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Flintshire County Council

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Flintshire

Flintshire Retail Study

Final Report

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1 INTRODUCTION

Purpose of the Study

1.1 In September 2018, Flintshire County Council commissioned PBA, now part of Stantec, to undertake the Flintshire Retail Study on its behalf. The Council requires this study to update its evidence base and support the preparation of the new Local Plan.

1.2 In accordance with the County Council's brief, this study provides:

- a summary of national and local retail planning policy and its interpretation, together with an overview of national trends in the retail markets, and their implications for the County;
- health checks to assess the performance of the County's town and district centres;
- an overview of current shopping expenditure patterns based on up-to-date survey data and the identification of existing market shares for defined centres and other destinations;
- a quantitative assessment of retail floorspace requirements in both the convenience and comparison goods sectors up to 2032, taking into account the latest population and expenditure data, and the effects of multi-channel retailing (such as online shopping);
- recommendations in terms of how to meet the identified floorspace requirements, having regard to the performance of centres, their capacity to accommodate new development, and the need to increase consumer choice; and
- policy recommendations in respect of future strategies for Flintshire's main centres.

Structure of the Report

1.3 The remainder of our report is structured as follows:

- Section 2 describes the context within which the study has been undertaken, with regard to national and local planning policies, as well as current trends within the retail sector;
- Section 3 provides our performance analysis of the County's main centres, which includes a health check of each centre's vitality and viability;
- Section 4 summarises current patterns of retail spending within the study area based on the household telephone survey;
- Section 5 contains our assessment of quantitative and qualitative requirements for additional retail floorspace; and
- Section 6 provides a summary of our findings.

2 THE POLICY AND MARKET CONTEXT

Introduction

2.1 The study has been undertaken in the midst of a renewed focus on the changing role and function of town centres. It is widely accepted that the traditional role of town centres has been undermined by the continued attraction of out-of-centre retail locations, the growth in popularity of multi-channel shopping, the relatively recent economic downturn and the associated decline in expenditure growth. In this section of our report, we highlight some of these challenges in order to set the context for the remainder of the report.

Policy Context

Planning Policy Wales

2.2 The tenth edition of Planning Policy Wales ('PPW') was published by the Welsh Government in December 2018.

2.3 Retail and commercial development is addressed in Chapter 4 of PPW ('Active and Social Places'). PPW sets out the following overarching objectives for retail and commercial centres which have been established by the Welsh Government to provide guidance as to the outcomes that planning authorities should aim to deliver:

- promote viable urban and rural retail and commercial centres as the most sustainable locations to live, work, shop, socialise and conduct business;
- sustain and enhance retail and commercial centres' vibrancy, viability and attractiveness; and
- improve access to, and within, retail and commercial centres by all modes of transport, prioritising walking, cycling and public transport.

2.4 PPW identifies retail and commercial centres as 'central' to community activity and local prosperity, and requires planning authorities to establish a clear strategy for retail development, supported by policies to achieve *'vibrant, attractive and viable retail and commercial centres'.*

2.5 PPW acknowledges that retail and commercial centres will experience growth and decline and requires development plans to identify these changing retail pressures and opportunities, as well as devise appropriate responses to them in their retail strategies.

2.6 Under the heading 'Sequential Test', PPW confirms that the Welsh Government operates a 'town centres first' policy in relation to the location of new retail and commercial centres and that, in implementing this policy, planning authorities should adopt a sequential approach to the selection of new sites in their development plan and when determining planning applications for retail and other complementary uses.

2.7 PPW states that whilst Class A1 retail uses should underpin retail and commercial centres, it is only one of the factors which contribute towards their vibrancy, and that policies should encourage a diversity of uses in centres and recognise the importance of evening and night time economies.

2.8 Under the heading ‘Needs Test’, PPW requires evidence to be presented to demonstrate whether retail provision is adequate or not, by assessing if there is further expenditure capacity in a catchment area (quantitative need) or if there is a lack of retail quality, range of goods or accessibility (qualitative need). PPW states that precedence should be given to establishing quantitative need before qualitative need is considered for both convenience and comparison retail floorspace, particularly as a basis for development plan allocations.

Technical Advice Note 4: Retail and Commercial Development

2.9 Technical Advice Note (‘TAN’) 4, which was published by the Welsh Government in November 2016, provides local authorities with advice in respect of retail and commercial development, and associated plan-making and development management issues.

2.10 TAN 4 sets out the Welsh Government’s three objectives for retail and commercial centres, which are to promote viable retail and commercial centres as the most sustainable locations to live, work, socialise and conduct business; sustain and enhance the vibrancy, vitality and attractiveness of centres; and improving access to and within centres by all modes of transport.

2.11 Section 3 of the TAN addresses development plans and states that LPAs should develop their evidence base and plan positively to protect and enhance the vibrancy, vitality and attractiveness of their retail and commercial centres. The same section also urges local planning authorities to work together to identify cross-boundary issues and take account of wider retail hierarchies.

2.12 Section 4 of the TAN goes on to state that local hierarchies should be developed to guide development to the most appropriate locations and that appropriate policies should be applied to those centres based on their characteristics. Paragraph 4.6 of the TAN states that out-of-centre retail parks whose development has been based solely on retailing should not normally be included in the local hierarchy. This should not, however, preclude these destinations being assessed against locally set criteria to ascertain if they have matured into retail and commercial centres in their own right, offering the same level of service provision and being as accessible as traditional centres.

2.13 Section 5 of the TAN, which addresses retail strategies, masterplanning and ‘place plans’, states that development plans should include a clear strategy for centres which sets out how the LPA wishes to see those areas develop over the plan period. These strategies should be developed with a range of stakeholders. Paragraph 5.2 states that if a need for further retail development has been identified then this should be addressed through retail strategies and development plan allocations. If needs require new sites to be identified, then a sequential approach should be adopted.

2.14 Where a centre has been identified as being in decline to the point of no longer being viable then Section 5 of the TAN states that change should be managed as part of the retail strategy to ensure communities retain access to the goods and services they require. The TAN highlights the role of area-wide strategies, place plans and masterplans in informing policy development and providing supplementary guidance.

2.15 Section 9 of the TAN addresses primary and secondary areas of retail and commercial activity, and states that the designation of primary and secondary areas can help to promote and maintain an effective distribution and balance of uses and activities. Nevertheless, where a centre's performance is poor, the TAN suggests that LPAs should consider applying a more flexible strategy. Flexibility to expand or contract primary and secondary areas, and to allow changes of use to attract investment and diversify uses, is recognised as being essential within vulnerable or declining centres.

Flintshire Unitary Development Plan

2.16 The Flintshire Unitary Development Plan 'UDP' was adopted by the County Council in 2011, covering the period from 2000 to 2015. The Council is now in the process of preparing a new Local Plan to replace the UDP.

2.17 Chapter 2 of the UDP sets out the spatial strategy for the County, which includes the need to promote the revitalisation of town centres and other local/district centres that offer a range of everyday shopping, community and employment opportunities.

2.18 Chapter 12 of the UDP addresses 'shopping centres and commercial development' and sets out various policy objectives including to promote the vitality, viability and attractiveness of existing retail centres; to promote choice within town centres; to direct new shopping and commercial investment into town centres; and to support local shops and rural diversification. Below, we highlight key policies from Chapter 12 of the UDP that are relevant to this study.

2.19 Policy S1 of the UDP sets out a hierarchy of centres within the County. Buckley, Flint, Holywell, Mold and Shotton are all designated as town centres, whilst Connah's Quay, Queensferry and Saltney are designated as district centres. A range of other, smaller centres are designated as local centres. Policy S1 also allocates six sites for 'commercial development', three of which are in designated town and district centres, with the remaining three in out-of-centre locations, including the allocation of land to the north of Broughton Retail Park[1] for non-retail commercial uses.

2.20 Policy S7 of the UDP addresses retail frontages within town centre core retail areas, stating that non-Class A1 uses will only be permitted in these areas where various criteria designed to avoid an over-concentration of non-retail uses are met, including a minimum marketing period of a year. Policy S9 states that non-retail commercial uses will be permitted elsewhere within town centres providing that such development is of an appropriate scale, does not have a detrimental impact on the shopping centre and would not be significantly detrimental to residential amenities.

[1] The UDP refers to 'Broughton Retail Park' whereas in the remainder of our report we use the term 'Broughton Shopping Park'

2.21 Policy S12 of the UDP states that, outside of the defined town and district centres, new markets and car boot sales will only be permitted where it can be demonstrated that they would not adversely affect the overall viability of town centres and existing street markets, amongst other criteria.

Other Strategies

2.22 The County Council has published a number of other strategies that are relevant to this study, including town centre masterplans for Buckley, Connah's Quay and Shotton and Flint, and a town centre assessment of Holywell. For Mold, a 'Strategic Sites Study' was undertaken in 2014 and, more recently, a Town Plan was prepared by Mold Town Council and Mold Town Partnership. We refer to these studies and strategies in greater detail within other sections of our report.

Market Trends

2.23 Various key retail and leisure market trends have had significant impacts on the composition and performance of town centres in recent years. These trends, which we detail below, include the 'polarisation' trend in the comparison retail sector, restructuring in the convenience goods market, the growth of commercial leisure, and the effects of digital technology.

Market overview

2.24 The overall profile of retail and leisure markets in the UK has changed significantly over the past 10 to 15 years. These changes have resulted from a combination of factors including the growth of online retailing, evolving consumer expectations and behaviours, and the ongoing impacts of the economic recession in the late 2000s on expenditure, investment and demand for retail property.

2.25 In terms of overall expenditure, there has been annual growth in retail expenditure throughout the past decade, with the exception of 2009 and 2011, where the effects of the recession had significant impacts on household spending during these years. Levels of spending only began to recover strongly in 2014/15, although growth rates have since moderated. Whilst household spending has been supported by low interest rates and strong employment growth, it has been simultaneously suppressed by poor growth in real wages.

2.26 These fluctuations in spending have served to accelerate trends that were evident before the recession, such as the consolidation of mid-market comparison goods retailers and the growth of discount retailers in both the comparison and convenience retail sectors. In addition, there has been continued growth in spending on online shopping and changing consumer expectations in terms of the retail experience. The latter is allied to the growth and diversification of the leisure sector and its increasing overlap with the retail sector

Figure 2.1 Trends in Retail Expenditure Growth 2008-2017

Vol growth per head (%)	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Retail spend	2.1	-2.0	1.3	-1.2	0.9	1.8	2.5	3.1	3.4	3.9
Convenience goods	-4.3	-3.7	-0.4	-3.1	-0.6	-0.9	-0.1	0.5	1.3	1.3
Comparison goods	4.5	-2.0	2.1	-0.2	1.8	3.6	4.3	4.9	4.7	5.5
of which bulky	7.3	-3.1	1.7	1.6	2.6	4.9	6.0	8.4	6.3	6.2
non- bulky	3.0	-2.1	1.9	-1.3	1.2	3.0	3.6	3.5	4.1	5.2
Leisure	-3.0	-9.4	0.6	-0.5	1.0	-0.2	0.8	-0.1	0.8	0.3
Consumer spending	-1.1	-2.8	0.6	-1.9	1.1	1.1	1.2	1.1	1.9	1.9
Retail spend ex SFT*	-0.1	-3.8	0.4	-2.3	0.2	0.8	2.1	2.8	2.3	2.0

* Taking into account adjustments for internet trading that relies on floorspace in existing stores

Source: Retail Planner Briefing Note 16, Experian (December 2018)

2.27 According to Local Data Company, during the first half of 2018 there was a net loss of 4,402 units in active retail or leisure use across the whole of Great Britain. The data also indicate a clear north/south divide; the percentage of units vacant over three years in Greater London, the South East, the South West and East of England is less than the Great Britain average, whereas the North East and the North West of England have the largest percentage of long-term vacant units across Great Britain.

2.28 The market shifts referred to above pose significant challenges to town centres (and increasingly also out-of-centre destinations). Those challenges include weakening demand for retail property (particularly in secondary locations), the requirement to provide a diverse range of uses, the need to adapt to new technology, and consequent challenges in maintaining investment both in commercial property and the physical environment of town centres and other key retail and leisure destinations.

2.29 We expand further on these key trends below before detailing the possible policy response and the broad implications of the trends for town centres within Flintshire.

Restructuring in the comparison retail sector

2.30 Whilst comparison retail spending has proven more resilient than other types of retail and leisure spending over the past decade, there have been significant changes within the sector. The changes include the failure of a number of more vulnerable national comparison goods retailers that have struggled to adapt to changing markets, the consolidation of mid-market retailers, growth in the 'value' end of the market and the changing nature of out-of-centre retail facilities.

2.31 The 'polarisation trend' refers to the preference for mid-market comparison goods retailers to concentrate trading activities within larger stores in higher-order centres and out-of-centre destinations. Retailers have increasingly recognised that greater efficiency can be achieved by having a strategic network of large stores offering a full range of their products, where investment to improve the quality of the in-store experience can be focused.

2.32 The recession and the growth in online shopping have further reinforced the need for retailers to reduce their store portfolios. The growth of online retail has posed fundamental challenges to specific sub-sectors where consumers will happily make purchases over the internet, including music, video, books and electrical goods. This has contributed to traditional retailers such as Woolworths, Comet and Maplin going into administration, and operators such as New Look and Carpetright entering into Company Voluntary Arrangements, resulting in store closures and the growth of digital-only retailers such as Amazon and ao.com.

Figure 2.2 Example High Profile Retail Administrations Since 2010

2.33 As well as the retailers that have collapsed, there are lots of examples of stores which have not entered into administration but have announced store closures as part of restructuring attempts.

Figure 2.3 Examples of Operators that have Announced Restructuring

2.34 The polarisation trend is also driven by consumers, however, who have become more discerning and are increasingly prepared to travel further afield to larger centres with a wider or better-quality offer. There is therefore an increasing concentration of comparison goods expenditure in a smaller number of larger centres and out-of-centre destinations. This trend has been exacerbated by difficulties in raising funding for more complex in-centre development schemes as a result of the recession and more restrictive funding regimes.

2.35 The implications for town centres of the trends outlined above is that many retailers have sought to withdraw from smaller centres by way of measures such as non-renewal of expiring leases. Mid-market comparison goods retailers have become increasingly concentrated within regional centres, larger retail parks and other out-of-centre destinations. This trend has matured over the last decade and is reflected in higher vacancy rates in many smaller centres, decreasing rental values and, in many cases, lower footfall.

2.36 The rise of discount retail operators, which was further encouraged by the recession and constrained consumer spending, has mitigated the impacts of the polarisation trend with many of these operators, such as Wilko or B&M, taking space in smaller town centres that was formerly occupied by mid-market comparison retailers. Whilst this has served to moderate the vacancy rate in some centres, it has significantly re-orientated the comparison goods offer of many centres, further concentrating it at the lower end of the market and away from the important clothing and footwear sub-sector.

2.37 In addition, the failure of a number of bulky goods retailers has provided surplus space in retail park locations at a time that coincided with the growth of value comparison retailers with relatively large space requirements. In many cases this has resulted in an incremental change in the nature of out-of-centre retail provision and increasing overlap with town centre provision.

2.38 The market trends described above are evident in many small town centres. Some smaller centres have been able to respond to the polarisation trend by diversifying their town centre offer, particularly through accommodating higher quality independent retailers and developing a strong food and drink offer. Markets and similar alternative forms of retail are also increasingly popular, with low entry costs to growing numbers of new types of market traders, and a consumer appetite for 'events' based shopping with a strong leisure angle. The centres that have most benefited from these trends tend to serve more affluent catchments, are located in larger urban areas or already benefit from an inflow of expenditure as established tourist destinations.

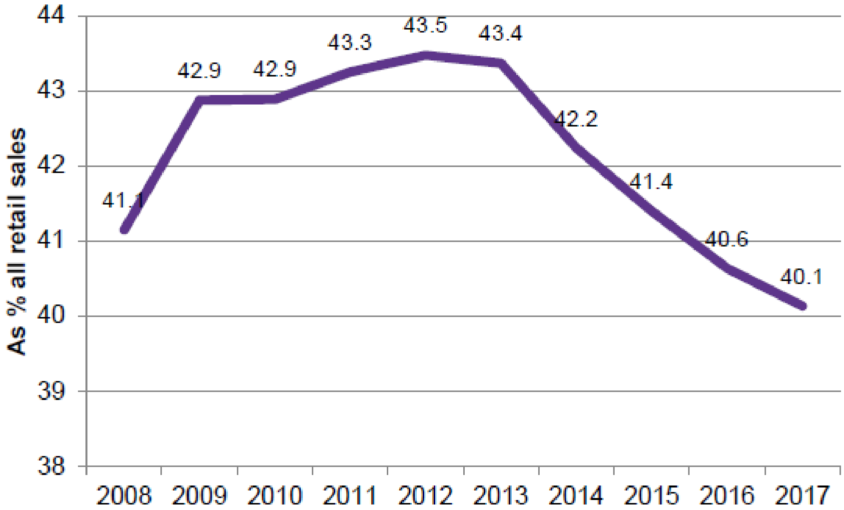
Restructuring of the convenience retail sector

2.39 Prior to, and during, the recession the convenience goods sector became a key driver of growth with the 'Big Four' supermarket operators (Asda, Morrisons, Tesco and Sainsbury's), which have traditionally dominated the market, building and operating increasing larger stores and expanding the range of services that they provide (particularly in terms of comparison goods). Whilst many of these larger stores were built outside of town centres, new large foodstores also often served to anchor redevelopment schemes within smaller town centres.

2.40 More recently, however, the market dominance of the 'Big Four' has been increasingly challenged, both by higher-end operators (such as Waitrose and Marks

& Spencer) and value/discount retailers (primarily Aldi and Lidl). In particular, the value retailers have posted significant year-on-year growth over recent years and they have emerged as important forces in the convenience goods market. Overall, expenditure on convenience retail goods has been falling in recent years due to increasing competition between operators (leading to a reduction in prices) and low inflation.

Figure 2.4 Supermarkets' sales as percentage of all retailers' sales



Source: ONS/Mintel

2.41 There has also been an increasing move by the major convenience goods operators away from opening larger-format stores towards smaller supermarkets and establishing a network of 'top up' convenience goods shopping facilities (sometimes referred to as 'c-stores'). Such stores are often located in town centres, or district/neighbourhood shopping parades, driven by a shift in consumer behaviours; shoppers are undertaking an increasing number of smaller 'top-up shopping' or 'basket shopping' trips instead of a weekly food shop to a large out of centre foodstore.

2.42 Data from Planet Retail shows that the compound annual growth rate ('CAGR') of discount retailers (such as Aldi and Lidl) and convenience (C-format) stores has reached 11 per cent and almost 7 per cent, respectively, whereas the growth rate amongst supermarkets is just 2 per cent. The 'discount' retailers have also successfully diversified their offers to include more premium products and greater appeal to new types of customers.

2.43 Both Sainsbury's and Tesco now have more 'C-stores' than large supermarkets and, along with Morrisons, these operators have withdrawn proposals for the development of new superstores and from town centre redevelopment projects. In the last few years, both Tesco and Morrisons have closed dozens of 'unprofitable' foodstores (with Morrisons also disposing of its portfolio of C-stores to concentrate on its core business, demonstrating the complexity of changes within the market). By way of comparison, Aldi plans to open 130 new stores during 2019 and 2020, whilst Lidl plans to open 50 to 60 new stores annually. Store formats are also evolving with new

Aldi stores now providing more floorspace and Lidl introducing facilities such as in-store bakeries.

2.44 In response to the rising popularity of the discount foodstores, Tesco has established a new discount chain called Jack's by converting a number of existing Tesco stores, opening new stores next to existing Tesco outlets and providing its new discount offer in mothballed former Tesco stores. Around 10 to 15 Jack's stores are expected to open by summer 2019. Tesco has also signed a deal with the Arcadia group to incorporate concessions such as Burton and Dorothy Perkins into its portfolio of large format foodstores, whilst Sainsbury's has introduced Argos concessions into many of its larger stores.

Growth of the commercial leisure sector

2.45 Most commentators predict that commercial leisure, such as gymnasiums and cinemas, will account for a growing share of town centre floorspace. This partly comprises replacement activity generated as a consequence of the reduced demand for traditional retail space, and is partly driven by the increase in leisure expenditure as discretionary household expenditure rises. Whilst there has been expansion in the food and drink market over the past decade, a number of high-profile restaurant closures have recently been announced, which suggests that the food and drink market has become saturated. The key market trends in the sector include:

- Cinema: expected to expand via acquisition and diversification of the market despite falling attendance figures. The big three cinema operators are focusing on larger markets where there is limited competition. The second tier and boutique operators are focusing on the qualitative difference in their offer to enable them to create specialist markets. Cinema development is increasingly concentrated in town centre locations (where there are complementary leisure and cultural uses, especially food and drink facilities) as the popularity of out-of- centre leisure parks has waned. Indeed, such development is serving to anchor in-centre development schemes.
- Health and fitness: the market is expected to experience continued growth, predominantly in the budget sector. The operator PureGym has grown to a chain of over 200 branches since 2009. Such operators take space in both in-centre and out-of-centre locations and will operate multiple facilities, particularly in larger urban areas.
- 'Big box' leisure: there has been a resurgence in the large floorspace Class D2 market since the recession. Operators are offering increasingly diverse activities with companies from abroad seeking space in the UK (such as trampolining or urban golf) as a result of consumers spending more disposable income on leisure-based activities and an increasing desire for more unusual leisure experiences. Often, these 'meanwhile' (or temporary) uses are transitioning to boutique uses.
- Food and drink: contributed significantly to the continued growth of the leisure sector since the recession, but recent indications suggest that the casual dining sector has reached or is approaching saturation with a number of high-profile

chains such as Carluccio's and Jamie's Italian announcing closures as part of restructuring plans. Whilst the rapid growth of food delivery services such as Deliveroo and Uber Eats has contributed towards the growth of smaller and medium-sized food and drink retailers in recent years, the rise of so-called 'ghost kitchens' and 'virtual restaurants' means that consumers no longer need to leave their homes to access restaurant quality meals and this may have consequential impacts for town centres.

2.46 Notwithstanding the trends described above, spending on food and drink typically accounts for more than 50 per cent of total leisure spending, compared to around 15 per cent on 'cultural services' (such as going to the cinema, theatre, art galleries or live music) and under 10 per cent on hotels, games of chance and recreation/sporting services.

Figure 2.5 New forms of leisure development

Above: Urban golf (Leeds) and boutique darts (Manchester)

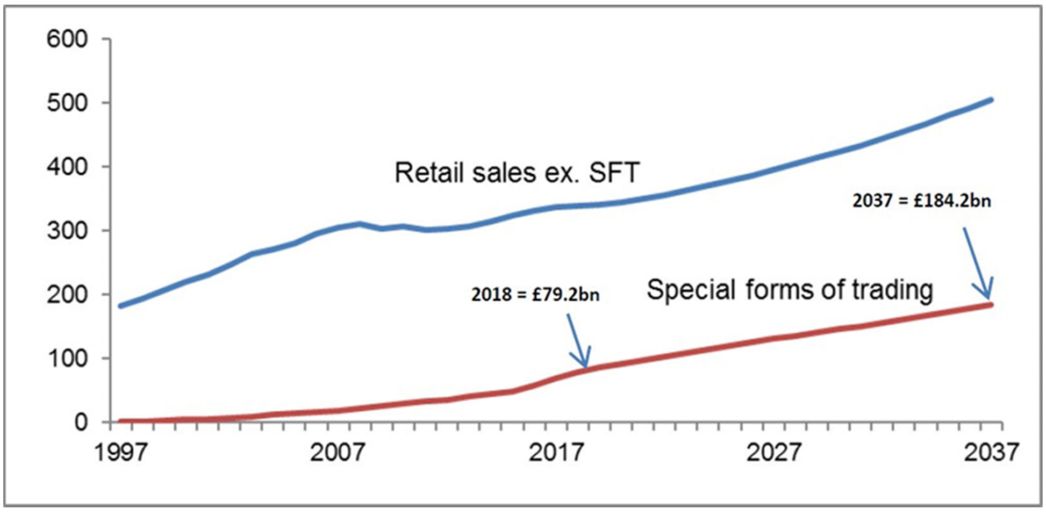
2.47 There is scope for town centres to capitalise on this trend, redefining their function as leisure 'destinations' in their own right. The development of a strong commercial leisure offer can help to increase footfall, particularly outside of retail hours, and visitors undertaking 'linked trips' between retail, leisure and other uses also increases dwell-time in centres.

Effects of digital technology

2.48 It has been widely documented that online shopping has increased at a rapid pace in recent years, particularly in the comparison goods sector. Online shopping is perceived to offer a number of significant advantages over 'traditional' town centre shopping, including: lower prices as there are lower operating overheads for online retailers; a wider variety of choice; and the ability for customers to easily search out bargains, including second-hand goods.

2.49 Overall, internet sales have been rising more rapidly than general retail sales in recent years and this is reflected in increasing market shares for special forms of trading ('SFT'). SFT accounted for 17.2 per cent of retail sales in 2017, and is forecast to rise to 26.7 per cent in 2037. As indicated by Figure 2.6, growth in retail sales exclusive of SFT is growing at a similar rate to SFT retail sales and the volume of SFT retail sales is expected to more than double between 2018 and 2037.

Figure 2.6 Growth of SFT retail sales



Source: Retail Planner Briefing Note 16, Experian (December 2018)

2.50 While many retailers have sought to scale back on physical retail space, their online operations continue to allow them to reach a wide customer base. Nevertheless, competition is not as straightforward as 'online shopping versus town centres' with new technologies increasingly promoting integration between alternative shopping channels. Consumers increasingly research purchases online before visiting stores, and vice versa.

2.51 The growth in the 'click and collect' method of online shopping is serving to drive footfall and trade at physical outlets. The click and collect concept is such that a customer orders and pays for the desired product online, and then collects the product from the nearest branch of the retailer in question. This approach is being rolled out by an increasing number of retailers. Recent research by the British Retail Consortium indicates that 60 per cent of click and collect transactions result in an additional purchase in the store.

2.52 Recent trends indicate that major retailers are becoming more willing to embrace the challenge posed by online and mobile technology by putting into place technology such as click and collect, better mobile websites, free in-store wi-fi, or in-store technology points where a customer can order a product online from the same retailer, which may not be available within the store. This may be particularly applicable for smaller town centres where many retailers' stores are relatively small and may not be able to carry the full range of products available.

2.53 There is clearly still a significant role for 'bricks and mortar' stores, but the evidence suggests that traditional town centres will need to become more multi-functional in order to remain vital and viable.

Policy Response

2.54 In recent years, a considerable number of studies have been published which assess the future role and function of town centres in order to respond to the market trends discussed above, including:

- The Portas Review, Mary Portas (2011)
- Beyond Retail: Redefining the Shape and Purpose of Town Centres, British Council of Shopping Centres (2013)
- 21st Century High Streets, British Retail Consortium (2013)
- The Future High Street, Future Spaces Foundation (2013)
- Accommodating Growth in Town Centres (2014), Greater London Authority
- Digital High Street 2020 Report, Digital High Street Advisory Board (2015)
- The Grimsey Review (2013) and the Grimsey Review 2: 'It's time to reshape our town centres' (2018), Bill Grimsey

The Portas Review

2.55 In May 2011, retail expert Mary Portas was appointed by the former Coalition Government to lead an independent review into the future of the high street in response to the decline of town centres nationally, seen as a consequence of reduced spending on the high street. The report supported the call to strengthen planning policy in favour of 'town centre first' and included 27 separate recommendations to tackle the further decline of the high street.

2.56 The core recommendations included measures to strengthen the management of high streets, improvements to the business rates system, reducing car parking charges, placing greater onus on landlords to proactively manage their assets or face the use of compulsory purchase powers by local authorities, and to increase community involvement in town centres.

2.57 As well as 24 'Portas Pilot' towns to trial the recommendations, the Coalition Government established the future High Street Forum to implement Portas's recommendations and provided funding to establish business improvement districts ('BIDs') and a 'Future High Street X Fund' (renamed the High Street Renewal Fund) to reward towns delivering innovative plans to promote their town centres.

Beyond Retail

2.58 Following the Portas Review, the Government supported the establishment of an industry task force to analyse retail property issues relating to town centres. The findings of the task force's report were presented in the 'Beyond Retail' report of 2013.

2.59 One of the report's key observations was that the trend towards market polarisation (discussed further below) has resulted in three broad types of town centre offer: strong centres with a wide retail and leisure offer; convenience food and service-based centres with an element of fashion and comparison goods; and localised convenience and everyday needs-focused centres. The report made a number of recommendations, including:

2.60 Strong and dynamic leadership, led at the local authority level but also including business and community involvement, to bring about long-term change in town centre function.

- Undertake bold, strategic land assembly, to enable redevelopment opportunities of scale and worth.
- Provide greater flexibility in the planning system to enable vacant retail premises to be converted to 'more economically productive uses'.
- Consider the mechanisms to address funding gaps to encourage local authorities to commit to long-term planning for town centres.
- Town centres must take advantage of technology to assist in marketing, driving footfall, and assisting independents and SMEs.
- A review of the business rate system and publishing of new retail valuation guidance.

21st Century High Streets

2.61 In 2013, the British Retail Consortium published the second '21st Century High Streets' report as an update to the original report published in 2009. The 2013 report set out various policy recommendations to help secure 'flourishing 21st Century high streets' under six key topics:

- A unique sense of place: local partnerships, authorities and retailers must create a brand for the town centre to engender consumer loyalty through differentiation.
- An attractive public realm: local partnerships and authorities must actively manage the public realm creating attractive public space.
- Planning for success: local authorities should develop a clear strategic vision focused on the role of the town centre and cooperate with neighbouring authorities to maintain viable and complimentary retail destinations.
- Accessibility: local authorities should manage accessibility holistically and responsively, and should provide adequate parking to assist in driving footfall.
- Safety and security: local police should work with retailers to better understand the impacts of retail crime to promote town centres as safe, secure and effectively managed.
- Supportive regulatory and fiscal regimes: central government should reform the Business Rate Multiplier to reduce the cost of operating and investing in town centres.

The Future High Street

2.62 The Future Spaces Foundation was established in 2013, made up of a diverse independent panel of experts to generate new ideas about how to create social and economic opportunity through the transformation of the built environment.

2.63 The Future High Street report (2013) sought to examine the high street debate from a holistic stance; it assessed the full range of socio-economic, demographic and technological factors which affect how we interact with high streets and it sought to challenge the traditional role of retail in town centre regeneration. The report made 14 specific recommendations under four key policy areas relating to public services and community cohesion, commercial drivers, transport and accessibility and health and well-being. The recommendations included:

- re-concentrating public services in and around the high street to harness agglomeration benefits;
- diversifying community spaces beyond their traditional functions;
- supporting a mobile-enabled high street;
- flexible use of space to mix retail, leisure and work dynamically to suit modern life styles;
- de-stigmatising bus travel, so that it provides a superior alternative to the car;
- transport infrastructure design with multiple uses to give it a fluid role in the town centre;
- providing housing, particularly assisted living, within easy access of high streets; and
- providing health services in close proximity to the high street.

Digital High Street

2.64 The Digital High Street Advisory Board was established following the work of the Future High Streets Forum to consider the revolutionary impact of digital technologies on the future success of high streets. The Advisory Board's report of 2015 made four principal inter-related recommendations that are critical to the revitalisation of high streets in a digitally dominated world. The recommendations included raising connectivity standards and increasing the deployment of digital technology, improving digital skills, and adopting a digital health index to assess the competitiveness of high streets, to measure the economic value of digital developments and set goals for digital integration.

The Grimsey Review and The Grimsey Review 2

2.65 Bill Grimsey, the former managing director of DIY chain Wickes and food retailer Iceland, published his report as an 'alternative response' to the recommendations of the Portas Review. The report made a total of 31 wide-ranging recommendations, including encouraging more people to live in town centres, appointing a High Streets Minister, and freezing car parking charges for a year.

2.66 Grimsey has now followed up his original report with a review, published in July 2018, which is particularly influenced by the recent high-profile collapse of retailers and some food and drink operators. Grimsey asserts that town centres are facing their greatest challenge in history. Towns must stop trying to compete with out-of-town shopping parks that are convenient and benefit from free parking. Instead, Grimsey argues that town centres must create their own unique reason for communities to gather there – being interesting and engaging and altogether a compelling and great experience.

2.67 Whilst it is not appropriate to have a one-size-fits-all approach, Grimsey sets out 25 recommendations to tackle the problems identified. Key recommendations include:

- replacement of business rates with a fairer and less complex system;
- creation of a digital commission to develop a 20-year strategy for local high streets;
- accelerating the digital transformation of smaller towns;
- appointment of high-quality designers to celebrate the local identify of town centres;
- free short-term parking; and
- improved public realm and free wi-fi.

2.68 A Future High Street Fund (£675m) has been made available by the government to support and fund local areas' plans to make their high streets and town centres fit for the future. However, this fund applies to local planning authorities in England only.

Implications for Flintshire

2.69 The research summarised above contains a number of recurring themes which will be important to consider in the context of future development for main town centre uses within Flintshire, including:

- The need for flexibility – town centre accommodation needs to be adaptable to a variety of uses to address future needs. This presents a number of challenges for Flintshire's centres, which largely comprise traditional, smaller commercial units with constrained parking and servicing facilities.
- Vital and viable centres need a varied mix of uses – centres are increasingly diverse with the emergence of a greater proportion of leisure uses. There is also an identified need to concentrate multi-functional public services in town centre locations to realise agglomeration benefits (as per 'The Future High Street' report). As relatively small centres, Flintshire's town centres will need to work to encourage a diverse range of uses which will provide greater resilience for the future.
- The integration of commercial and residential uses within town centres is important to their overall vibrancy, including access to high quality public transport, with the 'Future High Street' report specifically referring to improved bus services. This poses challenges for smaller town centres such as those within Flintshire, where town centre office and residential markets are neither strong nor well-established. However, there will be scope to improve accessibility and better integrate town centres with areas of residential and employment development.
- The role of each town centre needs to be clearly articulated to provide it with a distinct and recognisable identity appropriate to its role, as emphasised by the '21st Century High Streets' report and the Portas Review. This is, to some extent, already reflected in the individual strategies that the County Council has prepared for many of the centres within Flintshire, although it is important to ensure that these strategies are complementary and deliverable

3 TOWN CENTRE PERFORMANCE ANALYSIS

Introduction

3.1 We have undertaken performance analyses (otherwise known as 'health checks') of the County's defined town centres at Mold, Flint, Holywell, Buckley, Connah's Quay/Shotton, Queensferry and Saltney. Our appraisals have involved on-foot surveys of each centre, together with desk-based research which draws on published data from national data-providers.

3.2 The performance analyses have been undertaken with reference to the key indicators of vitality and viability that are set out within the Welsh Government's Technical Advice Note 4 ('TAN 4') and are summarised below in Table 3.1. We have not necessarily covered each of these indicators in detail, but instead have used these as a guide and, where possible and if up-to-date data are currently available, we have referred to them. Where relevant, we have compared our findings with those from the 2008 Town Centre Healthchecks Study[2] in order to track changes in the performance of the individual centres over the past decade.

3.3 Our primary research and site visits have also been supplemented with discussions with locally active property agents in the area, who have provided some market insight and intelligence into general levels of operator interest and other associated town centre issues.

Table 3.1 TAN 4 Indicators of Vitality and Viability

Vitality and viability of town centres: key indicators
• Diversity of uses • Retailer representation and intentions to change representation • Turnover in relation to floorspace • Proportion of vacant street level property • Rents and commercial yields on non-domestic property • Customer views • Pedestrian flows • Accessibility • Environmental quality • Perception of safety and occurrence of crime

3.4 As well as providing the base position for the future monitoring of town centre vitality and viability, the performance analysis exercise identifies the key strengths of the centres as well as deficiencies and areas that would benefit from improvement. We then use this information to inform our recommendations in subsequent sections of our report.

[2] Health checks or performance analyses of centres were not undertaken in the Flintshire Retail Capacity Study of June 2011

Performance of Mold Town Centre

3.5 Mold Town Centre is one of three town centres within Flintshire identified by Policy S1 of the UDP. The defined boundaries of the town centre are focused on the intersection of the A5119 and B5444 but spreads out from the four traditional shopping streets to include the Daniel Owen Shopping Centre to the west of the town centre and an area of freestanding foodstores and retail warehousing surrounding the A541 to the east.

Previous Findings

3.6 The 2008 Town Centre Healthchecks Study found Mold Town Centre to be a ‘pleasant and attractive market town centre, with a low level of unit vacancy’. The centre was found to have a strong convenience retail offer and a reasonably good range of comparison retail outlets, albeit the latter were primarily focused on the lower to middle end of the market. The previous study highlighted the role of the street market as a key attraction and noted that there were a variety of independent operators that provided higher quality retail goods and services.

3.7 Nevertheless, the previous study identified a number of shortcomings including the need for investment in some existing properties and the need to attract higher quality food and drink uses, and middle or higher-order retailers, to the town centre. Overall, Mold was found to be a reasonably healthy town centre but with scope for interventions to stave off potential decline.

Diversity of Uses

3.8 We have acquired Experian GOAD data to inform our assessment of diversity of uses within the Borough’s largest centres, including Mold (the full data are contained within Appendix A). The data for Mold, which are based on a survey undertaken in October 2017, found that the centre contains a total of 212 commercial units providing floorspace of 33,500 sq.m (average unit size of 158 sq.m).

3.9 The GOAD data show that a total of 10.9 per cent of units and 37.4 per cent of floorspace within Mold Town Centre were in use by convenience retail operators at the time of the survey, compared with UK average figures of 9.9 per cent and 18.5 per cent, respectively. Whilst the proportion of units in convenience retail uses is similar to the national average, the proportion of overall floorspace in convenience retail use far exceeds the national average.

3.10 The findings described above can be explained by the fact that there are a number of larger, freestanding foodstores on the edges of Mold Town Centre that, in aggregate, comprise a significant proportion of the total retail floorspace within the town centre area. However, it is also a reflection of the good range of convenience retail facilities within Mold, with the town centre performing above the national average for units and floorspace in terms of the key sub-categories of general convenience stores, frozen food specialists, bakers, butchers, greengrocers and fishmongers.

3.11 In terms of comparison retail uses, 38.9 per cent of units are occupied by comparison goods retailers, which equates to 33.3 per cent of all floorspace within the town centre. These figures compare to UK averages of 37.8 per cent and 43.2 per cent, respectively, reflecting the fact that comparison retailers are concentrated in the traditional core of the town centre where average unit sizes are much smaller than the freestanding foodstores and retail warehousing on the edges of the town centre.

3.12 The GOAD survey also provides detailed data for comparison retail sub-sectors, which shows that the diversity of uses within Mold is similar to, or above, the national average (in terms of number of units and/or proportion of floorspace) in a number of comparison goods sub-sectors. The sub-sectors with above average representation include menswear, womenswear and children's clothing, furniture, carpets and textiles, and chemists, toiletries and opticians. The town centre also has a higher than average proportion of units that are occupied by charity shops and other miscellaneous comparison retail uses.

3.13 Mold also underperforms in a number of key comparison retail sub-sectors, however. The town centre has a significantly smaller proportion of units and floorspace within the categories of mixed and general clothing, electrical goods, and variety/department stores than the national average.

3.14 In terms of non-retail uses, 42.0 per cent of all units within the town centre are in service uses, equating to just over 29.3 per cent of all floorspace. Each of these figures is a few percentage points above the national average, of 38.8 per cent of all units and 26.1 per cent of floorspace. The town centre has above average representation in a number of service categories including banks and financial services, hairdressers and beauty parlours, estate agents and travel agents. Only 12.7 per cent of units are in food and drink uses, however, compared to a national average of 17.8 per cent for this important sub-sector. Furthermore, only 6 per cent of units and floorspace is occupied by such uses, which is less than half the national average.

Proportion of Vacant Property

3.15 A total of 10.9 per cent of units within the town centre were vacant at the time of the latest GOAD survey, which equates to 5.6 per cent of all floorspace. This compares to UK averages of 12.4 per cent and 11.3 per cent, respectively. Mold Town Centre is therefore performing reasonably well relative to the national average, particularly in terms of the proportion of vacant floorspace. The figures for Mold indicate that vacant floorspace is largely contained within smaller units with an average size of 81 sq.m, compared to an average unit size of 158 sq.m for the town centre as a whole. At the time of our visit to the town centre, we did not identify any particular concentrations of vacant units.

Retailer Representation

3.16 The town centre has good representation from national multiple convenience goods retailers including Tesco, Aldi, Lidl, Farm Foods and Iceland. It is also served by a number of independent bakers, butchers, greengrocers and delicatessens. In terms of comparison goods retailers, a number of national multiples are represented within the town centre including Argos, B&M, Holland & Barrett, Homebase, Peacocks, Specsavers and WHSmith.

3.17 The town centre accommodates a number of good quality independent comparison retailers and specialist shops, such as a bookstore and a music shop. Mold's large street market is also clearly a popular event that serves to expand the range of goods available to users of the town centre, particularly in terms of clothing and footwear, of which there is otherwise limited choice. It should nevertheless be noted that this is a traditional street market whose offer is generally aimed at the lower end of the retail market.

3.18 In terms of non-retail uses, we have noted above that the town centre has a healthy complement of banks, building societies and other key service uses. Food and drink provision is reasonable, largely provided by independent operators rather than national multiples, and is of a noticeably better quality than within any of the County's other defined centres.

Commercial Rents

3.19 We have sourced commercial property data for Mold Town Centre from CoStar UK. Figure 3.1 below shows that asking rents for commercial property within the town centre have fluctuated between £4.75 per sq.ft in 2012 and a peak of £8.60 per sq.ft in 2017. In 2018, commercial rents have become more akin to the five-year average of £6.92 per sq.ft.

Figure 3.1 Town Centre Achieved Rents 2011-18 (£ per sq.ft)

Source: CoStar UK

Accessibility and Pedestrian Flows

3.20 Mold Town Centre is highly accessible by road and provides a number of small, well-signposted short and long-stay car parks that provide good access to different parts of the town centre. Off-street car parking is subject to charging but charging levels are generally low and car parks appeared to be well-used at the time of our visit.

3.21 A bus interchange is located at Chester Street and is well-related to the rest of the town centre, facilitating good access for services from other parts of the County and to more distant destinations such as Chester. Bus is the main form of public transport available to visitors, as Mold is not served by a railway station.

3.22 Pedestrian access to the town centre from residential areas to the north, west and south is considered to be good. Pedestrian movements to the eastern side of the town centre are more constrained by the busy A541. Whilst pedestrian connections between the core of the town centre and the Tesco foodstore off Chester Street are considered to be adequate, links with other foodstores and retail warehousing adjacent to the A541 are weaker.

3.23 Pedestrian movement around the compact core area of the town centre is considered to be reasonable, with adequate crossings. Pedestrian flows are strongest to the lower end of High Street and through the Daniel Owen Centre, with weaker flows in more peripheral areas.

Town Centre Environment

3.24 Mold is an attractive market town, mainly comprising historic properties and therefore smaller commercial units. Larger units are provided within the Daniel Owen Centre and by freestanding foodstores and retail warehousing to the east of the town centre's traditional core. Existing commercial accommodation is of mixed quality but is generally well maintained.

Figure 3.2 Town Centre Environment, Mold

3.25 There are large pedestrianised areas within the town centre which assist the functioning of the popular street market. Daniel Owen Square provides a flexible space for town centre events and Bailey Hill Park is a short distance to the north of the town centre, with access from High Street. Street furniture within the town centre is of reasonable quality and appears to be well maintained.

Summary

3.26 Mold is an attractive and generally healthy town centre that provides a range of retail facilities and service uses for local communities within this part of Flintshire. The town centre has a strong convenience retail offer, accommodates a popular street market and offers access to a reasonable range of service uses.

3.27 The town centre's comparison retail offer is stronger than any other defined centre within Flintshire and comprises some good quality independent retailers, but it is weak in a number of key areas including the provision of clothing and footwear, and electrical goods. Broughton Shopping Park contains lots of stores selling clothing and footwear and electric goods, such as Tesco Extra, Primark, New Look and Next, amongst others. It would be unrealistic for Mold to claw back a significant amount of comparison goods expenditure, due to the strength of offer at Broughton Shopping Park.

Performance of Flint Town Centre

3.28 Flint is defined as a 'town centre' in the UDP, with the Core Retail Area located along Church Street and part of Chester Street. The majority of the Core Retail Area (i.e. the historic town centre) is a designated conservation area.

3.29 The defined town centre at Flint contains three distinct areas; a traditional 'high street' focused on Church Street, a more secondary, linear commercial area to the north on Chester Street, and the Flintshire Retail Park to the east. It also contains a number of freestanding foodstores, public facilities and a cinema.

Previous Findings

3.30 The 2008 Town Centre Healthchecks Study found that the core area of Flint Town Centre was generally attractive with good accessibility., with a reasonably good range of mainstream comparison multiple retailers, leisure and community facilities. However, stakeholder engagement suggested that the convenience retail offer of the town centre would benefit from improvement. The town centre was also considered to be adversely affected by 'low-grade' property and congestion associated with the A548.

