
Cabot Circus	1.0%	1	0.0%	0	5.3%	1	0.0%	0	0.0%	0
Clifton	2.1%	2	0.0%	0	0.0%	0	3.7%	1	4.2%	1
Cribbs Causeway	34.0%	33	29.6%	8	31.6%	6	22.2%	6	54.2%	13
Henleaze	5.2%	5	0.0%	0	0.0%	0	18.5%	5	0.0%	0
Westbury Park (North View)	1.0%	1	0.0%	0	0.0%	0	3.7%	1	0.0%	0
Crow Lane (Henbury)	7.2%	7	7.4%	2	0.0%	0	7.4%	2	12.5%	3
Filton Road	1.0%	1	3.7%	1	0.0%	0	0.0%	0	0.0%	0
Gloucester Road	1.0%	1	0.0%	0	0.0%	0	0.0%	0	4.2%	1
Ridingleaze (Lawrence Weston)	1.0%	1	3.7%	1	0.0%	0	0.0%	0	0.0%	0
Shirehampton Road (Sea Mills)	1.0%	1	0.0%	0	0.0%	0	3.7%	1	0.0%	0
Southmead Road	1.0%	1	0.0%	0	0.0%	0	3.7%	1	0.0%	0
Stoke Lane (Westbury on Trym)	2.1%	2	0.0%	0	0.0%	0	7.4%	2	0.0%	0
Temple Meads	1.0%	1	0.0%	0	0.0%	0	3.7%	1	0.0%	0
Local stores, Bradley Stoke	1.0%	1	3.7%	1	0.0%	0	0.0%	0	0.0%	0
Local stores, Clevedon	1.0%	1	3.7%	1	0.0%	0	0.0%	0	0.0%	0
Local stores, Henbury	5.2%	5	3.7%	1	0.0%	0	0.0%	0	16.7%	4
Local stores, Portishead	1.0%	1	3.7%	1	0.0%	0	0.0%	0	0.0%	0
Local stores, Redcliffe	1.0%	1	0.0%	0	0.0%	0	3.7%	1	0.0%	0
Local stores, Shirehampton	7.2%	7	7.4%	2	26.3%	5	0.0%	0	0.0%	0
Local stores, Westbury-on-Trym	2.1%	2	0.0%	0	0.0%	0	3.7%	1	4.2%	1
(Don't know / varies)	4.1%	4	0.0%	0	5.3%	1	11.1%	3	0.0%	0
Base:		97		27		19		27		24

Lawrence Weston Household Telephone Survey For GVA

	Total	Zone 1	Zone 2	Zone 3	Zone 4					
Meanscore: [%]										
Q05 Thinking about your household's total expenditure on food and groceries (including milk deliveries, newspapers, cigarettes, etc) about what proportion do you spend in (STORE MENTIONED AT Q01)?										
<i>Those who do main food shopping at Q01</i>										
0-10%	1.0%	3	1.1%	1	0.0%	0	2.9%	2	0.0%	0
11-20%	2.0%	6	2.2%	2	0.0%	0	4.3%	3	1.4%	1
21-30%	3.4%	10	4.5%	4	0.0%	0	2.9%	2	5.7%	4
31-40%	3.4%	10	1.1%	1	5.8%	4	2.9%	2	4.3%	3
41-50%	10.4%	31	9.0%	8	11.6%	8	8.6%	6	12.9%	9
51-60%	6.0%	18	4.5%	4	4.3%	3	5.7%	4	10.0%	7
61-70%	9.4%	28	7.9%	7	10.1%	7	14.3%	10	5.7%	4
71-80%	22.8%	68	29.2%	26	20.3%	14	28.6%	20	11.4%	8
81-90%	19.1%	57	20.2%	18	20.3%	14	20.0%	14	15.7%	11
91-100%	12.8%	38	15.7%	14	17.4%	12	2.9%	2	14.3%	10
(Don't know)	9.1%	27	4.5%	4	8.7%	6	7.1%	5	17.1%	12
(Refused)	0.7%	2	0.0%	0	1.4%	1	0.0%	0	1.4%	1
<i>Mean:</i>		<i>69.6</i>		<i>71.8</i>		<i>73.6</i>		<i>65.5</i>		<i>66.9</i>
<i>Base:</i>		<i>298</i>		<i>89</i>		<i>69</i>		<i>70</i>		<i>70</i>

