RETAIL STATEMENT

ON BEHALF OF

BAE SYSTEMS

DARGAVEL VILLAGE, BISHOPTON MIXED USE DEVELOPMENT IN THE VILLAGE CENTRE

MAY 2013

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APPENDICES

1.0 INTRODUCTION

1.1 This Retail Statement is prepared in support of an application for planning permission in principle for mixed use development at the core of Dargavel Village comprising a food retail store of up to 4,000sqm gross floorspace, petrol filling station, individual retail/commercial units, library/learning resource centre, residential, park and ride, and open space within the Community Growth Area planned at Bishopton. Full details of the application are contained within a Planning Statement lodged with the application.

1.2 The Glasgow and Clyde Valley Joint Structure Plan 2006 (structure plan) estimated that capacity for approximately 19,000 additional houses needed to be identified for the period to 2018. The structure plan noted that although, on past experience, new brownfield opportunities will emerge to meet part of this demand, it is considered necessary to make provision for new areas of urban expansion. These areas are referred to as Community Growth Areas.

1.3 Bishopton is identified as a Community Growth Area in the structure plan with an indicative capacity of 2,500 houses. The structure plan states that Community Growth Areas are to be developed in accordance with master plans approved by the relevant planning authorities. The requirements for supporting infrastructure and services shall be established through these master plans and, where necessary, through legally binding agreements. These requirements include:

> *“access to adequate social and community facilities, including educational, religious and cultural, and if necessary a neighbourhood centre.”*

1.4 The Royal Ordance Factory (ROF) site at Bishopton is identified as the Community Growth Area for Bishopton. The Renfrewshire Local Plan, adopted in March 2006, identifies the majority of the site as being covered by Policy SS2 ‘Royal Ordnance Bishopton’, an important substantial development opportunity site.

1.5 Planning permission in principle was issued for the Community Growth Area in August 2009, following the resolution to grant in December 2008, subject to conditions and a legal agreement. The planning permission in principle describes the nature of the proposals as “*Regeneration of the site to form a mixed use community growth area*”. The proposals are further described as comprising “*residential development of some 2500 houses; 150,000 square metres of commercial/employment related floorspace with a business park; a community woodland park; recreation and open space area; community facilities; local services and retail and education provision; infrastructure works including a motorway junction and northern and southern link roads; improvements to station approach and park and ride facilities; and the retention of the existing BAe environment test facility”.*

1.6 In the report to Renfrewshire Council on the application on the issue of the town centre uses, the Director of Planning and Transport referred to Policy R1 of the Renfrewshire Local Plan, and stated:

> "*This policy requires that the Council will direct proposals for town centre uses to the strategic and secondary centres except those required to meet a local neighbourhood demand. I (the Director of Planning and Transport) consider that for the establishment of a successful, sustainable and integrated community growth area a range of town centre uses are required to support the new population. However, these would require to remain at a level that does not impact on the vitalities or viabilities of other centres and I am satisfied that subject to the imposition of a condition regulating this aspect, the proposal would remain in accordance with the terms of this policy".*

1.7 Condition 1 of the permission states that:

> *"The consent hereby approved shall comprise a maximum of 2500 residential units, 154,179 square metres of employment, commercial and community development of which 138,000 square metres shall be Industrial (Class 5)/Business (Class 4) floorspace, and local retail provision which shall not exceed 1000 square metres".*

1.8 Briefly stated the permission includes 'retail' as an approved use but it is limited by Condition 1 of the decision notice to no more than 1000 square metres. The report on the application however also states that: "*for the establishment of a successful, sustainable and integrated community growth area a range of town centre uses are required to support the new population*".

1.9 This Retail Statement considers the capacity for new retail development in a new village centre as part of the Community Growth Area, having regard to the need for a range of town centre uses that are required to support the new population, the scale of the current proposals and the potential impact on the vitality and viability of other centres. The Retail Statement provides a detailed assessment of the capacity for, and impact of, a food store of up to 4,000m^2 (gross).

1.10 The proposals for the village centre have been the subject of public consultation and discussions with the Community Liaison Group. A Pre-Application Public Consultation Statement is lodged with the planning application that describes the nature and extent of public consultation.

2.0 RETAIL CAPACITY

2.1 This section considers the current and potential future retail capacity in Bishopton to support existing and proposed new retail floorspace.

Population

2.2 The resident population of Bishopton, based on the 2001 Census is 5,157. The existing population has a very high proportion of owner occupied houses at 92% compared to the Scottish average of 63%, and car ownership at 89% compared to Scotland at 65%. A population profile from the 2001 Census is attached, Appendix A. Information from the 2011 Census for localities, such as Bishopton, will start to become available during the latter half of 2013.

2.3 The existing settlement of Bishopton is equivalent in size to towns such as Kelso (5,380), Alness (5,180), Dingwall (5,080) and Kinross (4,680). All of these towns have modern food stores with 2,000m^2 - 3,000m^2 sales area.

2.4 From the 2001 Census Bishopton has an average household size of 2.72 persons/household. Applying this ratio to the proposed community growth area of 2,500 houses, equates to an increase in population of 6,800. The total potential population estimate, following the development of the Community Growth Area, for Bishopton is therefore (5,157 + 6,800) 11,957.

2.5 With the Community Growth Area in place and occupied, the population of Bishopton, at approximately 11,957, is larger than traditional market towns such as Lanark (8,200), Haddington (8,600) and Cupar (8,800). These towns all have modern convenience stores of approximately 3,000m^2 – 3,500m^2 sales, and a wide range of other comparison and service outlets. That may be explained by the market town nature, and the large rural catchment of these towns.

2.6 The nearest large town to Bishopton is Erskine, it has a resident population of 15,347 based on the 2001 Census. Erskine has a Morrisons foodstore (4,000m^2) and an Aldi (1430m^2) in the Bridgewater Shopping Centre. There are a number of other retail and service outlets in the Bridgewater Shopping Centre, and other retail stores in local neighbourhood centres.

2.7 Other comparables, in terms of population, include Westhill (10,750) and Inverurie (10,970), both are in Aberdeenshire and both are close to Aberdeen. These towns support 2-3 large (4,000m^2 + sales) food stores and a large range of other retail outlets.

2.8 It is clear, in qualitative terms, that the range of town centre uses that are required to establish a successful, sustainable and integrated community growth area in Bishopton far exceed the current permission for 1,000m^2.

Expenditure

2.9 Using figures produced by the Glasgow and Clyde Valley Structure Plan, in its Technical Report (TR7/06) – Convenience and Comparison Shopping Capacity Assessments at 2011, the average expenditure per head on convenience goods in the Renfrew area, that includes Renfrew, Erskine and Bishopton, is £1,858/head and £3,279/head for comparison goods (at 2004 prices).

2.10 Applying these ratios to the existing and projected population in Bishopton;

Table 2.1
Bishopton – Available Expenditure

Population	Convenience Expenditure/Head (£)	Convenience Expenditure/Head Total (£m)	Comparison Expenditure/Head (£)	Comparison Expenditure/Head Total (£m)	Total Available Expenditure (£m)
Existing: 5,157	£1858	£9.6m	£3279	£16.9m	£26.5m
Projected: 11,957	£1858	£22.2m	£3279	£39.2m	£61.4m

(All at 2004 prices, consistent with Technical Report TR7/06)

There is clearly a substantial level of expenditure available to support existing local convenience food stores and potential for a significant increase of new retail floorspace in both convenience (food) and comparison sectors.

Existing Food Store Provision

2.11 The existing provision in Bishopton is restricted to relatively small convenience stores (Co-op, Costcutter, Key Store) that mainly provide for day to day top-up shopping. The Co-op store has recently been increased in size from 185m^2 (gross) to 500m^2 (gross) following the development of a new unit on a site south east of 24 Greenock Road, Bishopton.

2.12 Based on a review of the application drawings and on site observation it is estimated that the Co-op sales area extends to approximately 350m^2 (sales). The only other convenience stores are small and together are estimated to have a sales area of approximately 150m^2. The total convenience floorspace in Bishopton is estimated to be approximately 500m^2 (sales area)

2.13 A household survey of residents in Bishopton was undertaken in March 2012, by NEMS Market Research, to determine existing shopping patterns. A full copy of the report, including the results, conclusions, responses and sample questionnaire, is included in Appendix B. A brief summary of the key findings from the March survey is outlined below:

- Bishopton is a small settlement to the west of Glasgow and south of the M8. It consists of 1928 households with a total population of approximately 5,000.
- A household survey of residents was undertaken, using telephone interviews, in March 2012. Two hundred completed interviews were achieved from a random sample.
- Almost three quarters of residents undertake a main food and grocery shopping trip once a week. The big four operators: Morrisons, Asda, Tesco and Sainsbury's each have large stores within 20 minutes drivetime of Bishopton, and between them account for almost three-quarters (71%) of main shopping trips.
- Just over 8 out of 10 (83%) of households in Bishopton undertake 'top-up' food and grocery shopping. The convenience of local stores comes to the fore for top-up shopping with Costcutter in Bishopton accounting for 44% of such trips and other stores in Bishopton accounting for a further 9%.
- Bishopton stores also feature strongly for visits to other small shops to purchase food and groceries. Just over half (54%) of residents make such trips, they primarily visit Bishopton (64%) with the bulk of the remaining trips heading to Erskine.
- The average weekly household expenditure on food and groceries is £94.60, with over 70% of this going on main food shopping trips. This level of expenditure makes the Bishopton food and grocery market worth around £9.5 per annum.
- Around 19% of all food and grocery expenditure by residents is retained in the town, with the largest value share (39%) going to the immediate environs, which includes a 33% share going to the Morrisons in Erskine.
- Only an estimated 4% of non-food expenditure is retained in Bishopton, the bulk of which is on heath/beauty/chemist products.
- A tenth of non-food expenditure goes to special forms of trading (SFTs – online, TV and catalogue). The majority of the remaining expenditure heads east to two zones, with Braehead attracting the highest proportion of spend, and Glasgow centre and Paisley featuring strongly.
- Retail parks account for around a quarter of non-food expenditure.

- Car ownership in Bishopton is high at 88%. For the small minority without private transport, their shopping patterns do differ from their car owning counterparts. For food shopping, those without a car are more likely to visit Morrisons in Erskine and less likely to frequent the more distant main stores. The most notable impact on non-food shopping is that car owners are almost twice as likely to visit retail parks, compared with those relying on public transport or a lift from others.

2.14 At the time of the fieldwork in March 2012, the Co-op store in Bishopton was temporarily closed prior to re-opening in larger premises. Montagu Evans were concerned that this co-incidence of events had a potential impact on residents shopping patterns and instructed that supplementary interviews were undertaken. The supplementary work was completed and a Report Addendum issued in August 2012. A copy of the Report Addendum is included in Appendix C.

2.15 The Report Addendum concludes that during the temporary Co-op store closure much of the food and grocery expenditure was retained in Bishopton with an increase in patronage of the Costcutter. The updated survey of households demonstrates that the opening of the new Co-op retained the previous customer base, but also attracted new customers. The enhanced retail provision in Bishopton increased the retention of convenience goods expenditure in Bishopton by 5 percentage points, increasing the retention of expenditure from 19% to 24%, primarily by reclaiming a proportion of the leakage of expenditure to the Morrisons store at Erskine, reducing it from 33% to 28% of the total available expenditure in Bishopton.

2.16 The household survey confirms that there is a very large leakage of expenditure on main food shopping trips to stores outwith Bishopton. The vast majority (98%) of Bishopton residents undertake a main food and grocery shopping trip. Based on the Addendum Report, the top 5 destinations for main food and grocery shopping are:

Table 2.2
Top 5 Destinations for Main Food and Grocery Shopping

Store	% Share Visits
Morrisons, Erskine	50
Tesco Extra, Port Glasgow	9.5
Co-op, Bishopton	8.5
Asda, Phoenix Retail Park, Paisley	5.5
Sainsbury, Braehead	5.5

These stores represent 79% of the main food shopping trip over 70% of which goes to food stores outwith Bishopton.

2.17 Following the re-opening of the Co-op store in Bishopton, as noted above, only 24% of all expenditure on food and grocery shopping is retained in Bishopton. Based on an existing estimated expenditure in Bishopton of £9.6m, that equates to £2.3m retained and £7.3m leaking to other centres.

2.18 The location and size of the main foodstores used by Bishopton households, as identified in the household survey are listed below:

Table 2.3
Main Food Stores Used by Bishopton Households

Store	Location	Distance from Bishopton	Area Gross	Net
Morrisons	Erskine Town Centre	3 miles	4,000m^2	2,400m^2
Tesco Extra	Port Glasgow Town Centre	8 miles	10,200m^2	6,400m^2
Asda	Phoenix Retail Park, Paisley	8 miles	9,500m^2	5,600m^2
Sainsbury	Braehead Shopping Centre & Retail Park	7 miles	7,660m^2	4,800m^2

2.19 Bishopton and the centres in which the foodstores are located are shown in a plan, Appendix D, and described in more detail below:

- **Bishopton**

There are a range of retail and other services provided throughout Bishopton. This includes the new Co-op development that has a dry cleaners and take/away units. Other retail units include Costcutter, Key Store, chemist, newsagents, Post Office, Bank of Scotland, coffee shop, hairdressers, take-away restaurants, filling station and public houses. Other uses in the village include the library, health centre and nursery, community centre and tennis club.

- **Erskine Town Centre**

Erskine Town Centre is defined in the Renfrewshire Local Plan, it comprises the Bridgewater Shopping Centre and surrounding uses. The existing retail provision is based on a modern food store occupied by Morrisons (4,000m^2 gross), another large new retail unit (1430m^2 gross) occupied by ALDI and a parade of units opened in 1984 that include: a range of convenience stores (approximately 500m^2 gross), (Greggs, butchers), comparison (hardware), take away/restaurant, public house (Subway, ANI's Diner, Chinese, Whuppity Scourie), services (funeral directors, estate agents, laundrette, Ladbrokers, opticians, chemists, dentist, Bank of Scotland, solicitors). The town centre also includes a library, swimming pool and sports centre, medical centre, community centre, offices and small industrial units. The town centre is served by a surface level car park and public transport. The town centre has been very busy on all the days visited, that is obvious from the use of the car park and in the activity in the Morrisons store. The store appears to be trading well.

- **Port Glasgow Town Centre**

Port Glasgow is in Inverclyde Council area. The town centre is dominated by a new Tesco Extra store that has a gross area of 10,200m^2. The Tesco Extra offers a wide range of food and non food goods, a café and petrol filling station. The non food offer in the Tesco Extra store is extensive and includes clothing, electrical, homeware, books, cds. There is also an in store optician. The traditional town centre in Port Glasgow, based mainly on Princes Street, includes a wide variety of shops including Farmfoods, Iceland, Greggs, butcher, newsagents, as well as a range of other services; hairdressers, public houses, solicitors, estate agents and opticians. There are a number of civic uses in the town centre including the Town Hall, Churches, Salvation Army Hall. There is good pedestrian access between the Tesco Extra and the rest of the town centre. The Tesco Extra is served by a large surface level car park with taxi rank and public transport nearby. The Tesco Extra has been busy on the days of site visit.

- **Phoenix Retail Park, Paisley**

The Phoenix Retail Park is a large out-of-centre retailing centre that includes: Asda (described in the local plan as an out-of-centre superstore), retail warehouse parks and an area allocated to uses in the categories of leisure, business, hotel and car showrooms. The Asda is a large superstore, 9,500m^2 gross, with surface level car parking and a petrol filling station. There is a wide range of food and non-food goods available in store. The non food offer includes clothing, electrical, toys, homeware, books, music, dvds and seasonal goods. The Asda also includes the following in store: café, optician, pharmacy (with NHS prescription), photo shop and toilets. The Asda store is popular and it has been busy on all visits.