Diversity of Uses

3.31 Experian GOAD data collected in September 2017 show that Flint Town Centre (including Flintshire Retail Park) contained 107 units, providing a total floorspace of 27,740 sq.m. The average unit size is therefore 259 sq.m, although we note that this figure is heavily skewed by units within Flintshire Retail Park, which have an average unit size of 862 sq.m, compared to an average unit size of 137 sq.m elsewhere within the town centre. The 2008 Town Centre Healthchecks study was based on GOAD data for Flint Town Centre that at the time excluded Flintshire Retail Park, and therefore we have not sought to draw direct comparisons between the previous and current data.

3.32 The GOAD data show that Flint has a strong convenience retail sector, comprising 14.0 per cent of units (more than 4 percentage points above the national average) and 27.9 per cent of floorspace (more than 9 percentage points above the national average). Since the time of the previous Healthchecks Study, the convenience retail offer of the town centre has been expanded with the opening of Aldi and Sainsbury's stores. Whilst Flint is very well represented in respect of the general grocery and frozen food sub-category, it does not have any independent bakers or greengrocers, and just one butchers.

3.33 In terms of comparison retail, 38.3 per cent of town centre units are in comparison retail use, equating to 54.4 per cent of floorspace. This is above the national average in terms of both the proportion of units and amount of floorspace. The strongest comparison goods sub-sectors are *'DIY, hardware and household goods', 'electrical, home entertainment, telephones and video', 'furniture, carpets and textiles and 'variety, department and catalogue showrooms'*.

3.34 Nevertheless, there are a number of sub-sectors in which the town centre performs well below the national average. In particular, the clothing and footwear sub-categories *('footwear & repair', 'men's & boys' wear', 'women's, girls, children's clothing' and 'mixed and general clothing')* are especially underrepresented, accounting collectively for just three town centre units – equating to 2.8 per cent of all units and 2.5 per cent of all floorspace in the centre (compared to national averages of 9.1 and 11 per cent, respectively).

3.35 The proportion of service outlets in the centre is slightly below the UK average, accounting for 34 per cent of total units compared to the UK average of 39 per cent. In terms of floorspace, service uses account for 18 per cent, which is also below the UK average of 26 per cent. Nevertheless, Flint has reasonably good representation in all of the sub-categories of service uses, except perhaps in the 'building societies' and 'travel agents' sub-categories.

Proportion of Vacant Property

3.36 There were 13 vacant units at the time of Experian's latest GOAD survey of Flint, close to the UK average of 12 per cent. In terms of overall floorspace, the vacancy rate is below the UK average (17.9 per cent in Flint compared to an average of 26 per cent in the UK). The majority of the vacant units are located along Chester Street.

Retailer Representation

3.37 Flint's convenience goods offer includes a number of national multiple operators, such as Asda, Sainsbury's, Aldi, Tesco, Iceland and Farmfoods. There is also a good range of comparison multiples in Flint (taking into account the retail park), including Boots, Superdrug, Lloyds, Peacocks, Argos, Carpetright, B&M, Home Bargains, Poundland, Topps Tiles, and Motor World. The majority of national multiple comparison retailers are located along Church Street and at Flintshire Retail Park. This offer is supplemented by a range of smaller independent convenience and comparison outlets, selling a range of bulky and non-bulky goods.

3.38 The town centre contains only a limited number of service sector multiples, comprising two banks (Barclays and TSB) and food and drink outlets McDonald's, Sayers and Subway. Aside from these, there are a handful of smaller independent cafés and hot food takeaways (except for McDonald's at Flintshire Retail Park), restaurants, cafés or pub/bar chains.

Commercial Rents

3.39 Commercial property data for Flint Town Centre have been sourced from CoStar UK, as shown in Figure 3.3 below, which shows that asking rents have increased from around £4.50 per sq.ft in 2011 up to just below £7 per sq.ft in 2015, returning back to £4.50 per sq.ft in 2018. The five-year average stands at £5.64 per sq.ft.

Figure 3.3 Town Centre Asking Rents 2011-18 (£ per sq.ft)

Source: CoStar UK

Accessibility and Pedestrian Flows

3.40 Flint has a well-located railway station, with services to Holyhead, Llandudno, Manchester, Crewe and London. There are also good bus services, which are integrated with the railway station. The majority of the car parking is located free of charge at the retail park, with additional on- and off-street provision around the station and along Chester Street. The main coastal road (the A541) passes through the centre and does get busy at times, although pedestrian crossing facilities appear to be adequate. However, pedestrian links between the traditional centre and retail park would benefit from improvement. The railway line also severs pedestrian connectivity to the castle.

Town Centre Environment

3.41 Significant regeneration has recently taken place in the town centre, including the re-development of maisonettes, new extra care facilities, a new health centre, refurbishment of tower blocks, Townscape Heritage Initiative schemes and restoration of the church. The development of maisonettes, through the Council's Strategic Housing and Regeneration Programme (SHARP), has delivered 92 new homes for local people (intermediate and social rented housing) close to the town centre. The scheme has won the 2018 RTPI Wales Excellence Award. This regeneration has provided a significant boost to the town centre in terms of status, character, streetscene, perceptions and connectivity between the high street and Flintshire Retail Park. The majority of the retail and service uses in the traditional part of Flint Town Centre are accommodated within converted older residential/commercial buildings, which are in need of investment. Most of the retail core is located within a designated conservation area which may limit the scope for any significant extension and remodelling. The retail park contains large more modern premises, which appear to be fit for purpose.

Figure 3.4 Images of Flint

3.42 The town centre contains a number of architecturally significant buildings including the Grade II listed church at Church Street, and the Town Hall and railway station buildings. The core retail area is generally pleasant, and the views towards Flint Castle are particularly attractive. However, we observed that the public realm is in need of some investment and enhancement, particularly in terms of street furniture and soft landscaping. During our recent visit we also noted the presence of a development opportunity site to the north of Chester Street adjacent to Aldi and west of Church Street.

Summary

3.43 Flint's town centre boundary encompasses the traditional town centre and Flintshire Retail Park. The core retail area within the town centre is a designated conservation area, which, whilst attractive, makes any re-development proposals more complex. Flintshire Retail Park contains large retail units occupied by Sainsbury's, Argos, B&M and Poundland, amongst others.

3.44 Flint has a strong convenience retail sector, dominated by Sainsbury's and Aldi. Flint also has a strong comparison goods sector, although clothing and footwear categories are under-represented. The proportion of service sector outlets and floorspace are below the national average. The town centre performs well in relation to its vacancy rate, both in terms of the proportion of vacant units and floorspace Most vacant units are located along Chester Street. The town centre as a whole, including the retail park, is well represented by national multiples.

3.45 Flint is accessible by rail and bus services, but the main coastal road (the A541) passes through the centre and can get congested. Significant regeneration has recently taken place in the town centre area, providing a lift to the town centre in terms of status, character, streetscene, perceptions and connectivity between the high street and Flintshire Retail Park. Overall, Flint is found to be a generally healthy and attractive centre.

Performance of Holywell Town Centre

3.46 Holywell is an historic market town located north of the A55 in north-west Flintshire, and is defined as a 'town centre' under Policy SD1 of the UDP. The designated Core

Retail Area is concentrated located along the length of High Street, and the majority of Holywell Town Centre is a located within a conservation area.

Previous Findings

3.47 The 2008 Town Centre Healthchecks Study found that Holywell performed a localised role, catering primarily for local service and food shopping needs. The centre had a relatively strong convenience retail sector offer including both national multiple and independent food retailers. However, Holywell's non-food offer was reported to be very limited, with no operator demand identified from comparison goods retailers. There was a general perception among stakeholders that Holywell was experiencing decline, albeit the performance of the centre against indicators of vitality and viability had remained relatively static. Holywell had experienced only a marginal decline in the national retail rankings, the town's vacancy rate has been consistent, and pedestrian flow were stable.

3.48 The previous study found that overall there was scope for some improvement, albeit opportunities were limited. The study also highlighted that the centre would benefit from enhanced car parking facilities, and a boost to the attractiveness of the town to visitors.

Diversity of Uses

3.49 Holywell Town Centre contained a total of 13 convenience retail outlets in October 2017, equating to 13.7 per cent of the total units in the centre (95), which is above the UK average of 9.9 per cent. The 13 convenience retail outlets together provided a total of 5,820 sq.m gross floorspace, which represents 35 per cent of all retail floorspace available in the town centre (again above the UK average of 18.5 per cent). In terms of the number of units, this represents a slight drop in convenience retail outlets since the previous study (16 were reported in the 2008 Healthchecks Study), although convenience retail provision now accounts for a greater percentage of all town centre floorspace compared to the last study, when this was 28 per cent.

3.50 In terms of the comparison retail offer Holywell contained 32 outlets in October 2017, equating to 34 per cent of total units which is 4 percentage points below the national UK average of 38 per cent. As a proportion of total floorspace this equates to 30.3 per cent, which is considerably below the UK average of 43.2 per cent. Nevertheless, this represents an improvement against the proportion of comparison retail floorspace reported in the previous study, which was 22 percentage points below the national average at that time.

3.51 The clothing and footwear sub-categories remain particularly under-represented in Holywell, whereas there is an above average number of stores that fall within the *'furniture, carpets & textiles', 'booksellers, arts/crafts, stationers/copy bureaux', 'DIY, hardware & household goods', 'florists and gardens', and 'charity shops, pets and other comparison'* sub-categories. The comparison retail sector offer in Holywell is, therefore, limited in its size and diversity.

3.52 At the time of the previous study the proportion of service outlets in Holywell was slightly higher than the UK average, with such uses accounting for 38.2 per cent of town centre units, compared to the UK average of 33.2 per cent. This situation has remained relatively static with the latest GOAD survey data showing that in absolute terms the number of service units has fallen only slightly from 39 to 35, but this still accounts for 37 per cent of all units in the town centre and 22 per cent of all floorspace, compared to the national average of 39 and 26 per cent respectively.

3.53 The '*hairdressers, beauty parlours and health centres'* and *'estate agents & auctioneers'* sub-categories are well represented in the service sector against the national average (14.7 and 5.3 per cent of all units respectively), whereas outlets in the '*restaurants, cafés, coffee bars, fast food and take-aways'* sub-category are underrepresented, with these outlets equating to 11.6 per cent of total town centre units, compared to a UK average of 17.8 per cent. This is, however, an improvement from the last study where these uses only accounted for 8.8 per cent of all town centre units.

Proportion of Vacant Property

3.54 The 2008 Healthchecks Study reported that there were 11 vacant units om Holywell Town Centre, equating to a vacancy rate of 10.8 per cent which was marginally below the UK average of 11.1 per cent at that time. Stakeholder information collected during the previous study reported that a number of businesses were struggling and that any further downturn in turnover may force them to close.

3.55 The latest GOAD survey (October 2017) shows there are now 13 vacant units, which is only marginally higher than previously reported. This equates to a vacancy rate of 13.7 per cent which is only slightly above the current national average of 12.4 per cent. As a proportion of total floorspace, the vacancy rate is also broadly in line with the national average of 11.4 per cent. The vacant units are mostly located along High Street and Tower Gardens.

3.56 The analysis outlined above indicates that the levels of vacancy in Holywell remain similar to those identified during the Healthchecks Study in 2008, indicating that although there has been no real improvement, vacancy is generally staying in line with the national average and there has not been any significant worsening in terms of vacancy levels in the centre.

Retailer Representation

3.57 Holywell's convenience goods offer includes the national multiple operators Tesco, Lidl, Iceland and Spar. There is only a limited range of comparison retail multiples in the town centre, with representation from Home Bargains, Peacocks and Boots. The centre does contain a number of independent retailers including butchers, bakers and other comparison goods outlets (such as a florist, pet shop and second-hand shop).

3.58 The town centre contains a very small range of service uses, including estate agents and independent hairdressers and opticians. The 2008 study identified a number of banks and building societies along High Street, although many of these have now closed. During our visit we observed that there are also some independent cafés/tea rooms, but no representation from national fast food outlets, restaurants or café chains. There are, however, several public houses including a Wetherspoon which is a new addition since our previous study.

Commercial Rents

3.59 Commercial property data for Holywell Town Centre have been sourced from CoStar UK, as shown in Figure 3.5 below, which identifies that asking rents increased from around £4.50 per sq.ft in 2011 to around £6 per sq.ft in 2017. The latest data show a large jump in asking rents to just under £9 per sq.ft in 2018; however, we consider that the data may be skewed, with the five-year average standing at £5.23 per sq.ft.

Figure 3.5 Town Centre Achieved Rents 2011-18 (£ per sq.ft)

Source: CoStar UK

Accessibility and Pedestrian Flows

3.60 The centre is served by a well-located bus station at the end of High Street, as well as bus stops located to the immediate north of the town centre. There are no local rail connections. Off street parking provision is reasonable to the north of High Street, which is augmented with some on-street provision. The town centre core is pedestrianised, and since our previous study linkages have been improved between High Street and the Tesco and Lidl stores. Overall, the town centre appeared to have a relatively healthy level of footfall for the size and role of the centre.

Town Centre Environment

3.61 The majority of stores in Holywell are accommodated within converted residential/commercial buildings, rather than purpose-built retail units. Indeed, several retail units along High Street are located within attractive historic and listed buildings, with limited scope for extension/refurbishment, and so on. The retail property offer is therefore dominated by fairly small and constrained retail units, many of which appear now tired and are in need of investment. Tower Gardens contains more modern premises, but again the units available are generally quite small and this is likely to limit their market attractiveness to some potential occupiers.

3.62 Given the strong presence of architecturally significant Georgian and Victorian buildings throughout the centre, the environment and public realm is generally attractive. There have been recent improvements to the public realm. Also, a pilot scheme to de-pedestrianise the high street took place at the end of 2018, to allow traffic to freely access the town centre with the objective of increasing expenditure on the high street. There is also good access to local greenspace from High Street. Less positively, there are signs that the centre is becoming tired and so there is potential maximise the existing assets and enhance the centre. We also noted a derelict building at the end of High Street which detracts from the otherwise good quality townscape, but that property is due to be re-developed.

Figure 3.6 Town Centre Environment, Holywell

Summary

3.63 Holywell is an historic market town, the majority of which is located within a conservation area. As with Flint, any re-development within the conservation area is complex.

3.64 Holywell is well-served by convenience retailers, with both the proportion of units and floorspace being above the national average. Major operators include Tesco, Lidl, Iceland and Spar. The centre is under-represented in the comparison goods sector relative to the national average. National multiple operators are limited to Home Bargains, Peacocks and Boots. The clothing and footwear sub-categories are particularly under-represented. The proportion of service units and floorspace is broadly comparable with the national average. Holywell is lacking in food and beverage operators. The number of vacant units has risen by only two units, since 2008, to 13 vacant units.

3.65 Public transport is limited to bus services, with a bus station located at the end of High Street. The town centre core is pedestrianised and footfall is relatively strong. The Georgian and Victorian buildings within Holywell are attractive but are small and do not necessarily meet the needs of modern retailers. Overall, there are signs indicating that Holywell town centre is struggling and is in decline.

Performance of Buckley Town Centre

3.66 Buckley is defined as a 'town centre' in the UDP, with a Core Retail Area located along Brunswick Street and incorporating an indoor shopping precinct. The town is situated towards the south-east of Flintshire, on the A459.

Previous Findings

3.67 The 2008 Healthchecks Study found that Buckley is a relatively small town centre which primarily performs a localised convenience retail and day-to-day service function. The study noted that Buckley had experienced a considerable slippage in its position in the national retail rankings and had a relatively weak comparison retail offer with few national multiples. The food and drink sector was also found to be under-represented, and there was very limited operator demand for representation in the town. It was, however, also reported that the proportion of ground level vacancy in the centre was below the UK average and the number of vacant units had remained fairly constant.

Diversity of Uses, Retailer Representation and Vacancy

3.68 Buckley's convenience goods offer includes the national multiple operators Aldi, Iceland and Spar, supplemented by independent bakers, butchers and convenience retail outlets. The town centre thus has a rather limited convenience goods offer, although it has improved since the previous study with the introduction of Aldi to the centre.

3.69 In terms of comparison goods outlets, key national multiples include Home Bargains and Superdrug. There are also a number of other independent local operators and regional outlets such as Bevans, and a proliferation of charity shops. As noted in the previous study, the comparison retail offer in Buckley is still somewhat limited in its diversity and range.

3.70 Service uses in Buckley and include one bank (Lloyds), a Costa, independent cafés, estate agents, hairdressers and a tattoo studio. This position echoes that found in the 2008 Healthchecks Study which reported a similar range of service outlets in the centre.

3.71 At the time of the previous study there were eight vacant units, equating to a vacancy rate of 9.8 per cent which was below the UK average of 11.1 per cent at that time. During our recent visit we noticed a number of prominently located vacant units, mainly concentrated at the entrance to the shopping centre, together with a large vacant unit at the end of Brunswick Road. The vacancy level in the town appears to have deteriorated since the previous study and this is something to monitor closely.

3.72 Our discussions with locally active property market agents have revealed that there is very limited operator interest in Buckley shopping centre. Some attempts have been made to reconfigure the centre, including an application to combine some units, however there was no operator interest. The Aldi and Home Bargains stores appear to capture the majority of the trade and there is limited spill-over to other units. The agents also suggested that increasing passing trade by re-opening Brunswick Street to traffic might ignite more interest in the centre.

3.73 Since our discussions with agents, the precinct has changed ownership, presenting a real focus for re-investment and the potential to attract much needed comparison shopping. Of course, even a modest investment in comparison retailing can have an exponential effect on expenditure retention.

Commercial Rents

3.74 Commercial property data for Buckley Town Centre have been sourced from CoStar UK, as shown in Figure 3.7 below. Figure 3.7 identifies that asking rents jumped from around £7 per sq.ft in 2011 to around £14 per sq.ft in 2012, and then fell back sharply to around £5 per sq.ft between 2012 and 2018. The latest data show a large jump in asking rents to just over £12 per sq.ft in 2018, but we suspect that may be an anomaly, with the five-year average standing at £4.67 per sq.ft.

Figure 3.7 Town Centre Achieved Rents 2011-18 (£ per sq.ft)

Source: CoStar UK

Accessibility and Pedestrian Flows

3.75 The town centre core is pedestrianised with limited vehicular access, and is by-passed by the A549 (Windmill Road/Brunswick Road). Buckley is served by several surface-level parking areas, which appear to provide sufficient spaces, and the centre also benefits from good bus services.

Town Centre Environment

3.76 Buckley Town Centre contains a mix of converted residential/commercial buildings, and purpose-built retail units including an indoor shopping centre. The main shopping street along Brunswick Road is pedestrianised. The majority of town centre units are in reasonable to good condition, although some premises would benefit from investment/refurbishment. There are few buildings in the core area that could be described as architecturally significant and the general townscape is lacking character, albeit it is considered to be in good condition.

Figure 3.8 Town Centre Environment, Buckley

Summary

3.77 Buckley Town Centre continues to serve a relatively localised day-to-day retail and service function, with a limited convenience and comparison retail offer. Whilst this is not unexpected given Buckley's role and position in the retail hierarchy, we observed a number of prominent vacant units dispersed across the town centre, and we consider that vacancy levels should be closely monitored as the centre is showing some signs of weakness in this respect. More positively, the Aldi development in Buckley has attracted knock-on investment, through the development of Home Bargains. Similar investment in the comparison goods sector could attract further investment within the town centre.

3.78 The town centre environment is fairly bland, with some aesthetic enhancement needed in parts of the centre. Our discussions with locally active property market agents indicate that levels of operator demand in the centre are very low, which suggests that the centre is struggling to attract new interest and investment from retailers.

Performance of Shotton Town Centre

3.79 Shotton is defined as a 'town centre' in the UDP, located towards the north-east of Flintshire off the A494/A550. The Core Retail Area is linear and located along a section of Chester Road (West). The town centre merges with Connah's Quay to the immediate east.

Previous Findings

3.80 The 2008 Healthchecks Study concluded that Shotton performed an essentially localised role, catering primarily for local service and small-scale retail needs. The health of the centre was found to be relatively static, although there were some indications of decline and the town had experienced considerable slippage in the national retail rankings. Some scope for intervention in Shotton was identified, albeit there was limited demand from operators for representation in Shotton and there were no obvious development sites available in the core area. The most appropriate forms of intervention recommended at that time related to enhancements to the townscape and general physical appearance.

Diversity of Uses

3.81 The latest GOAD data (November 2016) shows that Shotton Town Centre contained a total of 12 convenience retail outlets, equating to 12.1 per cent of the total units in the centre, which is slightly above the UK average of 9.9 per cent. Convenience retail accounts for 2,530 sq.m of floorspace in the centre, which equates to 20.5 per cent of all available floorspace, and is therefore broadly in line with the national average of 19.5 per cent. This position is similar to that which was reported in the 2008 Healthchecks Study and therefore convenience retail provision appears to be relatively healthy and stable in the centre.

3.82 Shotton contains 37 comparison goods outlets, equating to 37.4 per cent of total units which is in line with the UK average. As a proportion of floorspace, however, comparison retail accounts for 33.2 per cent, which is 10 percentage points below the UK average of 43.2 per cent. There is strong representation in the 'furniture, carpets & textiles', 'DIY, hardware & household goods', 'cars, motorcycles & motor accessories' and the 'sports, toys, cycles and hobbies' sub-sectors. There is also reasonable representation in the important clothing and footwear sub-sectors. As was the case at the time of the 2008 study, Shotton's comparison retail offer is varied and is considered to cater primarily for localised comparison goods needs.

3.83 Service outlets in Shotton account for 36.7 per cent of town centre units, close to the UK average of 38.8 per cent. This is also broadly consistent with the level reported in the previous 2008 Healthchecks Study. The highest comparison goods representation is within the 'hairdressers, beauty parlours and health centres', 'banks & financial services' and 'building societies' sub-categories. Conversely, the 'restaurants, cafés, coffee bars, fast food and take-aways' sub-category is under-represented, with the 10 outlets in this sub-category equating to only 10.1 per cent of total town centre units, which is 7 percentage points below the UK average of 17.8 per cent. However, it is notable that this still represents an improvement over the position at the time of the Healthchecks Study in 2008, when there were only five outlets in this sub-sector, which was half the national average at that time in terms of the total number of total units.

Proportion of Vacant Property

3.84 The latest GOAD survey data suggest that there are 14 vacant units in the centre, which equates to 14.1 per cent of all units and 12.8 per cent of all floorspace in Shotton. This level of vacancy is slightly above the national average of 12.4 per cent (in terms of units) and 11.3 per cent (in terms of floorspace). The number and proportion of vacant units has increased slightly since the previous study, when it was reported that there were nine vacant units which equated to a vacancy rate of 13 per cent. Our latest centre surveys found that the vacant units in Shotton are dispersed across the town centre, and there are no major concentrations of vacant units.

Retailer Representation

3.85 There is a relatively limited range of convenience national multiple retailers present in Shotton Town Centre, including B&M Express, Iceland, Savers and Bargain Booze.

However, this is augmented by a range of independent delicatessens, butchers, bakers and other convenience retail stores. Shotton does not currently contain a mainstream supermarket.

3.86 There are also very few comparison retail multiples in the town centre (including Boots and various charity shops), but a wider range of independent outlets covering a number of sub-sectors including florists, variety shops, carpet shops, ladieswear, menswear, jewellery, domestic appliances and vaping shops.

Accessibility and Pedestrian Flows

3.87 Shotton Town Centre has a well-located railway station, and is also accessible via bus with stops adjacent to Iceland. There are various car parks spread throughout the centre, albeit the overall number of spaces available is fairly limited. As noted in the 2008 Healthchecks Study, pedestrian accessibility is hampered by the high volume of traffic which passes through the centre. During our recent visits we observed that it remained difficult to safely cross the main road through Shotton, and this was having the effect of dividing the town centre.

Town Centre Environment

3.88 As noted in the 2008 Healthchecks Study, Shotton is a linear centre with the retail and services core focused either side of Chester Road. The retail uses are strung out along the centre and are interspersed by services and other non-retail uses. From a townscape perspective, Shotton and Connah's Quay are very similar and not easily distinguishable. Both centres have few high-quality townscape or architectural features, our recent visit confirmed that little had changed and that the general townscape in Shotton would benefit from aesthetic improvement. The majority of the premises in Shotton are converted residential/commercial buildings, rather than purpose-built retail units. The units are in general, therefore, relatively small in size and restricted in their configuration.

Figure 3.9 Town Centre Environment, Shotton

Summary

3.89 Shotton contains a reasonable number of convenience and comparison retail units. However, this masks the fact that in qualitative terms the centre is lacking national multiple operators and currently has no supermarket. Comparison retail provision is well below the national average as a proportion of total available floorspace, and vacancy rates in the centre seem to be increasing albeit this is not at a level that would cause any significant concern at this stage. Nevertheless, the general retail offer is fairly varied with some representation in most sub-categories, and therefore the centre appears to be meeting daily shopping needs locally.

3.90 The general town centre environment is dominated by the busy main road, and comprises predominantly small traditional premises in reasonable condition, albeit there is little in terms of architectural features or visual interest. However, some units are starting to look dated and tired, and the general street scene would benefit from some investment to improve the visitor experience and possibly improve pedestrian movement either side of Chester Road.

Performance of Connah's Quay District Centre

3.91 Connah's Quay, which merges with Shotton to the immediate west, is defined as a 'district centre' in the UDP. The UDP specifically notes that there are regeneration issues associated with Connah's Quay which requires new development to improve the vitality and viability of the centre.

Previous Findings

3.92 The 2008 Town Centre Healthchecks Study found that although Connah's Quay contained a range of well-regarded civic, leisure and community facilities, it was a declining centre in need of significant investment. The centre was found to contain very few national multiple retailers and no multiple service operators, except for a Post Office. A high proportion of service sector outlets including beauty parlours and cafés was observed and a lack of comparison goods outlets was noted.

3.93 The 2008 Town Centre Healthchecks Study anticipated that a proposed medical centre at an allocated site to the rear of Connah's Quay Precinct could act as a catalyst for the development of low-grade shop units in the vicinity.

Diversity of Uses

3.94 The latest GOAD data (November 2016) show that Connah's Quay District contained four convenience outlets equating to 11.8 per cent of the total units in the centre, which is slightly above the UK average of 9.9 per cent. Notwithstanding this, convenience retail accounts for 680 sq.m of floorspace in the centre, which equates to 12.2 per cent of all available floorspace, which is below the national average of 18.5 per cent. The previous 2008 Healthchecks Study noted that the centre's convenience retail offering was limited, however at that time a Somerfield supermarket anchored the town's retail floorspace. This store has now ceased operating and thus the centre's convenience retail offering has worsened.

3.95 Connah's Quay contains six comparison goods outlets, equating to 17.7 per cent of total units which is significantly below the UK average of 37.8 per cent. As a proportion of floorspace this accounts for 20.1 per cent, which is less than half of the UK average of 43.2 per cent. The majority of the comparison goods representation is in the *'furniture, carpets & textiles'* and *'charity shops, pets and other'* sub-sectors. At the time of the 2008 Healthchecks Study, Connah's Quay contained 11 comparison goods outlets, equating to 30.6 per cent of total units; the centre's comparison goods offer has therefore declined significantly in the intervening period.

3.96 Service sector outlets in Connah's Quay account for half of town centre units, which is above the UK average of 38.8 per cent. As a proportion of floorspace this accounts for 23.7 per cent, which is slightly below the UK average of 26.1 per cent. The bulk of service representation is within the '*hairdressers, beauty parlours & health centres'* and *'restaurants, cafes, coffee bars, fast food & take-aways'* sub-sectors. Notably, there are no banks or building societies provided within Connah's Quay, which was also noted in the 2008 study.

Proportion of Vacant Property

3.97 There were six vacant units at the time of Experian's latest GOAD survey of Connah's Quay, which equates to 17.7 per cent of units, above the UK average of 12 per cent. When considered in terms of floorspace, 42 per cent is vacant, which is almost four times greater than the national average of 11 per cent. The closure of the Somerfield/Co-op foodstore and the Peacocks store represents the majority of the vacant floorspace. This position contrasts with the 2008 Healthchecks Study, when vacancy rates were not considered to be a significant issue for Connah's Quay.

Retailer Representation

3.98 There is a proliferation of independent retailers operating in Connah's Quay, with no national multiple retailers or service operators observed in the district centre, except for a One Stop convenience store and a Post Office. A variety of independent operators including an Eastern European foodstore, bakers, greengrocers, takeaways, beauty salons and second-hand furniture retailers were observed as operating within the district centre.

3.99 The Quay Shopping Centre, which opened in 2010 at the old Ffordd Llanarth neighbourhood centre, around 1.2km south-west of Connah's Quay District Centre, has become a hub for national multiple operators, perhaps limiting investment at Connah's Quay.

Accessibility and Pedestrian Flows

3.100 Connah's Quay is served by several surface-level parking areas, including a pay and display car park which served the former Somerfield/Co-op foodstore. Whilst there is no longer a railway station in Connah's Quay, the centre is well-served by public transport, being on main bus routes with centrally located bus stops, and close to Shotton railway station. Pedestrian links within the town are adequate, but would benefit from improvement; however, the major accessibility issue in Connah's Quay is road congestion, in particular around the High Street/Wepre Drive junction.

District Centre Environment

3.101 The majority of the retail and service uses in Connah's Quay are accommodated within converted older residential/commercial buildings, which are in need of investment. Whilst the centre generally has a lack-lustre appearance with few high-quality townscape or architectural features, and the development of The Quay Health Centre at Fron Road has served to modernise a small area of the district centre, there remains an opportunity to improve the quality of the wider district centre.

Figure 3.10 District Centre Environment, Connah's Quay

Summary

3.102 The closure of Peacocks and Somerfield (subsequently re-branded as Co-op) has had a significant negative effect on the vacancy levels in Connah's Quay District Centre. The closures have also meant that the limited presence of multiple retailers has reduced further since the previous 2008 Town Centre Healthchecks Study. Despite the opening of The Quay Health Centre, it is apparent that Connah's Quay is a declining centre.

Performance of Queensferry District Centre

3.103 Queensferry is defined as a 'district centre' in the UDP, and is located off the A494/A550 in the north-east of Flintshire. The town forms part of the Deeside area along with the closely neighbouring centres of Shotton and Connah's Quay.

3.104 Queensferry Town Centre has two distinct parts, comprising the traditional linear parade along Station Road, and the Asda 'Supercentre' which was built in the mid-1990s.

Previous Findings

3.105 The 2008 Healthchecks Study found that Queensferry was performing a dual role. Whilst the Asda store and Deeside Leisure Centre were key 'anchors' that attract visits from a County-wide catchment area, the traditional part of the town centre performed a more localised role and appeared to be suffering from decline. The vacancy rate was found to be above the national average and there was no evidence of operator demand for representation in the town.

Retailer Representation and Vacancy

3.106 Aside from the Asda store, there are no other national multiple retailers in Queensferry. There are a handful of independent retail outlets including a sportswear shop, domestic appliance shop, florist, delicatessen, and furniture shop. Other service and leisure uses include a Barclays bank, Subway, KFC, estate agents, recruitment agencies, hairdressers, beauty salons and a number of restaurants/hot food takeaways. There is also a McDonald's in the Asda store.

3.107 During our recent visits we observed vacancies spread throughout the traditional centre along Station Road. Nevertheless, our discussions with locally active property agents in the area have revealed that market interest in Queensferry has picked up since our previous study, and that there is currently relatively high demand in the area due to the availability of off-street parking, reasonable levels of pedestrian footfall/passing trade, low rents and no business rates.

Accessibility and Pedestrian Flows

3.108 The traditional part of the centre along Station Road was relatively quiet during our on-foot surveys of Queensferry. However, the area around the Asda store was significantly busier, which is to be expected given that this is the key anchor and main retail attraction in the town.

3.109 The A548 is a busy road and separates the traditional centre situated along Station Road and the Asda store. As a result, pedestrian linkages between the two areas are poor, although a designated pedestrian crossing is provided. A formal pedestrian crossing is also provided towards the north of the centre which links either side of Station Road, and the centre is served by several bus stops. As well as the large car park adjacent to Asda, there is a surface-level car park to the rear of premises on the northern side of Station Road.

Town Centre Environment

3.110 The traditional centre along Station Road contains a mix of small retail and service uses, interspersed by a number of residential and vacant units. The majority of the older premises in Queensferry are accommodated in converted residential/commercial buildings, rather than purpose-built retail units. Most units are therefore relatively small in size and restricted in their configuration. The main exception is the substantial Asda Supercentre, which is separated from core of the centre by the A548 and a large area of surface-level car parking.

3.111 Whilst few of the buildings in the centre could be described as architecturally significant, the centre's property stock generally appears to be well-maintained. Overall the centre is not unattractive, albeit it contains few noteworthy townscape features.

Figure 3.11 District Centre Environment, Queensferry

Summary

3.112 Queensferry continues to perform a localised comparison retail and service function, with limited representation in terms of convenience and comparison operators, aside from Asda. The Asda store is the dominant attraction, with poor pedestrian linkages to the traditional centre along Station Road which now feels very secondary in comparison. Levels of vacancy throughout the centre do not appear particularly high, and local agents have indicated there is moderate interest from operators due to the high levels of passing trade. The general town centre environment is unremarkable with limited visual interest, but the majority of premises appear to be in reasonable condition. The centre appears to be performing at a level commensurate with its size and role in the retail hierarchy, and there is limited scope for significant intervention.

Performance of Saltney District Centre

3.113 Saltney is defined a ‘district centre’ in the UDP, and is located at the intersection of High Street, Bridge Street and Victoria Road. The Core Retail Area contains a number of national multiple retailers including Morrisons, Farmfoods, Londis and Poundstretcher. There is also a Go Outdoors store on the edge of the Core Retail Area to the north of the railway line. The offer is complemented by a range of independent retailers such as an air rifle shop, a sewing shop and a mobility shop. Other services currently present in the centre include two hot food takeaways, a bookmakers, two hairdressers and a tattoo studio.

3.114 The retail premises in the centre comprise small traditional units, apart from the Morrisons store and the more recent purpose-built retail park units occupied by Poundstretcher and Farmfoods. At the time of our visit to Saltney there was only one vacant unit. The town centre environment is in a generally good condition, and despite the busy main road there are reasonable pedestrian linkages between Morrisons, Poundstretcher and other shops in the centre. Car parking is mainly limited to the Morrisons store, albeit this is fairly small and busy. We also observed the presence of a small play park opposite Morrisons.

3.115 Overall, Saltney appears to be a relatively healthy district centre that is functioning reasonably well to meet local shopping and service requirements.

Figure 3.12 Images of Saltney

Performance of Broughton Shopping Park

3.116 Broughton Shopping Park ('BSP') comprises an out-of-town retail park approximately 4 miles south-west of Chester, within the defined study area. BSP is not a traditional town or district centre as such and therefore is not listed a Key Shopping Centre within the UDP, but it makes a significant contribution to the retail offer of Flintshire, and so, unlike in the 2008 Town Centre Healthchecks Study, we have assessed the facility within the current study.

Diversity of Uses

3.117 Experian GOAD data collected in February 2017 show that BSP contained 43 units, providing a total floorspace of 32,390 sq.m. The majority of the retail offer at BSP is provided by national multiple operators.

3.118 Around 30 per cent of the floorspace at BSP is accounted for by convenience retailers, anchored by a Tesco Extra foodstore, alongside an Aldi store and a M&S Foodhall. Convenience retail outlets comprise around 7 per cent of the units at BSP, which is below the UK average of 9.9 per cent.

3.119 Some 55.8 per cent of the retail units at BSP are occupied by comparison goods retailers, including Primark, Next and Asda Living. This is significantly above the UK average of 37.8 per cent. In terms of floorspace, comparison good outlets take up 57.8 per cent of floorspace at BSP, which is also well above the UK average of 43.2 per cent.

3.120 The proportion of service sector outlets at BSP is slightly below the UK average, accounting for 28 per cent of total units compared to the UK average of 39 per cent. In terms of floorspace, service uses account for 13 per cent, which is half of the UK average of 26 per cent. The majority of service outlets at BSP are represented in the *'Restaurants, cafés, coffee bars, fast food & take-aways'* sub-category and include national operators including Costa, Pizza Express and Nando's.

Figure 3.13 Images of Broughton Shopping Park

Proportion of Vacant Property

3.121 The latest GOAD data identified four vacant units at BSP, equating to a vacancy rate of 9.3 per cent, which is below the UK average of 13.6 per cent. In terms of floorspace, these four units comprise 5.3 per cent of the floorspace at BSP, which is under half of the UK average of 12.2 per cent. Units which are currently vacant at BSP include those which were previously occupied by national retailers and have fallen into administration, such as Toys R Us and Poundworld.

Accessibility and Pedestrian Flows

3.122 BSP is located off junction 36A of the A55 and off the A5104. The shopping park benefits from a large, well laid-out central car park which has over 2,300 free car parking spaces. Whilst BSP is served by several bus routes to and from the surrounding area, the centre is not served by direct railway links. Furthermore, although there are good pedestrian crossing facilities, there are pedestrian linkages within the surrounding area are poor.

Town Centre Environment

3.123 BSP contains generally large, flexible and good quality units. The centre benefits from high-quality landscaping including seating areas which contributes to the overall quality of the environment of the retail park.

Summary

3.124 BSP makes a makes a significant contribution to the retail offer in Flintshire. The presence of multiple national retailers and operators, pleasant landscaping, alongside the availability of ample free car parking, ensures that the shopping park is a popular retail destination. The popularity of BSP is confirmed by the findings from the household survey, which we outline in the following section of our report.

3.125 However, we advise that currently, Broughton Shopping Park should not be allocated as a defined town centre. BSP is an out-of-centre facility with no policy protection and there is no justification for BSP to be a defined centre within the Development Plan. As set out in Paragraph 4.6 of Technical Advice Note 4 (November 2016), through time, destinations [such as out-of-centre retail parks] should be assessed as to whether these centres have matured into retail and commercial centres in their own right, offering the same level of service provision and being as accessible as traditional centres. Main town centre uses typically include retail, leisure, entertainment, and more intensive sport and recreation uses, offices, arts, culture and tourism development. The offer at BSP is predominantly retail, cinema and restaurant uses. In our view, BSP does not contain the same level of service provision as traditional centres and until it does, BSP should not be a defined centre within the Development Plan. BSP should be monitored and further assessments on this issue should be made in the future.

4 CURRENT RETAIL AND LEISURE EXPENDITURE PATTERNS

Introduction

4.1 In this section, we utilise the results from the household telephone survey to identify the current patterns of comparison and convenience retail and leisure spending by residents within the County. This can also be compared to the results from the previous household survey to indicate how shopping patterns have changed over time.

Household Survey Methodology

4.2 The telephone survey of households which informed the Council's previous retail capacity study was undertaken in December 2010. Our assessment of current shopping patterns is therefore based on a new telephone survey of 800 households undertaken in September 2018 by NEMS Market Research.

Study Area

4.3 The study area – as shown on the plan in Appendix B – is based on postcode sector boundaries and is the same as the study area used for the Flintshire Retail Capacity Study (June 2011). The constituent postcode sectors are detailed in Table 4.1 below.

Table 4.1 Postcode Sectors by Survey Zone

Zone	Postcode Sectors	Local Authority *
1	CH6 6, CH8 7, CH8 8, CH8 9, LL18 6, LL19 8, LL19 9	**Flintshire**
2	CH7 6	**Flintshire**
3	CH6 5	**Flintshire**
4	CH7 1, CH7 5, LL17 0 (part)	**Flintshire** / Denbighshire
5	CH7 4, LL11 3 (part), LL11 5 (part) LL12 0 (part), LL12 9 (part)	**Flintshire** / Denbighshire
6	CH7 2, CH7 3	**Flintshire**
7	CH5 1, CH5 2 (part), CH5 4 (part), CH64 5 (part)	**Flintshire**
8	CHA 5, CH1 6 (part), CH4 0, CH4 8 (part), CH4 9 (part), CH5 3	**Flintshire**

* The predominant local authority in each zone is highlighted in bold (that is, the local authority in which the majority of the populated area of the zone is located).

Survey Questionnaire

4.4 The survey questionnaire sought to establish:

- patterns of convenience goods spending, based on the location of:

- the store where the household last undertook a main food and grocery shop, the store visited the time before that, the amount spent per week and the frequency of visits to convenience stores (questions 1 to 4);
- the shop where the household last undertook a 'top-up' food and grocery shop, the shop visited the time before that, the amount spent per week and the frequency of visits (questions 5 to 8); and
- spending on food and groceries in small shops and markets (questions 9 to 12).
  - patterns of comparison goods spending, based on the locations of the last purchase of:
- clothes and shoes (questions 13 and 14);
- furniture, carpets or soft household furnishings (questions 15 and 16);
- DIY and decorating goods (questions 17 and 18);
- electrical items, such as TVs, DVD players, digital cameras, MP3 players, mobile phones, computers (questions 19 and 20);
- domestic appliances, washing machines, fridges or cookers (questions 21 and 22);
- health, beauty and chemist items (questions 23 and 24);
- recreational goods, such as sports equipment, bicycles, musical instruments and toys (questions 25 and 26); and
- other non-food items, such as books, CDs, jewellery, glass and china products (questions 27 and 28).

4.5 In addition to spending on retail goods, the household survey also sought to identify patterns of spending on leisure services and cultural activities (question 30), based on the locations where households spend the most money on:

- restaurants/cafés;
- pubs/bars/nightclubs;
- cinema;
- family entertainment (bowling, children's play centres);
- museums/art galleries;
- theatre/concerts;
- family entertainment centres such as ten pin bowling and skating;
- health and fitness;
- bingo/casino/bookmaker; and
- health and fitness.

4.6 Appendix C reproduces the household survey results and also shows the questions that were asked during the survey.

Composite Pattern of Spend on Comparison Goods

4.7 The composite pattern of spending for comparison retail goods, as shown in Spreadsheet 5 of Appendix E[3], was derived using expenditure data supplied by Experian. Table 4.2 below provides the weightings of each comparison goods category used to achieve the composite comparison goods expenditure figure.

Table 4.2 Composite Patterns of Comparison Goods Spend

Category	Percentage weighting
Clothes and shoes	29.9%
Furniture, floorcoverings, household textiles	15.1%
Hardware, DIY	6.2 %
Electrical items	18.8%
Domestic appliances	2.6%
Chemist goods	2.4%
Recreational goods	11.5%
Other non-food goods	13.5%
All Comparison retail goods	100.0%

4.8 The population of the study area in 2018, disaggregated by zone, is shown in the first row of figures in Spreadsheet 2. The overall population in the 2018 base year amounts to 164,029 persons, which is ONS based. Future population projections to 2030 are based on data from Experian MMG3.

4.9 The per capita spend on comparison goods in 2018 (Spreadsheet 3) varies from a low of £2,711 in Zone 7 to a high of £3,694 in Zone 2. The total amount of comparison goods spending for residents of the whole of the study area in 2018 is approximately £450.4m (Spreadsheet 4), excluding special forms of trading (internet, catalogue and TV shopping, which we subsequently abbreviate as SFT).

4.10 Spreadsheet 5 shows the market shares that each zone of the study area achieves in terms of the total spend on comparison retail goods by residents of each zone within the study area, and Spreadsheet 6 sets out the pattern of expenditure flows for the comparison goods sector as a whole, as revealed by the household survey.

4.11 Table 4.3 below, which is derived from the final two columns of Spreadsheet 6, summarises the main destinations for comparison retail goods expenditure within and outside of the study area. Broughton Shopping Park is, by some considerable margin, the main destination for comparison shopping within the study area, attracting £97.6m (21.7 per cent) of comparison retail expenditure available to study area residents. Mold Town Centre achieves the second-highest market share within the

[3] Any subsequent references to spreadsheets concerning comparison retail relate to the spreadsheets that are contained within Appendix E

study area (9.3 per cent, equivalent to £42.0m), and the only other centre within the study area to achieve a market share of 5 per cent is Flint Town Centre[4].

4.12 Overall, some 46.2 per cent of expenditure on comparison goods available to the study area's residents is spent in town and district centres, or in retail parks and freestanding stores, which are located within the study area. This is known as the aggregate retention rate. At the time of the last retail study, the aggregate retention rate was 49.4 per cent, and so there has been a decline of 3.2 percentage points.

4.13 Various retail facilities outside of, but close to, the study area now attract more of the comparison retail expenditure that is available to study area residents. For instance, Chester City Centre now has a comparison retail market share of 17.1 per cent, up from 15.9 per cent at the time of the last survey in 2010. Retail facilities in Denbighshire now attract 4.8 per cent of the study area's comparison retail expenditure, which is more than twice the market share of 2.3 per cent achieved in 2010. Denbighshire's improved market share is primarily due to the significant enhancement of retail provision in Prestatyn over recent years following the opening of Prestatyn Retail Park in 2013, which offers an array of high street names alongside a Tesco foodstore.

4.14 Mold Town Centre's comparison retail market share in 2018 is 9.3 per cent, slightly lower than its market share 9.7 per cent achieved in 2010. The attraction of Broughton Shopping Park has improved by four percentage points over the same period, from 17.7 per cent at the time of the last survey to 21.7 per cent in 2018.