Lawrence Weston Household Telephone Survey For GVA

	Total	Zone 1	Zone 2	Zone 3	Zone 4					
Q06 Where do you do most of your household's shopping for small scale 'top-up' food shopping ?										
Aldi, Crow Lane, Henbury	4.7%	14	5.6%	5	4.3%	3	2.9%	2	5.7%	4
Asda, East Street, Bedminster, Bristol	0.3%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Highwood Lane, Patchway Supercentre, Cribbs Causeway, Bristol	2.7%	8	4.4%	4	1.4%	1	1.4%	1	2.9%	2
Co-op, Avonmouth Road, Avonmouth	2.3%	7	0.0%	0	10.0%	7	0.0%	0	0.0%	0
Co-op, Crow Lane, Henbury	5.3%	16	0.0%	0	1.4%	1	0.0%	0	21.4%	15
Co-op, Station Road, Henbury	1.0%	3	0.0%	0	0.0%	0	0.0%	0	4.3%	3
Co-op, Ridingleaze, Lawrence Weston	3.0%	9	8.9%	8	0.0%	0	1.4%	1	0.0%	0
Co-op, Station Road, Pill	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Co-op, Shirehampton Road, Sea Mills	1.3%	4	0.0%	0	0.0%	0	5.7%	4	0.0%	0
Co-op, High Street, Shirehampton	16.7%	50	25.6%	23	32.9%	23	5.7%	4	0.0%	0
Co-op, Canford Lane, Wesbury-on-Trym	0.7%	2	0.0%	0	0.0%	0	1.4%	1	1.4%	1
Co-op, Falcondale Road, Westbury-on-Trym	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Co-op, Stoke Lane, Westbury-on-Trym	5.0%	15	0.0%	0	0.0%	0	21.4%	15	0.0%	0
Costco, St Brendan's Way, Avonmouth	0.3%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Costcutter, Ridingleaze, Lawrence Weston	0.7%	2	2.2%	2	0.0%	0	0.0%	0	0.0%	0
Costcutter, Sandypark Road, Brislington	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Iceland, Crow Lane, Henbury	2.3%	7	2.2%	2	0.0%	0	1.4%	1	5.7%	4
Lidl, Southmead Road, Westbury on Trym	0.7%	2	0.0%	0	2.9%	2	0.0%	0	0.0%	0
M&S Food Hall, Broadmead, Bristol	1.0%	3	1.1%	1	0.0%	0	1.4%	1	1.4%	1
Morrisons, Lysander Road, Cribbs Causeway	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Sainsbury's Local, Broad Quay, Bristol	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Sainsbury's, Winterstoke Road, Ashton Vale	0.7%	2	0.0%	0	1.4%	1	1.4%	1	0.0%	0
Sainsbury's, Queens Road, Dingles, Clifton	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Sainsbury's, Clifton Down Shopping Centre, Whiteladies Road, Clifton Down	1.0%	3	1.1%	1	0.0%	0	1.4%	1	1.4%	1
Sainsbury's, Kings Chase Shopping Centre, Regent Street, Kingswood	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Tesco Extra, Eastgate Road, Bristol	0.3%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Tesco Superstore, Lime Trees Road, Bristol	1.0%	3	1.1%	1	0.0%	0	1.4%	1	1.4%	1
Tesco Superstore, Kenn Road, Clevedon	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Tesco Express, Filton Avenue, Horfield	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Tesco Metro, Broadmead, Bristol	0.7%	2	0.0%	0	1.4%	1	1.4%	1	0.0%	0
Waitrose, Northumbria Drive, Henleaze / Westbury Park	1.7%	5	0.0%	0	0.0%	0	7.1%	5	0.0%	0
Bedminster	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Henleaze	0.7%	2	0.0%	0	0.0%	0	1.4%	1	1.4%	1
Crow Lane (Henbury)	1.3%	4	0.0%	0	0.0%	0	0.0%	0	5.7%	4
Gloucester Road	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Ridingleaze (Lawrence Weston)	2.3%	7	7.8%	7	0.0%	0	0.0%	0	0.0%	0
Shirehampton Road (Sea Mills)	0.7%	2	1.1%	1	1.4%	1	0.0%	0	0.0%	0