- **Braehead**

Braehead is a large retail and leisure destination that includes a covered shopping centre, retail warehousing, take-away restaurants and large free standing retail stores, including IKEA and Sainsbury. The centre is referred to as the 'Braehead Regional Shopping and Leisure Centre' in the adopted local plan. The centre is at present an out-of-centre retail location but the preferred strategy in the emerging LDP is to designate Braehead as a town centre and to support the expansion of the centre. The Sainsbury at Braehead is a large free standing superstore with surface level car parking and petrol filling station. The superstore includes a wide range of food and non food goods, and in store café. The non food goods include clothing, electrical, a large homeware area and seasonal goods. Braehead is a major shopping centre for the west side of Glasgow, and for residents in Renfrew and Inverclyde.

It is clear that there is an extensive range of food and non food facilities available to existing Bishopton residents with access to a car. Car ownership is high in Bishopton, at 88% of households The household survey confirms that the vast majority of households travel outwith Bishopton to undertake both the food and non food shopping trip. It is obvious that, unless there is improved provision within Bishopton, the existing patterns of shopping will continue and increase as the Community Growth Area is developed.

2.20 The household survey notes that for the minority of households without a car, their choice of shopping options is inevitably different due to both access via public transport and the transport of goods purchased.

2.21 The survey notes that those without a car spend similar amounts to their car owning counterparts on food and groceries within Bishopton itself, but their use of the main operator stores differ notably. The survey concludes that those without a car are more likely to use the Morrisons in Erskine and much less likely to frequent the other three more distant main stores; Asda in Paisley, Sainsbury in Braehead and Tesco Extra in Port Glasgow.

2.22 The survey comments that only a handful of respondents undertake their main food and shopping in Bishopton.

Capacity

2.23 The structure plan assessment of the retail capacity, for convenience goods, in the 2006 Structure Plan Alteration concluded that there was no surplus of turnover compared to expenditure and that there was no strategic requirement for additional floorspace in the Renfrew catchment area.

2.24 The structure plan assessment considered the Renfrew catchment area to include the towns of Erskine, Renfrew and Bishopton but it also included the turnover of the existing stores including those noted in the table above. It is clear that there is already substantial leakage of expenditure from Bishopton to the large food stores in Erskine, Port Glasgow, Paisley and Braehead.

2.25 There is a strong qualitative and quantitative case for increased and improved convenience retailing provision in Bishopton. There is a need at present but that is clearly re-enforced with the development of the Community Growth Area. It is not clear that the Structure Plan assessment of retail capacity included the increase in population that will occur as a result of the Community Growth Area in Bishopton.

2.26 Applying the figures used in the Structure Plan Technical Report TR7/06, on local convenience floorspace, of £4,000/m^2 (at 2004 prices) to the total existing convenience expenditure in Bishopton of £9.6m would equate to a floorspace requirement of approximately 2,400m^2 (sales) an increase of approximately 1,900m^2 (sales), above the current local provision. Looking ahead to when the Community Growth Area population is added gives an projected population base of 11,957 and an estimated available expenditure of £22.2m, that equates to a convenience floorspace requirement of 5,550m2 (sales), over 5,000m2 (sales) more than the current provision in Bishopton. Applying a 60% net to gross ratio to the net (sales) figure of 5,000m2 indicates a gross requirement of approximately 8,330m2 of new convenience floorspace.

2.27 There is a clear need for additional convenience (food) floorspace above the 1,000m^2 that is permitted in the original Community Growth Area permission to meet the current and future demand of residents in Bishopton. The household survey has confirmed that the vast majority of existing residents travel outwith Bishopton to undertake the main food shopping trip. As the Community Growth Area is developed, and the population grows, that leakage of expenditure will continue and increase unless a reasonably sized foodstore is developed in Bishopton.

2.28 The analysis has concentrated on convenience (food) goods but there is significant potential in terms of comparison goods expenditure. The existing available expenditure for comparison goods is £16.9m increasing to £39.2m with the Community Growth Area in place. There is very little local comparison sales floorspace. It is however expected that the majority of comparison goods spend will continue to be attracted to higher order centres. The household survey identifies Braehead, Glasgow and Paisley as the main shopping destinations for comparison goods. It is also significant that the stores identified as the current destinations for main food shopping trip include significant levels of floorspace devoted to the sale of non food/comparison goods. Looking at the potential provision of a reasonably sized food store in Bishopton, it would be appropriate to include for an element of comparison sales floorspace, at say 20% of the sales area.

3.0 RETAIL ASSESSMENT

Background

3.1 This Retail Statement is lodged as part of the documentation with an application for planning permission in principle for the village centre in the Community Growth Area. The village centre is an important component of the master plan for the whole Community Growth Area.

3.2 The retail capacity assessment has concluded that there is a need for a reasonably sized foodstore to serve existing Bishopton residents and the expanding population as the Community Growth Area develops. The current planning permission allows 1,000m2 retail floorspace. The retail capacity assessment estimates capacity for up to 5,000m^2 (sales) or 8,330m^2 (gross) convenience floorspace. There is also considerable capacity for new comparison floorspace but there is an expectation that residents (existing and new) will continue to look towards the higher order retail centres of Braehead, Glasgow and Paisley for the majority of their comparison goods shopping.

3.3 It is appropriate that the master plan addresses now the issue of the scale and nature of the retail provision in the village centre. Following discussion with the Council in respect of an earlier application for a store of up to 6,000m^2 (gross), now withdrawn, the proposal is for a food store of up to 4,000m^2 (gross).

3.4 The proposed foodstore is to serve both the existing and the expanding population. The rate of the expanding population will obviously depend upon market conditions, an indicative phasing plan is produced as part of the master plan, a copy of the plan and schedule is attached in Appendix D. The phases and indicative timing, together with an estimate of population growth (based on the Bishopton average of 2.72 persons/household) is set out below:

Table 3.1
Development Phase and Population Growth

Phase	Time Period	Housing Units	Population
1	2012-16	745	2,026
2	2017-18	388	1,055
3	2019-22	617	1,678
4	2023-25	444	1,208
5	2026-27	306	832
Total		2,500	6,800

3.5 As would be expected of such a significant number of houses the overall development of the Community Growth Area is expected to occur over a 15 year period. The provision of services, in particular services in the village centre including the food store cannot wait until the housing is completed, it has to be developed in conjunction with the early phases of development.

Policy

3.6 Consideration of the retail impact of the proposal has to be assessed against the development plan, that includes the Glasgow and the Clyde Valley Strategic Development Plan (SDP), which supercedes the Glasgow and Clyde Valley Joint Structure Plan 2006 and its associated alterations (structure plan), and the Renfrewshire Local Plan (local plan) adopted in March 2006.

3.7 The SDP is a new form of development plan. It is a strategic level document comprising a Spatial Vision of the city-region to 2035 along with a Spatial Development Strategy (SDS) to deliver that vision.

3.8 One of the fundamental principles of the SDP is that development proposals which do not have implications for the SDS will fall within the considerations of Local Development Plans and the development management process. It is stated that decisions on these matters are for the relevant local authority only.

3.9 The Community Growth Areas (CGA's), including Bishopton, are identified as one of the core components of the SDS, that includes economic activity and infrastructure.

3.10 On the subject of assessing demand/need the SDP states that for town centre and commercial development the relevant policy in Scottish Planning Policy should be followed.

3.11 The SDP acknowledges that the development of the CGA's has been impacted upon by the economic down turn but it is anticipated that rates of growth will recover to previous levels. The CGA's are recognised to provide an opportunity to create examples of low carbon sustainable communities.

3.12 The SDP identifies a network of strategic centres, their challenges and the range of interventions that will be required to support their long term roles and functions. The retail centres in this case which include: Bishopton and the town centres of Erskine and Port Glasgow are not identified as strategic centres. The out of centre location of Phoenix Retail Park is not included in the strategic network of strategic centres. Braehead is included in the network as a "commercial centre".

3.13 There is no guidance or policy basis outlined in the SDP in relation to assessing the effect of the proposal on existing town centres. The SDP refers to Scottish Planning Policy (SPP) as the basis of assessing demand/need.

3.14 SPP identifies town centres as a key element of the economic and social fabric of Scotland, acting as centres of employment and services for local communities and a focus for civic activity, and making an important contribution to sustainable economic growth.

3.15 SPP states that development plans should identify a network of centres, and explain the role of each centre in the network. As noted above in the context of the SDP only Braehead is identified as a strategic centre.

3.16 SPP is concerned that where a proposed retail development is contrary to the development plan, planning authorities should ensure that:

- The sequential approach to the site selection has been used;
- There is no unacceptable individual or cumulative impact on the vitality and viability of the identified network of centres;
- The proposal will help to meet qualitative and quantitative deficiencies identified in the development plan, and
- The proposal does not conflict with other significant objectives of the development plan or other relevant strategy.

SPP further states that a retail impact analysis should be undertaken where a retail development over 2,500 square metres gross floorspace outwith a defined town centre is proposed which is not in accordance with the development plan. The impact analysis should consider the relationship of the proposed development with the network of centres identified in the development plan. SPP states that in carrying out an analysis, a broad based approach should be adopted.

3.17 SPP on assessing impact relates to proposals that are contrary to the development plan, in this case the proposal for a new village centre is consistent with the development plan but there is a need to re-visit the scale of retail provision. Against that background the question of the sequential approach is addressed through the requirement in the masterplan to develop a new village centre as part of the CGA. Bishopton does not have a “town centre” but the local plan identifies an area around the Village Hall as “a primary area of focus for local facilities.” A traditional approach to the sequential test is therefore not appropriate in this case. There is a requirement for a village centre as part of the CGA masterplan. There is a desire for Bishopton and the CGA to be a sustainable community. The retail capacity exercise confirms that there is a need for a reasonably sized foodstore, in excess of the retail area approved in the original outline permission.

3.18 The question of retail impact is unusual in this case. The proposal is required to meet the needs of both the existing and the proposed population that will grow as the CGA is developed and occupied. The household survey provides excellent evidence of the current leakage of expenditure by existing residents on the main food shopping trip to stores and centres outwith Bishopton. That provides a base from which to assess the level of trade diversion from those stores/centres as a result of a new store being developed in Bishopton. The following provides a detailed assessment of the retail impact of a new food store of up to 4,000m^2 (gross).

3.19 A new food store of 4,000m^2 (gross) would equate to a sales area of 2,400m^2 (net), applying a standard gross to net ratio of 60% for food store developments. The convenience, or food, element would generally equate to 80% of the net sales area for stores of this size, that is 1,920m^2 (net convenience) with the balance of 20%, 480m^2 (net comparison) given over to non-food/comparison goods. The breakdown of the proposed store floorspace is shown in Table 3.2.

Table 3.2
Proposed Store - Floorspace

	Gross	Net (@60%)	Convenience (@80%)	Comparison (@20%)
Store	4,000m^2	2,400m^2	1,920m^2	480m^2

3.20 The average turnover estimate used in the strategic plan for assessing retail capacity on convenience goods in centres is £4,000/m^2 (at 2004 prices). The average of the national averages for the 4 largest food store operators (Asda, Sainsbury, Tesco, Morrisons) is £10,215/m^2 (at 2004 prices). The Co-op average is £5,183m^2 (2004 prices) and Asda are promoting a smaller store format in North Lanarkshire with a turnover ratio of £5,320/m^2, evidence that there is a range of potential turnover ratios, relative to the operator and the local catchment.

3.21 It is not considered appropriate to apply an average of the national average in this case. The potential for a new foodstore has to consider the available expenditure and the location and accessibility of competing stores. The example from North Lanarkshire illustrates the approach that national food store operations adopt in practice, where an assessment is made of the new store turnover, and not simply applying a national average. An operator is not identified for the proposed store in Bishopton. It is proposed to adopt a convenience turnover ratio of £6,000/m^2 (2004 prices) for the new store. This is below the average of the national averages but it is higher than the Co-op store average, it is higher than the recent Asda assessment, and it equates to the turnover estimate applied to the Morrisons store in Erskine. The comparison turnover ratio for Erskine town centre of £5,000/m^2 is adopted for the comparison floorspace in the new store. This is a robust assessment of the turnover potential of the new store. The turnover estimates for the new store are shown in Table 3.3.

Table 3.3 Proposed Store – Turnover Estimates			
Floorspace			
Type	Net Sales	Turnover Ratio	Turnover
Convenience	1,920m^2	£6,000/m	£11.52m
Comparison	480m^2	£5,000/m	£2.40m

Trade Draw

3.22 It is clear from the household survey that the existing retail provision, including the new Co-op store, does not retain the main food shopping trip for the majority of existing residents in Bishopton. The household survey concluded that 76% of the total available convenience expenditure in Bishopton is lost to other centres/stores. A new store, of sufficient scale to offer the range of goods to compete with the main food stores outwith Bishopton, should retain a high proportion of the leaked expenditure. This would be consistent with the Council's view that the retail provision should be of an appropriate scale to serve local needs.

3.23 Table 3.4 below provides an assessment of the most likely sources of trade draw to the new store.

Table 3.4 Proposed Store – Convenience Trade Draw					
1.	**Proposed Store**	- Convenience Turnover			£11.52m
2.	**Trade Draw**	- outwith catchment area (15%)			£1.7m
		- from catchment area (85%)			£9.8m
3.	**Existing Population**				
	Total Available Conv Exp (1)	Retained Conv Exp (2)	Leakage of Conv Exp (2)	Clawback @ 90%	
	£9.6m	£2.3m	£7.3m	£6.6m	£6.6m
4.	**Expenditure Balance**			**Deficit**	**£3.2m**
5.	**New Population**				
	Phase (3)	Housing (3)	Population (3)	Convenience Exp/Head (1)	Available Conv Exp
	1. 2012-16	745	2,026	£1,858	£3.76m
	2. 2016-18	388	1,055	£1,858	£1.96m
				Total	£5.72m

Notes:

(1) From Table 2.1

(2) From paragraph 2.17

(3) From Table 3.1

3.24 Looking at each step in the assessment in turn:

1. The convenience turnover of the proposed store is described above and detailed in Table 3.3.

2. The catchment area, based on the household survey, is very tightly drawn to only include the residents of Bishopton. There will always be a flow of trade into and out from any catchment area, you do not get "closed" retail catchment areas. Consistent with the designation as a 'local service centre' it is assumed that 85% of the new store trade will be drawn from the catchment area.

3. The calculation of the available expenditure from existing residents in the catchment area is taken from Table 2.1. The estimated retention of expenditure and the leakage of convenience expenditure is taken from the findings of the household shopping survey. Again consistent with the Council view that the new store should serve local needs it is assumed that 90% of the leaked expenditure would be clawed back by the new store. That assumption acknowledges that there will

continue to be leakage of expenditure but at a much reduced level after the new store is in place. The clawback of leakage, at £6.6m, will result in an impact on the stores/centres outwith Bishopton that currently benefit from the leaked expenditure. The assessment of impact is addressed later in this statement.

4. The expenditure balance is looking at the new store trade draw from the catchment area, at £9.8m, less the clawback of expenditure, at £6.6m, leaving a deficit of expenditure of £3.2m to support the new store. In this case the deficit is addressed by the growth in the resident population and the increase in available expenditure.