Table 4.3 Broad Destinations for Comparison Goods Expenditure

	2018		2010	
Destination	**£m**	**%**		
Broughton Shopping Park	97.6	21.7	76.3	17.7
Mold Town Centre	42.0	9.3	41.8	9.7
Other destinations within the Study Area	68.4	15.2	95.3	22.1
Total retained expenditure	*208.0*	*46.2*	*213.3*	*49.4*
Total leakage outside of the Study Area	*242.4*	*53.8*	*218.6*	*50.6*
TOTAL	**450.4**	**100%**	**431.4**	**100%**

4.15 Table 4.3 confirms that £42.4m of the comparison retail expenditure available within the study area (in 2018) leaks to destinations beyond the study area. The market shares and estimated comparison goods turnovers of the main centres and retail parks/freestanding stores within the study area (that is, all destinations with a market share of 1 per cent or more) are set out in the last two columns of Spreadsheet 6 and are summarised in Table 4.4 below for ease of reference.

[4] The figures for Flint Town Centre include Flintshire Retail Park.

Table 4.4 Comparison Goods Expenditure Retained Within the Study Area

Defined centres within the Study Area	£m	%
Mold Town Centre	42.0	9.3
Flint Town Centre (including Flintshire Retail Park)	22.6	5.0
Queensferry District Centre	16.1	3.6
Holywell Town Centre	6.2	1.4
Buckley Town Centre	5.5	1.2
Connah's Quay District Centre	4.5	1.0
Retail parks and freestanding stores within the study area		
Broughton Shopping Park	97.6	21.7

4.16 Table 4.4 confirms that Broughton Shopping Park is the main comparison shopping destination within the study area, achieving a market share of 21.7 per cent. Broughton is followed by Mold Town Centre and Flint Town Centre[5], with market shares of 9.3 per cent and 5.0 per cent, respectively. The only other centres within the study area that achieve a market share of 1 per cent or greater are Holywell Town Centre (1.4 per cent), Buckley Town Centre (1.2 per cent) and Connah's Quay District Centre at (1.0 per cent).

4.17 As noted above, just over half (53.8 per cent) of comparison retail expenditure generated by residents of the study area 'leaks' to destinations outside of the study area. The main destinations for comparison goods expenditure leakage, again as shown in the last two columns of Spreadsheet 6, are summarised below in Table 4.5. Chester City Centre attracts £77.1m of the study area's comparison goods expenditure, equating to a market share of 17.1 per cent, and the Greyhound/Chester/Deva Retail Parks in Chester collectively achieve a market share of 19.1 per cent (£86.2m).

4.18 Wrexham Town Centre achieves the second highest market share of any defined centre outside of the study area, accounting for £13.1m or 2.9 per cent of all comparison retail expenditure, and the Plas Coch/Berse Road Retail Parks in Wrexham attract a further £5.4m of study area expenditure, equating to a comparison market share of 1.2 per cent. Prestatyn Town Centre's comparison retail market share has improved six-fold, from 0.4 per cent in 2010 to 2.4 per cent in 2018, accounting for £10.7m of study area expenditure. Clwyd Retail Park, also in Denbighshire, achieves a market share of 1.1 per cent.

4.19 No other individual destination outside of the study area achieves a market share of over 1 per cent; the £3.9m of comparison retail expenditure drawn from the study area by Liverpool City Centre gives it a market share of 0.9 per cent.

[5] The figures for Flint Town Centre include Flintshire Retail Park, which is within the defined town centre boundary

Table 4.5 Main Destinations for Comparison Goods Expenditure Leakage

Defined centres outside of the Study Area	£m	%
Chester City Centre	77.1	17.1
Wrexham Town Centre	13.1	2.9
Prestatyn Town Centre	10.7	2.4
Liverpool City Centre	3.9	0.9
Retail parks and freestanding stores outside of the study area		
Greyhound/Chester/Deva Retail Parks, Chester	86.2	19.1
Plas Coch/Berse Road Retail Parks, Wrexham	5.4	1.2
Clwyd Retail Park, Rhyl	5.2	1.1

4.20 The study area's retention level by zone (see Spreadsheet 5, 'Total Inside Study Area' row) varies from a low of 38.4 per cent in Zone 8, which is the closest zone to retail facilities in Chester, to a high of 56.1 per cent for Zone 4, which contains Mold Town Centre.

4.21 The localised retention rate is the proportion of expenditure on comparison goods available to residents in a specific zone that is spent in town centres and stores located within that zone. The highest localised retention rate is achieved by Zone 4 (33.2 per cent), which contains Mold Town Centre (see Spreadsheet 5, 'Zone 4' column and 'Total Zone 4' row), followed by Zone 3 (31.2 per cent), which includes Flint Town Centre (encompassing Flintshire Retail Park) and Zone 8 (30.5 per cent), which contains Broughton Shopping Park. The next highest localised retention rate for comparison goods is achieved by Zone 7 (17.4 per cent). All of the remaining localised retention rates are below 10 per cent, indicating that there is a relatively broad dispersal of comparison shopping patterns around the study area. It could be expected that a reasonable proportion of comparison goods expenditure leakage would go to Cheshire Oaks Designer Outlet [Cheshire Oaks]. Across all zones as a whole, approximately 7% of residents last bought clothes and shoes at Cheshire Oaks. However, in the other non-food sub—sectors, the market share in Cheshire Oaks was lower than 7%. Also, due to Cheshire Oaks being located north of Chester City Centre, many Flintshire residents would need to travel through Chester City Centre to get to Cheshire Oaks, which is another reason for the low level of leakage to Cheshire Oaks.

Comparison Goods Market Shares by Centre

4.22 Below, we provide below a more detailed analysis of the comparison goods market shares achieved by each of the defined centres within the study area, as well as Broughton Shopping Park which, as shown above, is also an important destination for comparison goods spending in Flintshire.

Mold Town Centre

4.23 Mold Town Centre achieves a comparison goods market share of 32.7 per cent in its own zone (Zone 4), and market shares of 19.6 per cent and 16.3 per cent in neighbouring Zones 2 and 5, respectively. Zone 6 is the only other zone in which Mold achieves a material market share (8.7 per cent). In each of the remaining four zones, Mold Town Centre achieves a market share below 5 per cent and its market share is particularly low in Zones 7 and 8 – where the attraction of retail facilities in Chester is greatest – at 0.9 per cent and 1.8 per cent, respectively.

Flint Town Centre

4.24 As would be expected, Flint Town Centre (encompassing Flintshire Retail Park) achieves its highest comparison goods market share in its own zone (Zone 3), of 31.2 per cent. The only other zone in which Flint achieves a material market share, of 13.0 per cent, is in neighbouring Zone 1. Flint does not achieve a market share in excess of 2 per cent in any of the remaining six survey zones.

Holywell Town Centre

4.25 Holywell Town Centre achieves a maximum comparison goods market share in its own zone (Zone 1), of 8.8 per cent, and does not achieve a market share of over 0.5 per cent in any of the other seven survey zones.

Buckley Town Centre

4.26 The maximum comparison goods market share achieved by Buckley Town Centre, of 7.5 per cent, is in its own zone (Zone 6). The comparison goods market share of Buckley is less than 2 per cent in all other survey zones.

Shotton Town Centre

4.27 Shotton Town Centre achieves a maximum comparison goods market share of 2.5 per cent in its own zone (Zone 7) and does not achieve a market share in excess of 1 per cent in any of the other seven survey zones.

Queensferry and Connah's Quay District Centres

4.28 Queensferry District Centre (including Asda) achieves a maximum comparison goods market share of 9.1 per cent in its own zone (Zone 7), followed by market shares of 7.4 per cent and 4.2 per cent in neighbouring Zones 6 and 8, respectively. a market share of between 2.6 per cent and 3.1 per cent in Zones 1, 2, 3, 6 and 8. Queensferry's comparison goods market share 2 per cent or below in the remaining five survey zones.

4.29 Connah's Quay District Centre – which is also in Zone 7 – achieves a maximum comparison goods market share of 4.5 per cent in its own zone and achieves a market share of over 1 per cent in only one of the other seven survey zones (Zone 3, at 1.3 per cent).

Saltney District Centre

4.30 Saltney District Centre secure a comparison goods market share of 2.2 per cent in its own zone (Zone 8), but does not achieve a market share in excess of 0.5 per cent in any other zone.

Broughton Shopping Park

4.31 Broughton Shopping Park achieves double-digit comparison goods market shares in each of the eight study area zones, the highest of 27.8 per cent being in its own zone (Zone 8), closely followed by market shares of 27.4 per cent and 26.9 per cent in neighbouring Zones 7 and 6, respectively. This finding emphasises the appeal of the Shopping Park to residents across the whole of Flintshire.

Centres/Retail Parks – Analysis of Dominance by Zone

4.32 In our report of June 2011, we provided an analysis of dominant centres/out-of-centre retail parks – defined as instances where the comparison goods market share exceeds 20 per cent – and centres of subsidiary influence, which were defined on the basis of having comparison goods market shares of between 10 per cent and 20 per cent. For comparability with the previous study, we have replicated the same exercise, using the household survey of September 2018. Our findings are set out in Table 4.6 below, which reveals that:

i Broughton Shopping Park is now the dominant comparison shopping destination in four survey zones compared with two at the time of the 2010 survey), and has a subsidiary influence in the remaining four zones. As was the case in 2010, Broughton is the only destination within the study area to perform a dominant or subsidiary comparison shopping function in all eight zones.

ii Mold Town Centre is the dominant centre in its own zone, and has a subsidiary influence in two zones.

iii Flint Town Centre (including Flintshire Retail Park) is the dominant centre in its own zone, and has a subsidiary influence in one other zone.

iv Buckley Town Centre is not the dominant centre in any zones, and whilst it had a subsidiary influence in its own zone at the time of the last survey (12.0 per cent market share), Buckley now only achieves a comparison market share of 7.5 per cent in its own zone.

v Similarly, Holywell Town Centre exerted a subsidiary influence in its own zone in 2010 (10.2 per cent market share), but it now only achieves a comparison market share of 8.8 per cent in its own zone.

vi Chester City Centre did not achieve a market share of 20 per cent or above in any of the eight survey zones at the time of the 2010 survey, albeit it did exert a significant influence (between 10 and 20 per cent) in all of the zones. Chester City Centre now achieves a comparison retail market share in excess of 20 per cent in two zones (Zones 2 and 3), and it retains a subsidiary influence in the remaining six zones.

vii Greyhound/Chester/Deva Retail Parks in Chester are dominant in two zones (Zones 7 and 8), and they exert a subsidiary influence in five of the remaining six zones.

viii At the time of the 2010 survey, Wrexham Town Centre was the dominant centre in the southern-most zone in the catchment area (Zone 5), achieving a comparison market share of 28.9 per cent. Whilst Wrexham Town Centre still attracts the greatest share of the comparison retail expenditure available to Zone 5 residents, its market share is now below 20 per cent and so it has moved out of the 'dominant centres' column in the table. Wrexham does not have a subsidiary influence in any of the other zones, which is consistent with the finding in 2010.

ix The highest comparison retail market share achieved by Prestatyn Town Centre at the time of the 2010 survey was in Zone 1, at 1.9 per cent. Prestatyn's influence has increased substantially in the intervening period and it now achieves a market share in Zone 1 of 14.7 per cent, albeit it still achieves a very low market share in all of the other seven zones.

x The influence of competing centres, located outside of the study area, therefore continues to be significant in all of the eight survey zones.

xi In five of the eight zones, there was one dominant centre at the time of the last survey but that is now the case in only two zones. Two zones (Zones 1 and 5) do not have a dominant centre, with market share spread around a significant number of centres and retail parks of subsidiary influence. Competition for market share in each zone therefore appears to be more intense than at the time of the last survey in 2010, and distributed across more destinations.

Table 4.6 Comparison Goods Centres/Retail Parks of Dominant and Subsidiary Influence

Zone	Dominant Centres/ Retail Parks (Market Share 20%+)	Other Centres/Retail Parks of Significant Influence (Market Share 10% to 20%)
1		Chester City Centre, Broughton Shopping Park, Flint Town Centre (including Flintshire Retail Park), Greyhound/Chester/Deva Retail Parks (Chester), Chester City Centre, Prestatyn Town Centre
2	Broughton Shopping Park, Chester City Centre	Mold, Greyhound/Chester/Deva Retail Parks (Chester)
3	Chester City Centre, Flint Town Centre (including Flintshire Retail Park)	Broughton Shopping Park
4	Mold Town Centre	Chester City Centre, Broughton Shopping Park, Greyhound/Chester/Deva Retail Parks (Chester)
5		Broughton Shopping Park, Chester City Centre, Mold Town Centre, Wrexham Town Centre
6	Broughton Shopping Park	Chester City Centre, Greyhound/Chester/Deva Retail Parks (Chester)
7	Broughton Shopping Park, Greyhound/Chester/Deva Retail Parks (Chester)	Chester City Centre
8	Broughton Shopping Park, Greyhound/Chester/Deva Retail Parks (Chester),	Chester City Centre

Convenience Goods Spending Patterns in 2018

4.33 The per capita spend on convenience retail goods in 2018 (Spreadsheet 3 in Appendix D[6]) varies from a low of £1,864 in Zone 7 to a high of £2,181 in Zone 5. The total amount of convenience goods spending for residents of the whole study area in 2018 is £334.7m (Spreadsheet 4), of which £6.4m, or 1.9 per cent, is spent on SFT. The pattern of expenditure flows for the convenience goods sector as a whole, as revealed by the survey of households, is set out in Spreadsheets 5 (percentages) and 6 (monetary values).

4.34 Table 4.7 – which is derived from the final column of Spreadsheet 6 – reveals that, overall, some £294.0m (or 89.6 per cent) of the expenditure on convenience goods available to residents of the study area is spent at retail facilities that are located within the study area; this is known as the aggregate retention rate (see Spreadsheet 6, final column, 'Total Inside Study Area' row).

4.35 A further 2.4 per cent of convenience retail expenditure (equating to £8.0m) currently flows to stores in and around Chester; facilities in and around Wrexham account for 3.2 per cent (£10.5m) of available expenditure; with retail facilities in Prestatyn and elsewhere in Denbighshire accounting for 4.6 per cent (£14.9m) of available convenience retail expenditure. Only 0.3 per cent (£0.9m) flows to more distant locations.

Overall retention rate

4.36 The current retention rate of 89.6 per cent is almost identical to the retention rate of 89.8 per cent at the time of the household survey in 2010, which was considerably higher than the retention rate of 76.2 per cent that was identified from the results of the 2008 household survey. We explained in our report of June 2011 that the improvement in the retention rate between 2008 and 2010 could, in part, be the result of methodological differences between the two household surveys.

4.37 In particular, residents were questioned in the 2010 survey on where they undertook their last two food and grocery shopping trips whereas, in the 2008 survey, residents were asked about where they undertook most of their food and grocery shopping. The approach in the 2010 survey therefore made respondents think about actual trips, whereas the way the questions in the 2008 survey were worded tended to result in a bias towards the larger foodstores and centres.

4.38 Our approach to the questioning in the 2018 survey is substantially unchanged from the 2010 survey, however, and so unless there had been significant enhancements to local convenience retail provision in the intervening period, we would not have expected to see a material improvement to the retention rate. At the time of our last study in 2011, we considered that there was little scope for further improvement to the retention rate, given that it was high at almost 90 per cent. Our view remains that there is realistically no scope for the aggregate level of convenience retail

[6] Any subsequent references to spreadsheets concerning convenience retail relate to the spreadsheets that are contained within Appendix D

expenditure retention to improve further, given the availability of retail facilities close to, but outside of, the study area, in neighbouring Denbighshire, Wrexham and Chester.

Table 4.7 Broad Destinations for Convenience Goods Expenditure

Broad Destination for Convenience Goods Expenditure	£m	%
Destinations within the Study Area	294.0	89.6
Total Retained Expenditure	***294.0***	***89.6***
Retail Facilities in Cheshire West and Chester	8.0	2.4
Retail Facilities in Wrexham	10.5	3.2
Retail Facilities in Denbighshire	14.9	4.6
Other more distant locations	0.9	0.3
Total Leakage	***34.4***	***10.4***
TOTAL	**328.3**	**100.0**

Main destinations for food and grocery shopping

4.39 Table 4.8 identifies the foodstores within the study area which achieve a convenience retail market share of 2.0 per cent or greater. As was the case at the time of the 2010 survey, the most popular destination for food and groceries shopping within Flintshire is the Asda store at Aston Road, Queensferry District Centre, which has a convenience goods turnover of around £40.3m and a market share of 12.3 per cent. The Tesco store in Mold Town Centre also retains its position as the second most popular destination for convenience shopping within the study area, with a convenience retail turnover of £31.7m and a market share of 9.7 per cent.

4.40 The third most popular foodstore within the study area is now Aldi store at Precinct Way in Buckley, which started trading in December 2015. Aldi has a convenience retail turnover of around £24.3m and a market share of 7.3 per cent, just ahead of the Tesco Extra store at Broughton Shopping Park which achieves a convenience goods turnover of approximately £22.4m, and a market share of 6.8 per cent. The investment by Aldi in Buckley has acted as a catalyst in bringing Home Bargains to Buckley. Comparison goods investment in the precinct could also act as a catalyst for further retail investment. The other foodstores within the study area which achieve a convenience retail turnover in excess of £15m are the Aldi stores in Mold, Flint and Broughton, as well as the Morrisons store in Ffordd Llanarth, the Tesco store in Tesco store in Holywell Town Centre and the Sainsbury's foodstore at Flintshire Retail Park.

4.41 We also note that there are now ten foodstores in Flintshire which each achieve a convenience retail turnover in excess of £10m, compared with six at the time of the 2010 survey. Furthermore, only one so-called 'discount' foodstore in Flintshire achieved a convenience market share of 2.0 per cent or above in 2010 (Aldi in Mold Town Centre), whereas at the time of the 2018 survey there were six (Aldi stores in Buckley, Mold, Flint and Broughton and Lidl stores in Holywell and Mold).

4.42 The findings outlined above and shown in Table 4.8 indicate that there is now a greater dispersal of convenience retail expenditure in Flintshire, and they also serve to illustrate the increasing prominence of discount foodstores in recent years. We note in passing that Aldi and Lidl – which are commonly referred to as 'discount' foodstores or 'limited assortment discounters' – sell an increasingly broad range of product lines, including well-known branded goods, and so the distinction between those retailers and the 'big four' (Tesco, Asda, Sainsbury's and Morrisons) is becoming more blurred.

Table 4.8 Main Destinations for Convenience Goods Expenditure Retained within the Study Area

Foodstores/Centres within the OCA	Convenience Goods Expenditure Retained within the OCA (£m)	Market Share (%)
Asda, Aston Road, Queensferry District Centre	40.3	12.3
Tesco, Ponterwyl, Mold Town Centre	31.7	9.7
Aldi, The Precinct Way, Buckley	24.3	7.4
Tesco, Broughton Shopping Park, Broughton Road, Broughton	22.4	6.8
Aldi, Chester Street, Mold Town Centre	18.1	5.5
Morrisons, Ffordd Llanarth	17.7	5.4
Aldi, Chester Street, Flint	16.7	5.1
Aldi, Chester Road East, Broughton	16.1	4.9
Tesco, Strand Walk, Holywell	13.9	4.2
Sainsbury's, Flintshire Retail Park, Holywell Road, Flint Town Centre	11.0	3.4
Lidl, Coleshill Street, Holywell	7.5	2.3
Morrisons, High Street, Saltney	7.1	2.2
Lidl, Denbigh Road, Mold	6.5	2.0

4.43 The main leakage destinations for convenience goods expenditure are set out in Table 4.9. At the time of the 2010 survey, the Sainsbury's store at Plas Coch Retail Park in Wrexham was the most popular destination for food and groceries shopping outside of Flintshire, but the two most popular leakage destinations are now the Tesco and Aldi foodstores in Prestatyn.

Table 4.9 Main Destinations for Convenience Goods Expenditure Leakage

Stores Outside the Study	Convenience Goods Expenditure Leakage (£m)	Market Share (%)
Tesco, Prestatyn Retail Park, Prestatyn	6.0	1.8
Aldi, Meliden Road, Prestatyn	3.3	1.0
Sainsbury's, Plas Coch Retail Park, Wrexham	2.9	0.9
Aldi, Hartford Way, Chester	1.7	0.5
Morrisons, Ruthin Road, Wrexham	1.1	0.3
Asda, Holt Road, Eagles Meadow, Wrexham	1.1	0.3
Waitrose, Broughton, Chester	1.1	0.3

4.44 In our report of June 2011, we provided an analysis of the study area's retention level by zone, which is the proportion of expenditure on convenience retail goods available to residents in a specific zone which is spent in town centres and stores located within the study area. We have replicated that exercise, using the 'Total Inside Study Area' row of Spreadsheet 5.

4.45 The retention level remains at similar, very high levels (over 88 per cent) in six survey zones (Zones 2, 3, 4, 6, 7 and 8). In Zone 1, which was previously the other survey zone with a retention level over 88 per cent, the retention level has declined to 76 per cent, primarily because foodstores in neighbouring Denbighshire now attract a greater proportion of expenditure from that zone. The retention level in the remaining zone, Zone 5, was a relatively modest 59 per cent at the time of the last survey, which was not surprising given that the zone encompasses a largely rural area that does not contain any defined centres, and the zone is close to the study area's southern boundary, meaning that expenditure leakage to Wrexham is inevitable. Nevertheless, the retention level in Zone 5 has improved to 67 per cent.

4.46 We have also compared the localised retention rate identified by the 2018 survey – that is, the proportion of expenditure on convenience retail goods available to residents in a specific zone which is spent in centres and stores located within that zone – with the findings from the 2010 survey. Table 4.10 shows that, at 81.9 per cent, the localised retention rate remains highest for Zone 4, which encompasses Mold Town Centre, closely followed by Zone 3, which contains Flint Town Centre (encompassing Flintshire Retail Park), with a localised retention rate of 80.8 per cent.

4.47 A notable change relates to the localised retention rate in Zone 6, which contains Buckley Town Centre. The localised retention rate was relatively low at 33.0 per cent in 2010 but is now almost 60 per cent. The town centre previously contained a Co-operative foodstore, which was relatively small with only around 700 sq.m of convenience retail sales area floorspace. At the time of the last survey, the Co-operative store in Buckley attracted £6.0m of convenience retail expenditure available to study area residents. The Co-operative store has closed down, but a relatively new Aldi store in Buckley is the third most popular foodstore in Flintshire, attracting £24.3m of convenience retail expenditure available to study area residents.

4.48 The opening of Aldi in Buckley has resulted in fewer local residents travelling to the Tesco Extra at Broughton Shopping Park to meet their convenience shopping needs, which explains the much healthier localised retention rate now achieved by Zone 6.

4.49 The localised retention rate in Zone 1 has declined from 58.2 per cent in 2010 to 47.3 per cent in 2018. The reason is because foodstores in Denbighshire – and Prestatyn Town Centre in particular – now attract a greater proportion of expenditure from Zone 1.

4.50 The localised retention rate remains particularly low in Zone 2 and Zone 5, at 5.0 per cent and 6.4 per cent, respectively. That finding is not surprising, however, given that those survey zones both encompass rural areas containing no town or district centres. Residents of Zone 2 are relatively close to foodstores in Mold, Flint, Buckley and Queensferry, and residents of Zone 5 are similarly able to travel to Mold or Wrexham for their food and grocery shopping.

Table 4.10 Localised Convenience Goods Retention Rates

Zone	Zonal Retention Rate (%) 2010	2018
1 (Holywell)	58.2	47.3
2 (Central Flintshire)	3.1	5.0
3 (Flint)	76.3	80.8
4 (Mold and West Flintshire)	79.5	81.9
5 (South Flintshire)	9.9	6.4
6 (Buckley)	33.0	59.7
7 (Connah’s Quay, Shotton and Queensferry)	77.3	71.9
8 (Broughton and Saltney)	64.8	60.8

Conclusions in Relation to Retail Spending Patterns

Comparison Goods Spending

4.51 Town centres, retail parks and freestanding stores located within the study area account for 46 per cent of the comparison goods expenditure available to residents of the study area. The main comparison retail destinations within the study area are Broughton Shopping Park, which secures £97.6m of the residents’ comparison goods expenditure, and Mold Town Centre, which accounts for £42.0m.

4.52 Chester City Centre and other retail facilities in the Chester area account for £185.1m of residents’ comparison goods expenditure (41.1 per cent), which is only £23m less than the £208.0m that is attracted by all of the retail facilities across Flintshire.

4.53 Retail facilities in the Wrexham area attract a much smaller proportion of the comparison retail expenditure available to residents of the study area, at 4.5 per cent (£20.1m). Retail facilities in Denbighshire account for a similar proportion of expenditure (4.8 per cent, equating to £21.4m); this represents a substantial increase in relation to the time of the last survey (2.3 per cent, or £9.81m), which is primarily due to the opening of the high-quality Prestatyn Retail Park in 2013.

4.54 A further 3.5 per cent of comparison goods expenditure is accounted for by longer distance leakage to places like Liverpool City Centre.

4.55 Mold Town Centre achieves a comparison goods market share of 33 per cent in its own survey zone (Zone 4), similar to the 34 per cent market share it achieved in 2010, and it also achieves significant market shares of between 15 and 20 per cent in Zones 2 and 5. Mold Town Centre’s market shares are below 9 per cent in the remaining five zones, and the market share for the town centre is particularly low in Zones 3, 7 and 8, at less than 3 per cent.

4.56 Flint Town Centre’s comparison goods market share reaches a maximum of 32 per cent in own zone (Zone 3), and Flint also achieves a significant market share, of 3 per cent, in neighbouring Zone 1. Flint exerts a much weaker influence over the remainder of the study area, achieving a market share of below 2 per cent in the remaining six survey zones.

4.57 Holywell and Buckley and Shotton Town Centres achieve a maximum market share of 9 per cent and 8 per cent in their own zones (Zones 1 and 6), respectively, which represents a reduction on the 10 per cent (Holywell) and (12 per cent (Buckley) achieved at the time of the last survey. Queensferry District Centre also achieves a maximum comparison market share of 9 per cent in its own zone (Zone 7), which is largely due to the presence of the Asda store at Aston Road.

4.58 Shotton Town Centre and Connah's Quay District Centres are also located in Zone 7, but they achieve significantly lower maximum comparison market shares of 3 per cent and 5 per cent in their own zone, respectively. Saltney District Centre achieves a comparison goods market share pf 2 per cent in its own zone (Zone 8) but its market share in each of the remaining seven survey zones is substantially below 1 per cent.

4.59 Broughton Shopping Park achieves comparison goods market share in excess 20 per cent in four survey zones (Zones 2, 6, 7 and 8), and a market share in excess of 10 per cent in the remaining four zones.

Convenience Goods Spending

4.60 Town, district and local centres and freestanding stores located within the study area collectively account for 90 per cent of the convenience goods expenditure available to residents of the study area, which is the same level of expenditure retention achieved at the time of the 2010 survey.

4.61 The highest individual market shares within the study area are achieved by Asda in Queensferry, Tesco in Mold, Aldi in Buckley – which only started trading in 2015 – and Tesco Extra at Broughton Shopping Park. Ten foodstores in Flintshire now achieve a convenience retail turnover in excess of £10m, compared with six at the time of the 2010 survey, and whereas only one 'discount' foodstore in Flintshire achieved a convenience market share of 2.0 per cent or above in 2010, there are now six.

4.62 In our 2011 study, we advised that, the Council should prioritise the enhancement of convenience retail provision in Buckley Town Centre. The relatively recent addition of Aldi in Buckley appears to have addressed that localised deficiency; as noted above, whilst Aldi (and Lidl) is commonly referred to as a 'discount' foodstore, the quality and range of products available has improved significantly in recent years and it is now effectively a mainstream foodstore operator.

5 ASSESSMENT OF RETAIL NEEDS

Introduction

5.1 Based on the retail spending patterns identified in the previous section, and forecasts of future population and retail expenditure growth, this section of the report sets out the quantitative need for additional retail floorspace in the County over the study period. It goes on to provide our assessment of qualitative needs based on the town centre performance analysis set out in Section 3 of this report, and having regard to our review of market trends contained within Section 2.

Quantitative Assessment

Methodology

5.2 The key inputs and assumptions that have been applied as part of our quantitative assessment of retail needs are explained below. Our assessment is based on sub-national population projections provided by the Office for National Statistics (ONS).

5.3 At the outset, we emphasise that retail capacity forecasts should be subject to regular review throughout the plan period, in order to ensure an up-to-date evidence base which is informed by recent economic and market trends. Furthermore, we advise that longer-term quantitative forecasts should generally be treated as indicative given the inherent uncertainties in respect of longer-term economic and demographic trends.

Population and expenditure growth

5.4 Spreadsheets 2, 3 and 4 of Appendices D and E contain detailed figures for population and retail expenditure growth in the study area over the period to 2030. The population figures are derived from Experian MMG3 and are ONS-based. The total population figures for the study area are presented below in Table 5.1.

5.5 The figures in Table 5.1 show that the study area is predicted to experience only limited population growth over the study period under the trend-based scenario.

Table 5.1 Summary of ONS-Based Population Growth

Year	Study Area Population	Population Growth relative to 2018
2018	164,129	-
2022	165,123	994
2026	165,901	1,772
2030	166,215	2,086

Source: Spreadsheet 2 of Appendices D and E

5.6 We understand that the Council has taken a more positive approach in the projections of population growth in other evidence base documents, which has a higher population growth than the ONS-based projections. Rather than undertaking sensitivity testing for different population projections, we suggest that population growth is closely monitored over time. If population does rise higher than the ONS-based population projections, this growth can be taken into account in subsequent retail capacity studies.

5.7 Table 5.2 below provides a summary of overall levels of convenience retail spending growth across the study period. This includes an allowance made for special forms of trading ('SFT'), taken from Experian's Retail Planner Briefing Note 16 ('RPBN') of December 2018. Expenditure on SFT is excluded from our assessment as it is not considered to be available to support the future development of retail floorspace.

5.8 Experian provides adjusted forecasts of SFT market shares to account for online transactions that are serviced through stores (that is, items 'picked' for home delivery from stores and purchases made via 'click and collect'). Localised rates of SFT were captured by the household survey, although they do not take account of how individual transactions are serviced. The localised rates vary for convenience and comparison retail goods.

5.9 For convenience retail goods, the SFT market share identified by the household survey was 1.9 per cent. This is lower than Experian's adjusted market share for SFT of 3.4 per cent in 2017, or its forecast of 3.7 per cent for 2018, but we have chosen to use the SFT market share identified by the household survey as it is a locally derived figure rather than a national average. Similarly, for the forecast years (2022, 2026 and 2030), we have grown the 2018 household survey-based SFT figure but the rates we have used are lower than Experian's forecast national rates.

5.10 Based on Experian population data and expenditure forecasts, the total level of available convenience retail expenditure (excluding SFT) is expected to increase only by £9.5 million in the period to 2030, as shown in Table 5.2 below.

Table 5.2 Convenience Retail Expenditure Growth Summary

Year	Convenience expenditure inc. SFT (£m)	SFT (£m)	Convenience retail expenditure exc. SFT (£m)
2018	334.7	6.36	328.3
2022	342.6	8.09	334.54
2026	345.61	9.23	336.38
2030	347.64	9.82	337.8

Source: Spreadsheet 4 of Appendix E

5.11 Table 5.3 provides an equivalent summary for comparison goods expenditure. As with the convenience retail forecasts, we have used the SFT figure from the household survey for the 2018 base year, of 14.5 per cent, in preference to Experian's adjusted market share for SFT of 15.5 per cent in 2017, or its forecast rate of 17.0 per cent for 2018. We have also grown the 2018 household survey-based SFT figure but the SFT rates we have applied for the forecast years (2022, 2026 and 2030) are lower than Experian's forecast national rates.

5.12 After allowing for SFT growth, we forecast an increase in available comparison retail expenditure within the study area of £180.2 million between 2018 and 2030.

Table 5.3 Comparison Retail Expenditure Growth Summary

Year	Comparison expenditure inc. SFT (£m)	SFT (£m)	Comparison expenditure exc. SFT (£m)
2018	526.8	76.4	450.4
2022	593.9	99.8	494.1
2026	678.8	121.0	557.8
2030	771.4	140.8	630.6

Source: Spreadsheet 4 of Appendix D

Retained expenditure

5.13 The quantitative forecasts of retail need take account of the total amount of comparison and convenience goods expenditure which is retained within Flintshire. Table 5.4 sets out the total amount of expenditure retained within the study area in 2018.

Table 5.4 Summary of Expenditure Retention in Flintshire at 2018

	Expenditure Available to Study Area Residents (£m)	Expenditure Retained within Study Area (£m)	Expenditure Retained within Study Area (%)
Comparison goods	450.4	208.0	46.2 per cent
Convenience goods	328.3	294.0	89.6 per cent

Source: Spreadsheets 6 of Appendices D and E

5.14 In total, and as set out in greater detail in Section 4 of this report, 46.2 per cent of study area residents' expenditure on comparison retail goods is currently retained within the study area, and 89.6 per cent of residents' expenditure on convenience retail goods is retained within the study area.

5.15 As we explained in Section 4, we do not consider there to be any realistic scope for further improvement to the convenience retail retention rate, which is already high at almost 90 per cent and given the availability of retail facilities close to, but outside of, the study area, in neighbouring Denbighshire, Wrexham and Chester. We therefore assume that convenience goods market shares will remain constant over the study period.

5.16 For comparison retail goods, we do not consider realistic to expect that the retention rate can be improved back to the 49.4 per cent that was achieved in 2010. In our judgment, maintaining the retention rate at the current level (46.2 per cent) is a more realistic target, given the relatively strong competition from retail facilities in Denbighshire, Chester and elsewhere.

Claims on expenditure

5.17 As we explained in the previous section, the claim from spending on SFT (such as online shopping) has already been removed from the retail expenditure forecasts.

5.18 In addition to SFT, it is necessary to take account of sales density growth (which is the expected growth in turnover of existing retailers within the study area), and commitments for new retail floorspace (schemes implemented but not yet trading at the time of the household survey, or extant planning permissions which would result in additional retail floorspace). We cover each of these claims in turn, below.

Sales density growth

5.19 Sales density growth relates to the improved productivity or efficiency of retail floorspace over time. In assessing the amount of expenditure that is available to support the development of new retail floorspace, we make an allowance for sales density growth associated with existing retail floorspace within the study area. Allowances for sales density growth are linked to expenditure growth and, given the very low rates of expenditure growth forecast for the convenience retail sector, we do not allow for any real terms growth in sales densities for convenience goods floorspace within the study area. For comparison retail floorspace, we assume an average annual increase in sales densities of 1.5 per cent.

5.20 The ability of existing floorspace to absorb expenditure growth will depend on its type. More modern floorspace (such as that within purpose-built shopping centres and large, freestanding foodstores) is better able to accommodate growth than older, less flexible floorspace. Given that there is a variety of retail floorspace throughout the study area, it is considered robust to apply the average sales density growth figure of 1.5 per cent. We also make an allowance for sales density growth of committed comparison retail floorspace to account for the improved sales productivity of this additional floorspace.

Floorspace commitments

5.21 The floorspace commitments that have been identified by the Council and are taken account of in the quantitative need assessment are identified in Table 5.5 below.

Table 5.5 Retail Commitments

Commitment	Convenience Net Sales Area (sq.m)	Comparison Net Sales Area (sq.m)
Saltney Retail Park	-	3,520
Flintshire Retail Park	1,254	1,444
Denbigh Road, Mold	-	483
Total	**1,254**	**5,477**

Source: Spreadsheet 7 of Appendices D and E

5.22 We estimate that the committed retail floorspace referred to in Table 5.5 will generate a convenience goods turnover of £12.2 million in 2022, and a comparison goods turnover of £26.1 million in the same year, by which time we expect these committed developments to be fully trading. Further details of the assumptions applied in estimating the turnover of committed retail floorspace are contained in Spreadsheet 7 of Appendices D and E.

Need for Convenience Retail Floorspace

5.23 Spreadsheet 8 of Appendix E provides our forecasts of convenience retail floorspace requirements in Flintshire. Floorspace requirements have been calculated to the end of the study period and for the interval years of 2022, 2026 and 2030. The spreadsheet is structured as set out below in Table 5.6, where we explain some of the other assumptions that we have applied in calculating these quantitative requirements.

Table 5.6 Methodology for Convenience Retail Assessment

Row	Explanation/Description
A&B	Total population and convenience retail expenditure within the Flintshire study area. This is taken from Spreadsheets 2-4.
C&D	Proportion of convenience retail expenditure which is retained within the study area (£m & per cent) based on the findings of the household telephone survey (as detailed in Spreadsheets 5 and 6). Market share is held constant at 89.6 per cent throughout the study period.
E&F	Inflow of convenience retail expenditure to destinations within the study area from residents outside Flintshire. This is derived by applying the level of inflow specified in Row E to the convenience goods expenditure retained (Row D). The rate of inflow is held constant across the study period.
G & H	Baseline turnover of retailers of convenience goods in the study area, and growth in retained convenience goods expenditure within Flintshire taking into account rows A-G.
I&J	Claims on residual growth in convenience retail expenditure including sales density growth in existing stores within Flintshire and turnover from committed convenience retail floorspace. Commitments are expected to be implemented and trading by 2022. Given the low levels of expenditure growth we have not allowed for any sales density growth for either existing stores or commitments over the study period.
K	Total claims on expenditure (£m) from sales density growth in existing stores and committed convenience retail floorspace.
L	Final residual convenience retail expenditure capacity (£m), calculated by deducting total claims on expenditure (Row K) from growth in available expenditure (Row H) within Flintshire.
M-O	Final residual convenience retail expenditure converted into floorspace requirements by applying a generic convenience retail sales density of £10,000 per sq.m (kept constant over the study period in line with our approach to sales density growth). This produces a net floorspace requirement (i.e. total required convenience retail sales floorspace), which is converted to a gross convenience retail floorspace figure on the basis of an assumed net:gross floorspace ratio of 70:30.

5.24 Assuming a constant rate of expenditure retention, the result of Spreadsheet 8 in Appendix E indicates a negative overall floorspace requirement over the whole of the study period to 2030 due to the relatively low level of population and expenditure growth and the impact of existing commitments within Flintshire. The floorspace requirements arising within each study period are summarised in Table 5.7:

Table 5.7: Summary Convenience Retail Floorspace Requirements

2018-2022	2022-2026	2026-2030	2018-2030
-1,992 sq.m (gross)	86 sq.m (gross)	-219 sq.m (gross)	-2,115 sq.m (gross)
-1,387 sq.m (net sales)	60 sq.m (net sales)	-153 sq.m (net sales)	-1,480 sq.m (net sales)

Source: Spreadsheet 8 of Appendix E

5.25 Table 5.7 shows that there is no need for new convenience retail floorspace over the period 2018-2030. On this basis, the Council does not need to plan for new convenience retail floorspace in the short, medium or long term periods, although this position should be kept under review.

Need for Comparison Retail Floorspace

5.26 Table 8 of Appendix D calculates requirements for comparison retail floorspace over the study period, on the basis of the expenditure retention rate remaining constant at 46.2 per cent. Table 5.8 below explains the structure of this assessment, which is similar to the approach used for convenience retail floorspace, albeit the assumptions differ in terms of sales densities and net:gross floorspace ratios.

Table 5.8 Methodology for Comparison Retail Assessment

Row	Explanation/Description
A&B	Total population and comparison retail expenditure within the Flintshire study area. This is taken from Spreadsheets 2-4.
C&D	Proportion of comparison retail expenditure which is retained within the study area (£m & per cent) based on the findings of the household telephone survey (as detailed in Spreadsheets 5 and 6). Market share is held constant at 46.2 per cent throughout the study period.
E&F	Inflow of comparison retail expenditure to destinations within the study area from residents outside Flintshire. This is derived by applying the level of inflow specified in Row E to the comparison goods expenditure retained (Row D). The rate of inflow is held constant across the study period.
G & H	Baseline turnover of retailers of comparison goods in the study area, and growth in retained comparison goods expenditure within Flintshire taking into account rows A-G.
I&J	Claims on residual growth in comparison retail expenditure including sales density growth in existing stores within Flintshire and turnover from committed comparison retail floorspace. Commitments are expected to be implemented and trading by 2022. We have allowed for annual sales density growth of 1.5 per cent for existing stores and commitments over the study period.
K	Total claims on expenditure (£m) from sales density growth in existing stores and committed comparison retail floorspace.
L	Final residual comparison retail expenditure capacity (£m), calculated by deducting total claims on expenditure (Row K) from growth in available expenditure (Row H) within Flintshire.
M-O	Final residual comparison retail expenditure converted into floorspace requirements by applying a generic comparison retail sales density of £5,000 per sq.m, grown at a rate of 1.5 per cent, per annum over the study period in line with our approach to sales density growth. This produces a net floorspace requirement (i.e. total required comparison retail sales floorspace), which is converted to a gross comparison retail floorspace figure on the basis of an assumed net:gross floorspace ratio of 70:30.

5.27 Assuming a constant rate of expenditure retention, there will only be modest capacity for comparison retail goods at the end of the study period (as shown by Rows N and O of Spreadsheet 8 in Appendix D). Whilst forecast expenditure growth is higher in the comparison retail sector, this is principally due to the relatively low levels of population growth coupled with claims on expenditure through floorspace efficiency gains and planning commitments.

Table 5.9: Summary Comparison Retail Floorspace Requirements

2018-2022	2022-2026	2026-2030	2018-2030
-5,579 sq.m (gross)	3,370 sq.m (gross)	2,844 sq.m (gross)	635 sq.m (gross)
-4,463 sq.m (net sales)	2,696 sq.m (net sales)	2,275 sq.m (net sales)	508 sq.m (net sales)

Source: Spreadsheet 8 of Appendix D

5.28 Table 5.9 shows that there is a need for just 635 sq.m (gross) / 508 sq.m (net) comparison retail floorspace over the period 2018-2030.. On this basis, the Council does not need to plan for new comparison retail floorspace in the short and medium term. However, the Council should plan for a small amount of comparison retail floorspace in the long term.

Qualitative Assessment

5.29 Deficiencies and gaps in existing retail provision can be considered on the basis of the study area as a whole and in terms of Flintshire's individual centres. As set out within Section 4 of this report, we consider that the study area has a good retention rate for convenience goods expenditure which, at 89.6 per cent, is almost identical to the retention rate of 89.8 per cent at the time of the household survey in 2010.

5.30 The aggregate retention rate for comparison goods expenditure has declined by 3.2 percentage points, from 49.4 per cent at the time of the last retail study, to 46.2 per cent in 2018. As we reported in Section 4, Chester City Centre now attracts more of the study area's comparison retail expenditure than at the time of the last survey in 2010, and the market share of retail facilities in Denbighshire is more than twice the market share achieved in 2010. Denbighshire's improved market share is primarily due to the significant enhancement of retail provision in Prestatyn over recent years following the opening of Prestatyn Retail Park in 2013, which offers an array of high street names including M&S, New Look, River Island and Next Boots.

5.31 The updated health check assessments set out in Section 3 of this report have highlighted a number of qualitative retail needs, in terms of deficiencies and gaps in existing provision within some study centres, as follows:

- Mold – in terms of the retail offer, we have identified some scope for improvement in terms of representation in the general clothing and electrical item sub-categories. Mold is also significantly under-represented in terms of its food and drink/café offer, an improvement to which would complement the otherwise strong convenience and comparison provision and act as an additional attraction to the centre in terms of visitors and dwell time in the town centre.
- Flint – although the town centre has a generally healthy range of convenience and comparison retail outlets, including various national multiple retailers, the independent offer in terms of bakers, greengrocers and butchers is lacking for a centre of this size. We have also identified a particular deficiency in the clothing and footwear sub-categories.
- Holywell – in our assessment the clothing and footwear sub-categories remain particularly underrepresented in Holywell, and in general terms of the comparison retail sector is limited in its size and diversity, with few national multiple operators. We have also highlighted a deficiency in terms of food, drink and café provision in the centre.
- Buckley – the comparison retail offer in Buckley remains somewhat limited in its diversity and range, with few national multiples represented. While this is not wholly unexpected given the scale and nature of the centre, any opportunities to attract new comparison outlets and introduce greater diversity to the range of non-food operators available should be encouraged as this will help support the longer

terms health of the centre and stave off decline. The indoor shopping centre represents an opportunity for investment and regeneration which could help attract new retailers to the centre.

- Shotton – the convenience retail offer is Shotton Town Centre is relatively limited, with few national multiple retailers present and no supermarket. There are also very few comparison retail multiples in the town centre, albeit the general range and diversity is reasonably well catered for.
- Connah's Quay – our health check has identified that Connah's Quay Town Centre has experienced a notable decline in terms of the number and range of both convenience and comparison retail outlets present in the centre. There are no national multiple operators and increasing levels of vacancy. Connah's Quay is therefore in need of a significant qualitative improvement in all aspects of its retail offer, and should probably be considered as part of a more holistic intervention approach also incorporating Shotton Town Centre to which it is closely related.
- Queensferry – the convenience retail offer in Queensferry is dominated by the Asda store, and there is limited scope to widen this. However, the comparison retail sector is very narrow in terms of the range of operators and depth of representation in terms of the various sub-sectors.