Lawrence Weston Household Telephone Survey For GVA

	Total	Zone 1		Zone 2		Zone 3		Zone 4		
Local stores, Avonmouth	1.0%	3	0.0%	0	4.3%	3	0.0%	0	0.0%	0
Local stores, Clifton Down	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Local stores, Coombe Dingle	0.7%	2	0.0%	0	0.0%	0	2.9%	2	0.0%	0
Local stores, Henbury	2.3%	7	0.0%	0	0.0%	0	0.0%	0	10.0%	7
Local stores, Lawrence Weston	0.3%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Local stores, Shirehampton	6.3%	19	10.0%	9	14.3%	10	0.0%	0	0.0%	0
Local stores, Southmead	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Local stores, Stoke Bishop	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Local stores, Westbury-on-Trym	1.3%	4	0.0%	0	0.0%	0	2.9%	2	2.9%	2
Internet / home delivery (Don't know)	0.7%	2	1.1%	1	0.0%	0	1.4%	1	0.0%	0
(Don't do this type of shopping)	1.0%	3	1.1%	1	0.0%	0	2.9%	2	0.0%	0
(Don't do this type of shopping)	23.3%	70	24.4%	22	21.4%	15	18.6%	13	28.6%	20
Base:		300		90		70		70		70

Lawrence Weston Household Telephone Survey For GVA

	Total	Zone 1		Zone 2		Zone 3		Zone 4		
Q07 Apart from the (STORE MENTIONED AT Q06) are there any other places where you do your household's shopping for small scale 'top up' food shopping?										
<i>Those that do top up food shopping at Q06</i>										
Aldi, Brook Way, Bradley Stoke	0.4%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0
Aldi, Crow Lane, Henbury	2.6%	6	5.9%	4	0.0%	0	0.0%	0	4.0%	2
Asda, Highwood Lane, Patchway Supercentre, Cribbs Causeway, Bristol	2.2%	5	2.9%	2	3.6%	2	1.8%	1	0.0%	0
Co-op, Avonmouth Road, Avonmouth	0.9%	2	0.0%	0	3.6%	2	0.0%	0	0.0%	0
Co-op, Crow Lane, Henbury	2.6%	6	1.5%	1	0.0%	0	0.0%	0	10.0%	5
Co-op, Station Road, Henbury	1.3%	3	0.0%	0	0.0%	0	0.0%	0	6.0%	3
Co-op, Henleaze Road, Henleaze	0.4%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0
Co-op, Ridingleaze, Lawrence Weston	0.9%	2	2.9%	2	0.0%	0	0.0%	0	0.0%	0
Co-op, Shirehampton Road, Sea Mills	0.9%	2	0.0%	0	0.0%	0	3.5%	2	0.0%	0
Co-op, High Street, Shirehampton	7.0%	16	8.8%	6	14.5%	8	3.5%	2	0.0%	0
Co-op, Stoke Lane, Westbury-on-Trym	1.7%	4	0.0%	0	0.0%	0	7.0%	4	0.0%	0
Costco, St Brendan's Way, Avonmouth	0.4%	1	0.0%	0	0.0%	0	1.8%	1	0.0%	0
Costcutter, Ridingleaze, Lawrence Weston	0.4%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Iceland, Crow Lane, Henbury	1.3%	3	0.0%	0	1.8%	1	0.0%	0	4.0%	2
Lidl, Harbour Road, Portishead	0.4%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Lidl, Southmead Road, Westbury on Trym	1.3%	3	0.0%	0	1.8%	1	3.5%	2	0.0%	0
M&S Food Hall, Broadmead, Bristol	0.4%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0
M&S Food Hall, Cribbs Causeway	0.9%	2	1.5%	1	0.0%	0	0.0%	0	2.0%	1
Morrisons, Lysander Road, Cribbs Causeway	3.0%	7	2.9%	2	5.5%	3	0.0%	0	4.0%	2
Premier, Ridingleaze, Lawrence Weston	0.4%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Local, Broadmead, Bristol	0.4%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Local, 2 - 4 Gloucester Road, Bishopston, Bristol (Opposite Prince of Wales Pub and Carphone Warehouse)	0.4%	1	0.0%	0	0.0%	0	1.8%	1	0.0%	0
Sainsbury's Local, Whiteladies Road, Clifton Down	0.9%	2	0.0%	0	0.0%	0	3.5%	2	0.0%	0
Tesco Superstore, Lime Trees Road, Bristol	0.9%	2	0.0%	0	0.0%	0	3.5%	2	0.0%	0
Tesco Express, Filton Avenue, Horfield	0.4%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	1
Tesco Metro, Broadmead, Bristol	0.4%	1	0.0%	0	0.0%	0	1.8%	1	0.0%	0
Waitrose, The Pavillion, Queens Road, Clifton	0.4%	1	0.0%	0	0.0%	0	1.8%	1	0.0%	0
Waitrose, Northumbria Drive, Henleaze / Westbury Park	2.2%	5	0.0%	0	0.0%	0	8.8%	5	0.0%	0
Henleaze	0.4%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	1
Crow Lane (Henbury)	1.7%	4	0.0%	0	0.0%	0	0.0%	0	8.0%	4
Gloucester Road	0.4%	1	0.0%	0	0.0%	0	1.8%	1	0.0%	0
Ridingleaze (Lawrence Weston)	0.9%	2	2.9%	2	0.0%	0	0.0%	0	0.0%	0
Shirehampton Road (Sea Mills)	0.4%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Stoke Lane (Westbury on Trym)	0.9%	2	0.0%	0	0.0%	0	3.5%	2	0.0%	0