5. The phasing of housing and estimated population growth is taken from Table 3.1. This stage in the assessment demonstrates that the growth in expenditure in the phases up to 2016 of £3.76m and up to 2018 of £1.96m, giving total growth in 2016-18 of £5.72m, is more than sufficient to accommodate the proposed store.

Table 3.4 demonstrates that there is expenditure capacity in the combination of the clawback of existing expenditure and the growth associated with the early phases of residential development to support a new food store of up to 4,000m^2.

3.25 Table 3.5, below, considers the comparison floorspace element of the proposal.

Table 3.5
Proposed Store – Comparison Trade Draw

1.	**Proposed Store**	-	Comparison Turnover		£2.4m
2.	**Trade Draw**	-	outwith Catchment Area (15%)		£0.36m
		-	from Catchment Area (85%)		£2.04m
3.	**Existing Population**				
	Total Available Comparison Exp (1)	Retained Comp Exp (15%)			
	£22.2m	£3.33m			£3.33m
4.	**Expenditure Balance**			**Surplus**	**£1.29m**
5.	**New Population**				
	Phase (2)	Housing (2)	Population (2)	Comparison Exp/Head (1)	Available Comp Exp
	1. 2012-16	745	2,026	£3,279	£6.64m
	2. 2016 -18	388	1,055	£3,279	£3.46m

Notes:
(1) From Table 2.1
(2) From Table 3.1

In the case of the potential comparison turnover of the new store it is clear that there is a significant level of comparison expenditure available to support the new store. There is very little retention of comparison expenditure in the catchment area, as there is little current provision of comparison floorspace. The household survey estimates that only 4% of non-food expenditure is retained in Bishopton, the bulk of which is on health/beauty/chemist products. It will be the case that the majority of comparison expenditure will continue to be attracted to higher order retail centres; Braehead, Paisley, Glasgow. Given the levels of available expenditure that may occur with the new store in place, the trade diversion and thereby retail impact associated with the new stores comparison floorspace will be negligible.

Trade Diversion

3.26 The household survey identifies the existing shopping patterns of Bishopton residents, it confirms that there is substantial leakage of convenience spend to stores and centres outwith Bishopton. It is estimated that only 24% of all convenience expenditure (that includes both a very limited level of main food shopping and day to day top up shopping) is retained in Bishopton, after the opening of the new Co-op store. The remaining 76% is lost to other centres. It is assumed that a new store in Bishopton of sufficient scale to compete for the main food shopping trip, but also of a scale commensurate with the local service centre designation, would clawback a significant proportion of the leaked expenditure. The assessment of trade draw is set out in Tables 3.4 and 3.5. Table 3.6, below, considers in detail the trade diversion form individual stores/centres. The figures of % convenience spend are based on the household survey.

Table 3.6 Trade Diversion – Convenience			
Store/Centre	Convenience Spend from Bishopton Residents		Clawback (@90%)
	% (1)	£m	£m
Morrisons/Erskine	28	2.7	2.4
Tesco/Port Glasgow	9	0.9	0.8
Asda/Phoenix Retail Park	8	0.8	0.7
Sainsbury/Braehead	6	0.6	0.5
M+S/Kings Inch Road	3	0.3	0.3
M+S/High Street, Paisley	3	0.3	0.3
Asda/Clydebank	2	0.2	0.2
Aldi/Erskine	2	0.2	0.2
Tesco/East Lane, Paisley	2	0.2	0.2
Tesco/Renfrew	2	0.2	0.2
			(5.8)
Bishopton	24	2.3	-
Others/Internet	9	0.9	(0.8)
TOTAL	100	£9.6m	£6.6m

Notes:

(1) From Household Survey, share of convenience expenditure

Table 3.6 illustrates that there are a large number of stores/centres that benefit from convenience expenditure from Bishopton residents. The individual levels of trade diversion are very small across the range of stores/centres, the only significant level of diversion relates to the Morrisons store in Erskine.

3.27 Discussions with the Council have confirmed that the Council are concerned about the potential impact on Erskine town centre. The trade diversion assessment in Table 3.6, based on the household survey, confirms that the impact on the other stores/centres is negligible. The impact on Erskine town centre is addressed below.

Retail Impact

3.28 The existing floorspace and total turnover of Erskine town centre is outlined in Table 3.7.

Table 3.7 Erskine Town Centre				
	Floorspace		Turnover Ratio (2)	Turnover
	Gross	Net	£/m²	£m
Convenience				
Morrisons	4000	2400	6000	14.4
Aldi	1430	1144 (1)	4000	4.6
Other	500	300	4000	1.2
Comparison	500	300	5000	1.5
Total				£21.7m

Notes:

(1) The normal gross to net ratio of 60% is adjusted to 80% for Aldi reflecting the particular nature and operation of the operator.

(2) The turnover ratios are derived from the Technical Report TR7/06, and are at 2004 prices.

3.29 The policy test in Scottish Planning Policy and the development plan in planning terms is not the impact on individual stores but the impact on the vitality and viability of the town centre as a whole. Erskine town centre is noted to be a vibrant and successful town centre. There has been only one vacancy in recent years, the car park is very often close to full, the Morrison store appears to trade well, it has been busy on the numerous site visits on different days and at different times of day. Erskine has a resident population of approximately 15,000 and the town centre is the main focus for retail expenditure and other public service facilities.

3.30 A new store in Bishopton would have an impact on Erskine town centre. Table 3.8, below, indicates an impact of 11.2%. The impact occurs because residents in Bishopton do not have a store offering an alternative for the main food shopping trip. Given the obvious strength of Erskine town centre, its own resident population and range of retail and other service provision, it is considered that a proposed store of up to 4,000m^2 (gross) in Bishopton would not undermine the vitality and viability of Erskine town centre.

Table 3.8 Retail Impact			
Store/Centre	Store/Centre Turnover (1) £m	Trade Diversion (2) £m	Impact %
Erskine Town Centre	21.7 (1)	2.42	11.2
Notes: **(1) From Retail Statement, Table 3.3** **(2) From Table 5, Morrison, Erskine (£2.4m) + Aldi, Erskine (£0.2m)**			

3.31 The predicted impact on Erskine town centre will in any event be temporary. As the population in Bishopton increases it is accepted that there will continue to be a degree of leakage of expenditure and that Erskine town centre will receive the greatest share. By 2018 the available expenditure is expected to increase by £5.72m. Based on the turnover estimates the proposed store in Bishopton would only take £3.2m of that leaving over £2.5m available for either an increase in the turnover of the new Bishopton store or as leakage to other centres, sufficient to effectively mitigate the estimated £2.4m trade diversion from Erskine town centre.

3.32 The trade diversion assessment assumes that the existing 24% retention of expenditure in Bishopton is maintained. That is assumed because there is so little main food shopping currently undertaken in Bishopton and therefore little potential diversion to a new food store. The survey evidence is clear that the vast majority of the retained convenience expenditure is on top-up shopping, not the main food shopping trip. The Co-op in Bishopton will continue to play an important role in the provision of top-up shopping, and for the few that find it more convenient for main food shopping. As the CGA develops and new residents appear the Co-op may well benefit from an increase in its top-up shopping function. The existing retail provision in Bishopton, including the Co-op, is most likely to see significant benefits from the retention of the main food shopping trip related to the new store, the increase in housing and population, and the increase in the level of top-up shopping.

3.33 It is also significant in terms of the development plan policy test that Erskine is not a strategic centre in the SDP, there are no strategic concerns in relation to the impact of the proposal.

3.34 The local plan pre-dates the SDP but it broadly applies the same principles in relation to town centres and retail provision. The local plan notes that there is an existing network of centres, with different roles and functions depending on size and locations. The local plan confirms that Bishopton is not a strategic town centre. Bishopton is identified as one of a number of secondary centres, that: *"have more localised catchment areas and thereby provide a more restricted day to day range of goods and* *services."* The description in the local plan is consistent with the evidence from the household survey. The local plan notes that: *" the change in shopping patterns and greater mobility of modern society is putting pressure on these centres, but the importance the Council gives to their prosperity is expressed in the policies set down to foster their future well-being".*

3.35 The local plan recognises that*: " the secondary centres perform an important role as a focus for the surrounding communities, and it is important to support those centres by directing facilities to meet local needs to the secondary centres."* Bishopton is described as follows in the local plan:

> *"The Centre has been defined as the area around the Village Hall, at the junction of Old Greenock Road and Greenock Road. Shopping and Community facilities are dispersed to a number of locations, making it more difficult to define a centre as such. It is considered that the area chosen represents a primary area of focus for local facilities."*

Policy R8 relates to Secondary Centres, it states:

> *" The Council will direct proposals for shopping and other Town Centre uses to meet localised needs to the secondary centres identified on the Proposals Map."*

It is clear that the local plan describes Bishopton as it is now and not as it will be when the CGA is fully developed. The new village centre is part of the CGA, the inclusion of a reasonably sized foodstore will benefit both the existing and the proposed new population.

Conclusion

3.36 The proposal is required to meet the localised needs of Bishopton and the CGA, as it develops and the population grows. There is a local need now that is evident from the leakage of expenditure identified by the household survey.

3.37 It is concluded that the proposal does not raise any strategic concerns. It can also be reasonably concluded that the proposal is consistent with the local plan, in as much as the retail policies in the local plan provide a basis for any assessment of a new village centre proposed as an integral part of the CGA.

3.38 The retail capacity assessment confirms that there is a need for much larger retail provision in Bishopton than is provided for in the existing planning permission. It is also clear that there is a qualitative need for a reasonably sized food store, to contribute towards the low carbon sustainable community that is envisaged.

3.39 The levels of impact that the proposal would have relate to the extent that existing expenditure leakage is retained, resulting in de minimus levels of impact on Braehead, Phoenix Retail Park and Port Glasgow and a level of impact on Erskine that would not adversely affect the vitality and viability of the town centre.

3.40 It is appropriate that the issue of the scale and nature of the retail provision in the new village centre is addressed now. Although the population in the Community Growth Area will take some time to grow, the infrastructure, shape, design and scale of the integral elements of the village centre have to be planned and developed in the early phases of the overall scheme.

Montagu Evans LLP
May 2013

Appendix A

Bishopton Population Profile 2001 Census

Comparative Population Profile: Bishopton Locality Scotland

Interesting Facts	Bishopton	Scotland
Median Age - Male	39.00	37.00
Median Age - Female	41.00	39.00
Number of males per female - under 25	1.13	1.04
Number of males per female - 25 or over	0.94	0.88
Percentage of households where not all persons are in the same religion category	29.13	23.76
Percentage of households where not all persons are in the same ethnic category	0.26	0.97
Percentage of households where not all persons are in the same country of birth category	12.72	13.49

Sex	Bishopton	Scotland
Total resident population	5,157	5,062,011
- % Males	49.89	48.05
- % Females	50.11	51.95

Age	Bishopton	Scotland
Total resident population	5,157	5,062,011
- % 0-4 years old	4.63	5.47
- % 5-15 years old	14.56	13.73
- % 16-29 years old	16.64	17.46
- % 30-44 years old	22.45	22.97
- % 45-59 years old	26.49	19.29
- % 60-74 years old	11.19	13.98
- % 75 and over	4.03	7.09
Total resident population	5,157	5,062,011
- % under 16	19.20	19.20
- % 16-pensionable age	67.99	62.19
- % pensionable age and over	12.82	18.61

Marital Status	Bishopton	Scotland
Total resident population aged 16+	4,167	4,089,946
- % Single (never married)	24.26	30.55
- % Married (first marriage)	60.91	44.27
- % Re-married	4.13	5.52
- % Separated (but still legally married)	2.06	3.57
- % Divorced	3.19	7.02
- % Widowed	5.45	9.06

Resident Type	Bishopton	Scotland
Total resident population	5,157	5,062,011
- % People resident in households	100.00	98.30
- % People resident in communal establishments	0.00	1.70

Country of Birth	Bishopton	Scotland
Total resident population	5,157	5,062,011
- % Scotland (inc UK part not specified)	93.21	87.15
- % England	3.94	8.08
- % Wales	0.25	0.33
- % Northern Ireland	0.58	0.66
- % Ireland (inc. part not specified)	0.41	0.43
- % Rest of Europe	0.47	1.10
- % Elsewhere	1.14	2.25

Gaelic	Bishopton	Scotland
Total resident population	5,157	5,062,011
- % Speaking Gaelic	0.89	1.16
- Of those speaking Gaelic % born outside Scotland	0.00	8.27

Appendix B

Household Survey
March 2012

NEMS

NEMS market research
22-23 Manor Way
Belasis Hall Technology Park
Billingham
TS23 4HN
Tel 01642 37 33 55
www.nemsmr.co.uk

Bishopton Retail Study

for

Montagu Evans

March 2012

Job Ref: 210212

Table of Contents

Management Summary

- Bishopton is a small settlement to the west of Glasgow and south of the M8. It consists of 1928 households with a total population of approximately 5,000.
- A household survey of residents was undertaken, using telephone interviews, in March 2012. Two hundred completed interviews were achieved from a random sample.
- Almost three quarters of residents undertake a main food and grocery shopping trip once a week. The big four operators: Morrisons, Asda, Tesco and Sainsbury's each have large stores within 20 minute drivetime of Bishopton, and between them account for almost three-quarters (71%) of main shopping trips.
- Just over 8 out of 10 (83%) of households in Bishopton undertake 'top-up' food and grocery shopping. The convenience of local stores comes to the fore for top-up shopping with the Costcutter in Bishopton accounting for 44% of such trips and other stores in Bishopton accounting for a further 9%.
- Bishopton stores also feature strongly for visits to other small shops to purchase food and groceries. Just over half (54%) of residents make such trips, they primarily visit Bishopton (64%) with the bulk on the remaining trips heading to Erskine.
- The average weekly household expenditure on food and groceries is £94.60, with over 70% of this going on main food shopping trips. This level of expenditure makes the Bishopton food and grocery market worth around £9.5m per annum.
- Around 19% of all food and grocery expenditure by residents is retained in the town, with the largest value share (39%) going to the immediate environs, which includes a 33% share going to the Morrisons in Erskine.
- Only an estimated 4% of non-food expenditure is retained in Bishopton, the bulk of which is on health/beauty/chemist products.
- A tenth of non-food expenditure goes to special forms of trading (SFTs – online, TV and catalogue). The majority of the remaining expenditure heads east to two zones, with Braehead attracting the highest proportion of spend, and Glasgow centre and Paisley featuring strongly.
- Retail parks account for around a quarter of non-food expenditure.

- Car ownership in Bishopton is high at 88%. For the small minority without private transport, their shopping patterns do differ from their car owning counterparts. For food shopping, those without a car are more likely to visit Morrisons in Erskine and less likely to frequent the more distant main stores. The most notable impact on non-food shopping is that car owners are almost twice as likely to visit retail parks, compared with those relying on public transport or a lift from others.

Introduction

1.1 Research Background & Objectives

Bishopton is a small settlement to the west of Glasgow and south of the M8. It consists of 1928 households with a total population of approximately 5,000.

This survey is amongst residents of Bishopton to assess shopping habits for main food and grocery shopping, top-up shopping and non-food shopping.

1.2 Research Methodology

A total of 200 telephone interviews were conducted between Thursday 1st March 2012 and Saturday 10th March 2012. Interviews were conducted using NEMS in-house CATI (Computer Assisted Telephone Interviewing) Unit. Respondents were contacted during the day and in the evening. All respondents were the main shopper in the household, determined using a preliminary filter question.