5.32 We have set out the qualitative deficiencies within the various centres and made recommendations for how the retail offer of different towns can be strengthened. For some off the smaller centres, however, it may not be realistic to address the identified deficiencies.

6 OVERALL SUMMARY

Introduction

6.1 In this concluding section we summarise the findings of the study and set out our recommendations for the formulation of future planning policy within Flintshire. We provide recommendations in terms of retail requirements over the plan period and meeting these needs in a manner that will support the vitality and viability of the County's defined centres.

The Performance of Flintshire's Centres

6.2 In Section 3 of this report we considered the performance of Flintshire's defined town and district centres – as well as Broughton Shopping Park – in terms of the indicators of vitality and viability set out within national planning policy guidance. We summarise our findings in respect of the various centres below.

Mold Town Centre

6.3 Mold is an attractive and generally healthy town centre that provides a range of retail facilities and service uses for local communities within this part of Flintshire. The town centre has a strong convenience retail offer, accommodates a popular street market and offers access to a reasonable range of service uses.

6.4 The town centre's comparison retail offer is stronger than any other defined centre within Flintshire and comprises some good quality independent retailers, but it is weak in a number of key areas including the provision of clothing and footwear, and electrical goods. Broughton Shopping Park contains lots of stores selling clothing and footwear and electric goods, such as Tesco Extra, Primark, New Look and Next, amongst others. It would be unrealistic for Mold to claw back a significant amount of comparison goods expenditure, due to the strength of offer at Broughton Shopping Park.

Flint Town Centre

6.5 Flint's town centre boundary encompasses the traditional town centre and Flintshire Retail Park. The core retail area within the town centre is a designated conservation area, which, whilst attractive, makes any re-development proposals more complex. Flintshire Retail Park contains large retail units occupied by Sainsbury's, Argos, B&M and Poundland, amongst others.

6.6 Flint has a strong convenience retail sector, dominated by Sainsbury's and Aldi. Flint also has a strong comparison goods sector, although clothing and footwear categories are under-represented. The proportion of service sector outlets and floorspace are below the national average. The town centre performs well in relation to its vacancy rate, both in terms of the proportion of vacant units and floorspace Most vacant units are located along Chester Street. The town centre as a whole, including the retail park, is well represented by national multiples.

6.7 Flint is accessible by rail and bus services, but the main coastal road (the A541) passes through the centre and can get congested. Significant regeneration has recently taken place in the town centre area, providing a lift to the town centre in terms of status, character, streetscene, perceptions and connectivity between the high street and Flintshire Retail Park. Overall, Flint is found to be a generally healthy and attractive centre.

Holywell Town Centre

6.8 Holywell is an historic market town, the majority of which is located within a conservation area. As with Flint, any re-development within the conservation area is not necessarily straightforward.

6.9 Holywell is well-served by convenience retailers, with both the proportion of units and floorspace being above the national average. Major operators include Tesco, Lidl, Iceland and Spar. The centre is under-represented in the comparison goods sector relative to the national average. National multiple operators are limited to Home Bargains, Peacocks and Boots. The clothing and footwear sub-categories are particularly under-represented. The proportion of service units and floorspace is broadly comparable with the national average. Holywell is lacking in food and beverage operators. The number of vacant units has risen by only two units, since 2008, to 13 vacant units.

6.10 Public transport is limited to bus services, with a bus station located at the end of High Street. The town centre core is pedestrianised and footfall is relatively strong. The Georgian and Victorian buildings within Holywell are attractive but are small and do not necessarily meet the needs of modern retailers. Overall, there are signs indicating that Holywell town centre is struggling and is in decline.

Buckley Town Centre

6.11 Buckley Town Centre continues to serve a relatively localised day-to-day retail and service function, with a limited convenience and comparison retail offer. Whilst this is not unexpected given Buckley’s role and position in the retail hierarchy, we observed a number of prominent vacant units dispersed across the town centre, and we consider that vacancy levels should be closely monitored as the centre is showing some signs of weakness in this respect. More positively, the Aldi development in Buckley has attracted knock-on investment, through the development of Home Bargains. Similar investment in the comparison goods sector could attract further investment within the town centre.

6.12 The town centre environment is fairly bland, with some aesthetic enhancement needed in parts of the centre. Our discussions with locally active property market agents indicate that levels of operator demand in the centre are very low, which suggests that the centre is struggling to attract new interest and investment from retailers.

Connah's Quay District Centre

6.13 The closure of Peacocks and Somerfield (subsequently re-branded as Co-op) since the time of the last study has had a significant negative effect on the vacancy levels in Connah's Quay District Centre. The closures have also meant that the limited presence of multiple retailers has reduced further over recent years. Despite the opening of The Quay Health Centre, it is apparent that Connah's Quay is a declining centre.

Queensferry District Centre

6.14 Queensferry continues to perform a localised comparison retail and service function, with limited representation in terms of convenience and comparison operators, apart from Asda. The Asda store is the dominant attraction, with poor pedestrian linkages to the traditional centre along Station Road which now feels very secondary in comparison. Levels of vacancy throughout the centre do not appear particularly high, and local agents have indicated there is moderate interest from operators due to the high levels of passing trade.

The general town centre environment is unremarkable with limited visual interest, but the majority of premises appear to be in reasonable condition. The centre appears to be performing at a level commensurate with its size and role in the retail hierarchy, and there is limited scope for significant intervention. Saltney District Centre

6.15 Saltney District Centre contains a number of national multiple retailers including Morrisons, Farmfoods, Londis and Poundstretcher. There is also a Go Outdoors store on the edge of the Core Retail Area to the north of the railway line, and the offer is complemented by a range of independent retailers and service sector uses.

6.16 At the time of our visit to Saltney there was only one vacant unit and the town centre environment is in a generally good condition, with reasonable pedestrian linkages between Morrisons, Poundstretcher and other shops in the centre. Overall, Saltney appears to be a relatively healthy district centre that is functioning reasonably well, and the commitment for Saltney Retail Park is likely to bolster the provision of retail in that part of Flintshire.

Broughton Shopping Park

6.17 Broughton Shopping Park comprises an out-of-town retail park rather than a traditional town or district centre, but it makes a significant contribution to the retail offer of Flintshire, attracting a significant level of expenditure from all parts of Flintshire.

6.18 Most of the retail offer at Broughton is provided by national multiple operators. Convenience retailers comprise the anchor Tesco Extra foodstore, alongside an Aldi store and a M&S Foodhall, and comparison retailers include Primark, Next and Asda

Living. Retail facilities at the Shopping Park are complemented by service sector outlets such as Costa, Pizza Express and Nando's.

6.19 Overall, Broughton is an important component of the retail offer in Flintshire. The presence of multiple national retailers and operators, pleasant landscaping, alongside the availability of ample car parking, ensures that the Shopping Park is a popular retail destination.

6.1 However, we advise that currently, Broughton Shopping Park should not be allocated as a defined town centre. BSP is an out-of-centre facility with no policy protection and there is no justification for BSP to be a defined centre within the Development Plan. As set out in Paragraph 4.6 of Technical Advice Note 4 (November 2016), through time, destinations [such as out-of-centre retail parks] should be assessed as to whether these centres have matured into retail and commercial centres in their own right, offering the same level of service provision and being as accessible as traditional centres. Main town centre uses typically include retail, leisure, entertainment, and more intensive sport and recreation uses, offices, arts, culture and tourism development. The offer at BSP is predominantly retail, cinema and restaurant uses. In our view, BSP does not contain the same level of service provision as traditional centres and until it does, BSP should not be a defined centre within the Development Plan. BSP should be monitored and further assessments on this issue should be made in the future.

Retail Needs over the Study Period

6.2 The findings from our quantitative assessment of retail needs, set out in Section 5 of our report, are summarised below within Table 6.1. These figures are based on the assumption that expenditure retention levels within Flintshire will remain constant over the study period, in relation to both comparison and convenience retail.

Table 6.1 Summary of Retail Floorspace Requirements (2018-2030)

Comparison Retail Floorspace	Convenience Retail Floorspace
635 sq.m (gross)	-2,115 sq.m (gross)
508 sq.m (net sales)	-1,480 sq.m (net sales)

6.3 Our assessment shows that there will only be modest capacity for new comparison retail goods floorspace over the 2018-2030 period, and a negative requirement for new convenience retail floorspace over the same study period. This is principally due to the relatively low levels of population growth coupled with claims on expenditure through floorspace efficiency gains and planning commitments. The Council should plan for 635 sq. m (gross) / 508 sq. m (net) comparison retail floorspace over the period 2026 to 2030. The Council should identify sites to accommodate this retail need. There is no identified requirement for new convenience retail floorspace over the short, medium or long term and so there is no need to plan for new facilities in that retail sector.

6.4 In qualitative terms, key needs that we have identified are detailed elsewhere in this report but can be summarised as follows:

- Mold – scope for improvement in terms of representation in the general clothing and electrical goods sub-categories, as well as its food and drink/café offer. However, it may be difficult to address this qualitative need due to the existing clothing and electrical goods retailers present at Broughton Shopping Park.
- Flint – the independent offer in terms of bakers, greengrocers and butchers is lacking for a centre of this size. We have also identified a deficiency in the clothing and footwear sub-categories.
- Holywell – in general terms the comparison retail offer is limited in its size and diversity, with few national multiple operators, but it is questionable whether it is realistic to plan for a significant upsurge in comparison retail provision in Holywell. We have also highlighted a deficiency in terms of food, drink and café provision in the centre.
- Buckley – the indoor shopping centre represents an opportunity for investment and regeneration which could help attract new retailers to the centre.
- Shotton – the convenience retail offer is Shotton Town Centre is relatively limited, with few national multiple retailers present and no supermarket. There are also very few comparison retail multiples in the town centre.
- Connah's Quay – the district centre has experienced a notable decline in terms of both convenience and comparison retail provision, with no national multiple operators present and increasing levels of vacancy. Connah's Quay is therefore in need of a significant qualitative improvement in all aspects of its retail offer and should probably be considered as part of a more holistic intervention approach also incorporating Shotton Town Centre to which it is closely related.
- Queensferry – the comparison retail offer is very narrow in terms of the range of operators and depth of representation in terms of the various sub-sectors; agents report interest form operators and efforts should be made to capture some of this demand to bolster the centre.

6.5 As set out earlier in this report, whilst we have made recommendations for how the retail offer of different towns can be strengthened, in some instances it may not be realistic. This is particularly the case for smaller centres such as Shotton, Connah's Quay and Saltney

Monitoring and Review

6.6 A number of other key indicators should be monitored by the Council to determine likely changes to retail floorspace requirements over the development plan period, which include:

- The implementation of existing retail commitments. Non-implementation of commitments or the expiry of existing planning permissions will release additional capacity.
- We understand that the Council has taken a more positive approach in the projections of population growth in other evidence base documents, which has a higher population growth than the ONS-based projections. Rather than undertaking sensitivity testing for different population projections, we suggest that

population growth is closely monitored over time. If population does rise higher than the ONS-based population projections, this growth can be taken into account in subsequent retail capacity studies.

- Expenditure growth rates. These reflect general economic conditions and therefore an acceleration in economic growth is likely to result in higher floorspace requirements as a result of increased expenditure growth rates. Conversely, any future economic downturn is likely to reduce floorspace requirements as a result of lower (or negative) expenditure growth rates. Floorspace capacity forecasts should be reviewed on a regular basis to reflect any major economic changes.
- The market share of non-store retail sales (special forms of trading). Such market shares have increased considerably in recent years, but it remains to be seen whether this growth will be maintained, and at what level it will peak.

6.7 In some cases, we have made recommendations on how the larger centres can be strengthened. In some of the smaller centres, it is not realistic to expect significant improvements in the health of the smaller centres such as Shotton, Connah's Quay and Saltney. This is because some centres have declined since the previous retail capacity study and it would be unrealistic to expect some of the smaller centres to reverse this trend. However, interventions in the higher order centres can improve their health and the Council should assist with the regeneration of the higher order centres where possible. Small scale interventions can include shop front improvements, public realm works and the re-development of shopping centres which can be the catalyst for further investment.

6.8 In addition to monitoring, we recommend that the Council should maintain an up-to-date picture of the performance of the County's centres and any qualitative retail needs by continuing to review the composition of the centres, vacancy rates and environmental quality.

6.9 The Council should take a robust approach to out-of-centre retail development, given the declining nature of some of Flintshire's defined centres. As discussed above, BSP should not be reclassified as a defined centre at this time.

6.10 Sustained and significant changes in any of the key indicators should prompt a review and update of this assessment to ensure that the Council is meeting objectively assessed retail needs, encouraging sustainable shopping patterns and implementing the most appropriate strategy to support the vitality and viability of the defined centres.

APPENDIX A GOAD SURVEY DATA

TABLE 1 - Mold Centre Diversity of Uses

Goad Code	Operator Type	No. of Units				Floorspace			
		No. of units	% of Total	UK Average %	Index (UK=100)	Floorspace (sq.m)	% of Total	UK Average %	Index (UK=100)
	Number (and %) of Convenience Goods Outlets								
G1A	Bakers	5	2.36%	2.09%	113	580	1.61%	1.09%	148
G1B	Butchers	2	0.94%	0.72%	131	220	0.61%	0.39%	157
G1C	Greengrocers & fishmongers	2	0.94%	0.59%	160	470	1.31%	1.30%	101
G1D	Grocery and frozen foods	9	4.25%	2.92%	145	10,800	30.07%	12.89%	233
G1E	Off-licences and home brew	0	0.00%	0.48%	0	0	0.00%	0.30%	0
G1F	CTN & convenience	5	2.36%	3.08%	77	470	1.31%	2.53%	52
	TOTAL	**23**	**10.85%**	**9.88%**	**110**	**12,540**	**34.91%**	**18.50%**	**189**
	Number (and %) of Comparison Goods Outlets								
G2A	Footwear & repair	3	1.42%	1.56%	91	170	0.47%	1.14%	42
G2B	Men's & boys' wear	2	0.94%	0.80%	118	260	0.72%	0.72%	101
G2C	Women's, girls, children's clothing	5	2.36%	2.68%	88	590	1.64%	2.26%	73
G2D	Mixed and general clothing	6	2.83%	4.07%	70	1,020	2.84%	6.86%	41
G2E	Furniture, carpets & textiles	13	6.13%	3.20%	192	1,220	3.40%	3.51%	97
G2F	Booksellers, arts/crafts, stationers/copy bureaux	6	2.83%	3.56%	79	730	2.03%	2.80%	73
G2G	Electrical, home entertainment, telephones and video	4	1.89%	3.48%	54	220	0.61%	2.34%	26
G2H	DIY, hardware & household goods	2	0.94%	2.23%	42	1,580	4.40%	3.92%	112
G2I	Gifts, china, glass and leather goods	4	1.89%	1.68%	112	360	1.00%	0.88%	114
G2J	Cars, motorcycles & motor accessories	1	0.47%	1.08%	44	330	0.92%	1.69%	54
G2K	Chemists, toiletries & opticians	9	4.25%	3.95%	107	1,420	3.95%	3.91%	101
G2L	Variety, department & catalogue showrooms	1	0.47%	0.65%	73	540	1.50%	6.52%	23
G2M	Florists and gardens	2	0.94%	0.79%	119	300	0.84%	0.36%	232
G2N	Sports, toys, cycles and hobbies	2	0.94%	1.89%	50	380	1.06%	2.25%	47
G2O	Jewellers, clocks & repair	3	1.42%	1.85%	76	220	0.61%	0.90%	68
G2P	Charity shops, pets and other comparison	13	6.13%	4.36%	141	1,800	5.01%	3.14%	160
	TOTAL	**76**	**35.85%**	**37.83%**	**95**	**11,140**	**31.01%**	**43.20%**	**72**
	Number (and %) of Service Uses								
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	27	12.74%	17.78%	72	3,470	9.66%	13.26%	73
G3B	Hairdressers, beauty parlours & health centres	33	15.57%	11.22%	139	2,590	7.21%	5.47%	132
G3C	Laundries & drycleaners	0	0.00%	0.84%	0	0	0.00%	0.38%	0
G3D	Travel agents	5	2.36%	1.01%	234	340	0.95%	0.62%	153
G3E	Banks & financial services (incl. accountants)	10	4.72%	3.49%	135	1,960	5.46%	3.80%	144
G3F	Building societies	2	0.94%	0.49%	193	230	0.64%	0.39%	164
G3G	Estate agents & auctioneers	12	5.66%	3.93%	144	1,230	3.42%	2.19%	156
	TOTAL	**89**	**41.98%**	**38.76%**	**108**	**9,820**	**27.34%**	**26.11%**	**105**
	Number (and %) of Miscellaneous Uses								
G4A	Employment, careers, Post Offices and information	1	0.47%	1.18%	40	550	1.53%	0.87%	176
G4B	Vacant units (all categories)	23	10.85%	12.37%	88	1,870	5.21%	11.32%	46
	TOTAL	**24**	**11.32%**	**13.55%**	**84**	**2,420**	**6.74%**	**12.19%**	**55**
	GRAND TOTAL	**212**	**100%**	**100%**		**35,920**	**100%**	**100%**	

Mold

0 25 50 75 100 m

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TABLE 2 - Flint Diversity of Uses

Goad Code	Operator Type	No. of Units				Floorspace			
		No. of units	% of Total	UK Average %	Index (UK=100)	Floorspace (sq.m)	% of Total	UK Average %	Index (UK=100)
	Number (and %) of Convenience Goods Outlets								
G1A	Bakers	0	0.00%	2.09%	0	0	0.00%	1.09%	0
G1B	Butchers	1	0.93%	0.72%	130	100	0.33%	0.39%	85
G1C	Greengrocers & fishmongers	0	0.00%	0.59%	0	0	0.00%	1.30%	0
G1D	Grocery and frozen foods	5	4.67%	2.92%	160	6,260	20.63%	12.89%	160
G1E	Off-licences and home brew	1	0.93%	0.48%	195	290	0.96%	0.30%	319
G1F	CTN & convenience	8	7.48%	3.08%	243	1,080	3.56%	2.53%	141
	TOTAL	**15**	**14.02%**	**9.88%**	**142**	**7,730**	**25.48%**	**18.50%**	**138**
	Number (and %) of Comparison Goods Outlets								
G2A	Footwear & repair	1	0.93%	1.56%	60	80	0.26%	1.14%	23
G2B	Men's & boys' wear	0	0.00%	0.80%	0	0	0.00%	0.72%	0
G2C	Women's, girls, children's clothing	1	0.93%	2.68%	35	90	0.30%	2.26%	13
G2D	Mixed and general clothing	1	0.93%	4.07%	23	520	1.71%	6.86%	25
G2E	Furniture, carpets & textiles	5	4.67%	3.20%	146	1,990	6.56%	3.51%	187
G2F	Booksellers, arts/crafts, stationers/copy bureaux	3	2.80%	3.56%	79	460	1.52%	2.80%	54
G2G	Electrical, home entertainment, telephones and video	5	4.67%	3.48%	134	560	1.85%	2.34%	79
G2H	DIY, hardware & household goods	6	5.61%	2.23%	251	5,280	17.40%	3.92%	444
G2I	Gifts, china, glass and leather goods	0	0.00%	1.68%	0	0	0.00%	0.88%	0
G2J	Cars, motorcycles & motor accessories	1	0.93%	1.08%	87	290	0.96%	1.69%	57
G2K	Chemists, toiletries & opticians	6	5.61%	3.95%	142	1,160	3.82%	3.91%	98
G2L	Variety, department & catalogue showrooms	3	2.80%	0.65%	431	3,300	10.88%	6.52%	167
G2M	Florists and gardens	1	0.93%	0.79%	118	460	1.52%	0.36%	421
G2N	Sports, toys, cycles and hobbies	2	1.87%	1.89%	99	110	0.36%	2.25%	16
G2O	Jewellers, clocks & repair	0	0.00%	1.85%	0	0	0.00%	0.90%	0
G2P	Charity shops, pets and other comparison	6	5.61%	4.36%	129	780	2.57%	3.14%	82
	TOTAL	**41**	**38.32%**	**37.83%**	**101**	**15,080**	**49.70%**	**43.20%**	**115**
	Number (and %) of Service Uses								
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	17	15.89%	17.78%	89	2,600	8.57%	13.26%	65
G3B	Hairdressers, beauty parlours & health centres	9	8.41%	11.22%	75	940	3.10%	5.47%	57
G3C	Laundries & drycleaners	1	0.93%	0.84%	111	140	0.46%	0.38%	121
G3D	Travel agents	1	0.93%	1.01%	93	90	0.30%	0.62%	48
G3E	Banks & financial services (incl. accountants)	5	4.67%	3.49%	134	740	2.44%	3.80%	64
G3F	Building societies	0	0.00%	0.49%	0	0	0.00%	0.39%	0
G3G	Estate agents & auctioneers	3	2.80%	3.93%	71	420	1.38%	2.19%	63
	TOTAL	**36**	**33.64%**	**38.76%**	**87**	**4,930**	**16.25%**	**26.11%**	**62**
	Number (and %) of Miscellaneous Uses								
G4A	Employment, careers, Post Offices and information	2	1.87%	1.18%	158	260	0.86%	0.87%	99
G4B	Vacant units (all categories)	13	12.15%	12.37%	98	2,340	7.71%	11.32%	68
	TOTAL	**15**	**14.02%**	**13.55%**	**103**	**2,600**	**8.57%**	**12.19%**	**70**
	GRAND TOTAL	**107**	**100%**	**100%**		**30,340**	**100%**	**100%**	

FLINT

0 25 50 75 100 m

0 15 30 45 60 m

FLINT - FLINTSHIRE RETAIL CENTRE

TABLE 3 - Holywell Centre Diversity of Uses

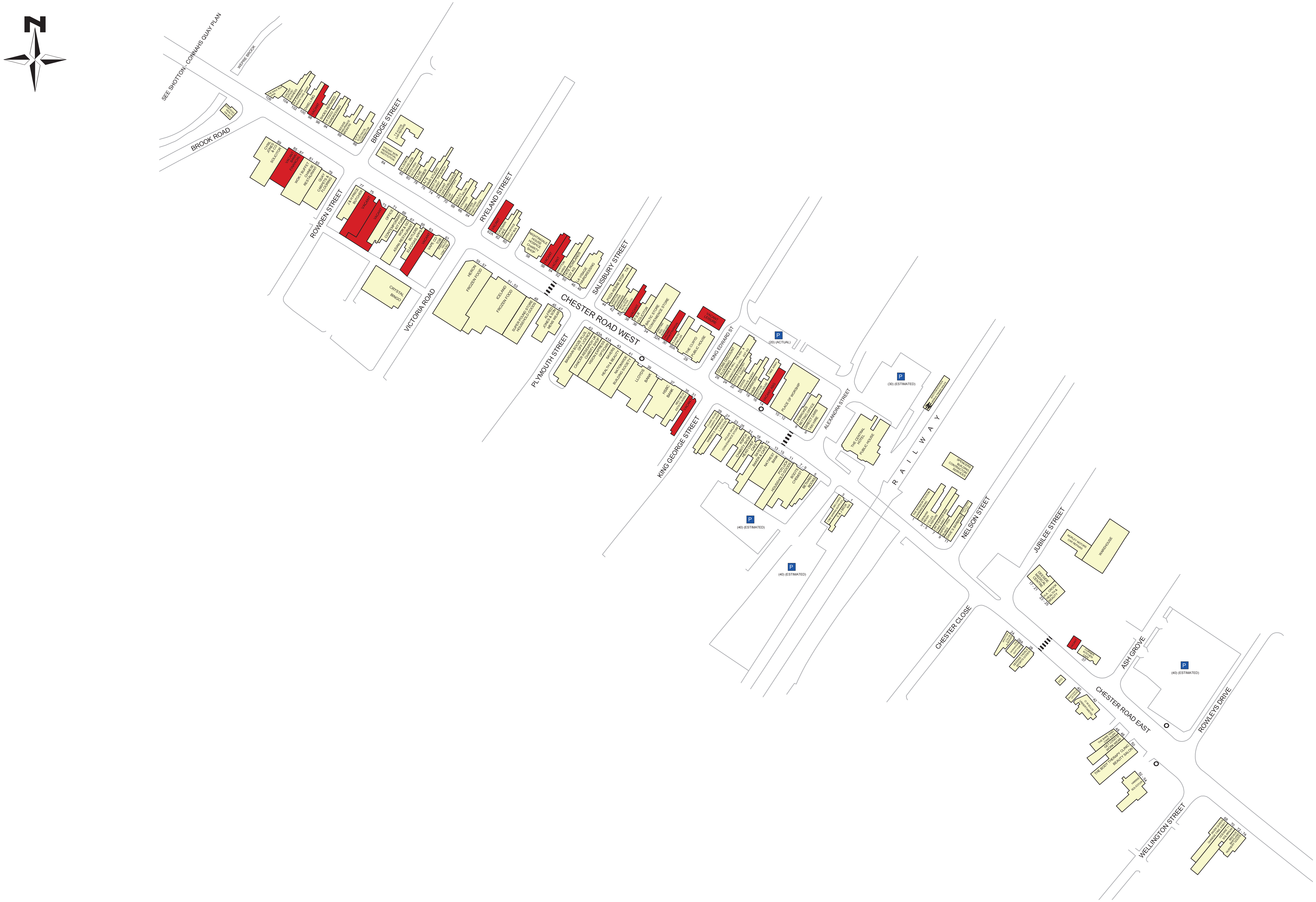
Goad Code	Operator Type	No. of Units				Floorspace			
		No. of units	% of Total	UK Average %	Index (UK=100)	Floorspace (sq.m)	% of Total	UK Average %	Index (UK=100)
	Number (and %) of Convenience Goods Outlets								
G1A	Bakers	2	2.11%	2.09%	101	200	1.20%	1.09%	111
G1B	Butchers	1	1.05%	0.72%	146	40	0.24%	0.39%	62
G1C	Greengrocers & fishmongers	1	1.05%	0.59%	178	70	0.42%	1.30%	32
G1D	Grocery and frozen foods	4	4.21%	2.92%	144	4,880	29.40%	12.89%	228
G1E	Off-licences and home brew	1	1.05%	0.48%	219	180	1.08%	0.30%	361
G1F	CTN & convenience	4	4.21%	3.08%	137	450	2.71%	2.53%	107
	TOTAL	**13**	**13.68%**	**9.88%**	**139**	**5,820**	**35.06%**	**18.50%**	**190**
	Number (and %) of Comparison Goods Outlets								
G2A	Footwear & repair	1	1.05%	1.56%	67	140	0.84%	1.14%	74
G2B	Men's & boys' wear	0	0.00%	0.80%	0	0	0.00%	0.72%	0
G2C	Women's, girls, children's clothing	0	0.00%	2.68%	0	0	0.00%	2.26%	0
G2D	Mixed and general clothing	1	1.05%	4.07%	26	440	2.65%	6.86%	39
G2E	Furniture, carpets & textiles	4	4.21%	3.20%	132	470	2.83%	3.51%	81
G2F	Booksellers, arts/crafts, stationers/copy bureaux	5	5.26%	3.56%	148	380	2.29%	2.80%	82
G2G	Electrical, home entertainment, telephones and video	2	2.11%	3.48%	60	130	0.78%	2.34%	33
G2H	DIY, hardware & household goods	3	3.16%	2.23%	142	1,700	10.24%	3.92%	261
G2I	Gifts, china, glass and leather goods	0	0.00%	1.68%	0	0	0.00%	0.88%	0
G2J	Cars, motorcycles & motor accessories	1	1.05%	1.08%	97	190	1.14%	1.69%	68
G2K	Chemists, toiletries & opticians	4	4.21%	3.95%	107	420	2.53%	3.91%	65
G2L	Variety, department & catalogue showrooms	0	0.00%	0.65%	0	0	0.00%	6.52%	0
G2M	Florists and gardens	3	3.16%	0.79%	400	300	1.81%	0.36%	502
G2N	Sports, toys, cycles and hobbies	0	0.00%	1.89%	0	0	0.00%	2.25%	0
G2O	Jewellers, clocks & repair	1	1.05%	1.85%	57	60	0.36%	0.90%	40
G2P	Charity shops, pets and other comparison	7	7.37%	4.36%	169	800	4.82%	3.14%	153
	TOTAL	**32**	**33.68%**	**37.83%**	**89**	**5,030**	**30.30%**	**43.20%**	**70**
	Number (and %) of Service Uses								
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	11	11.58%	17.78%	65	1,680	10.12%	13.26%	76
G3B	Hairdressers, beauty parlours & health centres	14	14.74%	11.22%	131	1,200	7.23%	5.47%	132
G3C	Laundries & drycleaners	1	1.05%	0.84%	125	30	0.18%	0.38%	48
G3D	Travel agents	1	1.05%	1.01%	104	50	0.30%	0.62%	49
G3E	Banks & financial services (incl. accountants)	3	3.16%	3.49%	90	260	1.57%	3.80%	41
G3F	Building societies	0	0.00%	0.49%	0	0	0.00%	0.39%	0
G3G	Estate agents & auctioneers	5	5.26%	3.93%	134	400	2.41%	2.19%	110
	TOTAL	**35**	**36.84%**	**38.76%**	**95**	**3,620**	**21.81%**	**26.11%**	**84**
	Number (and %) of Miscellaneous Uses								
G4A	Employment, careers, Post Offices and information	2	2.11%	1.18%	178	320	1.93%	0.87%	222
G4B	Vacant units (all categories)	13	13.68%	12.37%	111	1,810	10.90%	11.32%	96
	TOTAL	**15**	**15.79%**	**13.55%**	**117**	**2130**	**12.83%**	**12.19%**	**105**
	GRAND TOTAL	**95**	**100%**	**100%**		**16,600**	**100%**	**100%**	

HOLYWELL

0 25 50 75 100 m

TABLE 4 - Shotton Centre Diversity of Uses

Goad Code	Operator Type	No. of Units				Floorspace			
		No. of units	% of Total	UK Average %	Index (UK=100)	Floorspace (sq.m)	% of Total	UK Average %	Index (UK=100)
	Number (and %) of Convenience Goods Outlets								
G1A	Bakers	4	4.04%	2.09%	193	340	2.75%	1.09%	252
G1B	Butchers	1	1.01%	0.72%	140	120	0.97%	0.39%	249
G1C	Greengrocers & fishmongers	0	0.00%	0.59%	0	0	0.00%	1.30%	0
G1D	Grocery and frozen foods	3	3.03%	2.92%	104	1,330	10.76%	12.89%	83
G1E	Off-licences and home brew	1	1.01%	0.48%	210	220	1.78%	0.30%	593
G1F	CTN & convenience	3	3.03%	3.08%	98	520	4.21%	2.53%	166
	TOTAL	**12**	**12.12%**	**9.88%**	**123**	**2,530**	**20.47%**	**18.50%**	**111**
	Number (and %) of Comparison Goods Outlets								
G2A	Footwear & repair	1	1.01%	1.56%	65	70	0.57%	1.14%	50
G2B	Men's & boys' wear	1	1.01%	0.80%	126	190	1.54%	0.72%	214
G2C	Women's, girls, children's clothing	3	3.03%	2.68%	113	260	2.10%	2.26%	93
G2D	Mixed and general clothing	1	1.01%	4.07%	25	100	0.81%	6.86%	12
G2E	Furniture, carpets & textiles	5	5.05%	3.20%	158	500	4.05%	3.51%	115
G2F	Booksellers, arts/crafts, stationers/copy bureaux	3	3.03%	3.56%	85	230	1.86%	2.80%	66
G2G	Electrical, home entertainment, telephones and video	2	2.02%	3.48%	58	160	1.29%	2.34%	55
G2H	DIY, hardware & household goods	3	3.03%	2.23%	136	510	4.13%	3.92%	105
G2I	Gifts, china, glass and leather goods	1	1.01%	1.68%	60	30	0.24%	0.88%	28
G2J	Cars, motorcycles & motor accessories	2	2.02%	1.08%	187	270	2.18%	1.69%	129
G2K	Chemists, toiletries & opticians	4	4.04%	3.95%	102	690	5.58%	3.91%	143
G2L	Variety, department & catalogue showrooms	0	0.00%	0.65%	0	0	0.00%	6.52%	0
G2M	Florists and gardens	1	1.01%	0.79%	128	70	0.57%	0.36%	157
G2N	Sports, toys, cycles and hobbies	4	4.04%	1.89%	214	400	3.24%	2.25%	144
G2O	Jewellers, clocks & repair	1	1.01%	1.85%	55	80	0.65%	0.90%	72
G2P	Charity shops, pets and other comparison	5	5.05%	4.36%	116	540	4.37%	3.14%	139
	TOTAL	**37**	**37.37%**	**37.83%**	**99**	**4,100**	**33.17%**	**43.20%**	**77**
	Number (and %) of Service Uses								
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	10	10.10%	17.78%	57	1,120	9.06%	13.26%	68
G3B	Hairdressers, beauty parlours & health centres	14	14.14%	11.22%	126	1,280	10.36%	5.47%	189
G3C	Laundries & drycleaners	0	0.00%	0.84%	0	0	0.00%	0.38%	0
G3D	Travel agents	0	0.00%	1.01%	0	0	0.00%	0.62%	0
G3E	Banks & financial services (incl. accountants)	6	6.06%	3.49%	174	1,120	9.06%	3.80%	238
G3F	Building societies	1	1.01%	0.49%	206	200	1.62%	0.39%	415
G3G	Estate agents & auctioneers	5	5.05%	3.93%	129	430	3.48%	2.19%	159
	TOTAL	**36**	**36.36%**	**38.76%**	**94**	**4,150**	**33.58%**	**26.11%**	**129**
	Number (and %) of Miscellaneous Uses								
G4A	Employment, careers, Post Offices and information	0	0.00%	1.18%	0	0	0.00%	0.87%	0
G4B	Vacant units (all categories)	14	14.14%	12.37%	114	1,580	12.78%	11.32%	113
	TOTAL	**14**	**14.14%**	**13.55%**	**104**	**1,580**	**12.78%**	**12.19%**	**105**
	GRAND TOTAL	**99**	**100%**	**100%**		**12,360**	**100%**	**100%**	

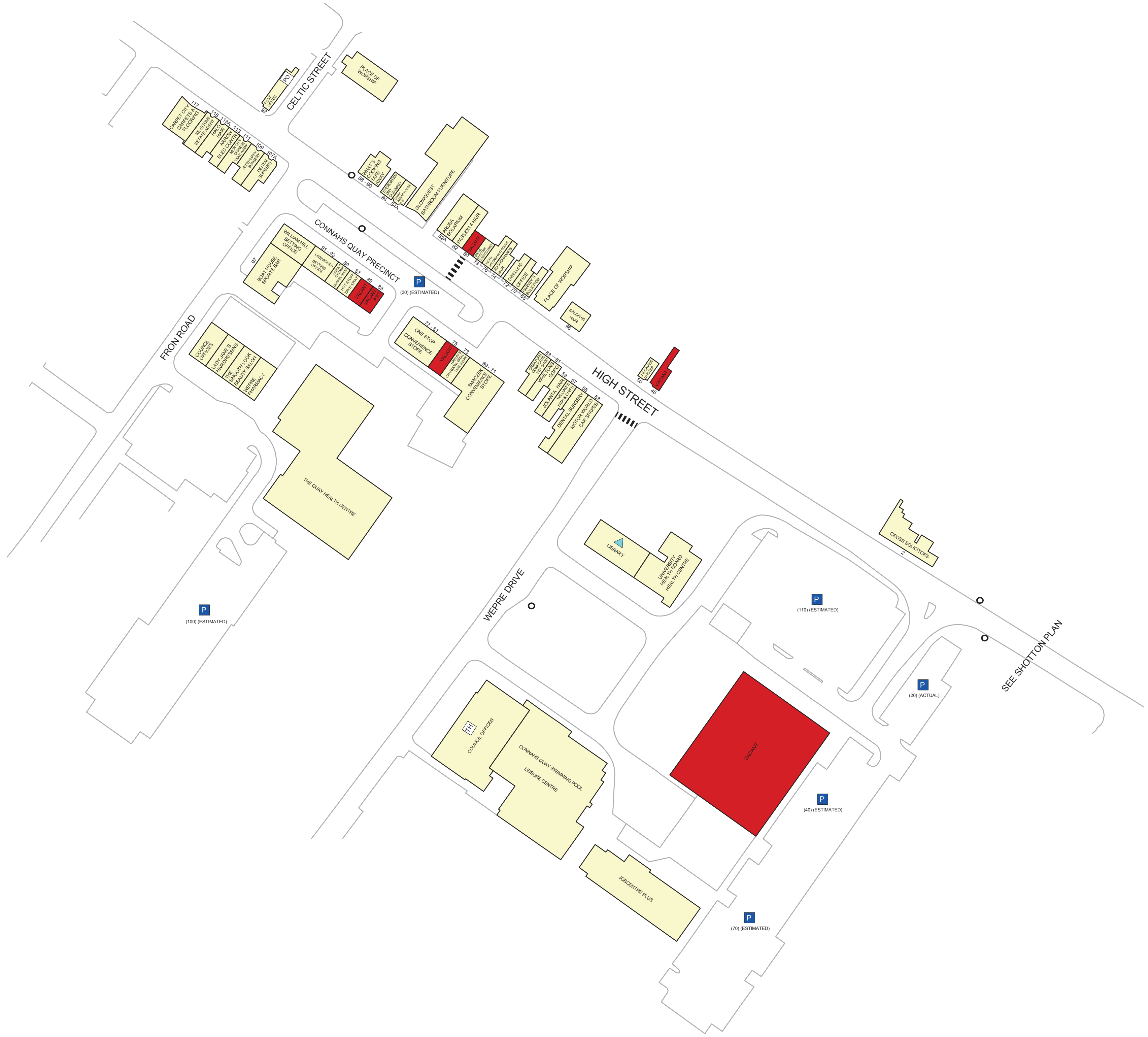


SHOTTON

0 25 50 75 100 m

TABLE 5 - Connah's Quay Centre Diversity of Uses

Goad Code	Operator Type	No. of Units				Floorspace			
		No. of units	% of Total	UK Average %	Index (UK=100)	Floorspace (sq.m)	% of Total	UK Average %	Index (UK=100)
	Number (and %) of Convenience Goods Outlets								
G1A	Bakers	0	0.00%	2.09%	0	0	0.00%	1.09%	0
G1B	Butchers	0	0.00%	0.72%	0	0	0.00%	0.39%	0
G1C	Greengrocers & fishmongers	1	2.94%	0.59%	499	80	1.44%	1.30%	111
G1D	Grocery and frozen foods	0	0.00%	2.92%	0	0	0.00%	12.89%	0
G1E	Off-licences and home brew	0	0.00%	0.48%	0	0	0.00%	0.30%	0
G1F	CTN & convenience	3	8.82%	3.08%	286	600	10.79%	2.53%	427
	TOTAL	**4**	**11.76%**	**9.88%**	**119**	**680**	**12.23%**	**18.50%**	**66**
	Number (and %) of Comparison Goods Outlets								
G2A	Footwear & repair	0	0.00%	1.56%	0	0	0.00%	1.14%	0
G2B	Men's & boys' wear	0	0.00%	0.80%	0	0	0.00%	0.72%	0
G2C	Women's, girls, children's clothing	0	0.00%	2.68%	0	0	0.00%	2.26%	0
G2D	Mixed and general clothing	0	0.00%	4.07%	0	0	0.00%	6.86%	0
G2E	Furniture, carpets & textiles	2	5.88%	3.20%	184	670	12.05%	3.51%	343
G2F	Booksellers, arts/crafts, stationers/copy bureaux	0	0.00%	3.56%	0	0	0.00%	2.80%	0
G2G	Electrical, home entertainment, telephones and video	0	0.00%	3.48%	0	0	0.00%	2.34%	0
G2H	DIY, hardware & household goods	0	0.00%	2.23%	0	0	0.00%	3.92%	0
G2I	Gifts, china, glass and leather goods	0	0.00%	1.68%	0	0	0.00%	0.88%	0
G2J	Cars, motorcycles & motor accessories	1	2.94%	1.08%	272	190	3.42%	1.69%	202
G2K	Chemists, toiletries & opticians	1	2.94%	3.95%	74	120	2.16%	3.91%	55
G2L	Variety, department & catalogue showrooms	0	0.00%	0.65%	0	0	0.00%	6.52%	0
G2M	Florists and gardens	0	0.00%	0.79%	0	0	0.00%	0.36%	0
G2N	Sports, toys, cycles and hobbies	0	0.00%	1.89%	0	0	0.00%	2.25%	0
G2O	Jewellers, clocks & repair	0	0.00%	1.85%	0	0	0.00%	0.90%	0
G2P	Charity shops, pets and other comparison	2	5.88%	4.36%	135	140	2.52%	3.14%	80
	TOTAL	**6**	**17.65%**	**37.83%**	**47**	**1,120**	**20.14%**	**43.20%**	**47**
	Number (and %) of Service Uses								
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	7	20.59%	17.78%	116	470	8.45%	13.26%	64
G3B	Hairdressers, beauty parlours & health centres	8	23.53%	11.22%	210	710	12.77%	5.47%	233
G3C	Laundries & drycleaners	1	2.94%	0.84%	350	50	0.90%	0.38%	237
G3D	Travel agents	0	0.00%	1.01%	0	0	0.00%	0.62%	0
G3E	Banks & financial services (incl. accountants)	0	0.00%	3.49%	0	0	0.00%	3.80%	0
G3F	Building societies	0	0.00%	0.49%	0	0	0.00%	0.39%	0
G3G	Estate agents & auctioneers	1	2.94%	3.93%	75	90	1.62%	2.19%	74
	TOTAL	**17**	**50.00%**	**38.76%**	**129**	**1,320**	**23.74%**	**26.11%**	**91**
	Number (and %) of Miscellaneous Uses								
G4A	Employment, careers, Post Offices and information	1	2.94%	1.18%	249	80	1.44%	0.87%	165
G4B	Vacant units (all categories)	6	17.65%	12.37%	143	2,360	42.45%	11.32%	375
	TOTAL	**7**	**20.59%**	**13.55%**	**152**	**2,440**	**43.88%**	**12.19%**	**360**
	GRAND TOTAL	**34**	**100%**	**100%**		**5,560**	**100%**	**100%**	



SHOTTON - CONNAHS QUAY

0 25 50 75 100 m

TABLE 6 - Broughton Shopping Park Diversity of Uses

Goad Code	Operator Type	No. of Units				Floorspace			
		No. of units	% of Total	UK Average %	Index (UK=100)	Floorspace (sq.m)	% of Total	UK Average %	Index (UK=100)
	Number (and %) of Convenience Goods Outlets								
G1A	Bakers	0	0.00%	2.09%	0	0	0.00%	1.09%	0
G1B	Butchers	0	0.00%	0.72%	0	0	0.00%	0.39%	0
G1C	Greengrocers & fishmongers	0	0.00%	0.59%	0	0	0.00%	1.30%	0
G1D	Grocery and frozen foods	2	4.65%	2.92%	159	8,740	26.98%	12.89%	209
G1E	Off-licences and home brew	0	0.00%	0.48%	0	0	0.00%	0.30%	0
G1F	CTN & convenience	1	2.33%	3.08%	76	980	3.03%	2.53%	120
	TOTAL	**3**	**6.98%**	**9.88%**	**71**	**9,720**	**30.01%**	**18.50%**	**162**
	Number (and %) of Comparison Goods Outlets								
G2A	Footwear & repair	1	2.33%	1.56%	149	610	1.88%	1.14%	165
G2B	Men's & boys' wear	0	0.00%	0.80%	0	0	0.00%	0.72%	0
G2C	Women's, girls, children's clothing	4	9.30%	2.68%	347	1,010	3.12%	2.26%	138
G2D	Mixed and general clothing	5	11.63%	4.07%	286	5,860	18.09%	6.86%	264
G2E	Furniture, carpets & textiles	1	2.33%	3.20%	73	2,150	6.64%	3.51%	189
G2F	Booksellers, arts/crafts, stationers/copy bureaux	3	6.98%	3.56%	196	1,330	4.11%	2.80%	147
G2G	Electrical, home entertainment, telephones and video	2	4.65%	3.48%	134	500	1.54%	2.34%	66
G2H	DIY, hardware & household goods	1	2.33%	2.23%	104	780	2.41%	3.92%	61
G2I	Gifts, china, glass and leather goods	0	0.00%	1.68%	0	0	0.00%	0.88%	0
G2J	Cars, motorcycles & motor accessories	0	0.00%	1.08%	0	0	0.00%	1.69%	0
G2K	Chemists, toiletries & opticians	3	6.98%	3.95%	177	1,860	5.74%	3.91%	147
G2L	Variety, department & catalogue showrooms	0	0.00%	0.65%	0	0	0.00%	6.52%	0
G2M	Florists and gardens	0	0.00%	0.79%	0	0	0.00%	0.36%	0
G2N	Sports, toys, cycles and hobbies	3	6.98%	1.89%	369	2,560	7.90%	2.25%	351
G2O	Jewellers, clocks & repair	0	0.00%	1.85%	0	0	0.00%	0.90%	0
G2P	Charity shops, pets and other comparison	1	2.33%	4.36%	53	120	0.37%	3.14%	12
	TOTAL	**24**	**55.81%**	**37.83%**	**148**	**16,780**	**51.81%**	**43.20%**	**120**
	Number (and %) of Service Uses								
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	10	23.26%	17.78%	131	3,150	9.73%	13.26%	73
G3B	Hairdressers, beauty parlours & health centres	0	0.00%	11.22%	0	0	0.00%	5.47%	0
G3C	Laundries & drycleaners	0	0.00%	0.84%	0	0	0.00%	0.38%	0
G3D	Travel agents	2	4.65%	1.01%	461	1,010	3.12%	0.62%	503
G3E	Banks & financial services (incl. accountants)	0	0.00%	3.49%	0	0	0.00%	3.80%	0
G3F	Building societies	0	0.00%	0.49%	0	0	0.00%	0.39%	0
G3G	Estate agents & auctioneers	0	0.00%	3.93%	0	0	0.00%	2.19%	0
	TOTAL	**12**	**27.91%**	**38.76%**	**72**	**4,160**	**12.84%**	**26.11%**	**49**
	Number (and %) of Miscellaneous Uses								
G4A	Employment, careers, Post Offices and information	0	0.00%	1.18%	0	0	0.00%	0.87%	0
G4B	Vacant units (all categories)	4	9.30%	12.37%	75	1,730	5.34%	11.32%	47
	TOTAL	**4**	**9.30%**	**13.55%**	**69**	**1,730**	**5.34%**	**12.19%**	**44**
	GRAND TOTAL	**43**	**100%**	**100%**		**32,390**	**100%**	**100%**	