Lawrence Weston Household Telephone Survey For GVA

	Total	Zone 1		Zone 2		Zone 3		Zone 4		
Local stores, Avonmouth	0.4%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0
Local stores, Henbury	1.3%	3	0.0%	0	0.0%	0	1.8%	1	4.0%	2
Local stores, Kingsweston	0.4%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Local stores, Lawrence Weston	0.9%	2	2.9%	2	0.0%	0	0.0%	0	0.0%	0
Local stores, Sea Mills	0.4%	1	0.0%	0	0.0%	0	1.8%	1	0.0%	0
Local stores, Shirehampton	5.7%	13	10.3%	7	9.1%	5	1.8%	1	0.0%	0
Local stores, Westbury-on-Trym	1.3%	3	0.0%	0	0.0%	0	3.5%	2	2.0%	1
(Don't know)	2.6%	6	1.5%	1	0.0%	0	7.0%	4	2.0%	1
(Nowhere else)	46.5%	107	45.6%	31	54.5%	30	36.8%	21	50.0%	25
Base:		230		68		55		57		50

GEN Gender of respondent.

Male	31.3%	94	35.6%	32	22.9%	16	35.7%	25	30.0%	21
Female	68.7%	206	64.4%	58	77.1%	54	64.3%	45	70.0%	49
Base:		300		90		70		70		70

AGE Could I ask, how old are you ?

18 to 24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
25 to 34	4.0%	12	4.4%	4	5.7%	4	2.9%	2	2.9%	2
35 to 44	8.7%	26	8.9%	8	8.6%	6	8.6%	6	8.6%	6
45 to 54	31.0%	93	23.3%	21	35.7%	25	40.0%	28	27.1%	19
55 to 64	14.3%	43	11.1%	10	11.4%	8	14.3%	10	21.4%	15
65 +	41.0%	123	52.2%	47	37.1%	26	31.4%	22	40.0%	28
(Refused)	1.0%	3	0.0%	0	1.4%	1	2.9%	2	0.0%	0
Base:		300		90		70		70		70

CAR How many cars does your household own or have the use of ?