1.3 Sampling

1.3.1 Survey Area

The survey area comprised of 1 zone. This zone was based on the Bishopton locale within the postcode sector PA7 5.

1.3.2 Telephone Numbers

All available telephone numbers are used to obtain the sample of interviews. This includes published telephone numbers (land-lines and some mobile numbers) but is supplemented with ex-directory numbers as the demographic profile of this sub-set is different to the demographics of the published numbers sample. Ex-directory numbers are randomly generated using the published numbers as a 'seed'. Business numbers are de-duped and excluded.

We don't screen against the TPS (Telephone Preference Service) database, again because the demographic profile of TPS registered numbers is slightly different to the rest of the population. In addition, there is no legal requirement to screen against TPS registered numbers; market research is not classified as unsolicited sales and marketing.

1.3.3 Sample Profile

It should be noted that as per the survey's requirements, the profile of respondents is that of the main shopper / person responsible for most of the food shopping in the household. As such it will always differ from the demographic profile of all adults within the survey area. With any survey among the main shopper / person responsible for most of the food shopping in the household the profile is typically biased more towards females and older people. The age of the main shopper / person responsible for most of the food shopping in the household is becoming older due to the financial constraints on young people setting up home.

A number of measures are put in place to ensure the sample is representative of the profile of the person responsible for most of the food / shopping in the household.

First of all interviewing is normally spread over a relatively long period of time, certainly longer than the theoretical minimum time it would take. This allows us time to call back people who weren't in when we made the first phone call. If we only interview people who are at home the first time we call we over-represent people who stay at home the most; these people tend to be older / less economically active.

We also control the age profile of respondents; this is a two-stage process. First of all we look at the age profile of the survey area according to the latest Census figures. Using a by-product from additional data we collect from a weekly telephone survey of a representative sample of all adults across the country we know the age profile of the main-shopper in any given area. This information is from data based on in excess of 100,000 interviews and is regularly updated and is therefore probably the most accurate and up to date information of its kind.

Stratified random sampling helps ensure that the sample is as representative as possible. While the system dials the next random selected number for interviewers, all calls are made by interviewers; no automated call handling systems are used.

1.3.4 Time of Interviewing

Approximately two-thirds of all calls are made outside normal working hours.

1.3.5 Monitoring of Calls

At least 5% of telephone interviews are randomly and remotely monitored by Team Leaders to ensure the interviewing is conducted to the requisite standard. Both the dialogue and on-screen entries are monitored and evaluated. Interviewers are offered re-training should these standards not be met.

1.4 Statistical Accuracy

As with any data collection where a sample is being drawn to represent a population, there is potentially a difference between the response from the sample and the true situation in the population as a whole. Many steps have been taken to help minimise this difference (e.g. random sample selection, questionnaire construction etc) but there is always potentially a difference between the sample and population – this is known as the standard error.

The standard error can be estimated using statistical calculations based on the sample size, the population size and the level of response measured (as you would expect you can potentially get a larger error in a 50% response than say a 10% response simply because of the magnitude of the numbers).

To help understand the significance of this error, it is normally expressed as a confidence interval for the results. Clearly to have 100% accuracy of the results would require you to sample the entire population. The usual confidence interval used is 95% - this means that you can be confident that in 19 out of 20 instances the actual population behaviour will be within the confidence interval range.

For example, if 50% of a sample of 1000 answers "Yes" to a question, we can be 95% sure that between 46.9% and 53.1% of the population holds the same opinion (i.e. +/- 3.1%). However, if 50% of a sample of 100 answers "Yes" to a question, we can be 95% sure that between 40.2% and 59.8% of the population holds this opinion (i.e. +/-9.8%).

The following is a guide showing confidence intervals attached to various sample sizes from the study:

%ge Response	95% confidence interval
10	±4.2
20	±5.5
30	±6.4
40	±6.8
50	±6.9

1.5 Data Tables

Tables are presented in question order with the question number analysed shown at the top of the table. Those questions where the respondent is prompted with a list of possible answers are indicated in the question text with a suffix of [PR].

The sample size for each question and corresponding column criteria is shown at the base of each table. A description of the criteria determining to whom the question applies is shown in italics directly below the question text; if there is no such text evident then the question base is the full study sample. If the tabulated data is weighted (indicated in the header of the tabulations), in addition to the sample base, the weighted base is also shown at the bottom of each table.

Unless indicated otherwise in the footer of the tabulations, all percentages are calculated down the column. Arithmetic rounding to whole numbers may mean that columns of percentages do not sum to exactly 100%. Zero percent denotes a percentage of less than 0.05%.

Percentages are calculated on the number of respondents and not the number of responses. This means that where more than one answer can be given to a question the sum of percentages may exceed 100%. All such multi-response questions are indicated in the tabulated by a suffix of [MR] on the question text.

Where appropriate to the question, means are shown at the bottom of response tables. These are calculated in one of two ways: if the data is captured to a coded response a weighted mean is calculated and the code weightings are shown as a prefix above the question text; if actual specific values were captured from respondents these individual numbers are used to calculate the mean.

1.6 Composite Expenditure

The survey measures shopping behaviour across a range of both convenience and comparison goods categories. In order to examine expenditure flows for these it is necessary to calculate a composite of categories.

These composites are calculated in a two stage process:

Firstly 'last' and 'time before that' are combined to create a representative sample of trips within each category;

The categories are then combined by weighting each category by proportion of average total household spend.

The between category expenditure weightings for convenience goods are calculated from the data collected in the survey (respondents were asked to provide typical spend on main, top-up and in other small shops). Expenditure weightings for comparison goods are calculated from average household spend in the wider population. A summary of the weightings used is given below:

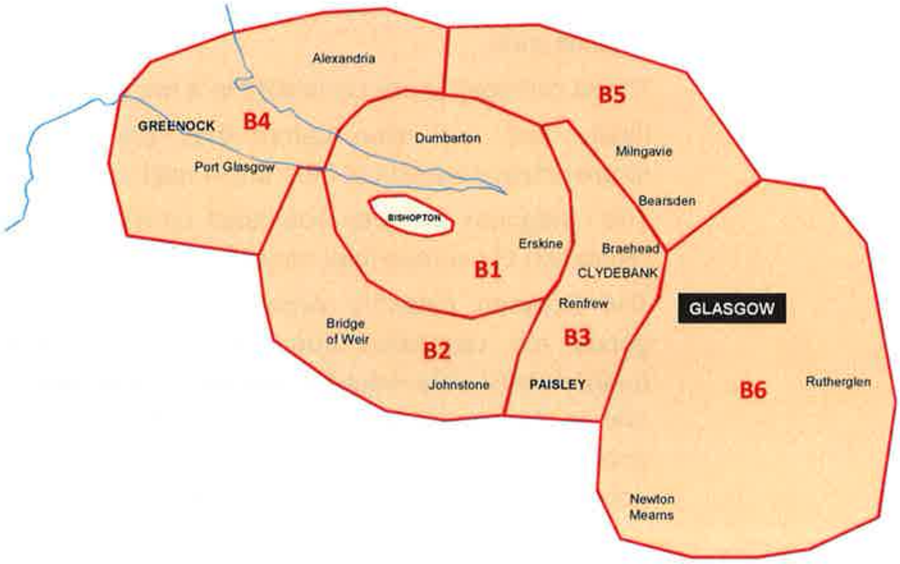
Non-food:

Question	Description	Weighting
Comparison Goods Sub-Category Weightings by Zone (%)		
Q08,Q09	Clothing and footwear	23%
Q10,Q11	Furniture, carpets and soft furnishings	12%
Q12,Q13	DIY and decorating	8%
Q14,Q15	Electrical	16%
Q16,Q17	Healthy, beauty and chemist goods	13%
Q18,Q19	Recreational	17%
Q20,Q21	Other	11%

Food and grocery:

Question	Description	Total Mean Spend	Total Base	Total Mean Spend adjusted to base	WEIGHT
Q1/Q2	Main food	£67.50	197	£66.86	71.1%
Q7/Q8	Top up food	£26.90	167	£23.12	24.0%
Q11	Small shops food/groceries	£8.40	108	£4.67	4.9%

In order to facilitate the understanding of expenditure flows, destinations are grouped into 7 buffer zones surrounding the main core survey zone of Bishopton itself;



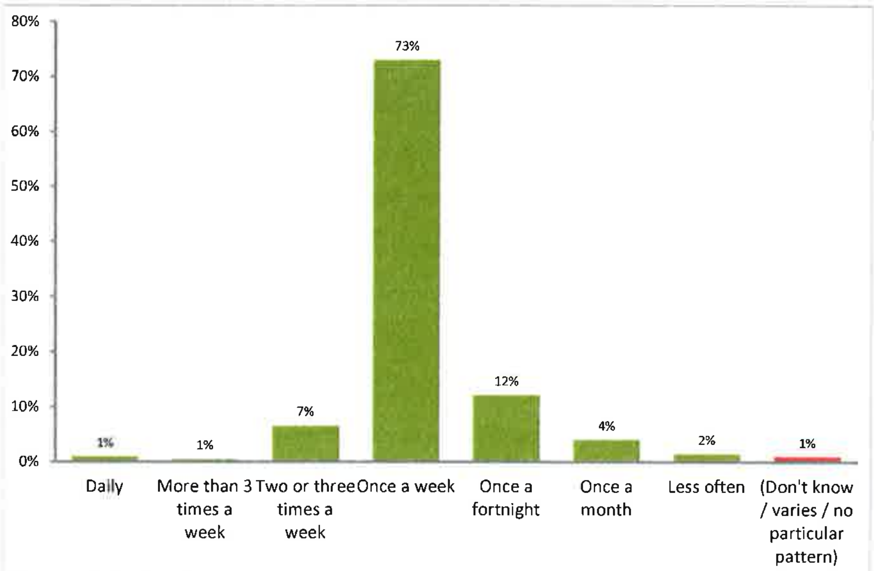
2 Results

2.1 Food and Grocery Shopping

2.1.1 Type and Frequency

The vast majority (98%) of Bishopton households undertake a main food and grocery shopping trip. Typically for this type of shopping, a weekly shop is the most common frequency (73% of all those undertaking a main shop and a mean frequency of 1.08 times per week), with 1 in 8 undertaking a fortnightly visit (see Fig 1).

Fig 1: Frequency of undertaking main food and grocery shop [Q04]



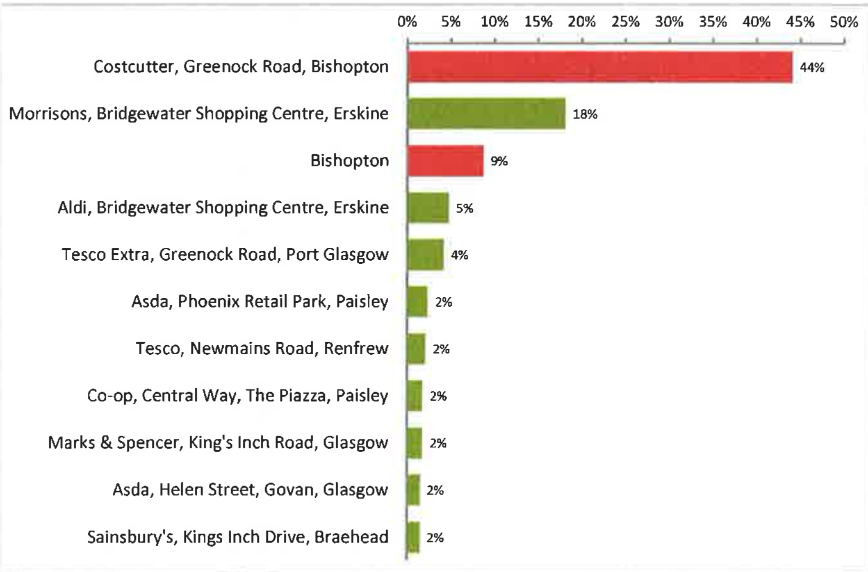
There are four main destinations for main food and grocery shopping and these stores account for just almost three-quarters (71%) of all such trips. The main destination is Morrisons at the Bridgewater Shopping Centre in Erskine, accounting for 41% of all main food and grocery shopping visits. Asda at Phoenix Retail Park in Paisley and the Tesco Extra in Port Glasgow each account for about 11% of all main shopping visits. The Sainsbury's in Braehead accounts for a further 8%.

Top 5 destinations for main food & grocery shopping:

Store	% share visits
Morrisons, Bridgewater Shopping Centre, Erskine	41%
Tesco Extra, Greenock Road, Port Glasgow	11%
Asda, Phoenix Retail Park, Paisley	11%
Sainsbury's, Kings Inch Drive, Braehead	8%
Costcutter, Greenock Road, Bishopton	4%

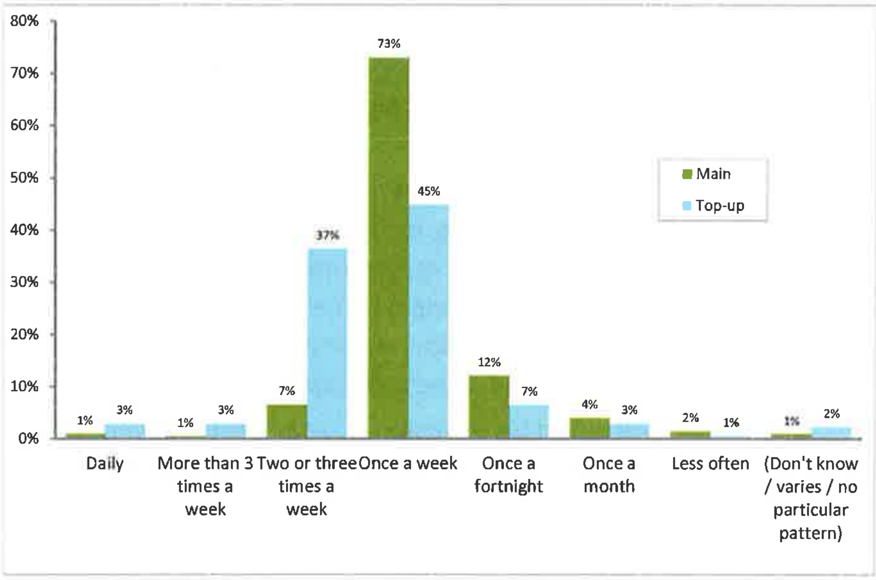
In addition to a main food and grocery shop, many people undertake additional 'top-up' shops. Just over 8 out of 10 (83%) of households in Bishopton undertake 'top-up' food and grocery shopping. While the top main food and grocery destinations still feature for top-up also, the large influence of proximity and convenience for top-up is evident with the Costcutter in Bishopton being the main destination for top-up shopping (accounting for 44% of top-up trips). A further 9% of top-up shopping trips are undertaken in other shops in Bishopton (see Fig 2).