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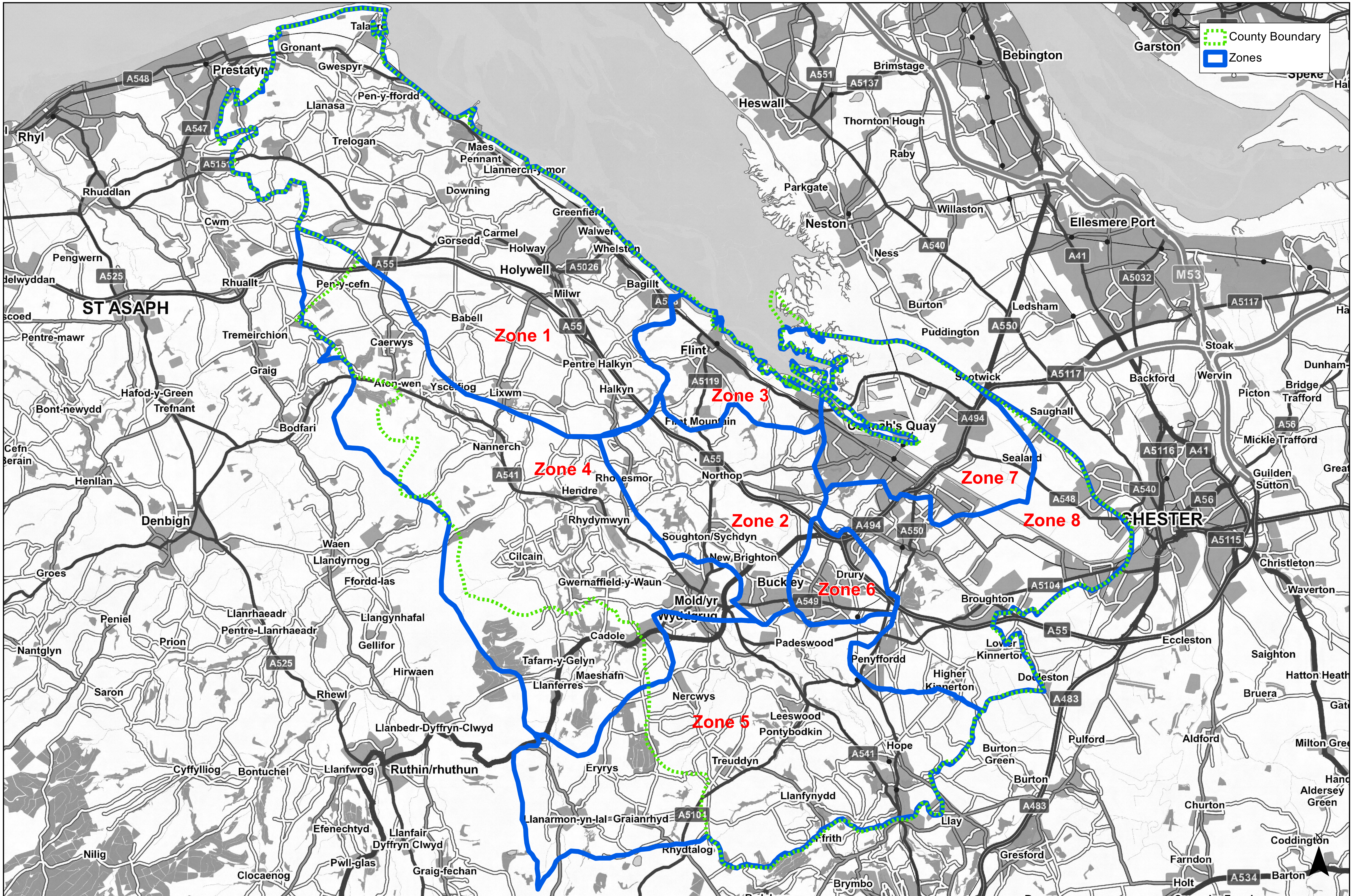
goad.sales@uk.experian.com

CHESTER - BROUGHTON SHOPPING PARK

0 25 50 75 100 m

APPENDIX B STUDY AREA



Flintshire Retail and Town Centres Study

0 2.5 5 10 Kilometers

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Flintshire County Council

pba peterbrett

Client

Flintshire County Council

1:120,000 @ A3	Study Location
16/10/18	
Drawn: TL	
Checked: JW	Figure 1 Rev A

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APPENDIX C SURVEY RESULTS

Q01 Where did your household last undertake a main food and grocery shop?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Aldi, Chester Road East, Broughton, CH4 0DP	5.4%	44	0.7%	1	0.7%	0	0.6%	0	0.0%	0	2.3%	1	1.3%	1	6.2%	10	21.0%	30
Aldi, Chester Street, Flint, CH6 5DH	6.5%	52	7.1%	9	0.0%	0	45.0%	33	1.0%	1	0.0%	0	0.0%	0	6.0%	9	0.0%	0
Aldi, Chester Street, Mold, CH7 1LA	6.0%	48	2.5%	3	19.8%	13	0.6%	0	19.2%	18	19.3%	12	0.6%	1	0.0%	0	0.6%	1
Aldi, Hartford Way, Chester, CH1 4NT	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	4
Aldi, Meliden Road, Prestatyn, LL19 9RT	1.2%	10	8.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Plas Coch, Retail Park, Wrexham, LL11 2BA	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.9%	1
Aldi, The Precinct Way, Buckley, CH7 2DE	9.2%	74	0.0%	0	15.6%	10	0.0%	0	1.4%	1	3.9%	2	55.4%	49	5.3%	8	2.0%	3
Asda, Aston Road, Queensferry, Deeside, CH5 1TP	14.5%	117	5.1%	6	2.1%	1	4.3%	3	2.0%	2	0.0%	0	13.2%	12	44.0%	68	17.4%	25
Asda, Flintshire Retail Park, Holywell Road, Flint, CH6 5BG	0.8%	6	1.5%	2	0.0%	0	6.2%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Holt Road, Eagles Meadow, Wrexham, LL13 8HL	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	2	0.0%	0	0.0%	0	0.7%	1
B&M Express, Chester Road, Shotton, CH5 1BY	0.1%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Main Road, Broughton, CH4 0NR	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2
Co-op, Queen Street, Leeswood, CH7 4RQ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Saint Davids Park, Ewloe, CH5 3XN	1.1%	9	0.0%	0	0.0%	0	0.0%	0	3.6%	3	0.0%	0	0.0%	0	0.0%	0	3.7%	5
Iceland, Central Parade, Brunswick Road, Buckley, CH7 2EF	1.4%	12	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.0%	0	7.6%	7	0.0%	0	2.4%	3
Iceland, Church Street, Flint, CH6 5AD	0.7%	5	0.0%	0	0.0%	0	6.2%	5	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Iceland, Dodds Lane, Gwersyllt, Wrexham, LL11 4NT	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Iceland, High Street, Holywell, CH8 7LH	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, High Street, Prestatyn, LL19 9BE	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, New Street, Mold, CH7 1NY	0.4%	3	0.0%	0	0.0%	0	1.0%	1	1.7%	2	1.9%	1	0.0%	0	0.0%	0	0.0%	0
Lidl, Chester Road East, Shotton, CH5 1JJ	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	4	1.1%	2
Lidl, Coleshill Street, Holywell, CH8 7UP	2.2%	18	12.8%	16	0.0%	0	1.4%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Denbigh Road, Mold, CH7 1BL	1.2%	10	0.0%	0	5.0%	3	0.0%	0	5.3%	5	2.5%	2	0.0%	0	0.0%	0	0.0%	0
Lidl, Salop Road, Wrexham, LL13 7AF	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Londis, Holywell Road, Flint, CH6 5RR	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
M&S Foodhall, Broughton Park, Chester Road, Broughton, CH4 0DP	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
M&S Simply Food, Foregate Street, Chester, CH1 1HP	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	1.2%	2
Morrisions, Ruthin Road, Wrexham, LL13 7TU	0.5%	4	1.1%	1	0.0%	0	0.7%	1	0.0%	0	3.5%	2	0.0%	0	0.0%	0	0.0%	0
Morrisons, Ffordd Llanarth, Connah's Quay, CH5 4WL	4.8%	39	1.3%	2	3.1%	2	4.1%	3	0.8%	1	0.7%	0	0.6%	1	19.9%	31	0.0%	0
Morrisons, High Street, Saltney, CH4 8RU	2.8%	22	0.0%	0	0.7%	0	0.0%	0	1.0%	1	2.0%	1	3.2%	3	0.0%	0	12.0%	17
Sainsbury's Local, Mercia Drive, The Square, Mynydd Isa, CH7 6UY	0.1%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Caldy Valley Road, Boughton Heath, Chester, CH3 5QJ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Sainsbury's, Flintshire Retail Park, Flint, CH6 5GB	3.8%	30	7.7%	9	3.6%	2	23.1%	17	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Plas Coch Road, Wrexham, LL11 2BW	1.1%	8	0.6%	1	0.0%	0	0.0%	0	0.7%	1	11.3%	7	0.0%	0	0.0%	0	0.0%	0
Spar, Loggerheads Garage, Mold, CH7 5SA	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Chester Street, Flint, CH6 5HR	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Crescent Road, Wrexham, LL13 8HF	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0
Tesco, Broughton Shopping Park, Broughton Road, Chester, CH4 0DR	7.9%	64	0.0%	0	5.9%	4	2.7%	2	2.3%	2	9.9%	6	7.4%	7	3.5%	5	26.7%	38
Tesco, Chester Road, Old Station Yard, Ponterwyl, Mold, CH7 1UB	11.6%	93	4.2%	5	31.5%	20	1.3%	1	45.0%	43	16.9%	11	9.6%	8	2.4%	4	0.7%	1
Tesco, Frodsham Street, Chester, CH1 3JS	0.1%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Prestatyn Retail Park, Nanthall Road , Prestatyn, LL19 9LR	2.3%	19	14.8%	18	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Strand Walk, Holywell, CH8 7AN	4.4%	35	28.0%	34	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Waitrose, Boughton, Chester, CH3 5AF	0.4%	3	0.6%	1	2.9%	2	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Buckley	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Local shops, Denbigh	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0
Local shops, Ellesmere Port	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Local shops, Mold	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Neston	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Rhuddlan	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Rhyl	0.2%	1	0.6%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Ruthin	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.8%	1	3.0%	2	0.0%	0	0.0%	0	0.0%	0
Local shops, Saltney	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Local shops, Wrexham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0
B&M, High Street, Mold, CH7 1AZ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Ambrose Lloyd Centre, Mold, CH7 1NH	0.5%	4	0.0%	0	0.0%	0	0.0%	0	4.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Chester Road West, Shotton, CH5 1BY	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	3	0.0%	0
Lidl, Old Mold Road, Gwersyllt, Wrexham, LL11 4AP	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	3	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	2.6%	21	0.9%	1	3.1%	2	0.6%	0	1.0%	1	2.7%	2	0.0%	0	7.2%	11	2.5%	4
(Don't know / can't remember)	0.2%	2	0.9%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't do this type of shopping)	0.6%	5	0.0%	0	0.7%	0	0.0%	0	3.0%	3	0.0%	0	0.6%	1	0.0%	0	0.6%	1
Weighted base:		803		123		64		74		95		63		88		154		141
Sample:		803		100		100		100		103		100		100		100		100

Column %ges.

Q02 And where did your household go the time before that for a main food and grocery shop (was it the same, or different, and if so, please specify)?
Not 'Don't do' or 'Don't know' at Q01

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Aldi, Chester Road East, Broughton, CH4 0DP	5.6%	45	0.0%	0	0.0%	0	0.0%	0	3.7%	3	6.4%	4	1.4%	1	9.0%	14	15.8%	22
Aldi, Chester Street, Flint, CH6 5DH	4.5%	36	8.8%	11	0.8%	1	28.2%	21	1.0%	1	0.0%	0	0.0%	0	1.3%	2	0.6%	1
Aldi, Chester Street, Mold, CH7 1LA	6.1%	48	2.8%	3	16.8%	11	0.0%	0	25.2%	23	12.5%	8	2.4%	2	0.0%	0	0.6%	1
Aldi, Hartford Way, Chester, CH1 4NT	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	5
Aldi, Meliden Road, Prestatyn, LL19 9RT	1.1%	9	7.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Plas Coch, Retail Park, Wrexham, LL11 2BA	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0
Aldi, The Precinct Way, Buckley, CH7 2DE	6.8%	54	0.0%	0	14.1%	9	0.0%	0	1.7%	2	4.1%	3	36.8%	32	3.5%	5	2.3%	3
Asda, Aston Road, Queensferry, Deeside, CH5 1TP	12.9%	103	0.0%	0	6.4%	4	4.4%	3	1.0%	1	1.6%	1	13.5%	12	32.2%	50	22.7%	32
Asda, Flintshire Retail Park, Holywell Road, Flint, CH6 5BG	2.4%	19	4.6%	6	3.7%	2	15.6%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Greyhound Retail Park, Greyhound Road, Chester, CH1 4QG	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Holt Road, Eagles Meadow, Wrexham, LL13 8HL	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	1.5%	2
B&M Express, Chester Road, Shotton, CH5 1BY	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0
Co-op, Church Road, Saughall, Chester, CH1 6EP	0.1%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Five Ashes Road, Westminster Park Estate, Chester, CH4 7QS	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Main Road, Broughton, CH4 0NR	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Co-op, Queen Street, Leeswood, CH7 4RQ	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.7%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, The Hwy, Ewloe, CH5 3DN	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Farmfoods Freezer Centre, Flintshire Retail Park, Flint, CH6 5GB	0.7%	5	0.0%	0	0.7%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	2.9%	4	0.0%	0
Farmfoods Freezer Centre, Lead Mills Road, Mold, CH7 1UD	0.2%	2	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.9%	1	0.6%	1	0.0%	0	0.0%	0
Farmfoods Freezer Centre, St Davids Retail Park, High Street, Saltney, CH4 8SN	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Iceland, Central Parade, Brunswick Road, Buckley, CH7 2EF	1.6%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	12.8%	11	0.0%	0	0.6%	1
Iceland, Church Street, Flint, CH6 5AD	0.7%	6	0.0%	0	0.7%	0	7.2%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Dodds Lane, Gwersyllt, Wrexham, LL11 4NT	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Iceland, High Street, Holywell, CH8 7LH	0.5%	4	3.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, High Street, Prestatyn, LL19 9BE	0.3%	2	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, New Street, Mold, CH7 1NY	1.0%	8	0.0%	0	3.0%	2	0.0%	0	1.3%	1	2.6%	2	3.3%	3	0.0%	0	0.0%	0
Lidl, Chester Road East, Shotton, CH5 1JJ	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	8	0.0%	0
Lidl, Coleshill Street, Holywell, CH8 7UP	2.4%	19	14.4%	17	0.0%	0	1.3%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Denbigh Road, Mold, CH7 1BL	2.4%	19	0.0%	0	5.2%	3	0.6%	0	12.7%	12	3.4%	2	1.2%	1	0.0%	0	0.0%	0
Lidl, Salop Road, Wrexham,	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
LL13 7AF																		
M&S Foodhall, Broughton Park, Chester Road, Broughton, CH4 0DP	1.5%	12	0.7%	1	2.0%	1	0.0%	0	0.7%	1	1.5%	1	0.7%	1	0.5%	1	4.6%	6
M&S Simply Food, Foregate Street, Chester, CH1 1HP	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Morrisions, Ruthin Road, Wrexham, LL13 7TU	0.2%	2	0.6%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Morrisons, Ffordd Llanarth, Connah's Quay, CH5 4WL	5.8%	46	0.0%	0	5.8%	4	4.0%	3	0.8%	1	0.0%	0	0.6%	1	24.7%	38	0.0%	0
Morrisons, High Street, Saltney, CH4 8RU	1.7%	13	0.0%	0	0.7%	0	0.0%	0	0.0%	0	2.0%	1	1.5%	1	0.0%	0	7.3%	10
Morrisons, Liverpool Road, Chester, CH2 1AU	0.2%	2	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
One Stop Community Stores Ltd, High Street, Connah's Quay, CH5 4DD	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Local, Mercia Drive, The Square, Mynydd Isa, CH7 6UY	0.1%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Caldy Valley Road, Boughton Heath, Chester, CH3 5QJ	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2
Sainsbury's, Flintshire Retail Park, Flint, CH6 5GB	3.4%	27	4.2%	5	2.4%	2	24.1%	18	0.0%	0	0.0%	0	0.0%	0	1.8%	3	0.0%	0
Sainsbury's, Plas Coch Road, Wrexham, LL11 2BW	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.7%	1	9.9%	6	0.0%	0	0.0%	0	0.0%	0
Spar, Golftyn Lane, Connah's Quay, CH5 4BH	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	3	0.0%	0	0.0%	0	0.0%	0
Spar, High Street, Prestatyn, LL19 9BB	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Loggerheads Garage, Mold, CH7 5SA	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Crescent Road, Wrexham, LL13 8HF	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.7%	1	3.4%	2	0.0%	0	0.0%	0	0.0%	0
Tesco, Broughton Shopping Park, Broughton Road, Chester, CH4 0DR	7.2%	58	0.9%	1	1.1%	1	0.0%	0	1.7%	2	6.2%	4	12.2%	11	5.7%	9	22.0%	31
Tesco, Chester Road, Old Station Yard, Ponterwyl, Mold, CH7 1UB	9.6%	77	3.2%	4	26.2%	17	4.9%	4	32.6%	30	16.2%	10	10.0%	9	0.8%	1	1.5%	2
Tesco, Prestatyn Retail Park, Nanthall Road , Prestatyn, LL19 9LR	1.8%	14	10.6%	13	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Tesco, Strand Walk, Holywell, CH8 7AN	4.9%	39	30.2%	37	0.0%	0	1.6%	1	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, Boughton, Chester, CH3 5AF	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.6%	1	0.9%	1
Local shops, Birkenhead	0.1%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Broughton	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Local shops, Ellesmere Port	0.6%	5	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	1.9%	3
Local shops, Flint	0.2%	1	0.7%	1	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Holywell	0.1%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Mold	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.7%	1	1.9%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Neston	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Prestatyn	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Queensferry	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	4	0.0%	0
Local shops, Rhuddlan	0.3%	2	0.9%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Rhyl	0.6%	5	2.7%	3	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Local shops, Ruthin	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	2	0.0%	0	0.0%	0	0.0%	0
Local shops, Sandycroft	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Local shops, Wrexham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
B&M, High Street, Mold, CH7 1AZ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Ambrose Lloyd Centre, Mold, CH7 1NH	0.4%	3	0.0%	0	0.0%	0	0.0%	0	3.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Chester Road West, Shotton, CH5 1BY	1.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	9
Lidl, Old Mold Road, Gwersyllt, Wrexham, LL11 4AP	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	2	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	2.0%	16	0.0%	0	3.8%	2	0.6%	0	3.3%	3	2.7%	2	0.9%	1	4.8%	7	0.0%	0
Other, outside area	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't	1.2%	9	0.0%	0	0.0%	0	4.4%	3	0.0%	0	0.0%	0	0.0%	0	1.8%	3	2.5%	4

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
remember)																		
Weighted base:		797		122		64		73		93		63		88		154		140
Sample:		794		99		99		99		99		100		99		100		99

Mean score [£]:

Q03 Approximately how much money does your household normally spend on a main food and grocery shop?
Not 'Don't do' or 'Don't know' at Q01

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
£1 - 10	0.4%	3	0.9%	1	0.0%	0	2.0%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£11 - 20	3.2%	25	0.6%	1	1.4%	1	9.8%	7	2.8%	3	2.2%	1	3.6%	3	2.8%	4	3.7%	5
£21 - 30	5.5%	44	9.5%	12	3.4%	2	3.2%	2	5.5%	5	5.2%	3	8.1%	7	4.7%	7	3.7%	5
£31 - 40	6.8%	54	5.7%	7	6.9%	4	14.0%	10	6.6%	6	9.3%	6	11.0%	10	2.0%	3	5.4%	8
£41 - 50	11.6%	92	16.4%	20	17.6%	11	12.8%	9	10.0%	9	17.3%	11	8.7%	8	8.3%	13	7.9%	11
£51 - 60	10.8%	86	15.0%	18	13.6%	9	16.9%	12	12.9%	12	7.7%	5	10.5%	9	4.5%	7	10.1%	14
£61 - 70	6.6%	53	3.2%	4	6.7%	4	6.8%	5	5.4%	5	11.6%	7	8.0%	7	8.0%	12	5.7%	8
£71 - 80	9.7%	78	7.1%	9	10.2%	7	3.4%	2	13.8%	13	11.3%	7	5.7%	5	11.0%	17	12.9%	18
£81 - 90	5.5%	43	3.2%	4	2.1%	1	1.5%	1	6.4%	6	3.9%	2	3.0%	3	8.0%	12	9.9%	14
£91 - 100	11.1%	89	12.9%	16	10.9%	7	7.4%	5	3.3%	3	8.9%	6	8.6%	8	13.9%	21	16.4%	23
£101 - 150	7.7%	61	13.7%	17	3.0%	2	3.6%	3	3.2%	3	6.5%	4	9.8%	9	9.7%	15	6.4%	9
£151 - 200	2.3%	18	3.7%	5	0.8%	1	0.0%	0	0.0%	0	2.0%	1	4.9%	4	3.5%	5	1.3%	2
£201+	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	1.3%	2	0.0%	0
(Don't know / varies)	16.1%	128	6.8%	8	19.7%	13	18.6%	14	27.9%	26	13.9%	9	12.0%	11	19.0%	29	13.9%	19
(Refused)	2.4%	19	1.2%	1	3.8%	2	0.0%	0	1.5%	1	0.0%	0	5.3%	5	3.5%	5	2.7%	4
Mean:		*74.03*		*77.64*		*66.74*		*54.64*		*63.14*		*69.76*		*75.38*		*88.09*		*76.40*
Weighted base:		797		122		64		73		93		63		88		154		140
Sample:		794		99		99		99		99		100		99		100		99

Mean score [Times a week]: More than once a week = 2, Once a week = 1, Once a fortnight = 0.5, Once a month = 0.25, Less often = 0.1

Q04 How often does your household do a main food and grocery shop?
Not 'Don't do' or 'Don't know' at Q01

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
More than once a week	16.8%	134	23.2%	28	22.1%	14	23.6%	17	19.1%	18	7.3%	5	20.1%	18	11.8%	18	11.4%	16
Once a week	68.1%	543	59.4%	72	68.0%	43	61.5%	45	63.1%	58	63.7%	40	68.2%	60	75.0%	115	76.9%	108
Once a fortnight	8.7%	69	7.2%	9	5.8%	4	6.6%	5	12.4%	12	22.2%	14	5.1%	4	4.3%	7	10.8%	15
Once a month	4.0%	32	7.1%	9	1.4%	1	2.1%	2	2.4%	2	4.1%	3	5.8%	5	7.0%	11	0.0%	0
Less often	0.3%	2	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies / no particular pattern)	2.2%	17	1.3%	2	2.7%	2	6.2%	5	3.1%	3	2.6%	2	0.9%	1	2.0%	3	0.9%	1
Mean:		*1.10*		*1.13*		*1.19*		*1.20*		*1.12*		*0.93*		*1.14*		*1.05*		*1.06*
Weighted base:		797		122		64		73		93		63		88		154		140
Sample:		794		99		99		99		99		100		99		100		99

Q05 Where did your household last undertake a 'top-up' food and grocery shop?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Aldi, Chester Road East, Broughton, CH4 0DP	1.1%	9	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.7%	1	1.9%	3	3.2%	5
Aldi, Chester Street, Flint, CH6 5DH	3.0%	24	0.9%	1	0.7%	0	28.6%	21	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Aldi, Chester Street, Mold, CH7 1LA	2.6%	21	1.9%	2	9.0%	6	0.6%	0	9.1%	9	5.9%	4	0.0%	0	0.0%	0	0.0%	0
Aldi, Hartford Way, Chester, CH1 4NT	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Aldi, Meliden Road, Prestatyn, LL19 9RT	0.2%	2	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Plas Coch, Retail Park, Wrexham, LL11 2BA	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.9%	1
Aldi, The Precinct Way, Buckley, CH7 2DE	4.2%	34	0.0%	0	3.4%	2	0.0%	0	0.0%	0	0.7%	0	31.6%	28	0.0%	0	2.2%	3
Asda, Aston Road, Queensferry, Deeside, CH5 1TP	4.6%	37	3.1%	4	0.0%	0	2.8%	2	0.0%	0	1.1%	1	2.7%	2	14.3%	22	4.4%	6
Asda, Flintshire Retail Park, Holywell Road, Flint, CH6 5BG	2.0%	16	4.3%	5	0.0%	0	10.5%	8	0.0%	0	0.0%	0	0.0%	0	1.8%	3	0.0%	0
Asda, Greyhound Retail Park, Greyhound Road, Chester, CH1 4QG	0.2%	1	0.0%	0	0.7%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&M Express, Chester Road, Shotton, CH5 1BY	0.1%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Brookhouse, Chester Road, Pentre, CH5 2DT	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Co-op, Central Drive, Aston, Deeside, CH5 1LR	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	4	0.0%	0
Co-op, Church Road, Saughall, Chester, CH1 6EP	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Co-op, Five Ashes Road, Westminster Park Estate, Chester, CH4 7QS	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Holway Road, Holywell, CH8 7LQ	0.7%	5	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	4
Co-op, Main Road, Broughton, CH4 0NR	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	3
Co-op, Queen Street, Leeswood, CH7 4RQ	0.8%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.3%	7	0.0%	0	0.0%	0	0.0%	0
Co-op, Rhyl Road, Rhuddlan, LL18 2TS	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Saint Davids Park, Ewloe, CH5 3XN	2.3%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	3	0.0%	0	11.1%	16
Co-op, The Hwy, Ewloe, CH5 3DN	2.4%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	3.5%	5	9.2%	13
Farmfoods Freezer Centre, Flintshire Retail Park, Flint, CH6 5GB	0.1%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Farmfoods Freezer Centre, Lead Mills Road, Mold, CH7 1UD	0.8%	6	0.0%	0	0.7%	0	0.0%	0	3.0%	3	4.8%	3	0.0%	0	0.0%	0	0.0%	0
Farmfoods Freezer Centre, St Davids Retail Park, High Street, Saltney, CH4 8SN	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Iceland, Central Parade, Brunswick Road, Buckley, CH7 2EF	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	8.5%	7	0.0%	0	0.0%	0
Iceland, Church Street, Flint, CH6 5AD	0.7%	6	0.0%	0	0.0%	0	3.1%	2	0.0%	0	0.0%	0	0.0%	0	2.4%	4	0.0%	0
Iceland, Dodds Lane, Gwersyllt, Wrexham, LL11 4NT	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Iceland, Frodsham Street, Chester, CH1 3JJ	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	4	0.0%	0
Iceland, High Street, Holywell, CH8 7LH	1.2%	10	8.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, High Street, Prestatyn, LL19 9BE	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, New Street, Mold, CH7 1NY	1.2%	9	0.0%	0	0.7%	0	0.0%	0	9.3%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Lidl, Coleshill Street, Holywell, CH8 7UP	1.8%	14	10.9%	13	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Denbigh Road, Mold, CH7 1BL	2.3%	18	1.9%	2	3.4%	2	0.0%	0	12.6%	12	1.9%	1	0.6%	1	0.0%	0	0.0%	0
Lidl, Salop Road, Wrexham, LL13 7AF	0.4%	3	0.0%	0	1.0%	1	0.0%	0	0.0%	0	4.3%	3	0.0%	0	0.0%	0	0.0%	0
M&S Foodhall, Broughton Park, Chester Road, Broughton, CH4 0DP	1.4%	11	0.0%	0	0.0%	0	0.6%	0	3.6%	3	2.0%	1	0.0%	0	0.0%	0	4.3%	6
M&S Simply Food, Foregate Street, Chester, CH1 1HP	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Morrisions, Ruthin Road, Wrexham, LL13 7TU	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0
Morrisons, Ffordd Llanarth, Connah's Quay, CH5 4WL	6.1%	49	0.0%	0	1.7%	1	0.7%	1	0.0%	0	0.0%	0	1.3%	1	29.3%	45	0.7%	1
Morrisons, High Street, Saltney, CH4 8RU	1.3%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.6%	11
Morrisons, Liverpool Road, Chester, CH2 1AU	0.3%	2	0.0%	0	3.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
One Stop Community Stores Ltd, High Street, Connah's Quay, CH5 4DD	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	3	0.0%	0	1.9%	3	0.0%	0
Sainsbury's Local, Charles Street, Chester, CH2 3AZ	0.4%	3	0.0%	0	3.7%	2	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Local, Mercia Drive, The Square, Mynydd Isa, CH7 6UY	2.3%	18	0.7%	1	25.8%	17	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Flintshire Retail Park, Flint, CH6 5GB	1.7%	14	4.0%	5	1.4%	1	11.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Plas Coch Road, Wrexham, LL11 2BW	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0
Spar, Brunswick Road, Buckley, CH7 2ED	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	4	0.0%	0	0.0%	0
Spar, Fina Garage, Chester Road, Flint, CH6 5DZ	0.2%	1	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Golftyn Lane, Connah's Quay, CH5 4BH	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.5%	1	0.0%	0
Spar, Loggerheads Garage, Mold, CH7 5SA	0.4%	4	0.0%	0	0.0%	0	0.0%	0	2.8%	3	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Spar, Victoria Square, Bagillt Street, Holywell, CH8 7TR	0.1%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Chester Street, Flint, CH6 5HR	0.7%	5	0.0%	0	0.0%	0	5.9%	4	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Tesco Extra, Crescent Road, Wrexham, LL13 8HF	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Tesco, Broughton Shopping Park, Broughton Road, Chester, CH4 0DR	2.9%	23	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.6%	1	1.8%	3	13.0%	18
Tesco, Chester Road, Old Station Yard, Ponterwyl, Mold, CH7 1UB	4.0%	32	0.0%	0	12.8%	8	0.6%	0	17.1%	16	7.2%	5	2.2%	2	0.0%	0	0.7%	1
Tesco, Prestatyn Retail Park, Nanthall Road , Prestatyn, LL19 9LR	0.2%	2	1.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Strand Walk, Holywell, CH8 7AN	1.5%	12	9.7%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, Boughton, Chester, CH3 5AF	0.2%	1	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Bagillt	0.3%	2	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Broughton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Local shops, Buckley	1.6%	13	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	10.5%	9	0.0%	0	1.9%	3
Local shops, Caerwys	0.6%	5	0.6%	1	2.3%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Local shops, Chester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Local shops, Connah's Quay	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Local shops, Ewloe	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Local shops, Flint	1.3%	11	2.3%	3	0.0%	0	6.3%	5	3.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Holywell	0.2%	2	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Mold	2.2%	18	0.9%	1	0.8%	1	0.6%	0	15.2%	14	2.2%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Mynydd Isa	0.1%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Prestatyn	0.3%	2	1.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Queensferry	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Local shops, Rhyl	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Ruthin	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Local shops, Shotton	0.1%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Wrexham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
B&M, High Street, Mold, CH7 1AZ	0.1%	1	0.0%	0	0.7%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Ambrose Lloyd Centre, Mold, CH7 1NH	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, The Precinct Way, Buckley, CH7 2EG	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	2	0.6%	1	1.9%	3
Iceland, Chester Road West, Shotton, CH5 1BY	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	4	0.7%	1
Lcoal Shops, Llanarmon-yn-Iâl	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0
Lidl, Old Mold Road, Gwersyllt, Wrexham, LL11 4AP	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Local Shops, Caergwrle	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Local Shops, Hope	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Local Shops, Northop	0.2%	1	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Shops, Penyffordd	1.0%	8	6.3%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Shops, Pontyblyddyn	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Local Shops, Treuddyn	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	3	0.0%	0	0.0%	0	0.0%	0
Spar, Hawarden Road, Penyffordd, Chester, CH4 0JE	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	3
Spar, High Street, Caergwrle, Wrexham, LL12 9ET	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.7%	4	0.0%	0	0.0%	0	0.0%	0
Other, zone 4	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Other, outside area	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	1.6%	13	1.5%	2	0.0%	0	0.0%	0	1.0%	1	2.4%	2	0.0%	0	4.1%	6	1.5%	2
(Don't do this type of shopping)	24.3%	195	32.1%	39	18.8%	12	21.1%	16	13.4%	13	22.7%	14	27.5%	24	26.2%	40	25.6%	36
Weighted base:		803		123		64		74		95		63		88		154		141
Sample:		803		100		100		100		103		100		100		100		100

Q06 And where did your household shop the time before that for a 'top-up' food and grocery shop (was it the same, or different, and if different, please specify)?
Not 'Don't do' or 'Don't know' at Q05

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Aldi, Chester Road East, Broughton, CH4 0DP	2.2%	13	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.6%	3	8.6%	9
Aldi, Chester Street, Flint, CH6 5DH	3.4%	20	4.7%	4	0.8%	0	20.3%	12	0.0%	0	0.0%	0	0.0%	0	3.9%	4	0.0%	0
Aldi, Chester Street, Mold, CH7 1LA	3.3%	20	2.9%	2	16.1%	8	0.8%	0	6.8%	6	5.3%	2	0.8%	1	0.0%	0	0.0%	0
Aldi, Hartford Way, Chester, CH1 4NT	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.9%	1
Aldi, Meliden Road, Prestatyn, LL19 9RT	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, The Precinct Way, Buckley, CH7 2DE	4.6%	27	0.0%	0	5.7%	3	0.0%	0	0.0%	0	2.0%	1	31.0%	20	2.5%	3	0.9%	1
Asda, Aston Road, Queensferry, Deeside, CH5 1TP	4.8%	29	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	4	17.6%	19	5.8%	6
Asda, Flintshire Retail Park, Holywell Road, Flint, CH6 5BG	2.0%	12	1.3%	1	0.0%	0	13.9%	8	0.0%	0	0.0%	0	0.0%	0	2.5%	3	0.0%	0
Asda, Holt Road, Eagles Meadow, Wrexham, LL13 8HL	0.3%	2	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
B&M Express, Chester Road, Shotton, CH5 1BY	0.5%	3	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	3	0.0%	0
Co-op, Brookhouse, Chester Road, Pentre, CH5 2DT	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Co-op, Central Drive, Aston, Deeside, CH5 1LR	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Co-op, Church Road, Saughall, Chester, CH1 6EP	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.9%	1
Co-op, Holway Road, Holywell, CH8 7LQ	0.5%	3	2.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Co-op, Kingsway, Newton, Chester, CH2 2LJ	0.1%	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
Co-op, Main Road, Broughton, CH4 0NR	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	2.1%	2
Co-op, Queen Street, Leeswood, CH7 4RQ	1.2%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.9%	7	0.0%	0	0.0%	0	0.0%	0
Co-op, Rhyl Road, Rhuddlan, LL18 2TS	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Saint Davids Park, Ewloe, CH5 3XN	2.9%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	3.5%	2	0.0%	0	13.8%	14
Co-op, The Hwy, Ewloe, CH5 3DN	3.6%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	6.0%	6	14.2%	15
Farmfoods Freezer Centre, Flintshire Retail Park, Flint, CH6 5GB	0.5%	3	1.0%	1	0.8%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Farmfoods Freezer Centre, Lead Mills Road, Mold, CH7 1UD	0.2%	1	0.0%	0	0.8%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Central Parade, Brunswick Road, Buckley, CH7 2EF	2.1%	13	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	16.7%	11	0.0%	0	1.5%	2
Iceland, Church Street, Flint, CH6 5AD	1.4%	8	0.0%	0	0.0%	0	6.1%	4	0.0%	0	0.0%	0	0.0%	0	3.4%	4	0.9%	1
Iceland, Dodds Lane, Gwersyllt, Wrexham, LL11 4NT	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0
Iceland, Frodsham Street, Chester, CH1 3JJ	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	3	0.0%	0
Iceland, High Street, Holywell, CH8 7LH	1.4%	8	10.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, High Street, Prestatyn, LL19 9BE	0.1%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, New Street, Mold, CH7 1NY	1.8%	11	0.0%	0	0.8%	0	0.0%	0	11.2%	9	2.2%	1	0.0%	0	0.0%	0	0.0%	0
Lidl, Chester Road East, Shotton, CH5 1JJ	0.1%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Coleshill Street, Holywell, CH8 7UP	3.0%	18	21.1%	17	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Lidl, Denbigh Road, Mold, CH7 1BL	4.1%	25	2.9%	2	8.3%	4	0.0%	0	19.4%	16	2.2%	1	1.6%	1	0.0%	0	0.0%	0
Lidl, Salop Road, Wrexham, LL13 7AF	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	2	0.0%	0	0.0%	0	0.9%	1
M&S Foodhall, Broughton Park, Chester Road, Broughton, CH4 0DP	1.8%	11	0.9%	1	3.6%	2	0.0%	0	0.0%	0	1.2%	1	1.0%	1	0.8%	1	5.8%	6
M&S Simply Food, Foregate Street, Chester, CH1 1HP	0.5%	3	0.0%	0	1.3%	1	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2
Morrisions, Ruthin Road, Wrexham, LL13 7TU	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	2	0.0%	0	0.0%	0	0.0%	0
Morrisons, Ffordd Llanarth, Connah's Quay, CH5 4WL	6.3%	38	0.0%	0	0.8%	0	2.5%	1	0.0%	0	1.0%	0	1.0%	1	30.2%	32	2.1%	2
Morrisons, High Street, Saltney, CH4 8RU	2.6%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	1.2%	1	13.2%	14
One Stop Community Stores Ltd, High Street, Connah's Quay, CH5 4DD	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.5%	3	0.0%	0	2.7%	3	0.0%	0
Sainsbury's Local, Charles Street, Chester, CH2 3AZ	0.4%	2	0.0%	0	4.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Local, Mercia Drive, The Square, Mynydd Isa, CH7 6UY	2.4%	14	1.0%	1	23.9%	13	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Flintshire Retail Park, Flint, CH6 5GB	2.9%	17	1.0%	1	0.8%	0	26.2%	15	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Plas Coch Road, Wrexham, LL11 2BW	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.8%	1	4.5%	2	2.2%	1	0.0%	0	0.0%	0
Spar, Brunswick Road, Buckley, CH7 2ED	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	4	0.0%	0	0.0%	0
Spar, Fina Garage, Chester Road, Flint, CH6 5DZ	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Golftyn Lane, Connah's Quay, CH5 4BH	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.8%	1	0.0%	0
Spar, Loggerheads Garage, Mold, CH7 5SA	0.5%	3	0.0%	0	0.8%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Spar, Victoria Square, Bagillt Street, Holywell, CH8 7TR	0.2%	1	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Chester Street, Flint, CH6 5HR	1.1%	6	0.0%	0	0.0%	0	10.9%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Crescent Road, Wrexham, LL13 8HF	0.1%	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
Tesco, Broughton Shopping Park, Broughton Road, Chester, CH4 0DR	2.6%	16	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	2	4.2%	5	8.2%	8
Tesco, Chester Road, Old Station Yard, Ponterwyl, Mold, CH7 1UB	5.7%	34	1.3%	1	11.8%	6	0.0%	0	25.4%	21	8.4%	4	0.0%	0	0.0%	0	1.8%	2
Tesco, Frodsham Street, Chester, CH1 3JS	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Tesco, Prestatyn Retail Park, Nanthall Road , Prestatyn, LL19 9LR	1.0%	6	3.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	2.5%	3
Tesco, Strand Walk, Holywell, CH8 7AN	2.6%	15	18.0%	15	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Abergele	0.1%	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
Local shops, Bagillt	0.8%	5	5.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Broughton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Local shops, Buckley	1.7%	10	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	14.5%	9	0.0%	0	0.0%	0
Local shops, Caerwys	0.8%	5	0.9%	1	2.8%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Local shops, Chester	0.5%	3	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	3
Local shops, Connah's Quay	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	4	0.0%	0
Local shops, Denbigh	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Ellesmere Port	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0
Local shops, Ewloe	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Local shops, Flint	1.4%	8	5.2%	4	0.0%	0	6.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Hawarden	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Local shops, Mold	2.7%	16	0.0%	0	0.8%	0	0.8%	0	16.2%	13	4.0%	2	0.0%	0	0.0%	0	0.0%	0
Local shops, Mynydd Isa	0.1%	1	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Prestatyn	0.5%	3	2.8%	2	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Queensferry	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Local shops, Rhyl	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Saltney	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Local shops, Shotton	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Local shops, Wrexham	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	2	0.0%	0	0.0%	0	0.0%	0
B&M, High Street, Mold, CH7 1AZ	0.2%	1	0.0%	0	0.8%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, The Precinct Way, Buckley, CH7 2EG	1.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	2	0.9%	1	2.5%	3
Iceland, Chester Road West, Shotton, CH5 1BY	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	4	0.0%	0
Lcoal Shops, Llanarmon-yn-Iâl	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	1	0.0%	0	0.0%	0	0.0%	0
Lidl, Old Mold Road, Gwersyllt, Wrexham, LL11 4AP	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Local Shops, Caergwrle	0.1%	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
Local Shops, Hope	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	2	0.0%	0	0.0%	0	0.0%	0
Local Shops, Northop	0.1%	1	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Shops, Penyffordd	1.3%	8	9.5%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Shops, Pontyblyddyn	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Local Shops, Treuddyn	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	2	0.0%	0	0.0%	0	0.0%	0
Spar, Hawarden Road, Penyffordd, Chester, CH4 0JE	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	2.7%	2	0.0%	0	0.9%	1
Spar, High Street, Caergwrle, Wrexham, LL12 9ET	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	3	0.0%	0	0.0%	0	0.0%	0
Other, zone 4	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	0.2%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Other, outside area	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	1.9%	11	0.0%	0	1.3%	1	4.7%	3	6.6%	5	2.7%	1	0.0%	0	0.9%	1	0.0%	0
Weighted base:		595		82		52		58		82		47		64		107		103
Sample:		595		62		75		76		86		70		76		71		79

Mean score [£]:

Q07 Approximately how much money does your household normally spend on a 'top-up' food and grocery shop?
Not 'Don't do' or 'Don't know' at Q05

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
£1 - 10	41.2%	245	43.5%	36	44.1%	23	35.8%	21	50.4%	41	38.5%	18	36.8%	24	43.2%	46	35.7%	37
£11 - 20	28.6%	170	30.1%	25	21.6%	11	28.4%	17	24.7%	20	38.1%	18	28.0%	18	32.0%	34	26.9%	28
£21 - 30	9.6%	57	16.7%	14	8.4%	4	8.9%	5	7.9%	6	6.5%	3	12.5%	8	3.0%	3	12.6%	13
£31 - 40	2.6%	16	0.0%	0	3.8%	2	2.6%	2	1.5%	1	3.5%	2	5.8%	4	3.4%	4	1.7%	2
£41 - 50	2.5%	15	4.7%	4	0.0%	0	2.8%	2	0.0%	0	2.4%	1	0.0%	0	4.3%	5	3.5%	4
£51 - 60	0.3%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
£61 - 70	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£71 - 80	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£81 - 90	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£91 - 100	0.1%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£101 - 150	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£151 - 200	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£201+	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	13.6%	81	2.2%	2	20.0%	10	21.4%	12	14.7%	12	11.0%	5	15.1%	10	12.1%	13	16.1%	17
(Refused)	1.5%	9	0.9%	1	2.1%	1	0.0%	0	0.8%	1	0.0%	0	1.8%	1	1.2%	1	3.7%	4
Mean:		*15.29*		*17.94*		*13.17*		*15.09*		*11.75*		*15.55*		*15.73*		*15.44*		*16.28*
Weighted base:		595		82		52		58		82		47		64		107		103
Sample:		595		62		75		76		86		70		76		71		79