None	18.3%	55	30.0%	27	18.6%	13	10.0%	7	11.4%	8
One	48.7%	146	44.4%	40	52.9%	37	41.4%	29	57.1%	40
Two	26.0%	78	21.1%	19	21.4%	15	40.0%	28	22.9%	16
Three or more	6.3%	19	4.4%	4	5.7%	4	7.1%	5	8.6%	6
(Refused)	0.7%	2	0.0%	0	1.4%	1	1.4%	1	0.0%	0
Base:		300		90		70		70		70

INC Approximately what is your total household income ?

£0-£5,000	1.3%	4	1.1%	1	1.4%	1	1.4%	1	1.4%	1
£5,001 - £7,000	2.0%	6	1.1%	1	4.3%	3	1.4%	1	1.4%	1
£7,001 - £15,000	10.3%	31	11.1%	10	10.0%	7	8.6%	6	11.4%	8
£15,001 - £20,000	5.3%	16	6.7%	6	2.9%	2	1.4%	1	10.0%	7
£21,001 - £30,000	10.0%	30	11.1%	10	10.0%	7	10.0%	7	8.6%	6
£31,001 - £40,000	6.7%	20	5.6%	5	7.1%	5	5.7%	4	8.6%	6
£41,001 - £50,000	5.0%	15	2.2%	2	5.7%	4	8.6%	6	4.3%	3
£51,001 - £60,000	1.7%	5	1.1%	1	1.4%	1	4.3%	3	0.0%	0
£61,001 - £70,000	1.7%	5	2.2%	2	0.0%	0	1.4%	1	2.9%	2
£71,001 - £80,000	0.3%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0
£81,001 - £90,000	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£91,001 - £100,000	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£100,001 - £150,000	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0
£150,001+	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	25.0%	75	22.2%	20	30.0%	21	21.4%	15	27.1%	19
(Refused)	30.3%	91	34.4%	31	27.1%	19	34.3%	24	24.3%	17
Base:		300		90		70		70		70

Lawrence Weston Household Telephone Survey For GVA

	Total	Zone 1		Zone 2		Zone 3		Zone 4		
EMP Which of the following best describes the chief wage earner of your household's current employment situation ? [PR]										
Working full time - public sector	19.0%	57	15.6%	14	24.3%	17	14.3%	10	22.9%	16
Working full time - private sector	20.7%	62	18.9%	17	17.1%	12	28.6%	20	18.6%	13
Self-employed	3.0%	9	2.2%	2	1.4%	1	4.3%	3	4.3%	3
Working part time - all year	7.3%	22	5.6%	5	7.1%	5	11.4%	8	5.7%	4
Working part time - seasonal	0.3%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Unemployed	3.7%	11	8.9%	8	2.9%	2	1.4%	1	0.0%	0
Retired	45.3%	136	48.9%	44	47.1%	33	37.1%	26	47.1%	33
A housewife	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
A student	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Refused)	0.7%	2	0.0%	0	0.0%	0	1.4%	1	1.4%	1
Base:		300		90		70		70		70

QUOTA Zone

Zone 1	30.0%	90	100.0%	90	0.0%	0	0.0%	0	0.0%	0
Zone 2	23.3%	70	0.0%	0	100.0%	70	0.0%	0	0.0%	0
Zone 3	23.3%	70	0.0%	0	0.0%	0	100.0%	70	0.0%	0
Zone 4	23.3%	70	0.0%	0	0.0%	0	0.0%	0	100.0%	70
Base:		300		90		70		70		70

PS Postcode Sector

BS9 2	23.3%	70	0.0%	0	0.0%	0	100.0%	70	0.0%	0
BS107	23.3%	70	0.0%	0	0.0%	0	0.0%	0	100.0%	70
BS110	30.0%	90	100.0%	90	0.0%	0	0.0%	0	0.0%	0
BS119	23.3%	70	0.0%	0	100.0%	70	0.0%	0	0.0%	0
Base:		300		90		70		70		70