Fig 2: Top-up shopping share of visits [Q05/Q06]



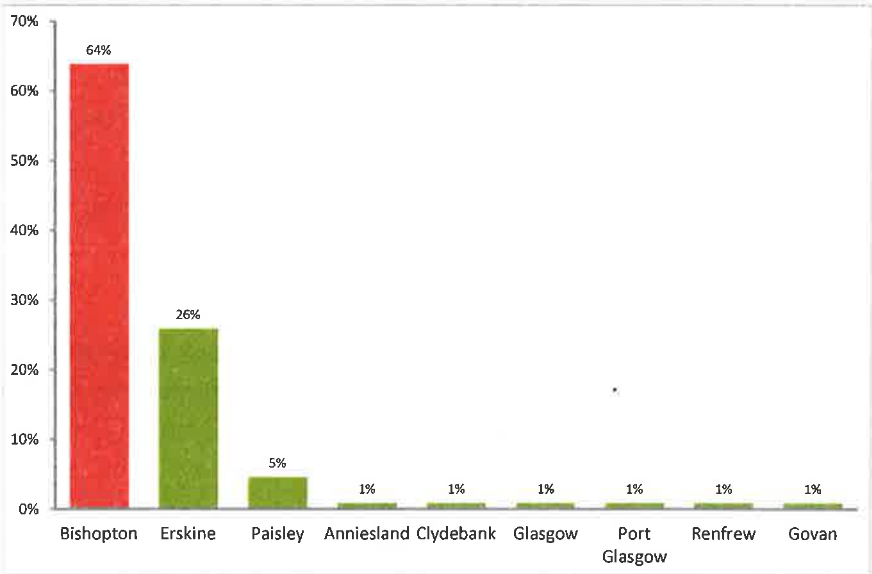
Top-up food and grocery shopping is by its very nature undertaken with a higher frequency than main shopping. The average frequency among those who do top-up is 1.8 times per week, with 45% doing so weekly and a further 37% undertaking a top-up shop two or three times a week (see Fig 3).

Fig 3: Frequency of undertaking main and top-up shops [Q08]



To account for all those small purchases that are often made outside the visits to usual main and top-up stores, respondents were asked about their purchases in 'small shops'. Just over half (54%) of people make such purchases, with the two main destinations being Bishopton (64%) and Erskine (26%) – see Fig 4.

Fig 4: Share of visits to small shops (food and grocery [Q10]



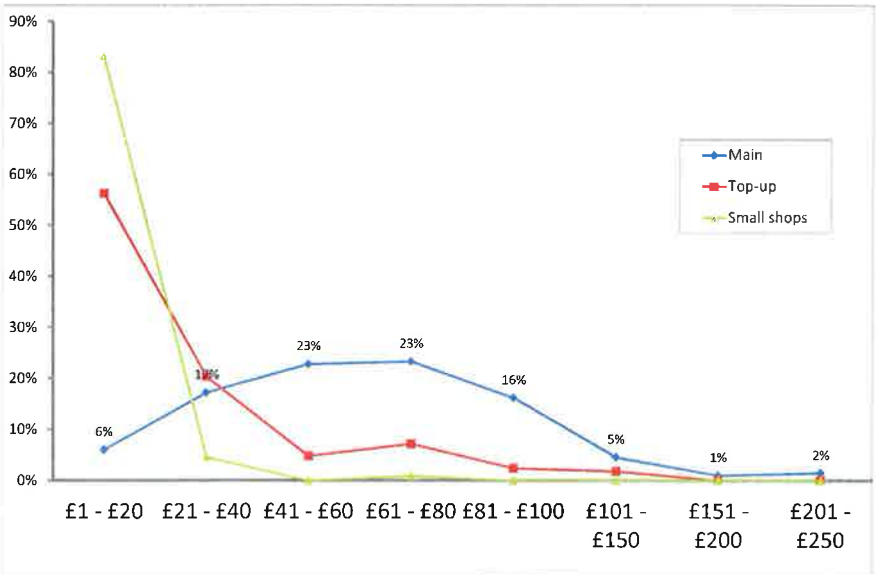
2.1.2 Household Expenditure

Respondents were asked about their normal household expenditure on food and groceries and their frequency of purchase, enabling the calculation of a 'typical' weekly spend for the various forms of grocery shopping.

The average weekly household expenditure on main food and grocery shopping is £66.90, with the most prevalent spend being in the £40 to £100 range. Among the 84% who undertake top-up food and grocery shopping, the average weekly spend is £16.80, while the average spent in other small shops is £8.50. The average weekly total household expenditure on food and groceries is £94.60.

As would be expected, typical weekly spend on top-up shopping and in other small shops is up to £20, though for some households it is considerably more. (see Fig 5).

Fig 5: Food and grocery weekly expenditure [X03,X07 & X11]



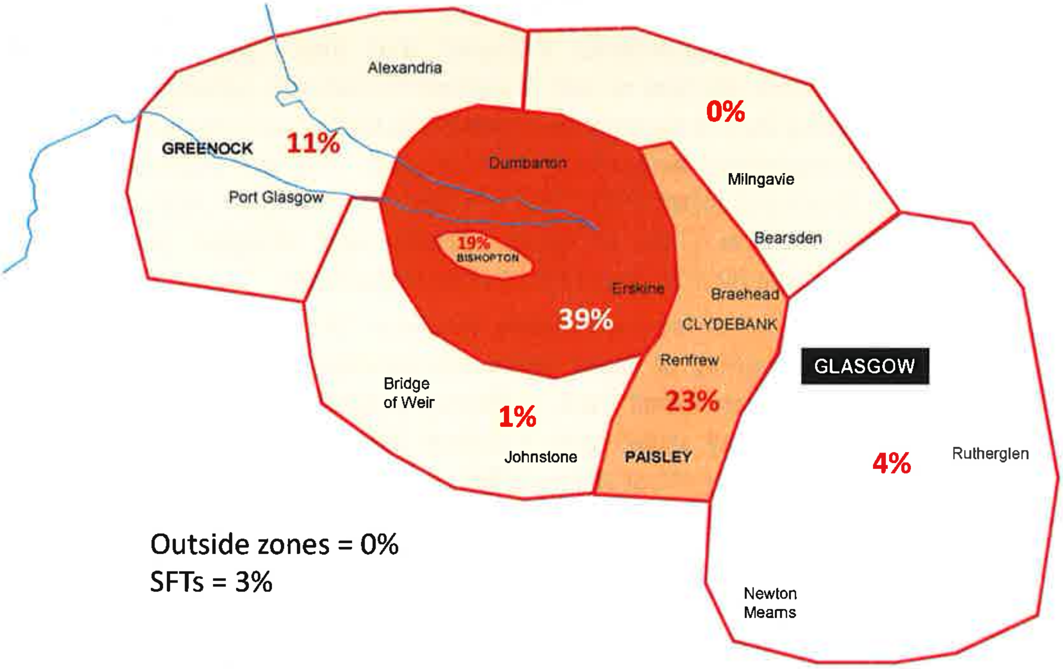
There are a total of 1928 residential addresses in the survey area, therefore total food and grocery expenditure can be estimated to be around £9.5m a year.

2.1.3 Food and Grocery Expenditure Flows

Around 19% of all food and grocery expenditure by residents of Bishopton is retained in the town. The largest value share (39%) goes to buffer zone 1, with 33% of this being accounted for by the Morrisons in Erskine.

Almost a quarter (23%) of convenience spend goes to buffer zone 3. This zone includes the Asda in Paisley (8% of all expenditure) and the Sainsbury's in Braehead (6% of expenditure). The Tesco Extra in Port Glasgow accounts for approximately 9% of all spend resulting in a total share of spend of 11% for buffer zone 4.

Proportion of Food Expenditure to Zones:



2.2 Non-food Shopping

All bar one of the respondents purchased clothing and footwear for themselves. The most popular location for purchasing these items is the Braehead shopping centre, accounting for almost a third (32%) of all visits. Other shops in Braehead account for a further 10% of visits. Glasgow city centre attracts just over a fifth (22%) of all visits for buying clothing and footwear.

Retail parks do not feature strongly in this non-food sector, only accounting for 8% of visits (Braehead Retail Park and Phoenix Retail Park in Paisley).

Online and catalogue purchases of clothing and footwear account for around 5% of all goods bought.

86% of respondents indicated that their household purchase furniture, carpets or soft household furnishings. Unsurprisingly retail parks feature strongly as destinations to buy such items, indeed they cumulatively account for 42% of visits. The two most popular are Braehead Retail Park (18% of visits) and Hillingdon Industrial Estate in Erskine (11% of visits). Paisley and Glasgow centres each account for 15% and 17% of visits respectively.

Nine out of ten households purchase DIY and decorating goods. The majority of these items are purchased in just two locations: Abbotsinch Retail Park in Paisley accounts for the majority share (51% of all visits); and a further 24% of visits in Paisley centre (additionally 4% of visits to Phoenix Retail Park in Paisley).

Retail parks are particularly important for the purchase of electrical items; cumulatively they account for over half (54%) of all visits to purchase these items. Braehead Retail Park is the leading destination accounting for 25% of visits, while Abbotsinch Retail Park in Paisley accounts for a further 17%.The two main centre destinations to purchase electrical items are Glasgow and Paisley, each accounting for 12% of visits.

Around 8% of all purchases of electrical items are done online.

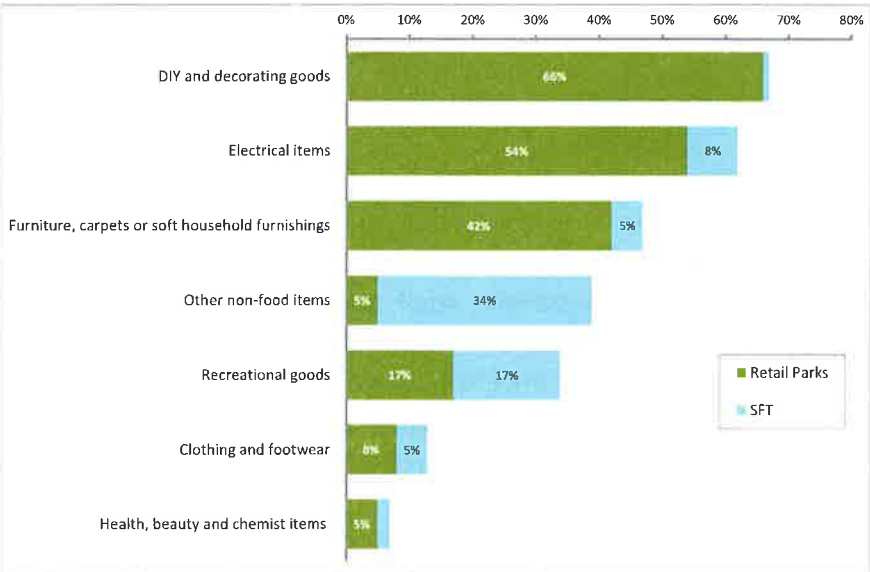
All of non-food items, it is health, beauty and chemist items that are most likely to be bought locally. Bishopton accounts for almost a third (31%) of all purchases and is the leading destination. Braehead Shopping Centre accounts for 23% of visits to buy such items and the third most popular destination is Paisley accounting for 9% of visits. Only 2% of such goods are bought online or through a home catalogue.

Only 61% of households purchase recreational goods (such as sports equipment, bicycles, musical instruments or toys). Online and TV shopping is the most likely source of such items accounting for 17% of purchases. The top three shopping destinations are: Glasgow centre (14%), Braehead Shopping Centre (12%) and Braehead Retail Park (10%).

Other non-food items such as books, CDs, jewellery, china and glass items are most likely to be purchased online or TV shopping, with over a third (34%) of purchases being made this way. Braehead Shopping Centre is the most popular shop destination accounting for 24% of visits and other shops in Braehead account for a further 7%. Eighteen percent of visits for such items are to Glasgow centre.

Bringing together and comparing the different non-food sectors, it can be clearly seen that the impact of retail parks and online/catalogue shopping shows significant differences. While most clothing, footwear and health/beauty/chemists products are still purchase in more traditional retail centres, considerable proportions of shopping for other non-food goods is going elsewhere.

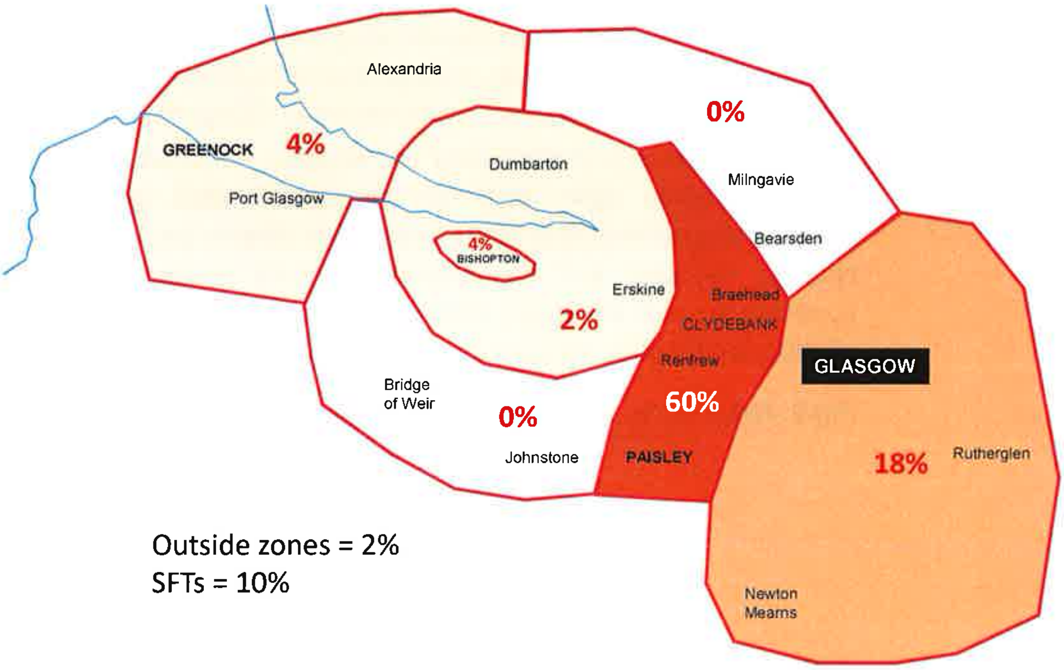
Fig 6: Retail parks and SFTs share of non-food shopping visits



2.2.1 Non-food Expenditure Flows

An estimated 10% of all non-food expenditure goes to special forms of trading (SFTs – online, TV and catalogue). The majority of the remaining expenditure goes to just two zones; 60% to buffer zone 6 and 18% to buffer zone 3. Only 4% of non-food expenditure is retained within the town of Bishopton.

Proportion of Non-food Expenditure to Zones:



Cumulatively retail parks account for a quarter of non-food expenditure. Of this, the majority goes to two locations: Braehead Retail Park (10%) and Abbotsinch Retail Park in Paisley (8%).

Of shopping centres, the three main destinations are: Braehead Shopping Centre (16% of expenditure); Glasgow (14%); and Paisley (11%).

2.3 Effect of Car Ownership

While car ownership in Bishopton is high (88%) for the minority of households without a car, their choice of shopping options is inevitably different due to both access via public transport and the transport of goods purchased. Those without a car are predominantly older (two thirds are aged 65 and over).

Those without a car spend similar amounts to their car owning counterparts on food and groceries within Bishopton itself, but their use of the main operator stores differs notably. Those without a car are more likely to use the Morrisons in Erksine and much less likely to frequent the other three more distant main stores; Asda in Paisley, Sainsbury's in Braehead and Tesco Extra in Port Glasgow.

The most notable impact on non-food shopping for those without a car is the use of retail parks. While car owners spend 26% of non-food expenditure in retail parks, this is almost double the 14% spent there by those without a car.

2.4 Bishopton

Only a handful of respondents undertake their main food and grocery shopping in Bishopton, accounting for around 6% of such visits. As would be expected it features much more strongly for top-up food and grocery shopping, accounting for over half (52%) of such visits. It also attracts a considerable share (64%) of further visits to small shops.