Mean score [Times a week]: Daily = 7, More than 3 times a week = 4, Two or three times a week = 2.5, Once a week = 1, Once a fortnight = 0.5, Less often = 0.1

Q08 How often does your household normally do its top-up food shopping?
Not 'Don't do' or 'Don't know' at Q05

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Daily	5.0%	30	6.5%	5	4.2%	2	10.5%	6	6.0%	5	0.0%	0	7.9%	5	3.4%	4	2.6%	3
More than 3 times a week	7.3%	44	7.8%	6	4.6%	2	6.9%	4	4.4%	4	4.0%	2	14.3%	9	9.9%	11	5.5%	6
Two or three times a week	28.0%	167	21.2%	17	43.3%	23	21.7%	13	33.2%	27	31.4%	15	18.9%	12	30.9%	33	26.3%	27
Once a week	41.9%	249	46.3%	38	31.4%	16	41.3%	24	29.2%	24	46.9%	22	42.4%	27	42.2%	45	51.1%	53
Once a fortnight	7.9%	47	7.8%	6	6.4%	3	9.5%	6	11.4%	9	5.7%	3	11.1%	7	5.7%	6	6.5%	7
Less often	2.6%	15	3.9%	3	3.1%	2	1.6%	1	4.2%	3	1.5%	1	0.8%	1	2.7%	3	1.8%	2
(Don't know / varies / no particular pattern)	7.3%	43	6.6%	5	7.0%	4	8.5%	5	11.5%	9	10.5%	5	4.5%	3	5.2%	6	6.2%	6
Mean:		*1.95*		*1.93*		*2.05*		*2.20*		*2.02*		*1.61*		*2.18*		*1.96*		*1.71*
Weighted base:		595		82		52		58		82		47		64		107		103
Sample:		595		62		75		76		86		70		76		71		79

Q09 Does your household also spend money on food and groceries in small shops or at market stalls?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Yes	37.3%	300	34.8%	43	38.4%	25	22.4%	17	57.3%	55	40.8%	26	42.2%	37	31.1%	48	35.3%	50
No	62.7%	503	65.2%	80	61.6%	40	77.6%	57	42.7%	41	59.2%	37	57.8%	51	68.9%	106	64.7%	91
Weighted base:		803		123		64		74		95		63		88		154		141
Sample:		803		100		100		100		103		100		100		100		100

Q10 Where are these small shops or market stalls located?
Yes at Q09

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Local shops, Bagillt	1.3%	4	9.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Birkenhead	0.2%	0	0.0%	0	0.0%	0	2.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Broughton	3.0%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.2%	9
Local shops, Buckley	9.7%	29	0.0%	0	6.6%	2	0.0%	0	0.0%	0	2.2%	1	65.4%	24	1.7%	1	3.4%	2
Local shops, Caerwys	0.8%	2	0.0%	0	0.0%	0	0.0%	0	4.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Chester	2.5%	7	0.0%	0	0.0%	0	7.6%	1	0.0%	0	0.0%	0	0.0%	0	3.7%	2	8.7%	4
Local shops, Connah's Quay	4.2%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	26.3%	13	0.0%	0
Local shops, Denbigh	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Ellesmere Port	0.7%	2	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	2
Local shops, Flint	3.8%	11	0.0%	0	9.7%	2	50.7%	8	0.0%	0	1.8%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Hawarden	2.9%	9	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	3	10.6%	5
Local shops, Holywell	4.3%	13	28.2%	12	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Mold	41.3%	124	5.6%	2	70.9%	18	38.9%	6	82.8%	45	51.6%	13	31.0%	12	15.3%	7	39.8%	20
Local shops, Mynydd Isa	0.4%	1	2.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Neston	0.5%	1	1.6%	1	2.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Prestatyn	2.8%	9	18.9%	8	1.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Queensferry	1.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	9.3%	4	0.0%	0
Local shops, Ruthin	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.5%	2	0.0%	0	0.0%	0	0.0%	0
Local shops, Shotton	4.0%	12	0.0%	0	1.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	24.1%	12	0.0%	0
Local shops, Warrington	0.2%	1	0.0%	0	2.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Wrexham	0.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.1%	3	0.0%	0	0.0%	0	0.0%	0
Lcoal Shops, Llanarmon-yn-Iâl	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	1	0.0%	0	0.0%	0	0.0%	0
Local Shops, Caergwrle	1.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.9%	4	0.0%	0	0.0%	0	0.0%	0
Local Shops, Hope	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	1	0.0%	0	0.0%	0	0.0%	0
Local Shops, Northop	0.1%	0	0.0%	0	1.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Shops, Pentre Halkyn	2.1%	6	14.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Shops, Penyffordd	1.6%	5	9.0%	4	0.0%	0	0.0%	0	0.0%	0	3.7%	1	0.0%	0	0.0%	0	0.0%	0
Local Shops, Treuddyn	0.5%	1	0.0%	0	0.0%	0	0.0%	0	1.8%	1	1.8%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Hawarden Road, Penyffordd, Chester, CH4 0JE	0.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	3
Other, zone 4	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, outside area	1.3%	4	0.0%	0	0.0%	0	0.0%	0	6.3%	3	1.8%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	5.5%	17	9.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	13.9%	7	10.5%	5
Weighted base:		300		43		25		17		55		26		37		48		50
Sample:		306		31		36		25		59		45		44		27		39

Mean score [£]:

Q11 Approximately how much money does your household spend on food and groceries on a typical trip to these small shops or market stalls?
Yes at Q09

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
£1 - 10	40.5%	121	61.6%	26	51.1%	13	37.9%	6	39.7%	22	37.0%	10	17.0%	6	36.8%	18	42.1%	21
£11 - 20	27.6%	83	25.2%	11	19.6%	5	24.3%	4	26.1%	14	19.1%	5	38.9%	14	29.6%	14	30.3%	15
£21 - 30	5.9%	18	5.5%	2	6.3%	2	6.7%	1	2.9%	2	9.6%	2	6.5%	2	9.3%	4	3.4%	2
£31 - 40	1.4%	4	1.6%	1	0.0%	0	0.0%	0	0.0%	0	7.2%	2	2.2%	1	0.0%	0	1.6%	1
£41 - 50	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	0	2.2%	1	0.0%	0	1.9%	1
£51 - 60	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£61 - 70	0.5%	2	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1
£71 - 80	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£81 - 90	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£91 - 100	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£101 - 150	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£151 - 200	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£201+	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	20.3%	61	4.2%	2	16.9%	4	31.1%	5	30.2%	17	25.2%	7	31.6%	12	13.1%	6	17.3%	9
(Refused)	3.1%	9	0.0%	0	6.3%	2	0.0%	0	1.1%	1	0.0%	0	1.7%	1	11.3%	5	1.9%	1
Mean:		*13.41*		*11.53*		*10.82*		*13.50*		*11.17*		*16.33*		*17.31*		*13.36*		*14.84*
Weighted base:		300		43		25		17		55		26		37		48		50
Sample:		306		31		36		25		59		45		44		27		39

Mean score [Times a week]: Daily = 7, More than 3 times a week = 4, Two or three times a week = 2.5, Once a week = 1, Once a fortnight = 0.5, Less often = 0.1

Q12 How often do you normally visit these other small shops or market stalls for food and groceries shopping?
Yes at Q09

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Daily	6.0%	18	19.0%	8	1.8%	0	0.0%	0	3.8%	2	0.0%	0	1.4%	1	9.3%	4	5.0%	3
More than 3 times a week	2.5%	8	0.0%	0	7.7%	2	3.3%	1	5.0%	3	1.8%	0	0.0%	0	2.0%	1	1.9%	1
Two or three times a week	7.5%	23	7.0%	3	3.5%	1	6.1%	1	13.7%	8	9.1%	2	6.1%	2	5.7%	3	5.6%	3
Once a week	31.9%	95	33.5%	14	25.8%	6	31.0%	5	48.5%	27	38.3%	10	34.6%	13	11.6%	6	29.6%	15
Once a fortnight	21.6%	65	11.6%	5	39.2%	10	31.6%	5	12.4%	7	22.2%	6	31.1%	12	32.3%	15	10.6%	5
Less often	22.5%	67	27.2%	12	13.4%	3	23.6%	4	10.1%	6	22.1%	6	25.4%	9	20.1%	10	36.7%	18
(Don't know / varies / no particular pattern)	7.9%	24	1.6%	1	8.6%	2	4.3%	1	6.5%	4	6.5%	2	1.4%	1	19.0%	9	10.6%	5
Mean:		*1.26*		*1.96*		*1.08*		*0.81*		*1.46*		*0.87*		*0.79*		*1.45*		*1.07*
Weighted base:		300		43		25		17		55		26		37		48		50
Sample:		306		31		36		25		59		45		44		27		39

Q13 So, speaking as an individual, can you tell me where you last made a purchase of clothes or shoes?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Abergele	0.1%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broughton	6.6%	53	4.6%	6	7.4%	5	16.9%	12	6.8%	7	0.7%	0	8.3%	7	6.7%	10	3.8%	5
Buckley	0.4%	3	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0
Chester	15.2%	122	14.5%	18	23.9%	15	17.6%	13	17.5%	17	13.4%	9	16.2%	14	10.2%	16	14.8%	21
Connah's Quay	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0
Denbigh	0.2%	2	0.9%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ellesmere Port	1.2%	10	0.0%	0	0.7%	0	1.0%	1	0.0%	0	0.0%	0	0.6%	1	0.5%	1	5.2%	7
Flint	1.3%	11	0.9%	1	1.4%	1	8.4%	6	0.7%	1	0.0%	0	0.9%	1	0.6%	1	0.0%	0
Holywell	0.7%	5	4.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Liverpool	1.2%	9	4.0%	5	0.0%	0	1.3%	1	1.0%	1	0.0%	0	0.6%	1	0.0%	0	1.5%	2
Llandudno	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0
London	0.4%	3	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	3
Mold	3.2%	26	1.5%	2	5.2%	3	0.0%	0	11.6%	11	6.2%	4	1.5%	1	0.0%	0	3.0%	4
Prestatyn	2.0%	16	12.7%	16	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Queensferry	1.9%	15	2.5%	3	0.0%	0	0.6%	0	0.0%	0	0.0%	0	3.3%	3	5.7%	9	0.0%	0
Rhyl	0.6%	4	1.7%	2	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Saltney	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	4
St Asaph	0.5%	4	1.1%	1	0.7%	0	1.9%	1	0.7%	1	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Warrington	0.3%	2	0.0%	0	3.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wrexham	2.3%	19	0.0%	0	1.7%	1	0.6%	0	5.8%	6	13.9%	9	3.0%	3	0.0%	0	0.0%	0
Bowers Retail Park (including Pets at Home), Earle Road, Widnes, WA8 0TA	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Broughton Retail Park, Chester Road, Broughton, Chester, Cheshire CH4 0DP	27.8%	224	11.5%	14	25.2%	16	13.3%	10	18.9%	18	27.7%	18	42.9%	38	34.7%	53	40.1%	57
Cheshire Oaks Designer Outlet, Kinsey Road, Ellesmere Port, South Wirral, CH65 9JJ	6.8%	55	8.4%	10	5.9%	4	6.8%	5	4.3%	4	9.4%	6	1.9%	2	6.9%	11	9.4%	13
Chester Retail Park, Old Seals Way, Chester, CH1 4RY	0.5%	4	0.0%	0	0.0%	0	5.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Clwyd Retail Park (including B&Q, Currys), Rhyl Road, Rhuddlan, Rhyl, LL18 2TJ	0.2%	2	0.6%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coliseum Shopping Park, 30 Coliseum Way, Ellesmere Port, Merseyside, CH65 9SD	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Deeside Retail Park, Chester Road East, Shotton, Deeside, CH5 1QD	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.8%	1	0.0%	0
Flintshire Retail Park (including Carpetright, Brantano, Argos), Holywell Road, Flint, Clwyd, CH6 5GB	0.9%	7	3.8%	5	0.0%	0	3.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Greyhound Retail Park (including B&Q, Cineworld, Wickes), Sealand Road, Chester, Cheshire, CH1 4QG	1.9%	15	1.9%	2	0.7%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	6.4%	10	0.7%	1
Mostyn Champneys Retail Park, Llandudno, LL30 1RY	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Plas Coch Retail Park (including Currys), Plas Coch Road, Wrexham, LL11 2BA	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.6%	1
Prestatyn Shopping Park, Nant Hall Road, Prestatyn, LL19 9BJ	2.0%	16	11.0%	13	0.7%	0	1.0%	1	1.0%	1	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Aston Road, Queensferry, CH5 1TP	2.2%	18	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.7%	0	3.3%	3	4.8%	7	3.9%	5
Marks & Spencers Cheshire Oaks, Ellesmere Port, CH65 9HX	0.4%	3	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.5%	1	0.0%	0
Tesco, Chester Road, Old Station Yard, Mold, CH7	1.0%	8	2.6%	3	0.0%	0	0.0%	0	5.2%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
1UB																		
Gemini Retail Park, Europa Boulevard, Warrington, WA5 7TY	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	9.4%	75	4.5%	6	13.6%	9	10.1%	7	11.3%	11	12.6%	8	6.2%	5	11.3%	17	8.3%	12
Home catalogue	1.4%	11	0.0%	0	2.0%	1	2.2%	2	3.8%	4	3.0%	2	1.8%	2	0.6%	1	0.0%	0
TV / Interactive shopping	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Other, outside area	1.0%	8	0.6%	1	0.7%	0	0.0%	0	1.3%	1	0.7%	0	1.5%	1	2.2%	3	0.6%	1
(Don't know / can't remember)	3.0%	24	4.0%	5	1.4%	1	5.1%	4	2.3%	2	3.0%	2	2.4%	2	5.3%	8	0.0%	0
(Don't do this type of shopping)	1.6%	13	1.7%	2	1.0%	1	0.6%	0	3.4%	3	3.8%	2	0.0%	0	1.3%	2	1.1%	2
Weighted base:		803		123		64		74		95		63		88		154		141
Sample:		803		100		100		100		103		100		100		100		100

Q14 And the time before that, where did you go to make a purchase of clothes or shoes?
Not 'Don't do' or 'Don't know' at Q13

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Abergele	0.1%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birkenhead	0.1%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broughton	5.6%	43	12.1%	14	6.0%	4	12.1%	8	3.4%	3	1.8%	1	4.7%	4	3.9%	6	2.2%	3
Buckley	0.1%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chester	17.9%	137	7.5%	9	21.4%	13	28.9%	20	16.8%	15	15.7%	9	14.9%	13	18.5%	27	22.2%	31
Connah's Quay	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0
Ellesmere Port	0.8%	6	1.5%	2	0.7%	0	0.0%	0	1.1%	1	0.0%	0	0.7%	1	0.0%	0	1.5%	2
Flint	1.5%	11	2.6%	3	0.7%	0	6.9%	5	1.4%	1	0.0%	0	0.9%	1	0.7%	1	0.0%	0
Holywell	0.3%	3	2.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Liverpool	2.5%	19	3.3%	4	1.4%	1	0.7%	0	0.0%	0	4.4%	3	0.6%	1	4.0%	6	3.9%	5
Llandudno	0.5%	4	0.0%	0	0.0%	0	1.0%	1	1.8%	2	0.8%	0	0.0%	0	0.0%	0	0.6%	1
London	0.2%	2	0.9%	1	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mold	4.2%	32	3.2%	4	8.7%	5	1.3%	1	11.5%	10	7.8%	5	6.7%	6	0.7%	1	0.0%	0
Oswestry	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0
Prestatyn	1.9%	14	11.1%	13	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Queensferry	0.5%	4	0.7%	1	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	3	0.0%	0
Rhyl	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St Asaph	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Wrexham	2.0%	16	0.9%	1	1.4%	1	1.3%	1	4.8%	4	10.5%	6	0.6%	1	0.0%	0	1.2%	2
Bowers Retail Park (including Pets at Home), Earle Road, Widnes, WA8 0TA	0.1%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broughton Retail Park, Chester Road, Broughton, Chester, Cheshire CH4 0DP	24.0%	184	12.5%	14	15.8%	10	10.7%	7	22.3%	20	23.8%	14	40.9%	35	33.0%	47	25.6%	36
Cheshire Oaks Designer Outlet, Kinsey Road, Ellesmere Port, South Wirral, CH65 9JJ	9.0%	69	5.6%	6	14.6%	9	3.4%	2	9.9%	9	4.0%	2	9.4%	8	13.5%	19	8.8%	12
Chester Retail Park, Old Seals Way, Chester, CH1 4RY	0.5%	4	2.0%	2	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Deeside Retail Park, Chester Road East, Shotton, Deeside, CH5 1QD	0.1%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Flintshire Retail Park (including Carpetright, Brantano, Argos), Holywell Road, Flint, Clwyd, CH6 5GB	1.3%	10	5.6%	6	1.8%	1	3.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Greyhound Retail Park (including B&Q, Cineworld, Wickes), Sealand Road, Chester, Cheshire, CH1 4QG	1.2%	9	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	7	0.7%	1
Mostyn Champneys Retail Park, Llandudno, LL30 1RY	0.1%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Plas Coch Retail Park (including Currys), Plas Coch Road, Wrexham, LL11 2BA	0.5%	3	0.0%	0	0.0%	0	0.0%	0	1.1%	1	2.2%	1	0.0%	0	0.0%	0	0.9%	1
Prestatyn Shopping Park, Nant Hall Road, Prestatyn, LL19 9BJ	1.8%	13	11.2%	13	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Aston Road, Queensferry, CH5 1TP	1.7%	13	0.0%	0	1.1%	1	1.6%	1	0.0%	0	1.0%	1	1.2%	1	1.3%	2	5.6%	8
Marks & Spencers Cheshire Oaks, Ellesmere Port, CH65 9HX	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	1.4%	2	0.0%	0
Tesco, Chester Road, Old Station Yard, Mold, CH7 1UB	1.1%	8	0.7%	1	0.0%	0	0.0%	0	4.9%	4	0.0%	0	3.3%	3	0.0%	0	0.0%	0
Internet / delivered	13.2%	101	9.6%	11	16.3%	10	14.8%	10	12.3%	11	19.5%	11	10.7%	9	10.2%	15	16.5%	23
Home catalogue	1.2%	9	0.0%	0	0.7%	0	1.7%	1	4.4%	4	1.6%	1	1.8%	2	0.6%	1	0.0%	0
TV / Interactive shopping	0.2%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0
Other, outside area	1.3%	10	3.3%	4	1.1%	1	0.0%	0	0.0%	0	0.8%	0	0.9%	1	1.2%	2	1.9%	3
(Don't know / can't remember)	3.8%	29	0.6%	1	3.9%	2	7.2%	5	3.7%	3	2.7%	2	1.8%	2	1.9%	3	8.5%	12

Column %ges.

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
Weighted base:	766	116	63	70	90	59	86	144	139
Sample:	760	92	97	96	96	92	96	93	98

Q15 Now can you tell me where your household last made a purchase of furniture, carpets, or soft household furnishings?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Birkenhead	0.4%	3	0.0%	0	0.0%	0	0.6%	0	2.2%	2	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Broughton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Buckley	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	2	0.5%	1	0.0%	0
Caerwys	0.1%	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
Chester	9.4%	76	8.6%	11	12.4%	8	8.7%	6	5.9%	6	5.6%	4	12.7%	11	7.8%	12	13.0%	18
Connah's Quay	2.5%	20	1.5%	2	0.7%	0	3.9%	3	2.3%	2	0.0%	0	0.6%	1	7.7%	12	0.0%	0
Ellesmere Port	0.3%	3	0.0%	0	0.8%	1	1.0%	1	0.0%	0	0.0%	0	0.6%	1	0.6%	1	0.0%	0
Flint	3.4%	27	6.3%	8	1.4%	1	18.7%	14	0.0%	0	4.1%	3	1.5%	1	0.6%	1	0.0%	0
Holywell	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Liverpool	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llandudno	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mold	5.6%	45	1.5%	2	12.6%	8	0.6%	0	29.2%	28	4.8%	3	3.0%	3	0.6%	1	0.0%	0
Prestatyn	0.7%	6	4.2%	5	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Queensferry	0.6%	5	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.7%	0	1.3%	1	1.8%	3	0.0%	0
Rhyl	1.2%	9	7.6%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ruthin	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Saltney	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Sandycroft	0.2%	1	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0
Shotton	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	4	0.0%	0
St Asaph	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Warrington	0.6%	5	1.6%	2	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	3	0.0%	0
Wrexham	1.9%	15	0.9%	1	1.0%	1	0.0%	0	2.4%	2	16.1%	10	0.0%	0	0.0%	0	0.6%	1
Border Retail Park (including Wickes), Holt Road, Wrexham, LL13 8DE	0.1%	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
Broughton Retail Park, Chester Road, Broughton, Chester, Cheshire CH4 0DP	1.4%	11	0.0%	0	0.7%	0	0.0%	0	0.8%	1	4.4%	3	0.7%	1	1.9%	3	2.7%	4
Cheshire Oaks Designer Outlet, Kinsey Road, Ellesmere Port, South Wirral, CH65 9JJ	1.0%	8	0.0%	0	0.7%	0	0.6%	0	0.0%	0	4.1%	3	0.0%	0	0.5%	1	2.5%	4
Chester Retail Park, Old Seals Way, Chester, CH1 4RY	2.0%	16	0.9%	1	0.0%	0	2.1%	2	0.7%	1	0.0%	0	0.0%	0	3.0%	5	5.6%	8
Clwyd Retail Park (including B&Q, Currys), Rhyl Road, Rhuddlan, Rhyl, LL18 2TJ	0.3%	3	1.5%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Deeside Retail Park, Chester Road East, Shotton, Deeside, CH5 1QD	1.9%	15	0.6%	1	1.0%	1	1.0%	1	3.0%	3	0.7%	0	0.6%	1	5.1%	8	0.9%	1
Deva Retail Centre (including Currys), Stendall Road, Chester, CH1 4LU	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	3
Flintshire Retail Park (including Carpetright, Brantano, Argos), Holywell Road, Flint, Clwyd, CH6 5GB	2.3%	19	12.8%	16	0.7%	0	2.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Greyhound Retail Park (including B&Q, Cineworld, Wickes), Sealand Road, Chester, Cheshire, CH1 4QG	20.1%	161	9.3%	11	18.7%	12	14.4%	11	14.8%	14	5.2%	3	20.1%	18	34.5%	53	27.4%	39
Plas Coch Retail Park (including Currys), Plas Coch Road, Wrexham, LL11 2BA	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	2	0.0%	0	0.0%	0	0.0%	0
Rhosddu Industrial Estate, Old Rhosrobin, Rhosrobin, Wrexham, Clwyd, LL11 4YL	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0
Homebase, Chester Road, Mold, Flintshire, CH7 1UE	0.1%	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
Tesco, Chester Road, Old Station Yard, Mold, CH7 1UB	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	3	0.0%	0	0.0%	0
Caergwrle	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	2	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Gemini Retail Park, Europa Boulevard, Warrington, WA5 7TY	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	2.0%	2	0.6%	1	2.7%	4
Other, zone 7	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Other, zone 8	0.5%	4	3.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	7.9%	63	10.2%	13	13.2%	8	4.8%	4	3.6%	3	8.7%	5	4.1%	4	10.0%	15	7.8%	11
Home catalogue	0.5%	4	0.0%	0	0.7%	0	0.6%	0	1.4%	1	1.1%	1	0.0%	0	0.0%	0	0.7%	1
TV / Interactive shopping	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.0%	0
Other, outside area	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.9%	1	0.0%	0	1.5%	2
(Don't know / can't remember)	10.7%	86	5.9%	7	6.5%	4	15.3%	11	16.6%	16	7.2%	5	16.3%	14	10.2%	16	8.9%	13
(Don't do this type of shopping)	19.8%	159	23.0%	28	24.5%	16	24.3%	18	13.5%	13	22.4%	14	25.6%	23	10.2%	16	22.7%	32
Weighted base:		803		123		64		74		95		63		88		154		141
Sample:		803		100		100		100		103		100		100		100		100

Q16 And the time before that, where did your household go to make a purchase of furniture, carpets, or soft household furnishings?
Not 'Don't do' or 'Don't know' at Q15

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Broughton	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	3.5%	3
Buckley	0.8%	5	0.0%	0	1.5%	1	0.0%	0	1.4%	1	1.3%	1	4.6%	2	0.0%	0	0.0%	0
Chester	12.5%	70	9.6%	8	18.6%	8	15.4%	7	9.9%	7	7.5%	3	20.8%	11	9.7%	12	14.4%	14
Connah's Quay	3.5%	20	2.9%	2	1.0%	0	4.9%	2	1.4%	1	0.0%	0	0.0%	0	11.0%	13	0.0%	0
Flint	2.9%	16	4.0%	3	2.2%	1	20.1%	9	0.0%	0	5.8%	3	0.0%	0	0.0%	0	0.0%	0
Holywell	0.3%	1	0.8%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llandudno	0.1%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mold	5.3%	30	0.8%	1	10.6%	5	1.0%	0	29.8%	20	3.4%	2	2.6%	1	0.0%	0	1.2%	1
Prestatyn	0.9%	5	4.7%	4	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Queensferry	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	2.6%	1	0.8%	1	0.0%	0
Rhyl	1.1%	6	7.2%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ruthin	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	2	0.0%	0	0.0%	0
Saltney	0.3%	2	0.8%	1	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Sandycroft	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Shotton	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Warrington	1.7%	9	3.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	3	3.5%	3
Wrexham	1.7%	9	1.2%	1	1.0%	0	0.0%	0	2.4%	2	11.2%	5	1.0%	1	0.0%	0	0.8%	1
Border Retail Park (including Wickes), Holt Road, Wrexham, LL13 8DE	0.2%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Bromfield Industrial Estate, Mold, CH7 1XB	0.7%	4	0.8%	1	0.0%	0	0.0%	0	5.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broughton Retail Park, Chester Road, Broughton, Chester, Cheshire CH4 0DP	2.1%	12	2.2%	2	5.0%	2	0.0%	0	1.1%	1	3.4%	2	0.0%	0	2.4%	3	2.7%	3
Cheshire Oaks Designer Outlet, Kinsey Road, Ellesmere Port, South Wirral, CH65 9JJ	1.2%	7	0.0%	0	0.0%	0	2.1%	1	0.0%	0	1.3%	1	1.2%	1	1.5%	2	2.7%	3
Chester Retail Park, Old Seals Way, Chester, CH1 4RY	1.4%	8	1.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.8%	1	5.4%	5
Clwyd Retail Park (including B&Q, Currys), Rhyl Road, Rhuddlan, Rhyl, LL18 2TJ	0.6%	3	2.5%	2	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Deeside Retail Park, Chester Road East, Shotton, Deeside, CH5 1QD	1.0%	6	0.0%	0	1.5%	1	5.1%	2	0.0%	0	1.1%	0	2.0%	1	1.0%	1	0.0%	0
Flintshire Retail Park (including Carpetright, Brantano, Argos), Holywell Road, Flint, Clwyd, CH6 5GB	1.7%	9	8.8%	8	0.0%	0	3.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Greyhound Retail Park (including B&Q, Cineworld, Wickes), Sealand Road, Chester, Cheshire, CH1 4QG	28.4%	159	20.0%	17	22.5%	10	11.1%	5	24.7%	16	15.7%	7	41.7%	21	36.4%	45	38.0%	37
New Mersey Retail Park (including B&Q, Currys, Carpetright), Speke Road, Speke, Liverpool, L24	0.1%	1	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Plas Coch Retail Park (including Currys), Plas Coch Road, Wrexham, LL11 2BA	0.6%	3	0.0%	0	1.2%	1	0.0%	0	0.0%	0	6.5%	3	0.0%	0	0.0%	0	0.0%	0
Rhosddu Industrial Estate, Old Rhosrobin, Rhosrobin, Wrexham, Clwyd, LL11 4YL	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	2	0.0%	0	0.0%	0	0.0%	0
B&Q, Berse Road, Wrexham, LL11 2BL	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Homebase, Chester Road, Mold, Flintshire, CH7 1UE	0.1%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Caergwrle	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	1	0.0%	0	0.0%	0	0.0%	0
Gemini Retail Park, Europa Boulevard, Warrington, WA5 7TY	1.5%	8	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	4.4%	2	0.0%	0	5.4%	5

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Trelawnyd	0.2%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 8	0.7%	4	4.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	9.8%	55	9.5%	8	13.1%	6	6.9%	3	6.5%	4	9.1%	4	4.6%	2	18.6%	23	3.9%	4
Home catalogue	1.2%	7	0.0%	0	1.0%	0	6.1%	3	2.1%	1	2.9%	1	0.0%	0	0.0%	0	1.0%	1
TV / Interactive shopping	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	1	0.0%	0	0.0%	0	0.0%	0
Other, outside area	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0
(Don't know / can't remember)	14.3%	80	13.5%	12	15.3%	7	20.6%	9	10.0%	7	18.6%	8	6.8%	3	14.9%	18	15.7%	15
Weighted base:		558		87		44		45		67		45		51		123		96
Sample:		544		68		70		60		69		64		62		80		71

Column %ges.

Q17 Now can you tell me where your household last made a purchase of DIY and decorating goods?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Bagillt	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birkenhead	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Broughton	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	2.4%	3
Buckley	2.2%	18	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.7%	0	16.1%	14	0.0%	0	1.8%	3
Chester	7.3%	59	1.6%	2	15.6%	10	9.2%	7	2.8%	3	1.9%	1	12.6%	11	11.6%	18	5.2%	7
Colwyn Bay	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Connah's Quay	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.6%	1	0.0%	0
Ellesmere Port	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Ewloe	0.2%	2	0.0%	0	1.0%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Flint	3.2%	26	6.7%	8	1.4%	1	22.1%	16	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Holywell	0.7%	6	4.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mold	10.0%	81	2.3%	3	29.9%	19	7.9%	6	26.5%	25	10.2%	6	17.4%	15	1.7%	3	2.2%	3
Prestatyn	1.1%	9	7.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Queensferry	4.7%	38	0.0%	0	1.7%	1	2.7%	2	0.0%	0	0.0%	0	3.3%	3	11.4%	17	10.0%	14
Rhuddlan	0.2%	2	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rhyl	0.9%	7	6.0%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ruthin	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Saltney	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Shotton	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	3	0.0%	0
Wrexham	1.3%	10	0.0%	0	0.0%	0	0.0%	0	0.7%	1	12.5%	8	0.0%	0	0.6%	1	0.7%	1
Border Retail Park (including Wickes), Holt Road, Wrexham, LL13 8DE	0.4%	3	0.0%	0	1.0%	1	0.0%	0	1.0%	1	2.0%	1	0.0%	0	0.0%	0	0.0%	0
Bromfield Industrial Estate, Mold, CH7 1XB	0.2%	1	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Broughton Retail Park, Chester Road, Broughton, Chester, Cheshire CH4 0DP	0.2%	2	0.6%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Cheshire Oaks Designer Outlet, Kinsey Road, Ellesmere Port, South Wirral, CH65 9JJ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Chester Retail Park, Old Seals Way, Chester, CH1 4RY	0.5%	4	0.0%	0	2.3%	1	2.1%	2	0.7%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Clwyd Retail Park (including B&Q, Currys), Rhyl Road, Rhuddlan, Rhyl, LL18 2TJ	2.6%	21	15.1%	19	0.0%	0	0.0%	0	2.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Deeside Retail Park, Chester Road East, Shotton, Deeside, CH5 1QD	2.3%	19	0.0%	0	1.5%	1	2.7%	2	5.8%	6	0.0%	0	0.0%	0	4.7%	7	2.1%	3
Deva Retail Centre (including Currys), Stendall Road, Chester, CH1 4LU	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	3.0%	5	0.0%	0
Flintshire Retail Park (including Carpetright, Brantano, Argos), Holywell Road, Flint, Clwyd, CH6 5GB	0.6%	5	3.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Greyhound Retail Park (including B&Q, Cineworld, Wickes), Sealand Road, Chester, Cheshire, CH1 4QG	26.0%	208	22.4%	27	7.7%	5	15.2%	11	8.3%	8	1.9%	1	17.0%	15	48.1%	74	47.3%	67
Marina Quay Retail Park, Rhyl, LL18 1LQ	0.3%	2	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mostyn Champneys Retail Park, Llandudno, LL30 1RY	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mount Street Retail Park (including Halfords), Mount Street, Wrexham, LL14 4AN	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Plas Coch Retail Park (including Currys), Plas Coch Road, Wrexham, LL11 2BA	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	2	0.6%	1	0.0%	0	0.9%	1
Queensway Retail Park (including Carpetright),	1.1%	9	0.0%	0	0.7%	0	2.8%	2	0.0%	0	0.0%	0	1.5%	1	0.0%	0	3.7%	5

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
168 New Chester Road, Birkenhead, Merseyside, CH41 9BG																		
Rhosddu Industrial Estate, Old Rhosrobin, Rhosrobin, Wrexham, Clwyd, LL11 4YL	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Trident Retail Park (including Carpetright, Currys), Halton Lea, Runcorn, WA7 2FQ	0.1%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Berse Road, Wrexham, LL11 2BL	1.3%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.4%	8	0.6%	1	0.6%	1	0.7%	1
Homebase, Chester Road, Mold, Flintshire, CH7 1UE	10.6%	85	4.4%	5	18.3%	12	4.1%	3	33.1%	32	34.2%	22	6.9%	6	0.0%	0	3.9%	5
Altami	0.1%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hawarden Industrial Park, Manor Lane, Hawarden, CH5 3PZ	0.3%	2	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 1	0.1%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	1.0%	8	0.0%	0	0.7%	0	0.0%	0	0.8%	1	2.0%	1	0.9%	1	1.8%	3	1.5%	2
Home catalogue	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Other, outside area	0.2%	2	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
(Don't know / can't remember)	4.2%	34	6.5%	8	0.7%	0	8.2%	6	1.0%	1	3.1%	2	1.9%	2	7.0%	11	2.7%	4
(Don't do this type of shopping)	12.9%	103	10.3%	13	15.5%	10	22.1%	16	14.2%	14	11.0%	7	17.1%	15	6.5%	10	13.4%	19
Weighted base:		803		123		64		74		95		63		88		154		141
Sample:		803		100		100		100		103		100		100		100		100

Q18 And the time before that, where did your household go to make a purchase of DIY and decorating goods?
Not 'Don't do' or 'Don't know' at Q17

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Bagillt	0.1%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birkenhead	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Broughton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Buckley	2.6%	17	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.9%	0	19.5%	14	0.0%	0	1.7%	2
Caerwys	0.4%	2	2.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chester	8.6%	57	2.7%	3	24.8%	13	14.7%	8	2.6%	2	0.0%	0	13.2%	9	11.2%	15	6.1%	7
Denbigh	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ellesmere Port	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Ewloe	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Flint	2.6%	18	4.1%	4	0.8%	0	24.1%	12	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Holywell	1.7%	11	9.9%	10	0.8%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mold	8.2%	55	7.2%	7	24.9%	13	6.5%	3	18.0%	15	5.9%	3	8.8%	6	2.6%	4	2.6%	3
Prestatyn	1.2%	8	7.6%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Queensferry	6.2%	41	2.3%	2	3.7%	2	8.6%	4	2.0%	2	4.0%	2	2.7%	2	13.9%	19	6.9%	8
Rhuddlan	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rhyl	1.1%	7	6.2%	6	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Saltney	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Sandycroft	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	2.2%	3
Shotton	1.4%	9	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	4.0%	3	3.6%	5	0.8%	1
Warrington	1.0%	7	0.0%	0	0.0%	0	3.0%	2	0.0%	0	0.0%	0	0.0%	0	2.0%	3	2.2%	3
Wrexham	1.8%	12	0.0%	0	0.0%	0	0.0%	0	0.8%	1	12.4%	7	0.0%	0	0.7%	1	3.0%	4
Border Retail Park (including Wickes), Holt Road, Wrexham, LL13 8DE	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	2	0.0%	0	0.0%	0	0.0%	0
Broughton Retail Park, Chester Road, Broughton, Chester, Cheshire CH4 0DP	0.3%	2	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.7%	1	0.0%	0
Cheshire Oaks Designer Outlet, Kinsey Road, Ellesmere Port, South Wirral, CH65 9JJ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Chester Retail Park, Old Seals Way, Chester, CH1 4RY	0.7%	4	0.0%	0	0.8%	0	6.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Clwyd Retail Park (including B&Q, Currys), Rhyl Road, Rhuddlan, Rhyl, LL18 2TJ	2.4%	16	13.2%	13	0.0%	0	0.0%	0	2.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Deeside Retail Park, Chester Road East, Shotton, Deeside, CH5 1QD	2.9%	19	3.8%	4	1.0%	1	3.0%	2	8.5%	7	0.0%	0	0.7%	1	2.8%	4	1.8%	2
Deva Retail Centre (including Currys), Stendall Road, Chester, CH1 4LU	0.8%	5	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	1.1%	1	2.0%	3	0.0%	0
Flintshire Retail Park (including Carpetright, Brantano, Argos), Holywell Road, Flint, Clwyd, CH6 5GB	0.5%	3	0.7%	1	0.0%	0	4.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Greyhound Retail Park (including B&Q, Cineworld, Wickes), Sealand Road, Chester, Cheshire, CH1 4QG	30.6%	203	20.8%	21	22.4%	12	13.5%	7	15.5%	13	9.4%	5	25.1%	18	46.4%	62	55.5%	66
Marina Quay Retail Park, Rhyl, LL18 1LQ	0.2%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mount Street Retail Park (including Halfords), Mount Street, Wrexham, LL14 4AN	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Plas Coch Retail Park (including Currys), Plas Coch Road, Wrexham, LL11 2BA	1.0%	7	0.0%	0	0.0%	0	0.0%	0	2.1%	2	6.5%	4	0.7%	1	0.0%	0	1.0%	1
Queensway Retail Park (including Carpetright), 168 New Chester Road, Birkenhead, Merseyside, CH41 9BG	2.0%	14	3.8%	4	2.7%	1	1.1%	1	0.0%	0	0.0%	0	1.9%	1	0.0%	0	5.4%	6

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Rhosddu Industrial Estate, Old Rhosrobin, Rhosrobin, Wrexham, Clwyd, LL11 4YL	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Trident Retail Park (including Carpetright, Currys), Halton Lea, Runcorn, WA7 2FQ	0.2%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Berse Road, Wrexham, LL11 2BL	1.5%	10	0.0%	0	0.0%	0	0.0%	0	0.9%	1	11.2%	6	1.9%	1	0.7%	1	0.8%	1
Homebase, Chester Road, Mold, Flintshire, CH7 1UE	10.6%	71	3.8%	4	10.5%	6	6.2%	3	30.3%	25	37.5%	20	11.9%	8	0.7%	1	3.0%	4
Altami	0.4%	3	0.0%	0	0.8%	0	0.0%	0	2.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hawarden Industrial Park, Manor Lane, Hawarden, CH5 3PZ	0.4%	2	2.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 7	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	4	0.0%	0
Internet / delivered	1.6%	11	0.0%	0	1.6%	1	1.1%	1	3.3%	3	2.4%	1	2.3%	2	2.0%	3	1.0%	1
Home catalogue	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Other, outside area	0.6%	4	1.1%	1	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.7%	1	0.0%	0	0.8%	1
(Don't know / can't remember)	3.9%	26	3.8%	4	3.5%	2	4.2%	2	5.5%	4	3.4%	2	3.0%	2	5.6%	8	2.0%	2
Weighted base:		666		102		54		51		81		54		71		133		118
Sample:		650		82		79		72		86		82		78		85		86

Column %ges.