19% of food and grocery expenditure, with 13% of this going to the Costcutter. With an estimated total food and grocery expenditure from households in the town of £9.5m per annum, then these shares equate to £1.8m and £1.2m respectively.

Bishopton stores retain 4% of total non-food expenditure, though this share is a little higher at 7% for those without private transport. This non-food expenditure is almost exclusively on health/beauty/chemist products; as to be expected looking at the current mix of retailers in the town.

Conclusions

The town of Bishopton consists of 1928 households. Their total food and grocery expenditure is estimated to be worth around £9.5m per annum, and their comparison goods expenditure around £16m per annum.

Within a 20 minute drive-time the town has access to major stores of all four main grocery operators, and these four stores account for 56% of all convenience expenditure. The closest (within 10 minutes), Morrisons in Erskine takes the largest share (33%) of convenience spend. The other three, Asda in Paisley, Sainsbury's in Braehead and Tesco Extra in Port Glasgow are all just under 20 minutes drive away and each take a share of expenditure of around 6%-9%.

Retention of 19% of convenience expenditure in Bishopton itself is mainly down to top-up food shopping and the Costcutter takes the majority share. The market does however also support a range of other small shops in Bishopton; a Co-op and two general convenience stores.

Unsurprisingly given the mix of retailers, only 4% of non-food expenditure is retained in the town and the bulk of this is spend on health/beauty/chemist products.

The three main destinations for non-food shopping are to the east of Bishopton; Braehead, Paisley and Glasgow centre. These three locations account for two-thirds of all comparison goods purchased.

The largest proportion of non-food expenditure (32%) currently goes to Braehead; 16% to Braehead shopping centre, 10% to Braehead Retail Park and 6% elsewhere in Braehead. Just over a fifth (21%) expenditure also go to Paisley (11%, 8% to Abbottsinch Retail Park and 2% to Phoenix Retail Park). Glasgow centre is also a considerable attraction for non-food spend, accounting for a further 14%.

Appendices

Data tabulations

Composite expenditures by zone

Sample questionnaire

Appendix 1:

Data Tabulations

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

	Total		No car in Hhold		Car in Hhold	
Aldi, Bridgewater Shopping Centre, Erskine	2.0%	4	0.0%	0	2.3%	4
Asda, Britannia Way, Clydebank	2.5%	5	8.3%	2	1.7%	3
Asda, St James Retail Park, Dumbarton	1.5%	3	4.2%	1	1.1%	2
Asda, Helen Street, Govan, Glasgow	1.5%	3	0.0%	0	1.7%	3
Asda, Phoenix Retail Park, Paisley	9.5%	19	0.0%	0	10.8%	19
Lidl, Newark Street, Port Glasgow	0.5%	1	0.0%	0	0.6%	1
Marks & Spencer, King's Inch Road, Glasgow	1.0%	2	4.2%	1	0.6%	1
Morrisons, Bridgewater Shopping Centre, Erskine	44.0%	88	45.8%	11	43.8%	77
Morrisons, Rue End Street, Greenock	1.0%	2	0.0%	0	1.1%	2
Morrisons, Napier Street, Johnstone	1.0%	2	0.0%	0	1.1%	2
Morrisons, Anchor Mills, Paisley	0.5%	1	4.2%	1	0.0%	0
Sainsbury's, Kings Inch Drive, Braehead	9.5%	19	0.0%	0	10.8%	19
Sainsbury's, Great Western Road / Allerdyce Drive, Drumchapel	0.5%	1	0.0%	0	0.6%	1
Tesco Extra, Greenock Road, Port Glasgow	8.0%	16	0.0%	0	9.1%	16
Tesco, East Lane, Paisley	1.0%	2	0.0%	0	1.1%	2
Tesco, Newmains Road, Renfrew	2.5%	5	4.2%	1	2.3%	4
Tesco Express (Esso), Renfrew Road, Paisley	1.0%	2	4.2%	1	0.6%	1
Bishopton	1.0%	2	4.2%	1	0.6%	1
Braehead	0.5%	1	4.2%	1	0.0%	0
Linwood	0.5%	1	0.0%	0	0.6%	1
Renfrew	0.5%	1	0.0%	0	0.6%	1
Internet / delivered	3.5%	7	8.3%	2	2.8%	5
Costcutter, Greenock Road, Bishopton	3.5%	7	4.2%	1	3.4%	6
Marks & Spencer, High Street, Paisley	0.5%	1	0.0%	0	0.6%	1
Tesco Extra, Dalrymple Street, Greenock	0.5%	1	0.0%	0	0.6%	1
Tesco Extra, Silverburn Shopping Centre, Barrhead Road, Glasgow	0.5%	1	0.0%	0	0.6%	1
(Don't do)	1.5%	3	4.2%	1	1.1%	2
Base:		200		24		176

Q02 And where did your household go the time before that for a main food and grocery shop?

	Total		No car in Hhold		Car in Hhold	
Aldi, Paisley Road West, Cardonald	0.5%	1	0.0%	0	0.6%	1
Aldi, Bridgewater Shopping Centre, Erskine	2.5%	5	4.2%	1	2.3%	4
Aldi, Fulbar Road, Paisley	0.5%	1	0.0%	0	0.6%	1
Asda, Britannia Way, Clydebank	2.5%	5	4.2%	1	2.3%	4
Asda, St James Retail Park, Dumbarton	1.5%	3	4.2%	1	1.1%	2
Asda, Helen Street, Govan, Glasgow	1.5%	3	0.0%	0	1.7%	3
Asda, Phoenix Retail Park, Paisley	12.0%	24	0.0%	0	13.6%	24
Co-op, Lomond Drive, Bellsmyre	0.5%	1	4.2%	1	0.0%	0
Co-op, Central Way, The Piazza, Paisley	0.5%	1	4.2%	1	0.0%	0
Lidl, Newark Street, Port Glasgow	0.5%	1	0.0%	0	0.6%	1
Marks & Spencer, King's Inch Road, Glasgow	3.5%	7	0.0%	0	4.0%	7
Morrisons, Bridgewater Shopping Centre, Erskine	36.0%	72	41.7%	10	35.2%	62
Morrisons, Rue End Street, Greenock	1.5%	3	0.0%	0	1.7%	3
Morrisons, Napier Street, Johnstone	1.0%	2	0.0%	0	1.1%	2
Morrisons, Anchor Mills, Paisley	1.0%	2	4.2%	1	0.6%	1
Sainsbury's, Kings Inch Drive, Braehead	6.0%	12	4.2%	1	6.3%	11
Tesco Extra, Greenock Road, Port Glasgow	14.0%	28	4.2%	1	15.3%	27
Tesco, Newmains Road, Renfrew	3.0%	6	4.2%	1	2.8%	5
Tesco Express (Esso), Renfrew Road, Paisley	0.5%	1	0.0%	0	0.6%	1
Bishopton	0.5%	1	4.2%	1	0.0%	0
Kilmacolm	0.5%	1	0.0%	0	0.6%	1
Internet / delivered	3.0%	6	8.3%	2	2.3%	4
Costcutter, Greenock Road, Bishopton	3.5%	7	0.0%	0	4.0%	7
Marks & Spencer, High Street, Paisley	0.5%	1	4.2%	1	0.0%	0
Tesco Extra, Dalrymple Street, Greenock	0.5%	1	0.0%	0	0.6%	1
(Don't know / can't remember)	1.0%	2	0.0%	0	1.1%	2
(Don't do)	1.5%	3	4.2%	1	1.1%	2
Base:		200		24		176

Q03 Approximately how much money does your household normally spend on a main food and grocery shop?
Those who do a main food shop at a specific location at Q01:

	Total		No car in Hhold		Car in Hhold	
£1 - £10	1.0%	2	4.3%	1	0.6%	1
£11 - £20	2.0%	4	8.7%	2	1.1%	2
£21 - £30	6.1%	12	8.7%	2	5.7%	10
£31 - £40	8.6%	17	17.4%	4	7.5%	13
£41 - £50	14.2%	28	17.4%	4	13.8%	24
£51 - £60	8.6%	17	8.7%	2	8.6%	15
£61 - £70	13.7%	27	4.3%	1	14.9%	26
£71 - £80	10.2%	20	4.3%	1	10.9%	19
£81 - £90	4.1%	8	4.3%	1	4.0%	7
£91 - £100	15.7%	31	4.3%	1	17.2%	30
£101 - £110	0.0%	0	0.0%	0	0.0%	0
£111 - £120	2.5%	5	0.0%	0	2.9%	5
£121 - £130	2.5%	5	4.3%	1	2.3%	4
£131 - £140	0.5%	1	4.3%	1	0.0%	0
£141 - £150	0.5%	1	0.0%	0	0.6%	1
£151 - £175	0.5%	1	0.0%	0	0.6%	1
£176 - £200	1.5%	3	0.0%	0	1.7%	3
£201 - £250	1.0%	2	0.0%	0	1.1%	2
(Don't know / varies)	5.1%	10	8.7%	2	4.6%	8
(Refused)	1.5%	3	0.0%	0	1.7%	3
Mean:		*73.4*		*56.1*		*75.7*
Base:		197		23		174

Q04 How often does your household do a main food and grocery shop?
Those who do a main food shop at a specific location at Q01:

	Total		No car in Hhold		Car in Hhold	
Daily	1.0%	2	4.3%	1	0.6%	1
More than 3 times a week	0.5%	1	0.0%	0	0.6%	1
Two or three times a week	6.6%	13	8.7%	2	6.3%	11
Once a week	73.1%	144	47.8%	11	76.4%	133
Once a fortnight	12.2%	24	21.7%	5	10.9%	19
Once a month	4.1%	8	8.7%	2	3.4%	6
Less often	1.5%	3	8.7%	2	0.6%	1
(Don't know / varies / no particular pattern)	1.0%	2	0.0%	0	1.1%	2
Mean:		*1.08*		*1.14*		*1.07*
Base:		197		23		174

X03 Approximately how much money does your household normally spend on main food and grocery shopping per week?
Those who do a main food shop at a specific location at Q01:

	Total		No car in Hhold		Car in Hhold	
£1 - £10	0.0%	0	0.0%	0	0.0%	0
£11 - £20	6.1%	12	30.4%	7	2.9%	5
£21 - £30	7.1%	14	13.0%	3	6.3%	11
£31 - £40	10.2%	20	13.0%	3	9.8%	17
£41 - £50	15.2%	30	17.4%	4	14.9%	26
£51 - £60	7.6%	15	0.0%	0	8.6%	15
£61 - £70	14.7%	29	8.7%	2	15.5%	27
£71 - £80	8.6%	17	4.3%	1	9.2%	16
£81 - £90	2.0%	4	0.0%	0	2.3%	4
£91 - £100	14.2%	28	0.0%	0	16.1%	28
£101 - £110	0.0%	0	0.0%	0	0.0%	0
£111 - £120	2.0%	4	0.0%	0	2.3%	4
£121 - £130	2.0%	4	0.0%	0	2.3%	4
£131 - £140	0.5%	1	4.3%	1	0.0%	0
£141 - £150	0.0%	0	0.0%	0	0.0%	0
£151 - £175	0.5%	1	0.0%	0	0.6%	1
£176 - £200	0.5%	1	0.0%	0	0.6%	1
£201 - £250	1.5%	3	0.0%	0	1.7%	3
(Don't know / varies)	5.6%	11	8.7%	2	5.2%	9
(Refused)	1.5%	3	0.0%	0	1.7%	3
Mean:		*67.5*		*40.8*		*70.9*
Base:		197		23		174

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

	Total		No car in Hhold		Car in Hhold	
Aldi, Paisley Road West, Cardonald	0.5%	1	0.0%	0	0.6%	1
Aldi, Bridgewater Shopping Centre, Erskine	3.0%	6	4.2%	1	2.8%	5
Asda, Britannia Way, Clydebank	0.5%	1	4.2%	1	0.0%	0
Asda, Helen Street, Govan, Glasgow	2.0%	4	0.0%	0	2.3%	4
Asda, Phoenix Retail Park, Paisley	2.0%	4	0.0%	0	2.3%	4
Co-op, Lomond Drive, Bellsmyre	0.5%	1	0.0%	0	0.6%	1
Co-op, Central Way, The Piazza, Paisley	1.0%	2	4.2%	1	0.6%	1
Lidl, Newark Street, Port Glasgow	1.0%	2	0.0%	0	1.1%	2
Marks & Spencer, King's Inch Road, Glasgow	2.0%	4	0.0%	0	2.3%	4
Morrisons, Bridgewater Shopping Centre, Erskine	14.0%	28	16.7%	4	13.6%	24
Morrisons, Napier Street, Johnstone	0.5%	1	0.0%	0	0.6%	1
Sainsbury's, Kings Inch Drive, Braehead	1.0%	2	0.0%	0	1.1%	2
Tesco Extra, Greenock Road, Port Glasgow	2.5%	5	0.0%	0	2.8%	5
Tesco, East Lane, Paisley	0.5%	1	0.0%	0	0.6%	1
Tesco, Newmains Road, Renfrew	1.5%	3	4.2%	1	1.1%	2
Bishopton	6.5%	13	8.3%	2	6.3%	11
Braehead	0.5%	1	4.2%	1	0.0%	0
Erskine	1.0%	2	0.0%	0	1.1%	2
Port Glasgow	0.5%	1	0.0%	0	0.6%	1
Internet / delivered	0.5%	1	0.0%	0	0.6%	1
Costcutter, Greenock Road, Bishopton	39.5%	79	29.2%	7	40.9%	72
Iceland, Church Street, Port Glasgow	0.5%	1	0.0%	0	0.6%	1
Lidl, Moss Road, Govan	0.5%	1	0.0%	0	0.6%	1
Marks & Spencer, Great Western Road, Glasgow	0.5%	1	0.0%	0	0.6%	1
Marks & Spencer, High Street, Paisley	0.5%	1	4.2%	1	0.0%	0
Sainsbury's Local, Sauchiehall Street, Glasgow	0.5%	1	0.0%	0	0.6%	1
(Don't do)	16.5%	33	20.8%	5	15.9%	28
Base:		200		24		176

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)?

	Total		No car in Hhold		Car in Hhold	
Aldi, Bridgewater Shopping Centre, Erskine	5.0%	10	4.2%	1	5.1%	9
Asda, Helen Street, Govan, Glasgow	0.5%	1	0.0%	0	0.6%	1
Asda, Phoenix Retail Park, Paisley	2.0%	4	0.0%	0	2.3%	4
Co-op, Central Way, The Piazza, Paisley	2.0%	4	4.2%	1	1.7%	3
Farmfoods, High Street, Renfrew	0.5%	1	0.0%	0	0.6%	1
Marks & Spencer, King's Inch Road, Glasgow	1.0%	2	0.0%	0	1.1%	2
Marks & Spencer Simply Food, St James Retail Park, Glasgow Road, Dumbarton	0.5%	1	0.0%	0	0.6%	1
Morrisons, Bridgewater Shopping Centre, Erskine	16.0%	32	16.7%	4	15.9%	28
Sainsbury's, Kings Inch Drive, Braehead	1.5%	3	0.0%	0	1.7%	3
Tesco Extra, Greenock Road, Port Glasgow	4.5%	9	4.2%	1	4.5%	8
Tesco, East Lane, Paisley	0.5%	1	0.0%	0	0.6%	1
Tesco, Newmains Road, Renfrew	2.0%	4	4.2%	1	1.7%	3
Bishopton	8.0%	16	8.3%	2	8.0%	14
Braehead	0.5%	1	4.2%	1	0.0%	0
Erskine	0.5%	1	0.0%	0	0.6%	1
Glasgow	0.5%	1	0.0%	0	0.6%	1
Internet / delivered	1.0%	2	0.0%	0	1.1%	2
Costcutter, Greenock Road, Bishopton	33.5%	67	29.2%	7	34.1%	60
Iceland, Church Street, Port Glasgow	0.5%	1	0.0%	0	0.6%	1
Marks & Spencer, High Street, Paisley	1.0%	2	4.2%	1	0.6%	1
Tesco Extra, Annick Street, Shettleston Industrial Estate, Glasgow	0.5%	1	0.0%	0	0.6%	1
(Don't know / can't remember)	1.5%	3	0.0%	0	1.7%	3
(Don't do)	16.5%	33	20.8%	5	15.9%	28
Base:		200		24		176

Q07 Approximately how much money does your household normally spend on a 'top-up' food and grocery shop?
Those who do a main food shop at a specific location at Q05:

	Total		No car in Hhold		Car in Hhold	
£1 - £10	39.5%	66	47.4%	9	38.5%	57
£11 - £20	32.3%	54	47.4%	9	30.4%	45
£21 - £30	14.4%	24	0.0%	0	16.2%	24
£31 - £40	4.8%	8	5.3%	1	4.7%	7
£41 - £50	1.8%	3	0.0%	0	2.0%	3
£51 - £60	0.6%	1	0.0%	0	0.7%	1
(Don't know / varies)	4.8%	8	0.0%	0	5.4%	8
(Refused)	1.8%	3	0.0%	0	2.0%	3
Mean:		*16.8*		*14.5*		*17.1*
Base:		167		19		148

Q08 How often does your household normally do its top-up food shopping?
Those who do a main food shop at a specific location at Q05:

	Total		No car in Hhold		Car in Hhold	
Daily	3.0%	5	0.0%	0	3.4%	5
More than 3 times a week	3.0%	5	0.0%	0	3.4%	5
Two or three times a week	36.5%	61	31.6%	6	37.2%	55
Once a week	44.9%	75	68.4%	13	41.9%	62
Once a fortnight	6.6%	11	0.0%	0	7.4%	11
Once a month	3.0%	5	0.0%	0	3.4%	5
Less often	0.6%	1	0.0%	0	0.7%	1
(Don't know / varies / no particular pattern)	2.4%	4	0.0%	0	2.7%	4
Mean:		*1.81*		*1.47*		*1.85*
Base:		167		19		148

X07 Approximately how much money does your household normally spend on 'top-up' food and grocery shopping per week?
Those who do a main food shop at a specific location at Q05:

	Total		No car in Hhold		Car in Hhold	
£1 - £10	28.1%	47	36.8%	7	27.0%	40
£11 - £20	28.1%	47	36.8%	7	27.0%	40
£21 - £30	14.4%	24	10.5%	2	14.9%	22
£31 - £40	6.0%	10	0.0%	0	6.8%	10
£41 - £50	4.8%	8	10.5%	2	4.1%	6
£51 - £60	0.0%	0	0.0%	0	0.0%	0
£61 - £70	3.0%	5	0.0%	0	3.4%	5
£71 - £80	4.2%	7	0.0%	0	4.7%	7
£81 - £90	0.6%	1	0.0%	0	0.7%	1
£91 - £100	1.8%	3	5.3%	1	1.4%	2
£101 - £110	0.0%	0	0.0%	0	0.0%	0
£111 - £120	0.0%	0	0.0%	0	0.0%	0
£121 - £130	1.2%	2	0.0%	0	1.4%	2
£131 - £140	0.6%	1	0.0%	0	0.7%	1
(Don't know / varies)	5.4%	9	0.0%	0	6.1%	9
(Refused)	1.8%	3	0.0%	0	2.0%	3
Mean:		*26.9*		*22.4*		*27.5*
Base:		167		19		148

Q09 Does your household also spend money on food and groceries in small shops?

	Total		No car in Hhold		Car in Hhold	
Yes	54.0%	108	54.2%	13	54.0%	95
No	46.0%	92	45.8%	11	46.0%	81
Base:		200		24		176

Q10 Where are these small shops located?
Those who also buy food and groceries in small shops at Q09

	Total		No car in Hhold		Car in Hhold	
Anniesland	0.9%	1	0.0%	0	1.1%	1
Bishopton	63.9%	69	53.8%	7	65.3%	62
Clydebank	0.9%	1	0.0%	0	1.1%	1
Erskine	25.9%	28	15.4%	2	27.4%	26
Glasgow	0.9%	1	0.0%	0	1.1%	1
Paisley	4.6%	5	30.8%	4	1.1%	1
Port Glasgow	0.9%	1	0.0%	0	1.1%	1
Renfrew	0.9%	1	0.0%	0	1.1%	1
Govan	0.9%	1	0.0%	0	1.1%	1
Base:		108		13		95

Q11 Approximately how much money does your household spend on food and groceries on a typical trip to these small shops?
Those who also buy food and groceries in small shops at Q09

	Total		No car in Hhold		Car in Hhold	
£1 - £10	70.4%	76	84.6%	11	68.4%	65
£11 - £20	17.6%	19	15.4%	2	17.9%	17
£21 - £30	2.8%	3	0.0%	0	3.2%	3
£31 - £40	0.9%	1	0.0%	0	1.1%	1
£41 - £50	0.0%	0	0.0%	0	0.0%	0
£51 - £60	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	7.4%	8	0.0%	0	8.4%	8
(Refused)	0.9%	1	0.0%	0	1.1%	1
Mean:		*9.51*		*8.08*		*9.72*
Base:		108		13		95

Q12 How often do you normally visit these other small shops for food and groceries shopping?
Those who also buy food and groceries in small shops at Q09

	Total		No car in Hhold		Car in Hhold	
Daily	3.7%	4	7.7%	1	3.2%	3
More than 3 times a week	1.9%	2	7.7%	1	1.1%	1
Two or three times a week	13.0%	14	15.4%	2	12.6%	12
Once a week	38.9%	42	46.2%	6	37.9%	36
Once a fortnight	20.4%	22	0.0%	0	23.2%	22
Once a month	16.7%	18	23.1%	3	15.8%	15
Less often	2.8%	3	0.0%	0	3.2%	3
(Don't know / varies / no particular pattern)	2.8%	3	0.0%	0	3.2%	3
Mean:		*1.25*		*1.84*		*1.17*
Base:		108		13		95

X11 Approximately how much money does your household spend per week on food and groceries at these small shops?
Those who also buy food and groceries in small shops at Q09

	Total		No car in Hhold		Car in Hhold	
£1 - £10	71.3%	77	76.9%	10	70.5%	67
£11 - £20	12.0%	13	7.7%	1	12.6%	12
£21 - £30	4.6%	5	7.7%	1	4.2%	4
£31 - £40	0.0%	0	0.0%	0	0.0%	0
£41 - £50	0.0%	0	0.0%	0	0.0%	0
£51 - £60	0.0%	0	0.0%	0	0.0%	0
£61 - £70	0.9%	1	7.7%	1	0.0%	0
£71 - £80	0.0%	0	0.0%	0	0.0%	0
£81 - £90	0.0%	0	0.0%	0	0.0%	0
£91 - £100	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	10.2%	11	0.0%	0	11.6%	11
(Refused)	0.9%	1	0.0%	0	1.1%	1
Mean:		*8.4*		*13.0*		*7.7*
Base:		108		13		95

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

	Total		No car in Hhold		Car in Hhold	
Alexandria	0.5%	1	0.0%	0	0.6%	1
Bishopton	0.5%	1	0.0%	0	0.6%	1
Braehead	11.0%	22	4.2%	1	11.9%	21
Clydebank	2.5%	5	4.2%	1	2.3%	4
Erskine	1.0%	2	8.3%	2	0.0%	0
Glasgow	16.5%	33	8.3%	2	17.6%	31
Greenock	2.5%	5	4.2%	1	2.3%	4
Linwood	0.5%	1	0.0%	0	0.6%	1
Paisley	9.0%	18	20.8%	5	7.4%	13
Port Glasgow	0.5%	1	0.0%	0	0.6%	1
Renfrew	1.0%	2	0.0%	0	1.1%	2
Blythswood Retail Parks, Renfrew	0.5%	1	0.0%	0	0.6%	1
Braehead Retail Park, Kings Inch Drive, Glasgow	5.0%	10	0.0%	0	5.7%	10
Braehead Shopping Centre, Kings Inch Drive, Glasgow	35.5%	71	33.3%	8	35.8%	63
Phoenix Retail Park, Paisley	4.5%	9	0.0%	0	5.1%	9
Internet / delivered	2.5%	5	4.2%	1	2.3%	4
Home Catalogue	1.5%	3	12.5%	3	0.0%	0
Other - outside catchment area	2.0%	4	0.0%	0	2.3%	4
Ambleside Town Cnetre	0.5%	1	0.0%	0	0.6%	1
Bridge of Weir Village Centre	0.5%	1	0.0%	0	0.6%	1
Largs Town Centre, Ayrshire	0.5%	1	0.0%	0	0.6%	1
Stirling Town Centre	0.5%	1	0.0%	0	0.6%	1
(Don't know / can't remember)	0.5%	1	0.0%	0	0.6%	1
(Don't do)	0.5%	1	0.0%	0	0.6%	1
Base:		200		24		176

Q14 And the time before that, where did you go to make a purchase of clothes or shoes?

	Total		No car in Hhold		Car in Hhold	
Alexandria	1.0%	2	0.0%	0	1.1%	2
Bishopton	0.5%	1	0.0%	0	0.6%	1
Braehead	8.0%	16	4.2%	1	8.5%	15
Clydebank	2.0%	4	4.2%	1	1.7%	3
Dumbarton	0.5%	1	0.0%	0	0.6%	1
Edinburgh	0.5%	1	0.0%	0	0.6%	1
Glasgow	25.5%	51	25.0%	6	25.6%	45
Greenock	3.0%	6	0.0%	0	3.4%	6
Linwood	0.5%	1	0.0%	0	0.6%	1
Milngavie	0.5%	1	0.0%	0	0.6%	1
Paisley	10.5%	21	25.0%	6	8.5%	15
Port Glasgow	1.0%	2	0.0%	0	1.1%	2
Braehead Retail Park, Kings Inch Drive, Glasgow	3.5%	7	4.2%	1	3.4%	6
Braehead Shopping Centre, Kings Inch Drive, Glasgow	27.0%	54	16.7%	4	28.4%	50
Phoenix Retail Park, Paisley	1.5%	3	0.0%	0	1.7%	3
Internet / delivered	3.0%	6	0.0%	0	3.4%	6
Home Catalogue	2.5%	5	16.7%	4	0.6%	1
Other - outside catchment area	1.5%	3	0.0%	0	1.7%	3
Govan Town Centre	0.5%	1	4.2%	1	0.0%	0
Newton Mearns Town Centre	0.5%	1	0.0%	0	0.6%	1
Silverburn Shopping Centre, Barrhead Road, Glasgow	2.5%	5	0.0%	0	2.8%	5
(Don't know / can't remember)	3.5%	7	0.0%	0	4.0%	7
(Don't do)	0.5%	1	0.0%	0	0.6%	1
Base:		200		24		176

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

	Total		No car in Hhold		Car in Hhold	
Braehead	3.5%	7	0.0%	0	4.0%	7
Clydebank	4.0%	8	4.2%	1	4.0%	7
Glasgow	13.5%	27	20.8%	5	12.5%	22
Linwood	0.5%	1	4.2%	1	0.0%	0
Paisley	12.5%	25	16.7%	4	11.9%	21
Patrick	0.5%	1	4.2%	1	0.0%	0
Renfrew	1.0%	2	0.0%	0	1.1%	2
Abbotsinch Retail Park (The Junction), Washington Road, Paisley	3.5%	7	4.2%	1	3.4%	6
Blythswood Retail Parks, Renfrew	1.5%	3	0.0%	0	1.7%	3
Braehead Retail Park, Kings Inch Drive, Glasgow	14.0%	28	4.2%	1	15.3%	27
Braehead Shopping Centre, Kings Inch Drive, Glasgow	4.5%	9	8.3%	2	4.0%	7
Phoenix Retail Park, Paisley	3.0%	6	4.2%	1	2.8%	5
St James Retail Park, Glasgow Road, Dumbarton	0.5%	1	0.0%	0	0.6%	1
The Forge Retail Park, Gallowgate, Glasgow	0.5%	1	0.0%	0	0.6%	1
Waterfront Retail Park, Greenock	1.0%	2	0.0%	0	1.1%	2
Internet / delivered	3.0%	6	0.0%	0	3.4%	6
Hillington Industrial Estate, Hillington Park, Erskine Square, Glasgow	10.0%	20	4.2%	1	10.8%	19
Stirling Town Centre	0.5%	1	0.0%	0	0.6%	1
Tillicoutry Local Centre, Clackmannanshire	0.5%	1	0.0%	0	0.6%	1
(Don't know / can't remember)	8.0%	16	4.2%	1	8.5%	15
(Don't do)	14.0%	28	20.8%	5	13.1%	23
Base:		200		24		176

Column %ges.

Q16 And the time before that, where did your household go to make a purchase of furniture, carpets, or soft household furnishings?

	Total		No car in Hhold		Car in Hhold	
Braehead	3.5%	7	0.0%	0	4.0%	7
Clydebank	3.0%	6	4.2%	1	2.8%	5
Glasgow	14.0%	28	20.8%	5	13.1%	23
Greenock	1.0%	2	0.0%	0	1.1%	2
Kilmarnock	0.5%	1	0.0%	0	0.6%	1
Paisley	9.5%	19	16.7%	4	8.5%	15
Patrick	0.5%	1	4.2%	1	0.0%	0
Renfrew	1.0%	2	0.0%	0	1.1%	2
Abbotsinch Retail Park (The Junction), Washington Road, Paisley	3.5%	7	4.2%	1	3.4%	6
Blythswood Retail Parks, Renfrew	1.0%	2	0.0%	0	1.1%	2
Braehead Retail Park, Kings Inch Drive, Glasgow	12.5%	25	4.2%	1	13.6%	24
Braehead Shopping Centre, Kings Inch Drive, Glasgow	2.0%	4	0.0%	0	2.3%	4
Phoenix Retail Park, Paisley	3.0%	6	0.0%	0	3.4%	6
St James Retail Park, Glasgow Road, Dumbarton	0.5%	1	0.0%	0	0.6%	1
Waterfront Retail Park, Greenock	0.5%	1	0.0%	0	0.6%	1
Internet / delivered	4.0%	8	4.2%	1	4.0%	7
Hillington Industrial Estate, Hillington Park, Erskine Square, Glasgow	5.5%	11	0.0%	0	6.3%	11
(Don't know / can't remember)	20.5%	41	20.8%	5	20.5%	36
(Don't do)	14.0%	28	20.8%	5	13.1%	23
Base:		200		24		176

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

	Total		No car in Hhold		Car in Hhold	
Homebase, Broomfauld Industrial Estate, Dumbarton	1.5%	3	0.0%	0	1.7%	3
Homebase, Westshaw Street, Greenock	0.5%	1	0.0%	0	0.6%	1
Clydebank	0.5%	1	4.2%	1	0.0%	0
Erskine	0.5%	1	4.2%	1	0.0%	0
Glasgow	2.0%	4	4.2%	1	1.7%	3
Greenock	0.5%	1	0.0%	0	0.6%	1
Paisley	21.0%	42	12.5%	3	22.2%	39
Renfrew	4.0%	8	4.2%	1	4.0%	7
Abbotsinch Retail Park (The Junction), Washington Road, Paisley	46.0%	92	25.0%	6	48.9%	86
Blythswood Retail Parks, Renfrew	2.0%	4	0.0%	0	2.3%	4
Braehead Retail Park, Kings Inch Drive, Glasgow	1.5%	3	0.0%	0	1.7%	3
Great Western Retail Park, Duntreath Avenue (off Great Western Road), Drumchapel, Glasgow	2.5%	5	4.2%	1	2.3%	4
Phoenix Retail Park, Paisley	4.0%	8	4.2%	1	4.0%	7
Internet / delivered	1.0%	2	4.2%	1	0.6%	1
(Don't know / can't remember)	3.0%	6	8.3%	2	2.3%	4
(Don't do)	9.5%	19	25.0%	6	7.4%	13
Base:		200		24		176

Q18 And the time before that, where did your household go to make a purchase of DIY and decorating goods?