Q19 Can you tell me where you or your household last made a purchase of electrical items such as TVs, DVD players, digital cameras, MP3 players, mobile phones, computers?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Broughton	0.7%	6	0.7%	1	1.0%	1	0.0%	0	0.0%	0	4.1%	3	0.0%	0	0.0%	0	1.3%	2
Buckley	0.1%	1	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Chester	9.4%	75	6.5%	8	8.5%	5	9.2%	7	8.8%	8	4.1%	3	16.7%	15	10.9%	17	8.7%	12
Connah's Quay	0.7%	6	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	5	0.0%	0
Denbigh	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ellesmere Port	0.2%	2	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Ewloe	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Flint	2.9%	23	9.2%	11	0.7%	0	9.9%	7	0.0%	0	4.1%	3	0.6%	1	0.6%	1	0.0%	0
Hawarden	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Holywell	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Llandudno	0.2%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Mold	2.5%	20	0.0%	0	8.3%	5	0.0%	0	9.0%	9	4.3%	3	1.5%	1	1.2%	2	0.0%	0
Prestatyn	1.3%	10	8.2%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Queensferry	0.6%	5	0.0%	0	0.8%	1	0.6%	0	0.0%	0	0.0%	0	0.6%	1	2.0%	3	0.0%	0
Rhyl	0.2%	2	0.9%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shotton	0.5%	4	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	3	0.0%	0
Wrexham	1.4%	11	0.0%	0	0.7%	0	0.0%	0	1.3%	1	12.6%	8	0.9%	1	0.0%	0	0.7%	1
Broughton Retail Park, Chester Road, Broughton, Chester, Cheshire CH4 0DP	5.9%	48	8.8%	11	7.7%	5	3.7%	3	0.7%	1	0.7%	0	5.8%	5	6.9%	11	8.7%	12
Caldy Valley Retail Park (including Halfords), Caldy Valley Road, Chester, Cheshire, CH3 5QZ	0.2%	2	0.9%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheshire Oaks Designer Outlet, Kinsey Road, Ellesmere Port, South Wirral, CH65 9JJ	0.1%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chester Retail Park, Old Seals Way, Chester, CH1 4RY	1.4%	11	0.6%	1	6.3%	4	3.4%	3	1.3%	1	0.0%	0	0.0%	0	1.2%	2	0.6%	1
Clwyd Retail Park (including B&Q, Currys), Rhyl Road, Rhuddlan, Rhyl, LL18 2TJ	2.3%	18	15.0%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coliseum Shopping Park, 30 Coliseum Way, Ellesmere Port, Merseyside, CH65 9SD	0.1%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Deeside Retail Park, Chester Road East, Shotton, Deeside, CH5 1QD	0.6%	4	0.0%	0	0.8%	1	0.0%	0	3.6%	3	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Deva Retail Centre (including Currys), Stendall Road, Chester, CH1 4LU	1.8%	14	0.0%	0	1.4%	1	0.0%	0	0.8%	1	0.0%	0	2.4%	2	4.3%	7	2.7%	4
Flintshire Retail Park (including Carpetright, Brantano, Argos), Holywell Road, Flint, Clwyd, CH6 5GB	1.6%	13	6.2%	8	0.0%	0	7.3%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Greyhound Retail Park (including B&Q, Cineworld, Wickes), Sealand Road, Chester, Cheshire, CH1 4QG	24.2%	194	11.7%	14	28.3%	18	12.8%	9	24.7%	24	13.2%	8	28.2%	25	28.6%	44	36.6%	52
Marina Quay Retail Park, Rhyl, LL18 1LQ	0.3%	2	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mount Street Retail Park (including Halfords), Mount Street, Wrexham, LL14 4AN	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Plas Coch Retail Park (including Currys), Plas Coch Road, Wrexham, LL11 2BA	1.9%	15	0.0%	0	0.0%	0	0.0%	0	0.7%	1	19.1%	12	1.2%	1	0.0%	0	0.9%	1
Westminster Retail Park (including Halfords), Ellesmere Port, CH65 4AX	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Asda, Aston Road, Queensferry, CH5 1TP	0.8%	6	0.0%	0	0.0%	0	0.6%	0	1.0%	1	0.0%	0	2.6%	2	1.3%	2	0.6%	1
Marks & Spencers Cheshire Oaks, Ellesmere Port, CH65 9HX	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Tesco, Chester Road, Old Station Yard, Mold, CH7 1UB	0.3%	2	0.0%	0	0.0%	0	0.6%	0	0.7%	1	1.9%	1	0.0%	0	0.0%	0	0.0%	0
Other, zone 8	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	15.9%	128	8.6%	11	14.7%	9	21.0%	15	17.9%	17	15.1%	10	15.3%	13	16.6%	26	18.8%	27
Home catalogue	0.7%	5	0.0%	0	0.0%	0	1.3%	1	2.8%	3	0.0%	0	0.0%	0	0.0%	0	1.2%	2
TV / Interactive shopping	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, outside area	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.7%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	7.4%	59	5.9%	7	6.8%	4	10.7%	8	8.5%	8	5.7%	4	5.7%	5	10.7%	16	4.6%	6
(Don't do this type of shopping)	13.1%	105	10.8%	13	12.7%	8	17.6%	13	16.1%	15	12.6%	8	17.3%	15	8.4%	13	13.4%	19
Weighted base:		803		123		64		74		95		63		88		154		141
Sample:		803		100		100		100		103		100		100		100		100

Q20 And the time before that, where you or your household last made a purchase of electrical items such as TVs, DVD players, digital cameras, MP3 players, mobile phones or computers?
Not 'Don't do' or 'Don't know' at Q19

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Broughton	1.3%	8	1.7%	2	1.3%	1	5.8%	3	0.0%	0	0.0%	0	0.0%	0	0.7%	1	1.6%	2
Buckley	0.5%	3	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0	0.7%	1
Chester	9.8%	63	8.5%	9	10.0%	5	12.8%	7	10.7%	8	4.6%	2	18.5%	13	9.0%	11	7.0%	8
Connah's Quay	0.8%	5	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	4	0.0%	0
Denbigh	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ellesmere Port	0.3%	2	0.7%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.9%	1	0.0%	0	0.0%	0
Flint	3.0%	19	9.9%	10	0.0%	0	11.0%	6	0.0%	0	0.0%	0	0.8%	1	2.3%	3	0.0%	0
Hawarden	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Holywell	0.3%	2	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Liverpool	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	1.0%	1
Llandudno	0.2%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Mold	3.0%	19	0.0%	0	6.1%	3	0.0%	0	10.0%	7	12.8%	7	2.9%	2	0.0%	0	0.0%	0
Prestatyn	0.7%	5	4.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Queensferry	0.5%	3	0.0%	0	1.0%	1	0.9%	0	0.0%	0	0.0%	0	0.8%	1	1.4%	2	0.0%	0
Rhyl	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Saltney	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Shotton	0.1%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Warrington	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Wrexham	1.9%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.9%	7	6.2%	4	0.0%	0	0.8%	1
Broughton Retail Park, Chester Road, Broughton, Chester, Cheshire CH4 0DP	6.9%	44	10.5%	11	7.0%	4	2.4%	1	0.9%	1	0.9%	0	6.6%	5	9.4%	12	9.6%	11
Caldy Valley Retail Park (including Halfords), Caldy Valley Road, Chester, Cheshire, CH3 5QZ	0.3%	2	1.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheshire Oaks Designer Outlet, Kinsey Road, Ellesmere Port, South Wirral, CH65 9JJ	0.2%	1	0.8%	1	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chester Retail Park, Old Seals Way, Chester, CH1 4RY	1.9%	12	3.0%	3	7.8%	4	4.8%	3	0.9%	1	0.0%	0	0.0%	0	0.8%	1	0.8%	1
Clwyd Retail Park (including B&Q, Currys), Rhyl Road, Rhuddlan, Rhyl, LL18 2TJ	2.1%	13	9.0%	9	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0	2.3%	3
Coliseum Shopping Park, 30 Coliseum Way, Ellesmere Port, Merseyside, CH65 9SD	0.2%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Deeside Retail Park, Chester Road East, Shotton, Deeside, CH5 1QD	0.6%	4	0.0%	0	1.0%	1	0.0%	0	4.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Deva Retail Centre (including Currys), Stendall Road, Chester, CH1 4LU	2.7%	18	0.0%	0	0.0%	0	0.9%	0	1.3%	1	1.1%	1	0.8%	1	9.0%	11	3.3%	4
Flintshire Retail Park (including Carpetright, Brantano, Argos), Holywell Road, Flint, Clwyd, CH6 5GB	2.2%	14	8.6%	9	0.0%	0	10.3%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Greyhound Retail Park (including B&Q, Cineworld, Wickes), Sealand Road, Chester, Cheshire, CH1 4QG	26.0%	166	10.0%	10	31.5%	16	12.1%	6	23.7%	17	20.3%	11	24.5%	17	35.0%	44	39.2%	45
Plas Coch Retail Park (including Currys), Plas Coch Road, Wrexham, LL11 2BA	2.3%	15	0.0%	0	0.0%	0	0.0%	0	0.9%	1	21.2%	11	1.5%	1	0.0%	0	1.7%	2
Prestatyn Shopping Park, Nant Hall Road, Prestatyn, LL19 9BJ	0.4%	2	2.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Westminster Retail Park (including Halfords), Ellesmere Port, CH65 4AX	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Asda, Aston Road, Queensferry, CH5 1TP	1.3%	8	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	5.0%	3	2.2%	3	0.8%	1
B&Q, Berse Road, Wrexham, LL11 2BL	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	2
Marks & Spencers Cheshire Oaks, Ellesmere Port, CH65 9HX	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Other, zone 8	0.1%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	18.2%	116	11.6%	12	23.0%	12	16.1%	9	21.3%	15	15.3%	8	21.4%	15	17.8%	22	20.7%	24
Home catalogue	0.9%	6	0.7%	1	0.0%	0	0.9%	0	3.8%	3	0.0%	0	0.0%	0	0.0%	0	1.5%	2
TV / Interactive shopping	0.6%	4	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	3	0.0%	0
Other, outside area	0.6%	4	0.0%	0	2.8%	1	0.9%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.8%	1
(Don't know / can't remember)	8.7%	56	11.9%	12	7.8%	4	18.6%	10	15.5%	11	6.9%	4	6.5%	4	5.9%	7	2.8%	3
Weighted base:		639		102		52		53		72		52		68		125		116
Sample:		635		80		81		70		76		83		78		80		87

Q21 Can you tell me where you or your household last made a purchase of domestic appliances, such as washing machines, fridges or cookers?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Birkenhead	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Broughton	0.7%	6	1.8%	2	1.0%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	1.3%	2	0.0%	0
Buckley	0.9%	7	0.0%	0	2.0%	1	0.0%	0	0.7%	1	0.0%	0	5.6%	5	0.0%	0	0.0%	0
Chester	6.4%	51	5.4%	7	6.3%	4	8.5%	6	5.9%	6	2.2%	1	13.3%	12	4.9%	8	5.6%	8
Connah's Quay	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	4	0.0%	0
Ellesmere Port	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Ewloe	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Flint	2.8%	22	2.3%	3	1.4%	1	18.1%	13	0.0%	0	0.0%	0	0.6%	1	0.6%	1	2.5%	4
Hawarden	4.9%	39	4.5%	6	3.6%	2	6.0%	4	10.9%	10	7.5%	5	1.5%	1	4.8%	7	2.4%	3
Holywell	0.1%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mold	3.0%	24	0.0%	0	6.9%	4	0.0%	0	8.8%	8	7.1%	4	2.2%	2	0.0%	0	3.6%	5
Queensferry	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.8%	1	0.0%	0
Rhyl	0.2%	2	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ruthin	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Saltney	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0
Sandycroft	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shotton	0.8%	6	0.0%	0	0.0%	0	0.6%	0	0.7%	1	0.0%	0	0.0%	0	0.5%	1	3.0%	4
Wrexham	1.7%	13	0.0%	0	0.0%	0	1.0%	1	0.7%	1	12.0%	8	3.0%	3	0.6%	1	0.6%	1
Bearse Road Retail Park, Bearse Road, Wrexhm LL11 2BL	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Broughton Retail Park, Chester Road, Broughton, Chester, Cheshire CH4 0DP	1.4%	11	1.5%	2	0.0%	0	0.0%	0	0.0%	0	1.5%	1	3.0%	3	0.6%	1	3.3%	5
Cheshire Oaks Designer Outlet, Kinsey Road, Ellesmere Port, South Wirral, CH65 9JJ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Chester Retail Park, Old Seals Way, Chester, CH1 4RY	1.0%	8	0.9%	1	2.9%	2	4.4%	3	0.0%	0	0.9%	1	0.0%	0	0.6%	1	0.0%	0
Clwyd Retail Park (including B&Q, Currys), Rhyl Road, Rhuddlan, Rhyl, LL18 2TJ	2.9%	23	18.1%	22	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Deeside Retail Park, Chester Road East, Shotton, Deeside, CH5 1QD	0.2%	1	0.0%	0	0.8%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Deva Retail Centre (including Currys), Stendall Road, Chester, CH1 4LU	1.2%	9	0.0%	0	0.0%	0	0.6%	0	0.8%	1	0.0%	0	0.6%	1	2.5%	4	2.7%	4
Flintshire Retail Park (including Carpetright, Brantano, Argos), Holywell Road, Flint, Clwyd, CH6 5GB	1.0%	8	5.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Greyhound Retail Park (including B&Q, Cineworld, Wickes), Sealand Road, Chester, Cheshire, CH1 4QG	24.8%	199	11.3%	14	26.5%	17	9.2%	7	15.7%	15	8.5%	5	33.5%	30	34.9%	54	40.8%	58
Marina Quay Retail Park, Rhyl, LL18 1LQ	0.2%	1	0.6%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Plas Coch Retail Park (including Currys), Plas Coch Road, Wrexham, LL11 2BA	1.5%	12	0.0%	0	0.0%	0	0.0%	0	1.3%	1	13.7%	9	0.0%	0	0.0%	0	1.5%	2
Rhosddu Industrial Estate, Old Rhosrobin, Rhosrobin, Wrexham, Clwyd, LL11 4YL	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	2	0.0%	0	0.0%	0	0.0%	0
St David's Retail Park, Saltney, CH4 8SJ	0.1%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Aston Road, Queensferry, CH5 1TP	0.4%	3	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	3	0.0%	0
Caergwrle	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Hawarden Industrial Park, Manor Lane, Hawarden, CH5 3PZ	1.2%	10	0.6%	1	0.7%	0	0.0%	0	3.4%	3	1.1%	1	0.0%	0	1.1%	2	2.0%	3
Leeswood	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Internet / delivered	19.2%	154	21.4%	26	21.6%	14	17.7%	13	19.9%	19	18.0%	11	16.5%	15	20.2%	31	17.5%	25
Home catalogue	0.8%	7	0.0%	0	0.0%	0	1.9%	1	3.0%	3	0.9%	1	0.0%	0	0.6%	1	0.7%	1
TV / Interactive shopping	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Other, outside area	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	6.9%	55	5.5%	7	5.6%	4	13.0%	10	10.3%	10	9.3%	6	4.1%	4	6.7%	10	4.1%	6
(Don't do this type of shopping)	13.8%	111	17.9%	22	19.4%	12	18.2%	13	15.9%	15	11.3%	7	13.6%	12	11.0%	17	8.6%	12
Weighted base:		803		123		64		74		95		63		88		154		141
Sample:		803		100		100		100		103		100		100		100		100

Q22 And the time before that, where you or your household last made a purchase of domestic appliances, such as washing machines, fridges or cookers?
Not 'Don't do' or 'Don't know' at Q21

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Broughton	1.1%	7	2.3%	2	1.4%	1	5.0%	3	0.0%	0	0.0%	0	0.0%	0	1.5%	2	0.0%	0
Buckley	0.8%	5	0.0%	0	2.7%	1	0.0%	0	0.9%	1	0.0%	0	4.5%	3	0.0%	0	0.0%	0
Chester	7.1%	45	6.1%	6	6.4%	3	11.8%	6	6.6%	5	2.8%	1	12.0%	9	6.0%	8	6.4%	8
Denbigh	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ellesmere Port	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	3
Flint	2.7%	17	1.9%	2	0.9%	0	18.6%	9	0.0%	0	0.0%	0	0.7%	1	0.0%	0	3.9%	5
Hawarden	6.0%	38	3.4%	3	4.8%	2	7.4%	4	10.9%	8	8.3%	4	2.5%	2	7.9%	10	4.2%	5
Holywell	0.4%	3	2.3%	2	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mold	3.8%	24	0.7%	1	6.7%	3	0.0%	0	12.4%	9	6.5%	3	4.2%	3	0.0%	0	4.1%	5
Prestatyn	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Queensferry	1.1%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	1.8%	1	4.3%	5	0.0%	0
Rhyl	0.4%	3	2.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ruthin	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0	0.0%	0
Saltney	0.4%	3	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0
Shotton	1.4%	9	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	4	3.5%	4
Wrexham	1.4%	9	0.0%	0	0.0%	0	0.0%	0	0.9%	1	7.5%	4	6.5%	5	0.0%	0	0.0%	0
Bearse Road Retail Park, Bearse Road, Wrexhm LL11 2BL	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Border Retail Park (including Wickes), Holt Road, Wrexham, LL13 8DE	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0
Bromfield Industrial Estate, Mold, CH7 1XB	0.2%	1	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Broughton Retail Park, Chester Road, Broughton, Chester, Cheshire CH4 0DP	1.0%	7	1.9%	2	0.0%	0	0.9%	0	0.0%	0	1.9%	1	1.1%	1	0.8%	1	1.3%	2
Cheshire Oaks Designer Outlet, Kinsey Road, Ellesmere Port, South Wirral, CH65 9JJ	0.2%	1	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Chester Retail Park, Old Seals Way, Chester, CH1 4RY	1.3%	8	0.0%	0	6.0%	3	8.0%	4	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Clwyd Retail Park (including B&Q, Currys), Rhyl Road, Rhuddlan, Rhyl, LL18 2TJ	2.8%	18	16.8%	16	0.0%	0	0.0%	0	2.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Deeside Retail Park, Chester Road East, Shotton, Deeside, CH5 1QD	0.2%	1	0.0%	0	1.1%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Deva Retail Centre (including Currys), Stendall Road, Chester, CH1 4LU	1.8%	11	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.7%	1	7.3%	9	1.0%	1
Flintshire Retail Park (including Carpetright, Brantano, Argos), Holywell Road, Flint, Clwyd, CH6 5GB	1.4%	9	7.5%	7	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Greyhound Retail Park (including B&Q, Cineworld, Wickes), Sealand Road, Chester, Cheshire, CH1 4QG	24.1%	153	12.8%	12	30.1%	15	13.3%	7	15.8%	11	11.3%	6	30.0%	22	28.8%	36	36.5%	45
Plas Coch Retail Park (including Currys), Plas Coch Road, Wrexham, LL11 2BA	1.7%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.2%	9	0.0%	0	0.0%	0	1.7%	2
Rhosddu Industrial Estate, Old Rhosrobin, Rhosrobin, Wrexham, Clwyd, LL11 4YL	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0
St David's Retail Park, Saltney, CH4 8SJ	0.1%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Aston Road, Queensferry, CH5 1TP	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Asda, Conway Road, Llandudno, LL30 1PJ	0.2%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Hawarden Industrial Park, Manor Lane, Hawarden, CH5 3PZ	1.5%	10	0.0%	0	0.9%	0	0.0%	0	4.7%	3	2.4%	1	0.0%	0	0.0%	0	3.8%	5
Internet / delivered	22.3%	142	27.0%	25	26.9%	13	10.8%	6	25.2%	18	21.4%	11	26.6%	19	18.4%	23	22.0%	27
Home catalogue	0.8%	5	0.0%	0	0.0%	0	1.8%	1	3.0%	2	0.0%	0	0.0%	0	0.8%	1	0.8%	1
TV / Interactive shopping	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2	0.0%	0
(Don't know / can't remember)	12.2%	78	12.5%	12	8.5%	4	18.8%	10	14.4%	10	14.6%	7	7.0%	5	15.5%	20	8.1%	10
Weighted base:		636		94		48		51		70		50		73		127		123
Sample:		631		75		79		70		76		80		83		84		84

Flintshire Retail Study
for Peter Brett Associates

Q23 Can you tell me where you or your household last made a purchase of health, beauty or chemist items?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Bagillt	0.9%	7	5.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broughton	3.6%	29	1.1%	1	0.7%	0	0.7%	1	0.8%	1	0.7%	0	1.4%	1	6.7%	10	9.8%	14
Buckley	7.8%	63	0.0%	0	9.3%	6	0.0%	0	0.0%	0	3.5%	2	52.9%	47	0.0%	0	5.5%	8
Caerwys	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Chester	3.6%	29	1.6%	2	2.0%	1	2.2%	2	0.0%	0	0.0%	0	2.0%	2	4.8%	7	10.6%	15
Connah's Quay	3.0%	24	0.0%	0	3.7%	2	0.0%	0	0.0%	0	4.1%	3	0.0%	0	12.5%	19	0.0%	0
Denbigh	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Flint	7.3%	58	6.3%	8	1.4%	1	65.9%	49	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Hawarden	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	1.9%	3
Holywell	4.6%	37	29.3%	36	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Liverpool	0.7%	5	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	2.9%	4	0.0%	0
London	0.5%	4	3.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mold	18.1%	145	6.8%	8	43.2%	28	5.8%	4	75.8%	72	38.6%	24	4.9%	4	1.2%	2	1.5%	2
Mynydd Isa	0.7%	5	0.0%	0	7.4%	5	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Prestatyn	3.2%	25	20.7%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Queensferry	2.1%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.4%	8	6.1%	9
Rhyl	0.2%	2	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ruthin	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.8%	1	2.8%	2	0.0%	0	0.0%	0	0.0%	0
Saltney	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	2.2%	3
Shotton	2.7%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.4%	16	3.9%	5
Wrexham	1.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.6%	7	0.0%	0	0.0%	0	1.5%	2
Border Retail Park (including Wickes), Holt Road, Wrexham, LL13 8DE	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Bromfield Industrial Estate, Mold, CH7 1XB	0.1%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broughton Retail Park, Chester Road, Broughton, Chester, Cheshire CH4 0DP	14.9%	120	2.4%	3	10.6%	7	1.0%	1	1.8%	2	10.2%	6	9.8%	9	30.1%	46	32.7%	46
Cheshire Oaks Designer Outlet, Kinsey Road, Ellesmere Port, South Wirral, CH65 9JJ	0.7%	5	0.0%	0	1.0%	1	0.7%	1	0.0%	0	0.9%	1	0.0%	0	0.0%	0	2.5%	4
Chester Retail Park, Old Seals Way, Chester, CH1 4RY	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	3
Clwyd Retail Park (including B&Q, Currys), Rhyl Road, Rhuddlan, Rhyl, LL18 2TJ	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Deeside Retail Park, Chester Road East, Shotton, Deeside, CH5 1QD	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Flintshire Retail Park (including Carpetright, Brantano, Argos), Holywell Road, Flint, Clwyd, CH6 5GB	0.2%	2	0.0%	0	2.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Greyhound Retail Park (including B&Q, Cineworld, Wickes), Sealand Road, Chester, Cheshire, CH1 4QG	1.6%	13	2.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	4	4.0%	6
Plas Coch Retail Park (including Currys), Plas Coch Road, Wrexham, LL11 2BA	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Prestatyn Shopping Park, Nant Hall Road, Prestatyn, LL19 9BJ	1.0%	8	5.9%	7	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Tarvin Road, Chester, CH3 5ND	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Asda, Aston Road, Queensferry, CH5 1TP	3.0%	24	0.0%	0	3.3%	2	0.0%	0	0.0%	0	0.0%	0	12.1%	11	6.9%	11	0.7%	1
Homebase, Chester Road, Mold, Flintshire, CH7 1UE	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Tesco, Chester Road, Old Station Yard, Mold, CH7 1UB	1.2%	10	0.6%	1	3.5%	2	0.0%	0	6.2%	6	0.0%	0	1.3%	1	0.0%	0	0.0%	0
Caergwrle	1.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.3%	9	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Leeswood	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Penyfford	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.9%	1	0.0%	0	0.6%	1
Internet / delivered	3.5%	28	1.4%	2	2.0%	1	7.5%	6	2.3%	2	3.9%	2	0.0%	0	4.8%	7	5.6%	8
Home catalogue	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Other, outside area	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	2.2%	18	3.5%	4	0.7%	0	1.6%	1	0.0%	0	0.7%	0	0.0%	0	4.5%	7	3.0%	4
(Don't do this type of shopping)	7.2%	58	7.3%	9	5.8%	4	14.6%	11	6.6%	6	4.1%	3	11.4%	10	6.4%	10	4.1%	6
Weighted base:		803		123		64		74		95		63		88		154		141
Sample:		803		100		100		100		103		100		100		100		100

Q24 And the time before that, where did you or your household go to make a purchase of health, beauty or chemist items?
Not 'Don't do' or 'Don't know' at Q23

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Bagillt	0.9%	7	6.3%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broughton	5.0%	36	1.3%	1	2.3%	1	8.6%	5	4.3%	4	0.0%	0	5.3%	4	6.8%	9	8.4%	11
Buckley	7.1%	52	0.0%	0	11.2%	7	0.0%	0	1.1%	1	3.7%	2	47.1%	37	0.0%	0	3.8%	5
Caerwys	0.6%	4	0.0%	0	0.0%	0	0.0%	0	1.1%	1	5.1%	3	0.0%	0	0.0%	0	0.0%	0
Chester	5.3%	39	4.5%	5	5.4%	3	3.7%	2	1.1%	1	2.1%	1	3.7%	3	6.3%	9	11.0%	14
Connah's Quay	2.9%	21	0.0%	0	5.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.8%	18	0.0%	0
Denbigh	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ellesmere Port	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Flint	8.4%	61	8.9%	10	3.7%	2	68.6%	42	0.0%	0	0.0%	0	0.0%	0	2.1%	3	2.7%	4
Hawarden	0.9%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	4.0%	5
Holywell	4.6%	34	30.2%	33	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Liverpool	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	4	0.0%	0
Mold	18.7%	136	8.7%	10	36.8%	22	1.5%	1	70.4%	63	43.5%	26	6.3%	5	0.0%	0	7.3%	10
Mynydd Isa	0.9%	7	0.0%	0	10.0%	6	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Prestatyn	4.2%	31	28.1%	31	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Queensferry	3.6%	26	1.3%	1	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0	10.7%	15	6.6%	9
Rhyl	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ruthin	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	2	0.0%	0	0.0%	0	0.0%	0
Saltney	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	2.4%	3
Shotton	2.6%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.8%	19	0.0%	0
Warrington	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wrexham	0.9%	7	0.0%	0	0.0%	0	0.9%	1	0.0%	0	8.7%	5	0.0%	0	0.0%	0	0.7%	1
Broughton Retail Park, Chester Road, Broughton, Chester, Cheshire CH4 0DP	18.2%	133	2.0%	2	15.7%	9	2.8%	2	5.5%	5	12.3%	7	14.5%	11	31.7%	44	39.8%	52
Cheshire Oaks Designer Outlet, Kinsey Road, Ellesmere Port, South Wirral, CH65 9JJ	0.2%	2	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Chester Retail Park, Old Seals Way, Chester, CH1 4RY	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	2.0%	3
Clwyd Retail Park (including B&Q, Currys), Rhyl Road, Rhuddlan, Rhyl, LL18 2TJ	0.2%	2	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Greyhound Retail Park (including B&Q, Cineworld, Wickes), Sealand Road, Chester, Cheshire, CH1 4QG	1.6%	12	2.1%	2	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	5	2.9%	4
Plas Coch Retail Park (including Currys), Plas Coch Road, Wrexham, LL11 2BA	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Prestatyn Shopping Park, Nant Hall Road, Prestatyn, LL19 9BJ	0.6%	4	3.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Aston Road, Queensferry, CH5 1TP	1.5%	11	0.0%	0	1.1%	1	0.0%	0	1.1%	1	0.0%	0	8.0%	6	2.1%	3	0.0%	0
Tesco, Chester Road, Old Station Yard, Mold, CH7 1UB	2.2%	16	0.6%	1	3.5%	2	0.0%	0	4.4%	4	0.8%	0	11.2%	9	0.0%	0	0.0%	0
Caergwrle	1.1%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.3%	8	0.0%	0	0.0%	0	0.0%	0
Leeswood	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0
Penyfford	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	1.0%	1	0.0%	0	0.6%	1
Internet / delivered	3.1%	23	0.0%	0	2.9%	2	4.8%	3	3.2%	3	2.4%	1	0.0%	0	4.0%	5	6.2%	8
Home catalogue	0.4%	3	0.0%	0	1.1%	1	0.0%	0	0.7%	1	0.9%	1	1.0%	1	0.0%	0	0.0%	0
TV / Interactive shopping	0.1%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, outside area	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	1.4%	11	0.0%	0	0.0%	0	5.0%	3	5.4%	5	0.8%	0	0.0%	0	0.7%	1	0.9%	1
Weighted base:		727		110		60		62		89		60		78		137		131
Sample:		728		87		95		83		94		94		91		92		92

Q25 Can you tell me where you or your household last made a purchase of recreational goods such as sports equipment, bicycles, musical instruments or toys?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Broughton	2.2%	18	0.0%	0	2.1%	1	1.4%	1	3.2%	3	0.9%	1	3.3%	3	3.6%	6	2.5%	4
Buckley	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.9%	1	3.0%	3	0.0%	0	0.0%	0
Chester	6.0%	48	5.1%	6	5.7%	4	10.4%	8	5.3%	5	2.2%	1	8.1%	7	4.8%	7	6.7%	9
Colwyn Bay	0.2%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Connah's Quay	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.6%	1	0.0%	0
Denbigh	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ellesmere Port	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Flint	2.9%	24	4.0%	5	0.0%	0	24.7%	18	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Hawarden	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Holywell	1.0%	8	6.2%	8	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Liverpool	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Llandudno	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Mold	3.0%	24	1.8%	2	6.6%	4	0.0%	0	8.2%	8	6.7%	4	5.1%	4	0.6%	1	0.0%	0
Prestatyn	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Queensferry	1.4%	11	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.7%	0	0.7%	1	2.4%	4	4.3%	6
Rhyl	0.5%	4	1.9%	2	0.0%	0	0.0%	0	1.0%	1	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Ruthin	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Saltney	0.9%	7	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.9%	1	0.0%	0	0.6%	1	3.7%	5
Shotton	1.8%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	6.9%	11	1.7%	2
St Asaph	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Wrexham	1.0%	8	0.0%	0	0.0%	0	0.0%	0	1.0%	1	6.5%	4	2.0%	2	0.0%	0	0.9%	1
Broughton Retail Park, Chester Road, Broughton, Chester, Cheshire CH4 0DP	11.0%	88	1.4%	2	10.3%	7	0.6%	0	7.9%	8	11.9%	8	13.5%	12	19.6%	30	15.7%	22
Caldy Valley Retail Park (including Halfords), Caldy Valley Road, Chester, Cheshire, CH3 5QZ	0.1%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheshire Oaks Designer Outlet, Kinsey Road, Ellesmere Port, South Wirral, CH65 9JJ	1.1%	9	0.7%	1	0.7%	0	0.0%	0	0.0%	0	0.9%	1	2.0%	2	0.0%	0	3.7%	5
Clwyd Retail Park (including B&Q, Currys), Rhyl Road, Rhuddlan, Rhyl, LL18 2TJ	1.1%	9	6.3%	8	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Deeside Retail Park, Chester Road East, Shotton, Deeside, CH5 1QD	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Flintshire Retail Park (including Carpetright, Brantano, Argos), Holywell Road, Flint, Clwyd, CH6 5GB	0.7%	5	1.9%	2	0.0%	0	4.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Greyhound Retail Park (including B&Q, Cineworld, Wickes), Sealand Road, Chester, Cheshire, CH1 4QG	3.3%	27	0.7%	1	2.0%	1	1.9%	1	4.5%	4	2.6%	2	2.2%	2	6.2%	10	3.8%	5
Plas Coch Retail Park (including Currys), Plas Coch Road, Wrexham, LL11 2BA	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	3	0.0%	0	0.0%	0	0.0%	0
Prestatyn Shopping Park, Nant Hall Road, Prestatyn, LL19 9BJ	0.5%	4	3.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St David's Retail Park, Saltney, CH4 8SJ	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.6%	1	0.0%	0
Asda, Aston Road, Queensferry, CH5 1TP	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	3	0.0%	0	0.9%	1
Tesco, Chester Road, Old Station Yard, Mold, CH7 1UB	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	14.4%	115	18.6%	23	11.5%	7	11.5%	8	8.4%	8	9.8%	6	9.8%	9	19.6%	30	16.7%	24
Home catalogue	0.1%	1	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Other, outside area	0.3%	2	0.0%	0	0.0%	0	1.3%	1	1.0%	1	0.7%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	3.6%	29	3.4%	4	3.2%	2	2.3%	2	2.7%	3	0.7%	0	5.3%	5	5.6%	9	3.2%	5
(Don't do this type of shopping)	40.2%	323	42.1%	52	56.3%	36	39.1%	29	54.1%	52	45.5%	29	37.2%	33	27.7%	43	35.8%	50

Column %ges.

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
Weighted base:	803	123	64	74	95	63	88	154	141
Sample:	803	100	100	100	103	100	100	100	100

Q26 And the time before that, where did you or your household go to make a purchase of recreational goods such as sports equipment, bicycles, musical instruments or toys?
Not 'Don't do' or 'Don't know' at Q25

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Broughton	4.4%	20	0.0%	0	2.6%	1	8.4%	4	5.1%	2	1.7%	1	5.7%	3	5.5%	6	5.2%	4
Buckley	0.6%	3	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	4.3%	2	0.0%	0	0.0%	0
Chester	8.2%	37	2.3%	2	6.7%	2	9.5%	4	12.3%	5	2.8%	1	12.9%	7	9.7%	10	8.4%	7
Connah's Quay	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	0	1.0%	1	0.0%	0	0.0%	0
Denbigh	0.4%	2	0.0%	0	0.0%	0	0.0%	0	4.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ellesmere Port	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Flint	3.8%	17	5.8%	4	0.0%	0	27.4%	12	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.1%	1
Hawarden	0.2%	1	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Holywell	2.3%	11	15.8%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Liverpool	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.9%	1
Mold	3.6%	16	1.6%	1	14.6%	4	3.6%	2	15.1%	6	4.4%	2	4.4%	2	0.0%	0	0.0%	0
Prestatyn	0.1%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Queensferry	1.2%	5	1.6%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	2.6%	3	0.9%	1
Rhyl	0.4%	2	2.3%	2	0.0%	0	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0
Ruthin	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0
Saltney	1.3%	6	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	5
Shotton	1.4%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	1	3.4%	4	1.4%	1
St Asaph	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0
Wrexham	2.0%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.2%	5	1.0%	1	0.0%	0	4.1%	4
Bromfield Industrial Estate, Mold, CH7 1XB	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Broughton Retail Park, Chester Road, Broughton, Chester, Cheshire CH4 0DP	21.6%	98	6.0%	4	27.9%	7	6.9%	3	20.7%	9	31.6%	11	30.1%	15	29.4%	30	21.4%	18
Caldy Valley Retail Park (including Halfords), Caldy Valley Road, Chester, Cheshire, CH3 5QZ	0.2%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheshire Oaks Designer Outlet, Kinsey Road, Ellesmere Port, South Wirral, CH65 9JJ	2.9%	13	0.0%	0	7.3%	2	5.9%	3	0.0%	0	1.7%	1	2.8%	1	1.9%	2	5.2%	4
Croft Retail & Leisure Park, Welton Road, Bromborough, CH62 3PN	1.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	4
Flintshire Retail Park (including Carpetright, Brantano, Argos), Holywell Road, Flint, Clwyd, CH6 5GB	0.7%	3	0.0%	0	0.0%	0	7.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Greyhound Retail Park (including B&Q, Cineworld, Wickes), Sealand Road, Chester, Cheshire, CH1 4QG	6.1%	28	7.0%	5	5.0%	1	8.5%	4	2.3%	1	3.5%	1	5.7%	3	8.1%	8	5.4%	5
Plas Coch Retail Park (including Currys), Plas Coch Road, Wrexham, LL11 2BA	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.9%	2	0.0%	0	0.0%	0	0.0%	0
Prestatyn Shopping Park, Nant Hall Road, Prestatyn, LL19 9BJ	1.2%	5	6.9%	5	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St David's Retail Park, Saltney, CH4 8SJ	0.7%	3	0.0%	0	0.0%	0	0.0%	0	5.1%	2	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Asda, Aston Road, Queensferry, CH5 1TP	1.2%	5	0.0%	0	0.0%	0	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.0%	0	5.0%	4
Tesco, Chester Road, Old Station Yard, Mold, CH7 1UB	0.3%	2	1.3%	1	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	25.6%	115	36.2%	24	31.6%	8	12.0%	5	17.0%	7	17.2%	6	17.7%	9	30.5%	31	28.5%	24
Home catalogue	0.5%	2	1.1%	1	1.7%	0	1.1%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Other, outside area	0.6%	3	0.0%	0	2.6%	1	1.1%	0	2.3%	1	1.4%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	5.9%	27	9.3%	6	0.0%	0	4.6%	2	9.8%	4	7.2%	2	7.1%	4	7.0%	7	1.4%	1
Weighted base:		451		67		26		43		41		34		51		103		86
Sample:		401		44		37		55		45		52		49		61		58

Column %ges.

Q27 Can you tell me where you or your household last made a purchase of other non-food items such as books, CDs, jewellery or china and glass items?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Broughton	1.7%	14	0.0%	0	2.1%	1	1.4%	1	0.0%	0	0.0%	0	4.0%	3	3.5%	5	1.9%	3
Buckley	1.2%	9	0.0%	0	0.7%	0	0.0%	0	0.0%	0	1.6%	1	8.9%	8	0.0%	0	0.0%	0
Chester	9.6%	77	9.9%	12	7.0%	5	11.5%	8	2.1%	2	10.2%	6	5.5%	5	8.0%	12	18.8%	27
Connah's Quay	0.4%	3	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	1.2%	2	0.0%	0
Ellesmere Port	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Flint	1.5%	12	0.6%	1	0.0%	0	14.4%	11	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Holywell	1.9%	15	12.0%	15	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Liverpool	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Mold	7.8%	63	2.4%	3	13.7%	9	3.6%	3	26.4%	25	18.3%	12	7.9%	7	1.3%	2	2.0%	3
Mynydd Isa	0.1%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Oswestry	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Prestatyn	0.6%	5	4.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Queensferry	1.4%	11	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.6%	1	5.9%	9	0.0%	0
Rhyl	0.3%	2	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ruthin	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Saltney	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2
Shotton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Wrexham	1.2%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.9%	9	0.0%	0	0.0%	0	0.7%	1
Broughton Retail Park, Chester Road, Broughton, Chester, Cheshire CH4 0DP	7.5%	60	2.6%	3	8.0%	5	5.0%	4	6.3%	6	9.1%	6	3.9%	3	7.6%	12	15.2%	21
Cheshire Oaks Designer Outlet, Kinsey Road, Ellesmere Port, South Wirral, CH65 9JJ	0.6%	5	0.7%	1	1.0%	1	0.7%	1	1.0%	1	0.9%	1	0.0%	0	0.6%	1	0.0%	0
Deeside Retail Park, Chester Road East, Shotton, Deeside, CH5 1QD	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Flintshire Retail Park (including Carpetright, Brantano, Argos), Holywell Road, Flint, Clwyd, CH6 5GB	0.1%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Greyhound Retail Park (including B&Q, Cineworld, Wickes), Sealand Road, Chester, Cheshire, CH1 4QG	1.1%	9	0.7%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.9%	1	2.9%	4	1.5%	2
Asda, Aston Road, Queensferry, CH5 1TP	1.6%	13	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	7.8%	7	2.4%	4	1.3%	2
Tesco, Chester Road, Old Station Yard, Mold, CH7 1UB	0.4%	3	0.0%	0	1.4%	1	0.0%	0	1.7%	2	1.6%	1	0.0%	0	0.0%	0	0.0%	0
Gemini Retail Park, Europa Boulevard, Warrington, WA5 7TY	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 1	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	30.0%	241	28.3%	35	34.7%	22	26.6%	20	22.4%	21	16.3%	10	26.4%	23	38.3%	59	35.8%	50
Home catalogue	0.8%	6	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0	3.0%	4
TV / Interactive shopping	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.6%	1	0.0%	0
Other, outside area	1.1%	9	3.1%	4	3.6%	2	0.6%	0	1.0%	1	0.7%	0	0.0%	0	0.0%	0	0.6%	1
(Don't know / can't remember)	3.0%	24	2.1%	3	1.4%	1	2.5%	2	4.4%	4	3.0%	2	1.9%	2	6.4%	10	0.7%	1
(Don't do this type of shopping)	24.6%	198	30.9%	38	24.4%	16	29.1%	21	29.1%	28	22.4%	14	31.1%	27	20.7%	32	15.4%	22
Weighted base:		803		123		64		74		95		63		88		154		141
Sample:		803		100		100		100		103		100		100		100		100

Q28 And the time before that, where did you or your household go to make a purchase of other non-food items such as books, CDs, jewellery or china and glass items?
Not 'Don't do' or 'Don't know' at Q27

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Broughton	3.6%	21	0.0%	0	2.8%	1	7.9%	4	0.0%	0	0.0%	0	6.2%	4	5.7%	6	4.4%	5
Buckley	1.6%	9	0.0%	0	2.7%	1	0.0%	0	0.0%	0	1.0%	0	8.1%	5	0.0%	0	2.1%	3
Chester	14.9%	87	14.0%	12	11.4%	5	17.2%	9	5.0%	3	18.6%	9	9.2%	5	15.0%	17	22.7%	27
Connah's Quay	0.6%	4	0.0%	0	0.9%	0	0.0%	0	1.5%	1	0.0%	0	0.9%	1	1.6%	2	0.0%	0
Denbigh	0.1%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ellesmere Port	0.4%	2	0.0%	0	0.0%	0	4.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Flint	2.0%	11	1.7%	1	0.0%	0	18.0%	9	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Holywell	1.4%	8	9.1%	7	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Liverpool	0.4%	3	0.0%	0	0.0%	0	0.9%	0	2.4%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Llandudno	0.3%	2	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mold	7.9%	46	3.7%	3	14.1%	7	2.3%	1	33.5%	21	17.9%	8	5.4%	3	0.0%	0	1.7%	2
Mynydd Isa	0.1%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Oswestry	0.1%	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
Prestatyn	1.0%	6	6.9%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Queensferry	1.3%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	6.4%	7	0.0%	0
Rhyl	0.4%	2	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Saltney	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2
Shotton	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Wrexham	1.9%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.2%	10	0.0%	0	0.0%	0	0.8%	1
Broughton Retail Park, Chester Road, Broughton, Chester, Cheshire CH4 0DP	9.8%	57	6.8%	6	4.8%	2	7.7%	4	13.6%	9	3.6%	2	7.9%	5	4.2%	5	21.4%	25
Cheshire Oaks Designer Outlet, Kinsey Road, Ellesmere Port, South Wirral, CH65 9JJ	1.6%	9	5.7%	5	1.4%	1	0.0%	0	1.5%	1	2.4%	1	1.4%	1	0.0%	0	0.7%	1
Chester Retail Park, Old Seals Way, Chester, CH1 4RY	0.3%	2	0.0%	0	0.9%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Greyhound Retail Park (including B&Q, Cineworld, Wickes), Sealand Road, Chester, Cheshire, CH1 4QG	2.9%	17	1.0%	1	0.0%	0	0.0%	0	3.3%	2	0.0%	0	1.4%	1	4.0%	4	7.2%	9
Asda, Aston Road, Queensferry, CH5 1TP	3.2%	19	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	17.3%	10	6.4%	7	0.8%	1
Tesco, Chester Road, Old Station Yard, Mold, CH7 1UB	0.7%	4	0.0%	0	1.8%	1	1.4%	1	1.0%	1	2.2%	1	0.0%	0	0.0%	0	0.8%	1
Internet / delivered	35.8%	208	34.8%	29	47.7%	23	35.7%	18	26.5%	17	26.1%	12	34.5%	20	47.5%	53	30.2%	36
Home catalogue	1.3%	8	0.0%	0	0.0%	0	0.0%	0	5.3%	3	0.0%	0	0.0%	0	0.0%	0	3.6%	4
TV / Interactive shopping	0.5%	3	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	1.7%	2	0.0%	0
Other, outside area	1.2%	7	0.0%	0	5.4%	3	1.4%	1	1.5%	1	2.5%	1	0.0%	0	0.9%	1	0.7%	1
(Don't know / can't remember)	4.2%	24	10.7%	9	3.2%	2	1.8%	1	4.0%	3	3.4%	2	4.8%	3	4.1%	5	1.3%	2
Weighted base:		581		82		48		51		63		47		59		112		118
Sample:		559		58		73		65		71		73		66		71		82

Q29 When undertaking shopping via the Internet, how do you NORMALLY receive the items you have purchased?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Delivery to home or workplace	70.0%	562	66.0%	81	69.0%	44	77.2%	57	59.5%	57	61.4%	39	66.5%	59	80.3%	124	71.7%	101
Delivered to store (Click & collect)	4.7%	38	3.5%	4	3.9%	3	4.0%	3	4.7%	4	2.0%	1	3.3%	3	5.8%	9	7.4%	10
Delivered to another collection point (e.g convenience store, Amazon Locker etc.)	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.8%	1	3.2%	2	3.3%	3	0.5%	1	0.7%	1
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember / varies / don't do this)	24.4%	196	30.5%	37	27.1%	17	18.8%	14	35.0%	33	33.3%	21	27.0%	24	13.4%	21	20.2%	28
Weighted base:		803		123		64		74		95		63		88		154		141
Sample:		803		100		100		100		103		100		100		100		100

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

GEN Gender of respondent:

	Total %	Total	Zone 1 %	Zone 1	Zone 2 %	Zone 2	Zone 3 %	Zone 3	Zone 4 %	Zone 4	Zone 5 %	Zone 5	Zone 6 %	Zone 6	Zone 7 %	Zone 7	Zone 8 %	Zone 8
Male	37.2%	299	42.2%	52	30.5%	20	34.6%	26	26.0%	25	26.4%	17	33.6%	30	40.6%	63	48.3%	68
Female	62.8%	504	57.8%	71	69.5%	45	65.4%	48	74.0%	71	73.6%	47	66.4%	59	59.4%	91	51.7%	73
Weighted base:		803		123		64		74		95		63		88		154		141
Sample:		803		100		100		100		103		100		100		100		100

AGE Could I ask how old you are please?

	Total %	Total	Zone 1 %	Zone 1	Zone 2 %	Zone 2	Zone 3 %	Zone 3	Zone 4 %	Zone 4	Zone 5 %	Zone 5	Zone 6 %	Zone 6	Zone 7 %	Zone 7	Zone 8 %	Zone 8
18 to 24	8.2%	66	6.3%	8	11.2%	7	3.4%	3	10.8%	10	8.2%	5	3.3%	3	5.8%	9	15.2%	21
25 to 34	12.1%	97	18.8%	23	7.4%	5	17.1%	13	3.6%	3	4.1%	3	22.7%	20	14.4%	22	6.1%	9
35 to 44	19.3%	155	17.2%	21	11.3%	7	16.7%	12	13.1%	13	5.0%	3	11.9%	10	33.4%	51	26.0%	37
45 to 54	19.9%	160	16.4%	20	8.1%	5	15.7%	12	15.6%	15	17.9%	11	13.5%	12	32.1%	49	25.2%	36
55 to 64	18.2%	146	21.2%	26	21.9%	14	18.3%	13	26.2%	25	25.3%	16	25.5%	23	6.5%	10	13.7%	19
65 +	22.2%	178	20.1%	25	40.0%	26	28.8%	21	30.7%	29	39.6%	25	23.1%	20	7.9%	12	13.9%	20
(Refused)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		803		123		64		74		95		63		88		154		141
Sample:		803		100		100		100		103		100		100		100		100

QUOTA Zone:

	Total %	Total	Zone 1 %	Zone 1	Zone 2 %	Zone 2	Zone 3 %	Zone 3	Zone 4 %	Zone 4	Zone 5 %	Zone 5	Zone 6 %	Zone 6	Zone 7 %	Zone 7	Zone 8 %	Zone 8
Zone 1	15.3%	123	100.0%	123	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 2	8.0%	64	0.0%	0	100.0%	64	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 3	9.2%	74	0.0%	0	0.0%	0	100.0%	74	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 4	11.9%	95	0.0%	0	0.0%	0	0.0%	0	100.0%	95	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 5	7.9%	63	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	63	0.0%	0	0.0%	0	0.0%	0
Zone 6	11.0%	88	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	88	0.0%	0	0.0%	0
Zone 7	19.2%	154	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	154	0.0%	0
Zone 8	17.6%	141	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	141
Weighted base:		803		123		64		74		95		63		88		154		141
Sample:		803		100		100		100		103		100		100		100		100

PC Postcode sector:

	Total %	Total	Zone 1 %	Zone 1	Zone 2 %	Zone 2	Zone 3 %	Zone 3	Zone 4 %	Zone 4	Zone 5 %	Zone 5	Zone 6 %	Zone 6	Zone 7 %	Zone 7	Zone 8 %	Zone 8
CH1 6	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	3
CH4 0	6.3%	50	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	35.6%	50
CH4 8	1.4%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	11
CH4 9	1.3%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.5%	11
CH5 1	5.0%	40	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	26.2%	40	0.0%	0
CH5 2	3.4%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.8%	27	0.0%	0
CH5 3	8.3%	66	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	47.1%	66
CH5 4	10.7%	86	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	56.0%	86	0.0%	0
CH6 5	9.2%	74	0.0%	0	0.0%	0	100.0%	74	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CH6 6	2.7%	22	17.7%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CH7 1	7.0%	56	0.0%	0	0.0%	0	0.0%	0	59.2%	56	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CH7 2	6.3%	51	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	57.6%	51	0.0%	0	0.0%	0
CH7 3	4.7%	37	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	42.4%	37	0.0%	0	0.0%	0
CH7 4	4.2%	34	0.0%	0	0.0%	0	0.0%	0	0.0%	0	53.3%	34	0.0%	0	0.0%	0	0.0%	0
CH7 5	4.9%	39	0.0%	0	0.0%	0	0.0%	0	40.8%	39	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CH7 6	8.0%	64	0.0%	0	100.0%	64	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CH8 7	2.4%	19	15.8%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CH8 8	4.2%	34	27.4%	34	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CH8 9	4.8%	39	31.4%	39	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
LL11 5	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	3	0.0%	0	0.0%	0	0.0%	0
LL12 9	3.3%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	41.8%	26	0.0%	0	0.0%	0	0.0%	0
LL18 6	0.3%	3	2.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
LL19 9	0.9%	7	5.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		803		123		64		74		95		63		88		154		141
Sample:		803		100		100		100		103		100		100		100		100

APPENDIX D CONVENIENCE RETAIL CAPACITY

Spreadsheet 1 - Definition of Zones

Zone	Postcode Sectors
Zone 1	CH6 6 CH8 7 CH8 8 CH8 9 LL18 6 LL19 8, LL19 9
Zone 2	CH7 6
Zone 3	CH6 5
Zone 4	CH7 1 CH7 5 LL17 0 (part)
Zone 5	CH7 4, LL11 3 (part), LL11 5 (part) LL12 0 (part), LL12 9 (part)
Zone 6	CH7 2 CH7 3
Zone 7	CH5 1 CH5 2 (part) CH5 4 (part) CH64 5 (part)
Zone 8	CHA 5 CH1 6 (part) CH4 0 CH4 8 (part), CH4 9 (part), CH5 3

Spreadsheet 2 - Population Projections

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	All Zones Total
Population 2018	27,071	14,849	13,637	15,654	14,796	17,096	27,750	33,176	164,029
Population 2022	27,239	14,926	13,736	15,682	14,838	17,237	28,009	33,456	165,123
Population 2026	27,305	15,010	13,821	15,659	14,891	17,358	28,169	33,688	165,901
Population 2030	27,313	15,044	13,856	15,613	14,916	17,423	28,229	33,821	166,215
Change in population 2018 - 2030									
Numeric change	242	195	219	-41	120	327	479	645	2,186
Percentage change	0.9%	1.3%	1.6%	-0.3%	0.8%	1.9%	1.7%	1.9%	1.3%

NOTES:

(1) Population data and projections to 2030 are ONS-based and derived from Experian MMG3.

Spreadsheet 3 - Convenience Goods Expenditure Per Capita (£)

Year	Zone 1 £ per capita	Zone 2 £ per capita	Zone 3 £ per capita	Zone 4 £ per capita	Zone 5 £ per capita	Zone 6 £ per capita	Zone 7 £ per capita	Zone 8 £ per capita
2016	2,739	3,439	2,720	3,227	3,297	3,116	2,524	3,181
2018	2,081	2,143	1,925	2,146	2,181	1,976	1,864	2,077
2022	2,116	2,180	1,958	2,182	2,218	2,010	1,896	2,112
2026	2,125	2,189	1,966	2,191	2,227	2,018	1,904	2,121
2030	2,133	2,197	1,973	2,200	2,236	2,026	1,912	2,129

NOTES:
(1) 2016-based per capita convenience expenditure data were sourced from Experian MMG3.
(2) The 2016-based per capita convenience expenditure data were rolled forward to the base year and forecast years using the forecats contained within Experian Retail Planner Briefing Note 16 (Figure 1a, December 2018).

All monetary values are held constant at 2016 prices.

Spreadsheet 4 - Total Convenience Goods Expenditure and Expenditure Growth

	Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	All Zones Total £m
Total expenditure 2018	**56.33**	**31.82**	**26.25**	**33.59**	**32.26**	**33.79**	**51.74**	**68.89**	**334.68**
Spending on SFT in 2018 of average of 1.9%	1.07	0.60	0.50	0.64	0.61	0.64	0.98	1.31	**6.36**
Total expenditure excluding SFT 2018	55.26	31.22	25.75	32.95	31.65	33.15	50.76	67.59	**328.33**
Total expenditure 2022	**57.65**	**32.54**	**26.89**	**34.22**	**32.91**	**34.65**	**53.11**	**70.66**	**342.63**
Spending on SFT in 2022 of 2.4%	1.36	0.77	0.64	0.81	0.78	0.82	1.25	1.67	**8.09**
Total expenditure excluding SFT 2022	56.29	31.77	26.26	33.42	32.13	33.83	51.86	68.99	**334.54**
Total expenditure 2026	**58.02**	**32.85**	**27.17**	**34.31**	**33.16**	**35.03**	**53.63**	**71.44**	**345.61**
Spending on SFT in 2026 of 2.7%	1.55	0.88	0.73	0.92	0.89	0.94	1.43	1.91	**9.23**
Total expenditure excluding SFT 2026	56.47	31.97	26.44	33.39	32.27	34.10	52.20	69.53	**336.38**
Total expenditure in 2030	**58.27**	**33.06**	**27.34**	**34.35**	**33.35**	**35.30**	**53.96**	**72.01**	**347.64**
Spending on SFT in 2030 of 2.8%	1.65	0.93	0.77	0.97	0.94	1.00	1.52	2.03	**9.82**
Total expenditure excluding SFT 2030	56.63	32.12	26.57	33.38	32.40	34.31	52.44	69.97	**337.82**
Growth in total expenditure 2018 - 2022	1.32	0.71	0.64	0.63	0.64	0.86	1.37	1.77	**7.95**
Growth in total expenditure 2022 - 2026	0.37	0.31	0.27	0.09	0.25	0.38	0.52	0.78	**2.97**
Growth in total expenditure 2026 - 2030	0.25	0.21	0.18	0.04	0.19	0.27	0.33	0.57	**2.03**
Growth in total expenditure 2018 - 2030	1.94	1.23	1.09	0.76	1.08	1.52	2.22	3.11	**12.96**

NOTES:
(1) The figures in the above table are the product of multiplying the data presented in Spreadsheet 2 (population) by Spreadsheet 3 (per capita convenience goods expenditure), and are in millions of pounds (£m).
(2) The total expenditure includes a proportion of expenditure on Special Forms of Trading (SFT) (e.g. internet shopping). The proportion of expenditure on SFT in 2018 is derived from the telephone survey of households. For each of the forecast years, we have applied the rate of growth in adjusted SFT market shares implied by Experian's forecasts.

All monetary values are held constant at 2016 prices.

Spreadsheet 5 - Convenience Goods Spending Patterns in 2018 as a Percentage Across the Study Area Zones

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Zone 8 %
INSIDE STUDY AREA								
Zone 1								
Holywell Town Centre (including Tesco & Lidl)	42.7%	0.0%	2.0%	1.3%	0.0%	0.0%	0.0%	0.3%
Other, Zone 1	4.6%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.3%
Total Zone 1	***47.3%***	***0.0%***	***2.0%***	***1.4%***	***0.0%***	***0.0%***	***0.0%***	***0.6%***
Zone 2								
Other, Zone 2	0.3%	5.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%
Total Zone 2	***0.3%***	***5.0%***	***0.0%***	***0.2%***	***0.0%***	***0.0%***	***0.0%***	***0.0%***
Zone 3								
Flint Town Centre (including Flintshire Retail Park)	15.3%	5.4%	76.4%	1.7%	0.0%	0.0%	6.6%	0.3%
Other, Zone 3	1.1%	0.6%	4.3%	0.3%	0.1%	0.0%	0.0%	0.0%
Total Zone 3	***16.4%***	***6.0%***	***80.8%***	***1.9%***	***0.1%***	***0.0%***	***6.6%***	***0.3%***
Zone 4								
Mold Town Centre (including Tesco & Aldi)	5.7%	45.4%	3.4%	62.8%	32.1%	11.1%	1.4%	1.6%
Other Zone 4	0.9%	9.7%	2.6%	19.1%	7.0%	2.5%	1.0%	2.8%
Total Zone 4	***6.6%***	***55.0%***	***6.0%***	***81.9%***	***39.1%***	***13.6%***	***2.4%***	***4.3%***
Zone 5								
Other, Zone 5	0.0%	0.0%	0.0%	0.7%	6.4%	0.0%	0.0%	0.0%
Total Zone 5	***0.0%***	***0.0%***	***0.0%***	***0.7%***	***6.4%***	***0.0%***	***0.0%***	***0.0%***
Zone 6								
Buckley Town Centre (including Aldi)	0.0%	14.3%	0.0%	1.3%	3.9%	54.1%	4.1%	3.7%
Other, Zone 6	0.0%	1.0%	0.0%	0.0%	0.1%	5.7%	0.1%	0.6%
Total Zone 6	***0.0%***	***15.3%***	***0.0%***	***1.3%***	***4.1%***	***59.7%***	***4.2%***	***4.3%***
Zone 7								
Queensferry District Centre (including Asda)	2.4%	3.6%	3.9%	1.3%	0.8%	11.6%	35.8%	17.6%
Shotton Town Centre	0.0%	0.3%	0.1%	0.0%	0.0%	0.0%	1.9%	2.6%
Connah's Quay District Centre	0.0%	0.0%	0.0%	0.4%	0.7%	0.0%	0.3%	0.0%
Morrisons, Connah's Quay	0.5%	4.0%	3.6%	0.7%	0.4%	0.7%	24.1%	0.2%
Lidl, Shotton	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	3.5%	0.5%
Other, Zone 7	0.0%	0.2%	0.0%	0.1%	1.8%	0.1%	6.3%	0.0%
Total Zone 7	***2.9%***	***8.2%***	***7.7%***	***2.5%***	***3.7%***	***12.3%***	***71.9%***	***20.9%***
Zone 8								
Saltney District Centre (including Morrisons)	0.0%	0.6%	0.0%	0.4%	1.7%	2.0%	0.1%	9.9%
Broughton Shopping Park (including Tesco & Aldi)	1.0%	4.5%	1.6%	3.8%	11.6%	10.1%	11.7%	41.1%
Other, Zone 8	1.9%	0.0%	0.0%	1.5%	0.5%	1.4%	1.1%	9.8%
Total Zone 8	***2.8%***	***5.1%***	***1.6%***	***5.8%***	***13.7%***	***13.4%***	***12.9%***	***60.8%***
TOTAL INSIDE STUDY AREA	**76.4%**	**94.5%**	**98.0%**	**95.6%**	**67.2%**	**99.1%**	**98.1%**	**91.2%**
OUTSIDE STUDY AREA								
Cheshire West and Chester								
Greyhound/Deva/Chester Retail Parks	0.3%	0.1%	0.0%	0.1%	0.0%	0.0%	0.1%	2.9%
Chester City Centre	0.2%	1.9%	0.1%	0.3%	0.3%	0.5%	0.7%	1.1%
Other, Cheshire West and Chester	0.0%	2.9%	0.4%	0.0%	0.5%	0.1%	0.9%	2.9%
Total Cheshire West and Chester	***0.5%***	***4.8%***	***0.6%***	***0.4%***	***0.8%***	***0.6%***	***1.7%***	***6.9%***
Wrexham								
Wrexham Town Centre	0.0%	0.1%	0.0%	0.3%	6.5%	0.0%	0.0%	1.1%
Plas Coch/Berse Road Retail Parks, Wrexham	0.2%	0.0%	0.0%	0.6%	10.9%	0.3%	0.0%	0.4%
Other, Wrexham	0.7%	0.0%	0.3%	0.0%	9.2%	0.0%	0.0%	0.0%
Total Wrexham	***1.0%***	***0.1%***	***0.3%***	***0.9%***	***26.6%***	***0.3%***	***0.0%***	***1.5%***
Denbighshire								
Prestatyn Town Centre	18.5%	0.0%	0.7%	0.0%	0.0%	0.1%	0.2%	0.2%
Other, Denbighshire	3.5%	0.2%	0.0%	2.3%	4.3%	0.0%	0.0%	0.2%
Total Denbighshire	***22.1%***	***0.2%***	***0.7%***	***2.3%***	***4.3%***	***0.1%***	***0.2%***	***0.4%***
Other								
Other, Outside Study Area	0.1%	0.3%	0.4%	0.8%	1.1%	0.0%	0.0%	0.0%
Total Other	***0.1%***	***0.3%***	***0.4%***	***0.8%***	***1.1%***	***0.0%***	***0.0%***	***0.0%***
TOTAL OUTSIDE STUDY AREA	**23.6%**	**5.5%**	**2.0%**	**4.4%**	**32.8%**	**0.9%**	**1.9%**	**8.8%**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Spreadsheet 6 - Convenience Goods Spending Patterns in 2018 Across the Study Area Zones

	Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Total [1] £m	All Zones Market Share [2] %
INSIDE STUDY AREA										
Zone 1										
Holywell Town Centre (including Tesco & Lidl)	23.62	0.00	0.52	0.43	0.00	0.00	0.00	0.19	24.75	7.5%
Other, Zone 1	2.54	0.00	0.00	0.03	0.00	0.00	0.00	0.19	2.76	0.8%
Total Zone 1	***26.16***	***0.00***	***0.52***	***0.46***	***0.00***	***0.00***	***0.00***	***0.38***	***27.52***	***8.4%***
Zone 2										
Other, Zone 2	0.16	1.56	0.00	0.05	0.00	0.00	0.00	0.00	***1.77***	0.5%
Total Zone 2	***0.16***	***1.56***	***0.00***	***0.05***	***0.00***	***0.00***	***0.00***	***0.00***	***1.77***	***0.5%***
Zone 3										
Flint Town Centre (including Flintshire Retail Park)	8.45	1.69	19.68	0.54	0.00	0.00	3.37	0.20	33.93	10.3%
Other, Zone 3	0.61	0.17	1.12	0.09	0.03	0.00	0.00	0.00	2.02	0.6%
Total Zone 3	***9.06***	***1.86***	***20.80***	***0.63***	***0.03***	***0.00***	***3.37***	***0.20***	***35.95***	***11.0%***
Zone 4										
Mold Town Centre (including Tesco & Aldi)	3.13	14.16	0.88	20.69	10.18	3.69	0.71	1.05	54.50	16.6%
Other Zone 4	0.50	3.02	0.67	6.29	2.21	0.81	0.52	1.87	15.88	4.8%
Total Zone 4	***3.64***	***17.18***	***1.55***	***26.98***	***12.38***	***4.50***	***1.23***	***2.92***	***70.38***	***21.4%***
Zone 5										
Other, Zone 5	0.00	0.00	0.00	0.22	2.04	0.00	0.00	0.00	2.26	0.7%
Total Zone 5	***0.00***	***0.00***	***0.00***	***0.22***	***2.04***	***0.00***	***0.00***	***0.00***	***2.26***	***0.7%***
Zone 6										
Buckley Town Centre (including Aldi)	0.00	4.46	0.00	0.44	1.24	17.92	2.09	2.53	28.68	8.7%
Other, Zone 6	0.00	0.32	0.00	0.00	0.04	1.87	0.06	0.41	2.71	0.8%
Total Zone 6	***0.00***	***4.78***	***0.00***	***0.44***	***1.28***	***19.79***	***2.15***	***2.94***	***31.38***	***9.6%***
Zone 7										
Queensferry District Centre (including Asda)	1.33	1.13	1.01	0.43	0.25	3.84	18.18	11.91	38.08	11.6%
Shotton Town Centre	0.00	0.09	0.03	0.00	0.00	0.00	0.96	1.77	2.85	0.9%
Connah's Quay District Centre	0.00	0.00	0.00	0.14	0.22	0.00	0.17	0.00	0.54	0.2%
Morrisons, Connah's Quay	0.29	1.24	0.94	0.22	0.12	0.22	12.24	0.13	15.39	4.7%
Other, Zone 7	0.00	0.06	0.00	0.03	0.58	0.03	3.17	0.00	3.88	1.2%
Total Zone 7	***1.62***	***2.55***	***1.97***	***0.83***	***1.17***	***4.09***	***36.50***	***14.13***	***62.86***	***19.1%***
Zone 8										
Saltney District Centre (including Morrisons)	0.00	0.18	0.00	0.14	0.54	0.66	0.04	6.71	8.27	2.5%
Broughton Shopping Park (including Tesco & Aldi)	0.54	1.41	0.40	1.26	3.66	3.33	5.96	27.76	44.33	13.5%
Other, Zone 8	1.03	0.00	0.00	0.50	0.15	0.47	0.54	6.62	9.31	2.8%
Total Zone 8	***1.57***	***1.59***	***0.40***	***1.90***	***4.35***	***4.45***	***6.54***	***41.09***	***61.91***	***18.9%***
TOTAL INSIDE STUDY AREA	**42.21**	**29.52**	**25.24**	**31.50**	**21.26**	**32.84**	**49.80**	**61.66**	**294.02**	**89.6%**
OUTSIDE STUDY AREA										
Cheshire West and Chester										
Greyhound/Deva/Chester Retail Parks	0.16	0.02	0.00	0.02	0.00	0.00	0.05	1.96	2.21	0.7%
Chester City Centre	0.13	0.59	0.03	0.09	0.10	0.16	0.33	0.72	2.15	0.7%
Other, Cheshire West and Chester	0.00	0.91	0.11	0.00	0.16	0.03	0.46	1.98	3.66	1.1%
Total Cheshire West and Chester	**0.29**	**1.51**	**0.14**	**0.12**	**0.26**	**0.19**	**0.84**	**4.66**	**8.02**	***2.4%***
Wrexham										
Wrexham Town Centre	0.00	0.04	0.00	0.09	2.05	0.00	0.00	0.71	2.89	0.9%
Plas Coch/Berse Road Retail Parks, Wrexham	0.13	0.00	0.00	0.20	3.46	0.09	0.00	0.29	4.18	1.3%
Other, Wrexham	0.39	0.00	0.08	0.00	2.93	0.00	0.00	0.00	3.40	1.0%
Total Wrexham	**0.52**	**0.04**	**0.08**	**0.30**	**8.43**	**0.09**	**0.00**	**1.00**	***10.47***	***3.2%***
Denbighshire										
Prestatyn Town Centre	10.23	0.00	0.17	0.00	0.00	0.03	0.12	0.11	*10.65*	*3.2%*
Other, Denbighshire	1.96	0.05	0.00	0.76	1.36	0.00	0.00	0.16	4.29	1.3%
Total Denbighshire	**12.19**	**0.05**	**0.17**	**0.76**	**1.36**	**0.03**	**0.12**	**0.27**	**14.94**	**4.6%**
Other										
Other, Outside Study Area	0.06	0.10	0.11	0.28	0.34	0.00	0.00	0.00	0.88	0.3%
Total Other	***0.06***	***0.10***	***0.11***	***0.28***	***0.34***	***0.00***	***0.00***	***0.00***	***0.88***	***0.3%***
TOTAL OUTSIDE STUDY AREA	**13.05**	**1.70**	**0.51**	**1.45**	**10.39**	**0.31**	**0.96**	**5.93**	**34.30**	**0.10**
TOTAL	**55.26**	**31.22**	**25.75**	**32.95**	**31.65**	**33.15**	**50.76**	**67.59**	**328.33**	**100.0%**

NOTES:
(1) The spending patterns are calculated by multiplying the total convenience goods expenditure in 2018 (Spreadsheet 4) by the market share (Spreadsheet 5). The figures in the 'Total' column are the sum of the expenditure attracted to each centre/store from each zone.
(2) The 'All Zones Market Share' is calculated by dividing the total expenditure retained by each centre/store by the total expenditure in the study area.

Spreadsheet 7 - Convenience Retail Commitments

	Planning Application Ref. No.	Net floorspace gain [1] sqm	Sales density in opening year [2] £/sqm	Turnover from study area in opening year [3] £m
Assumed opening by 2022:				
Flint Retail Park [4]	57263	1,254	10,000	12.23
Sub-total (2022)		**1,254**	**-**	**12.23**

NOTES:

(1) Net retail floorspace gain taken from planning application material or based on PBA estimate. PBA estimates based on gross:net floorspace split of 70%.
(2) Sales density based on PBA estimate to reflect average of main convenience goods retailers and to reflect nature and location of proposed development.
(3) Assumed that 2.5% of turnover is inflow from outside of study area.
(4) Planning permission 057263 has no restrictions on Class A1 use and we have therefore assumed a 50/50 split of gross floorspace between comparison and convenience retailers.

Spreadsheet 8 - Summary of Capacity for Convenience Goods Retail Floorspace (Constant Retention Rate)

	2018	2022	2026	2030	Cumulative Change 2018-2030	Incremental Change 2018-22	2022-26	2026-30
Total Population and Expenditure [1]								
A. Total study area population (persons)	164,029	165,123	165,901	166,215	2,186	1,094	778	314
B. Total convenience goods expenditure (excluding SFT) (£m)	328.3	334.5	336.4	337.8	9.5	6.2	1.8	1.4
Retained Expenditure [2]								
C. Convenience goods expenditure retained in study area (%)	*89.6%*	*89.6%*	*89.6%*	*89.6%*				
D. Convenience goods expenditure retained in study area (£m)	294.0	299.6	301.2	302.5	8.5	5.6	1.6	1.3
Inflow [3]								
E. Inflow to study area at 2.5% (£m)	7.4	7.5	7.5	7.6	0.2	0.1	0.0	0.0
F. Growth in Inflow (£m)	0.0	0.1	0.0	0.0	0.0	0.1	-0.1	0.0
Total Turnover in Study Area [4]								
G. Baseline convenience goods turnover of stores in study area (£m)	301.4	301.4	301.4	301.4				
Initial Surplus [5]								
H. Growth in retained convenience goods expenditure (£m)	0.0	-1.6	-0.1	1.2	-0.1	-1.6	1.5	1.3
Claims on Expenditure [6]								
I. Sales density growth in existing stores (£m)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
J. Turnover from commitments	0.0	12.2	13.2	16.0	13.2	12.2	0.9	2.8
K. Total claims on expenditure (£m)	0.0	12.2	13.2	16.0	13.2	12.2	0.9	2.8
L. Residual expenditure (£m) [7]	0.0	-13.9	-13.3	-14.8	-13.3	-13.9	0.6	-1.5
Comparison Retail Floorspace Requirements [8]								
M. Assumed sales density (£/sq.m)	10,000	10,000	10,000	10,000	0			
N. Floorspace requirement (net sq.m)	0	-1,387	-1,327	-1,480	-1,480	-1,387	60	-153
O. Floorspace requirement (gross sq.m)	0	-1,982	-1,896	-2,115	-2,115	-1,982	86	-219

NOTES:
(1) Total population of the study area taken from Spreadsheet 2. Total convenience goods expenditure (excluding SFT) taken from Spreadsheet 4.
(2) Retained expenditure - proportion of all convenience goods expenditure spent at retail facilities within the study area, taken from Spreadsheet 6. This is held constant throughout the assessment period.
(3) Inflow - additional convenience goods expenditure drawn to retail facilities within the study area from residents outside the study area. Assumed to be 2.5% of retained expenditure.
(4) Total convenience goods turnover of stores within study area in the base year taken from Spreadsheet 6.
(5) Initial surplus - total growth in retained convenience goods expenditure before claims on expenditure.
(6) Claims on expenditure - the turnover of commitments for new convenience retail floorspace in the study area taken from Spreadsheet 7. No allowance is made for improving sales efficiency in existing stores dure to very low/ forecasts of sales density growth.
(8) Convenience retail floorspace requirements calculated by converting the residual expenditure using a sales density estimate of £10,000/sq.m in 2018, held constant due to very low/negative forecasts of sales density growth. 70% net to gross ratio assumed.
(9) All monetary figures are rounded to one decimal place and all floorspace figures are rounded to the nearest square metre.

APPENDIX E COMPARISON RETAIL CAPACITY

Spreadsheet 1 - Definition of Zones

Zone	Postcode Sectors
Zone 1	CH6 6 CH8 7 CH8 8 CH8 9 LL18 6 LL19 8, LL19 9
Zone 2	CH7 6
Zone 3	CH6 5
Zone 4	CH7 1 CH7 5 LL17 0 (part)
Zone 5	CH7 4, LL11 3 (part), LL11 5 (part) LL12 0 (part), LL12 9 (part)
Zone 6	CH7 2 CH7 3
Zone 7	CH5 1 CH5 2 (part) CH5 4 (part) CH64 5 (part)
Zone 8	CHA 5 CH1 6 (part) CH4 0 CH4 8 (part), CH4 9 (part), CH5 3

Spreadsheet 2 - Population Projections

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	All Zones Total
Population 2018	27,071	14,849	13,637	15,654	14,796	17,096	27,750	33,176	164,029
Population 2022	27,239	14,926	13,736	15,682	14,838	17,237	28,009	33,456	165,123
Population 2026	27,305	15,010	13,821	15,659	14,891	17,358	28,169	33,688	165,901
Population 2030	27,313	15,044	13,856	15,613	14,916	17,423	28,229	33,821	166,215
Change in population 2018 - 2030									
Numeric change	242	195	219	-41	120	327	479	645	2,186
Percentage change	0.9%	1.3%	1.6%	-0.3%	0.8%	1.9%	1.7%	1.9%	1.3%

NOTES:

(1) Population data and projections to 2030 are ONS-based and derived from Experian MMG3.

Spreadsheet 4 - Total Comparison Goods Expenditure and Expenditure Growth

	Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	All Zones Total £m
Total expenditure 2018	**79.66**	**54.85**	**39.84**	**54.26**	**52.41**	**57.21**	**75.24**	**113.35**	**526.81**
Spending on SFT in 2018 of average of 14.5%	11.55	7.95	5.78	7.87	7.60	8.30	10.91	16.44	**76.39**
Total expenditure excluding SFT 2018	68.11	46.90	34.07	46.39	44.81	48.92	64.33	96.91	**450.43**
Total expenditure 2022	**89.77**	**61.76**	**44.95**	**60.88**	**58.86**	**64.61**	**85.05**	**128.03**	**593.91**
Spending on SFT in 2022 of 16.8%	15.08	10.38	7.55	10.23	9.89	10.86	14.29	21.51	**99.79**
Total expenditure excluding SFT 2022	74.69	51.38	37.40	50.65	48.97	53.75	70.76	106.52	**494.12**
Total expenditure 2026	**102.37**	**70.65**	**51.45**	**69.15**	**67.20**	**74.01**	**97.31**	**146.65**	**678.80**
Spending on SFT in 2026 of 17.8%	18.25	12.59	9.17	12.33	11.98	13.19	17.35	26.14	**121.01**
Total expenditure excluding SFT 2026	84.12	58.06	42.28	56.83	55.22	60.82	79.96	120.51	**557.79**
Total expenditure in 2030	**116.15**	**80.32**	**58.51**	**78.21**	**76.35**	**84.27**	**110.61**	**167.00**	**771.41**
Spending on SFT in 2030 of 18.3%	21.20	14.66	10.68	14.28	13.94	15.38	20.19	30.48	**140.80**
Total expenditure excluding SFT 2030	94.95	65.66	47.83	63.93	62.42	68.88	90.42	136.52	**630.60**
Growth in total expenditure 2018 - 2022	10.12	6.90	5.11	6.62	6.46	7.40	9.82	14.68	**67.10**
Growth in total expenditure 2022 - 2026	12.60	8.89	6.50	8.27	8.34	9.40	12.25	18.62	**84.88**
Growth in total expenditure 2026 - 2030	13.78	9.67	7.06	9.06	9.15	10.25	13.30	20.35	**92.61**
Growth in total expenditure 2018 - 2030	36.49	25.46	18.66	23.95	23.95	27.05	35.37	53.65	**244.59**

NOTES:

(1) The figures in the above table are the product of multiplying the data presented in Spreadsheet 2 (population) by Spreadsheet 3 (per capita comparison goods expenditure), and are in millions of pounds (£m).

(2) The total expenditure includes a proportion of expenditure on Special Forms of Trading (SFT) (e.g. internet shopping). The proportion of expenditure on SFT in 2018 is derived from the telephone survey of households. This headline rate has been adjusted to take account of SFT sales from stores. For each of the forecast years, we have applied the rate of growth in adjusted SFT market shares implied by Experian's forecasts.

All monetary values are held constant at 2016 prices.

Spreadsheet 5 - Comparison Goods Spending Patterns in 2018 as a Percentage Across the Study Area Zones

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Zone 8 %
INSIDE STUDY AREA								
Zone 1								
Holywell Town Centre	8.8%	0.0%	0.0%	0.3%	0.1%	0.0%	0.0%	0.0%
Other, Zone 1	0.4%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Total Zone 1	***9.2%***	***0.0%***	***0.1%***	***0.3%***	***0.1%***	***0.0%***	***0.0%***	***0.0%***
Zone 2								
Other, Zone 2	0.0%	0.5%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%
Total Zone 2	***0.0%***	***0.5%***	***0.0%***	***0.1%***	***0.0%***	***0.0%***	***0.0%***	***0.0%***
Zone 3								
Flint Town Centre (including Flintshire Retail Park)	13.0%	1.5%	31.2%	0.5%	1.8%	0.9%	1.0%	0.3%
Other, Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total Zone 3	***13.0%***	***1.5%***	***31.2%***	***0.5%***	***1.8%***	***0.9%***	***1.0%***	***0.3%***
Zone 4								
Mold Town Centre	4.0%	19.6%	2.9%	32.7%	16.3%	8.7%	0.9%	1.8%
Other Zone 4	0.2%	0.2%	0.0%	0.5%	0.1%	0.0%	0.1%	0.0%
Total Zone 4	***4.2%***	***19.8%***	***2.9%***	***33.2%***	***16.3%***	***8.7%***	***1.0%***	***1.9%***
Zone 5								
Other, Zone 5	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%
Total Zone 5	***0.0%***	***0.0%***	***0.0%***	***0.0%***	***1.1%***	***0.0%***	***0.0%***	***0.0%***
Zone 6								
Buckley Town Centre	0.0%	1.6%	0.0%	0.4%	0.7%	7.5%	0.1%	0.5%
Other, Zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total Zone 6	***0.0%***	***1.6%***	***0.0%***	***0.4%***	***0.7%***	***7.5%***	***0.1%***	***0.5%***
Zone 7								
Queensferry District Centre	0.8%	1.2%	2.0%	0.8%	0.8%	7.4%	9.1%	4.2%
Shotton Town Centre	0.0%	0.0%	0.3%	0.0%	0.0%	0.5%	2.5%	0.6%
Connah's Quay District Centre	0.5%	0.7%	1.3%	0.6%	0.2%	0.5%	4.5%	0.0%
Deeside Retail Park, Shotton	0.2%	0.9%	0.9%	2.3%	0.2%	0.5%	1.1%	0.4%
Other, Zone 7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
Total Zone 7	***1.5%***	***2.7%***	***4.6%***	***3.7%***	***1.2%***	***8.9%***	***17.4%***	***5.2%***
Zone 8								
Broughton Shopping Park	12.2%	21.4%	16.3%	16.6%	18.4%	26.9%	27.4%	27.8%
Saltney District Centre	0.1%	0.2%	0.2%	0.4%	0.1%	0.1%	0.3%	2.2%
Other, Zone 8	1.6%	0.4%	0.3%	0.8%	0.4%	0.4%	0.5%	0.5%
Total Zone 8	***13.9%***	***21.9%***	***16.8%***	***17.8%***	***18.9%***	***27.3%***	***28.3%***	***30.5%***
TOTAL INSIDE STUDY AREA	**41.8%**	**48.1%**	**55.6%**	**56.1%**	**40.1%**	**53.4%**	**47.7%**	**38.4%**
OUTSIDE STUDY AREA								
Cheshire West and Chester								
Chester City Centre	12.6%	20.9%	22.6%	14.5%	12.1%	19.2%	16.1%	19.7%
Greyhound/Chester/Deva Retail Parks, Chester	10.4%	19.4%	13.8%	16.2%	8.4%	18.2%	28.9%	27.4%
Cheshire Oaks Designer Outlet	3.4%	5.2%	2.9%	3.0%	3.9%	2.8%	4.1%	4.9%
Other, Cheshire West and Chester	1.2%	0.5%	1.1%	0.5%	0.3%	1.1%	0.6%	1.5%
Total Cheshire West and Chester	***27.6%***	***46.0%***	***40.4%***	***34.1%***	***24.7%***	***41.2%***	***49.8%***	***53.6%***
Wrexham								
Wrexham Town Centre	0.4%	0.9%	0.4%	3.0%	18.8%	2.1%	0.1%	1.4%
Plas Coch/Berse Road Retail Parks, Wrexham	0.0%	0.1%	0.0%	0.6%	9.3%	0.4%	0.0%	0.8%
Other, Wrexham	0.0%	0.3%	0.0%	0.1%	2.0%	0.1%	0.0%	0.4%
Total Wrexham	***0.4%***	***1.4%***	***0.4%***	***3.6%***	***30.2%***	***2.7%***	***0.1%***	***2.6%***
Denbighshire								
Prestatyn Town Centre	14.7%	0.1%	0.4%	0.7%	0.3%	0.0%	0.1%	0.0%
Rhyl Town Centre	3.9%	0.0%	0.4%	0.5%	0.2%	0.0%	0.0%	0.1%
Clwyd Retail Park, Rhyl	6.4%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.3%
Other, Denbighshire	1.0%	0.6%	0.4%	0.9%	1.3%	0.6%	0.0%	0.0%
Total Denbighshire	***25.9%***	***0.7%***	***1.1%***	***3.3%***	***1.8%***	***0.6%***	***0.1%***	***0.4%***
Other								
Liverpool City Centre	1.2%	0.3%	0.5%	0.7%	1.0%	0.4%	0.8%	1.4%
Other, Outside Study Area	3.1%	3.6%	2.0%	2.2%	2.2%	1.7%	1.5%	3.7%
Total Other	***4.3%***	***3.8%***	***2.4%***	***2.9%***	***3.2%***	***2.1%***	***2.3%***	***5.1%***
TOTAL OUTSIDE STUDY AREA	**58.2%**	**51.9%**	**44.4%**	**43.9%**	**59.9%**	**46.6%**	**52.3%**	**61.6%**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Spreadsheet 6 - Comparison Goods Spending Patterns in 2018 Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total (1)	All Zones Market Share (2)
	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
INSIDE STUDY AREA										
Zone 1										
Holywell Town Centre	5.97	0.01	0.02	0.16	0.04	0.00	0.00	0.00	6.21	1.4%
Other, Zone 1	0.29	0.00	0.02	0.00	0.00	0.00	0.00	0.00	0.31	0.1%
Total Zone 1	***6.26***	***0.01***	***0.04***	***0.16***	***0.04***	***0.00***	***0.00***	***0.00***	***6.52***	***1.4%***
Zone 2										
Other, Zone 2	0.00	0.24	0.00	0.04	0.00	0.01	0.00	0.00	***0.29***	0.1%
Total Zone 2	***0.00***	***0.24***	***0.00***	***0.04***	***0.00***	***0.01***	***0.00***	***0.00***	***0.29***	***0.1%***
Zone 3										
Flint Town Centre (including Flintshire Retail Park)	8.88	0.73	10.64	0.23	0.79	0.46	0.65	0.25	22.63	5.0%
Other, Zone 3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Zone 3	***8.88***	***0.73***	***10.64***	***0.23***	***0.79***	***0.46***	***0.65***	***0.25***	***22.63***	***5.0%***
Zone 4										
Mold Town Centre	2.73	9.17	0.98	15.19	7.29	4.25	0.56	1.79	41.96	9.3%
Other Zone 4	0.10	0.09	0.00	0.23	0.03	0.01	0.06	0.02	0.55	0.1%
Total Zone 4	***2.83***	***9.27***	***0.98***	***15.42***	***7.32***	***4.26***	***0.62***	***1.81***	***42.51***	***9.4%***
Zone 5										
Other, Zone 5	0.00	0.00	0.00	0.00	0.48	0.00	0.00	0.00	0.48	0.1%
Total Zone 5	***0.00***	***0.00***	***0.00***	***0.00***	***0.48***	***0.00***	***0.00***	***0.00***	***0.48***	***0.1%***
Zone 6										
Buckley Town Centre	0.00	0.74	0.00	0.19	0.31	3.69	0.04	0.53	5.50	1.2%
Other, Zone 6	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Total Zone 6	***0.00***	***0.74***	***0.00***	***0.19***	***0.31***	***3.69***	***0.04***	***0.53***	***5.50***	***1.2%***
Zone 7										
Queensferry District Centre	0.54	0.55	0.70	0.39	0.36	3.63	5.88	4.03	16.07	3.6%
Shotton Town Centre	0.00	0.01	0.10	0.01	0.00	0.27	1.63	0.62	2.63	0.6%
Connah's Quay District Centre	0.31	0.31	0.46	0.26	0.07	0.22	2.88	0.00	4.52	1.0%
Deeside Retail Park, Shotton	0.13	0.42	0.31	1.06	0.10	0.24	0.74	0.36	3.35	0.7%
Other, Zone 7	0.00	0.00	0.00	0.00	0.00	0.00	0.07	0.08	0.15	0.0%
Total Zone 7	***0.99***	***1.29***	***1.57***	***1.71***	***0.53***	***4.36***	***11.19***	***5.09***	***26.72***	***5.9%***
Zone 8										
Broughton Shopping Park	8.32	10.05	5.54	7.71	8.24	13.15	17.65	26.97	97.63	21.7%
Saltney District Centre	0.05	0.07	0.06	0.18	0.05	0.04	0.20	2.11	2.77	0.6%
Other, Zone 8	1.09	0.16	0.10	0.37	0.19	0.17	0.34	0.51	2.95	0.7%
Total Zone 8	***9.47***	***10.29***	***5.71***	***8.26***	***8.49***	***13.36***	***18.19***	***29.59***	***103.36***	***22.9%***
TOTAL INSIDE STUDY AREA	**28.44**	**22.56**	**18.94**	**26.02**	**17.96**	**26.14**	**30.68**	**37.26**	**207.99**	**46.2%**
OUTSIDE STUDY AREA										
Cheshire West and Chester										
Chester City Centre	8.56	9.82	7.70	6.71	5.43	9.41	10.38	19.10	77.11	17.1%
Greyhound/Chester/Deva Retail Parks, Chester	7.10	9.08	4.72	7.50	3.75	8.88	18.61	26.57	86.21	19.1%
Other, Cheshire West and Chester	0.83	0.23	0.36	0.23	0.16	0.52	0.42	1.48	4.23	0.9%
Total Cheshire West and Chester	**18.78**	**21.56**	**13.77**	**15.83**	**11.07**	**20.16**	**32.06**	**51.90**	**185.14**	***41.1%***
Wrexham										
Wrexham Town Centre	0.26	0.43	0.14	1.39	8.43	1.05	0.04	1.37	13.12	2.9%
Plas Coch/Berse Road Retail Parks, Wrexham	0.00	0.06	0.00	0.26	4.17	0.21	0.00	0.74	5.43	1.2%
Other, Wrexham	0.00	0.16	0.00	0.03	0.91	0.04	0.03	0.37	1.55	0.3%
Total Wrexham	**0.26**	**0.65**	**0.14**	**1.68**	**13.51**	**1.30**	**0.07**	**2.48**	***20.10***	***4.5%***
Denbighshire										
Prestatyn Town Centre	10.02	0.06	0.12	0.32	0.14	0.00	0.06	0.00	*10.72*	*2.4%*
Rhyl Town Centre	2.66	0.00	0.13	0.23	0.09	0.00	0.00	0.09	*3.20*	*0.7%*
Clwyd Retail Park, Rhyl	4.33	0.00	0.00	0.56	0.00	0.00	0.01	0.27	*5.17*	*1.1%*
Other, Denbighshire	0.65	0.27	0.13	0.41	0.59	0.28	0.00	0.00	*2.32*	*0.5%*
Total Denbighshire	**17.66**	**0.33**	**0.38**	**1.51**	**0.82**	**0.28**	**0.07**	**0.36**	***21.41***	***4.8%***
Other										
Liverpool City Centre	0.84	0.12	0.16	0.33	0.44	0.21	0.49	1.37	3.94	0.9%
Other, Outside Study Area	2.13	1.67	0.68	1.02	1.00	0.83	0.96	3.54	11.83	2.6%
Total Other	***2.96***	***1.80***	***0.83***	***1.35***	***1.44***	***1.04***	***1.45***	***4.91***	***15.77***	***3.5%***
TOTAL OUTSIDE STUDY AREA	**39.67**	**24.34**	**15.13**	**20.37**	**26.84**	**22.78**	**33.64**	**59.66**	**242.43**	**53.8%**
TOTAL	**68.11**	**46.90**	**34.07**	**46.39**	**44.81**	**48.92**	**64.33**	**96.91**	**450.43**	**100.0%**

NOTES:

(1) The spending patterns are calculated by multiplying the total comparison goods expenditure in 2018 (Spreadsheet 4) by the market share (Spreadsheet 5). The figures in the 'Total' column are the sum of the expenditure attracted to each centre/store from each zone.

(2) The 'All Zones Market Share' is calculated by dividing the total expenditure retained by each centre/store by the total expenditure in the study area.

Spreadsheet 7 - Comparison Retail Commitments

	Planning Application Ref. No.	Net floorspace gain (1) sqm	Sales density in opening year (2) £/sqm	Turnover from study area in opening year (3) £m
Assumed opening by 2022:				
Saltney Retail Park	49292	3,520	5,000	17.16
Flint Retail Park (4)	57263	1,444	5,000	7.04
Denbigh Road, Mold (5)	44838	483	4,000	1.88
Sub-total (2022)		**5,447**	**-**	**26.08**

NOTES:

(1) Net retail floorspace gain taken from planning application material or based on PBA estimate. PBA estimates based on gross:net floorspace split of 80%.

(2) Sales density based on PBA estimate to reflect average of main comparison goods retailers and to reflect nature and location of proposed development.

(3) Assumed that 2.5% of turnover is inflow from outside of study area.

(4) Planning permission 57263 has no restrictions on Class A1 use and we have therefore assumed a 50/50 split of gross floorspace between comparison and convenience retailers.

(5) Planning permission 44838 has been partly implemented with the larger unit now occupied by Lidl. The permission restricted the use of the smaller unit such that it could not be used for the sale of food, clothing and footwear, pharmaceutical goods, books and recorded media. This is reflected in the assumed sales density.

Spreadsheet 8 - Summary of Capacity for Comparison Goods Retail Floorspace (Constant Retention Rate)

	2018	2022	2026	2030	Cumulative Change 2018-2030	Incremental Change 2018-22	2022-26	2026-30
Total Population and Expenditure (1)								
A. Total study area population (persons)	164,029	165,123	165,901	166,215	2,186	1,094	778	314
B. Total comparison goods expenditure (excluding SFT) (£m)	450.4	494.1	557.8	630.6	180.2	43.7	63.7	72.8
Retained Expenditure (2)								
C. Comparison goods expenditure retained in study area (%)	*46.2%*	*46.2%*	*46.2%*	*46.2%*				
D. Comparison goods expenditure retained in study area (£m)	208.0	228.2	257.6	291.2	83.2	20.2	29.4	33.6
Inflow (3)								
E. Inflow to study area at 2.5% (£m)	5.2	5.7	6.4	7.3	2.1	0.5	0.7	0.8
F. Growth in Inflow (£m)	0.0	0.5	0.7	0.8	0.8	0.5	0.2	0.1
Total Turnover in Study Area (4)								
G. Baseline comparison goods turnover of stores in study area (£m)	213.2	213.2	213.2	213.2				
Initial Surplus (5)								
H. Growth in retained comparison goods expenditure (£m)	0.0	15.5	45.1	78.8	45.1	15.5	29.6	33.7
Claims on Expenditure (6)								
I. Sales density growth in existing stores (£m)	0.0	13.1	27.0	41.7	41.7	13.1	13.9	14.7
J. Turnover from commitments	0.0	26.1	28.1	34.1	28.1	26.1	2.0	6.0
K. Total claims on expenditure (£m)	0.0	39.2	55.1	75.8	55.1	39.2	15.9	20.7
L. Residual expenditure (£m) (7)	0.0	-23.7	-10.0	3.0	-10.0	-23.7	13.7	13.0
Comparison Retail Floorspace Requirements (8)								
M. Assumed sales density (£/sq.m)	5,000	5,307	5,632	5,978	978			
N. Floorspace requirement (net sq.m)	0	-4,463	-1,767	508	508	-4,463	2,696	2,275
O. Floorspace requirement (gross sq.m)	0	-5,579	-2,209	635	635	-5,579	3,370	2,844

NOTES:

(1) Total population of the study area taken from Spreadsheet 2. Total comparison goods expenditure (excluding SFT) taken from Spreadsheet 4.

(2) Retained expenditure - proportion of all comparison goods expenditure spent at retail facilities within the study area, taken from Spreadsheet 6. This is held constant throughout the assessment period.

(3) Inflow - additional comparison goods expenditure drawn to retail facilities within the study area from residents outside the study area. Assumed to be 2.5% of retained expenditure.

(4) Total comparison goods turnover of stores within study area in the base year taken from Spreadsheet 6.

(5) Initial surplus - total growth in retained comparison goods expenditure before claims on expenditure.

(6) Claims on expenditure - the turnover of commitments for new comparison retail floorspace in the study area taken from Spreadsheet 7. An allowance for growth in the turnover of both existing stores and committed comparison retail floorspace based on the assumption that sales densities will grow by an average of 1.5% per annum throughout the study period.

(7) Residual expenditure - the product of deducting claims on expenditure from the initial surplus.

(8) Comparison retail floorspace requirements calculated by converting the residual expenditure using a sales density estimate of £5,000/sq.m in 2016, increased by 1.5 per cent per annum to account for anticipated sales density growth. 70% net to gross ratio assumed.

(9) All monetary figures are rounded to one decimal place and all floorsapce figures are rounded to the nearest square metre.

All monetary values are held constant at 2016 prices.