	Total		No car in Hhold		Car in Hhold	
Homebase, Broomfauld Industrial Estate, Dumbarton	2.0%	4	0.0%	0	2.3%	4
Homebase, Westshaw Street, Greenock	1.0%	2	0.0%	0	1.1%	2
Homebase, Main Street, Milngavie	0.5%	1	0.0%	0	0.6%	1
Clydebank	0.5%	1	0.0%	0	0.6%	1
Erskine	1.0%	2	4.2%	1	0.6%	1
Glasgow	2.0%	4	0.0%	0	2.3%	4
Greenock	1.0%	2	0.0%	0	1.1%	2
Paisley	19.5%	39	12.5%	3	20.5%	36
Renfrew	3.5%	7	4.2%	1	3.4%	6
Abbotsinch Retail Park (The Junction), Washington Road, Paisley	42.0%	84	25.0%	6	44.3%	78
Anniesland Retail Park, Crow Road, Patrick, Glasgow	0.5%	1	0.0%	0	0.6%	1
Blythswood Retail Parks, Renfrew	2.0%	4	0.0%	0	2.3%	4
Braehead Retail Park, Kings Inch Drive, Glasgow	1.0%	2	0.0%	0	1.1%	2
Great Western Retail Park, Duntreath Avenue (off Great Western Road), Drumchapel, Glasgow	2.5%	5	8.3%	2	1.7%	3
Phoenix Retail Park, Paisley	3.5%	7	4.2%	1	3.4%	6
Internet / delivered	0.5%	1	4.2%	1	0.0%	0
Bridge of Weir Village Centre	1.0%	2	0.0%	0	1.1%	2
(Don't know / can't remember)	6.5%	13	12.5%	3	5.7%	10
(Don't do)	9.5%	19	25.0%	6	7.4%	13
Base:		200		24		176

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 or domestic appliances, such as washing machines, fridges or cookers?

	Total		No car in Hhold		Car in Hhold	
Currys, Finnieston Street, Glasgow	0.5%	1	0.0%	0	0.6%	1
Homebase, Broomfauld Industrial Estate, Dumbarton	0.5%	1	0.0%	0	0.6%	1
Braehead	1.5%	3	0.0%	0	1.7%	3
Clydebank	1.5%	3	8.3%	2	0.6%	1
East Kilbride	0.5%	1	0.0%	0	0.6%	1
Erskine	1.0%	2	0.0%	0	1.1%	2
Glasgow	12.0%	24	16.7%	4	11.4%	20
Greenock	2.5%	5	0.0%	0	2.8%	5
Paisley	9.5%	19	16.7%	4	8.5%	15
Port Glasgow	1.0%	2	0.0%	0	1.1%	2
Renfrew	2.0%	4	4.2%	1	1.7%	3
Abbotsinch Retail Park (The Junction), Washington Road, Paisley	14.5%	29	25.0%	6	13.1%	23
Blythswood Retail Parks, Renfrew	1.0%	2	0.0%	0	1.1%	2
Braehead Retail Park, Kings Inch Drive, Glasgow	25.0%	50	4.2%	1	27.8%	49
Braehead Shopping Centre, Kings Inch Drive, Glasgow	1.5%	3	0.0%	0	1.7%	3
Gallagher Retail Park, Linwood Road, Paisley	0.5%	1	0.0%	0	0.6%	1
Great Western Retail Park, Duntreath Avenue (off Great Western Road), Drumchapel, Glasgow	1.0%	2	0.0%	0	1.1%	2
Phoenix Retail Park, Paisley	1.5%	3	4.2%	1	1.1%	2
Waterfront Retail Park, Greenock	4.0%	8	0.0%	0	4.5%	8
Internet / delivered	7.0%	14	4.2%	1	7.4%	13
Other - outside catchment area	0.5%	1	0.0%	0	0.6%	1
Clydebank Retail Park, Livingstone Street, Clydebank	0.5%	1	0.0%	0	0.6%	1
Giffnock Town Centre	0.5%	1	0.0%	0	0.6%	1
Hillington Industrial Estate, Hillington Park, Erskine Square, Glasgow	1.5%	3	0.0%	0	1.7%	3
(Don't know / can't remember)	4.5%	9	4.2%	1	4.5%	8
(Don't do)	4.0%	8	12.5%	3	2.8%	5
Base:		200		24		176

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, computers or domestic appliances, such as washing machines, fridges or cookers?

	Total		No car in Hhold		Car in Hhold	
Currys, Finnieston Street, Glasgow	0.5%	1	0.0%	0	0.6%	1
Braehead	4.0%	8	0.0%	0	4.5%	8
Clydebank	1.0%	2	0.0%	0	1.1%	2
Erskine	0.5%	1	0.0%	0	0.6%	1
Glasgow	8.5%	17	8.3%	2	8.5%	15
Greenock	1.0%	2	0.0%	0	1.1%	2
Paisley	10.5%	21	29.2%	7	8.0%	14
Renfrew	2.0%	4	0.0%	0	2.3%	4
Abbotsinch Retail Park (The Junction), Washington Road, Paisley	13.5%	27	16.7%	4	13.1%	23
Anniesland Retail Park, Crow Road, Patrick, Glasgow	0.5%	1	0.0%	0	0.6%	1
Blythswood Retail Parks, Renfrew	1.0%	2	0.0%	0	1.1%	2
Braehead Retail Park, Kings Inch Drive, Glasgow	18.0%	36	4.2%	1	19.9%	35
Braehead Shopping Centre, Kings Inch Drive, Glasgow	2.5%	5	4.2%	1	2.3%	4
Gallagher Retail Park, Linwood Road, Paisley	0.5%	1	0.0%	0	0.6%	1
Great Western Retail Park, Duntreath Avenue (off Great Western Road), Drumchapel, Glasgow	0.5%	1	0.0%	0	0.6%	1
Phoenix Retail Park, Paisley	1.0%	2	4.2%	1	0.6%	1
Waterfront Retail Park, Greenock	5.5%	11	0.0%	0	6.3%	11
Internet / delivered	5.5%	11	0.0%	0	6.3%	11
TV/Interactive Shopping	0.5%	1	0.0%	0	0.6%	1
Hillington Industrial Estate, Hillington Park, Erskine Square, Glasgow	0.5%	1	0.0%	0	0.6%	1
(Don't know / can't remember)	18.5%	37	20.8%	5	18.2%	32
(Don't do)	4.0%	8	12.5%	3	2.8%	5
Base:		200		24		176

Q21 Can you tell me where you or your household last made a purchase of health, beauty or chemist items?

	Total		No car in Hhold		Car in Hhold	
Bishopton	30.0%	60	54.2%	13	26.7%	47
Braehead	8.5%	17	0.0%	0	9.7%	17
Clydebank	1.0%	2	4.2%	1	0.6%	1
Erskine	6.5%	13	0.0%	0	7.4%	13
Glasgow	5.0%	10	4.2%	1	5.1%	9
Greenock	2.5%	5	0.0%	0	2.8%	5
Paisley	7.5%	15	16.7%	4	6.3%	11
Port Glasgow	1.0%	2	0.0%	0	1.1%	2
Renfrew	3.0%	6	4.2%	1	2.8%	5
Braehead Retail Park, Kings Inch Drive, Glasgow	4.5%	9	0.0%	0	5.1%	9
Braehead Shopping Centre, Kings Inch Drive, Glasgow	20.5%	41	4.2%	1	22.7%	40
Phoenix Retail Park, Paisley	0.5%	1	0.0%	0	0.6%	1
Internet / delivered	1.0%	2	4.2%	1	0.6%	1
Home Catalogue	1.0%	2	0.0%	0	1.1%	2
(Don't do)	7.5%	15	8.3%	2	7.4%	13
Base:		200		24		176

Q22 And the time before that, where did you or your household go to make a purchase of health, beauty or chemist items?

	Total		No car in Hhold		Car in Hhold	
Bishopton	26.5%	53	50.0%	12	23.3%	41
Braehead	6.5%	13	4.2%	1	6.8%	12
Clydebank	2.0%	4	4.2%	1	1.7%	3
Erskine	6.5%	13	0.0%	0	7.4%	13
Glasgow	4.5%	9	4.2%	1	4.5%	8
Greenock	2.5%	5	0.0%	0	2.8%	5
Linwood	1.0%	2	0.0%	0	1.1%	2
Milngavie	0.5%	1	0.0%	0	0.6%	1
Paisley	9.0%	18	16.7%	4	8.0%	14
Port Glasgow	1.0%	2	0.0%	0	1.1%	2
Renfrew	3.0%	6	4.2%	1	2.8%	5
Braehead Retail Park, Kings Inch Drive, Glasgow	3.5%	7	0.0%	0	4.0%	7
Braehead Shopping Centre, Kings Inch Drive, Glasgow	21.0%	42	8.3%	2	22.7%	40
Phoenix Retail Park, Paisley	0.5%	1	0.0%	0	0.6%	1
Internet / delivered	0.5%	1	0.0%	0	0.6%	1
Home Catalogue	1.0%	2	0.0%	0	1.1%	2
Bridgewater Shopping Centre, Bridgewater Place, Erskine	1.0%	2	0.0%	0	1.1%	2
Silverburn Shopping Centre, Barrhead Road, Glasgow	0.5%	1	0.0%	0	0.6%	1
(Don't know / can't remember)	1.5%	3	0.0%	0	1.7%	3
(Don't do)	7.5%	15	8.3%	2	7.4%	13
Base:		200		24		176

Q23 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		No car in Hhold		Car in Hhold	
Braehead	4.5%	9	0.0%	0	5.1%	9
Clydebank	4.5%	9	0.0%	0	5.1%	9
Erskine	0.5%	1	0.0%	0	0.6%	1
Glasgow	7.0%	14	4.2%	1	7.4%	13
Greenock	1.5%	3	0.0%	0	1.7%	3
Linwood	0.5%	1	0.0%	0	0.6%	1
Paisley	3.5%	7	0.0%	0	4.0%	7
Port Glasgow	0.5%	1	0.0%	0	0.6%	1
Renfrew	3.0%	6	0.0%	0	3.4%	6
Abbotsinch Retail Park (The Junction), Washington Road, Paisley	1.0%	2	0.0%	0	1.1%	2
Blythswood Retail Parks, Renfrew	3.0%	6	0.0%	0	3.4%	6
Braehead Retail Park, Kings Inch Drive, Glasgow	6.0%	12	0.0%	0	6.8%	12
Braehead Shopping Centre, Kings Inch Drive, Glasgow	7.0%	14	0.0%	0	8.0%	14
Phoenix Retail Park, Paisley	0.5%	1	0.0%	0	0.6%	1
Internet / delivered	8.5%	17	12.5%	3	8.0%	14
TV/Interactive Shopping	0.5%	1	0.0%	0	0.6%	1
Other - outside catchment area	0.5%	1	0.0%	0	0.6%	1
Govan Town Centre	2.5%	5	0.0%	0	2.8%	5
Ibrox Shopping Centre, Glasgow	0.5%	1	0.0%	0	0.6%	1
Livingston Designer Outlet, Almondvale Avenue, Livingston	1.0%	2	0.0%	0	1.1%	2
(Don't know / can't remember)	4.5%	9	0.0%	0	5.1%	9
(Don't do)	39.0%	78	83.3%	20	33.0%	58
Base:		200		24		176

Q24 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?

	Total		No car in Hhold		Car in Hhold	
Braehead	3.5%	7	0.0%	0	4.0%	7
Clydebank	3.0%	6	0.0%	0	3.4%	6
Erskine	1.0%	2	0.0%	0	1.1%	2
Glasgow	8.5%	17	4.2%	1	9.1%	16
Greenock	1.5%	3	0.0%	0	1.7%	3
Linwood	0.5%	1	0.0%	0	0.6%	1
Paisley	3.5%	7	0.0%	0	4.0%	7
Port Glasgow	0.5%	1	0.0%	0	0.6%	1
Renfrew	3.0%	6	0.0%	0	3.4%	6
Blythswood Retail Parks, Renfrew	2.0%	4	0.0%	0	2.3%	4
Braehead Retail Park, Kings Inch Drive, Glasgow	5.0%	10	0.0%	0	5.7%	10
Braehead Shopping Centre, Kings Inch Drive, Glasgow	6.5%	13	0.0%	0	7.4%	13
Phoenix Retail Park, Paisley	0.5%	1	0.0%	0	0.6%	1
Waterfront Retail Park, Greenock	0.5%	1	0.0%	0	0.6%	1
Internet / delivered	9.0%	18	12.5%	3	8.5%	15
TV/Interactive Shopping	0.5%	1	0.0%	0	0.6%	1
Other - outside catchment area	1.0%	2	0.0%	0	1.1%	2
Govan Town Centre	0.5%	1	0.0%	0	0.6%	1
Ibrox Shopping Centre, Glasgow	0.5%	1	0.0%	0	0.6%	1
Langbank Village Centre, Renfrewshire	0.5%	1	0.0%	0	0.6%	1
Livingston Designer Outlet, Almondvale Avenue, Livingston	0.5%	1	0.0%	0	0.6%	1
Silverburn Shopping Centre, Barrhead Road, Glasgow	0.5%	1	0.0%	0	0.6%	1
(Don't know / can't remember)	8.5%	17	0.0%	0	9.7%	17
(Don't do)	39.0%	78	83.3%	20	33.0%	58
Base:		200		24		176

Column %ges.

Q25 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		No car in Hhold		Car in Hhold	
Braehead	6.0%	12	4.2%	1	6.3%	11
Clydebank	0.5%	1	4.2%	1	0.0%	0
Erskine	0.5%	1	0.0%	0	0.6%	1
Glasgow	14.5%	29	20.8%	5	13.6%	24
Greenock	1.0%	2	0.0%	0	1.1%	2
Milngavie	0.5%	1	0.0%	0	0.6%	1
Paisley	2.5%	5	8.3%	2	1.7%	3
Port Glasgow	0.5%	1	0.0%	0	0.6%	1
Renfrew	1.0%	2	4.2%	1	0.6%	1
Braehead Retail Park, Kings Inch Drive, Glasgow	4.5%	9	4.2%	1	4.5%	8
Braehead Shopping Centre, Kings Inch Drive, Glasgow	18.0%	36	8.3%	2	19.3%	34
Internet / delivered	28.5%	57	12.5%	3	30.7%	54
TV/Interactive Shopping	1.0%	2	4.2%	1	0.6%	1
Other - outside catchment area	0.5%	1	0.0%	0	0.6%	1
Govan Town Centre	0.5%	1	0.0%	0	0.6%	1
Helensburgh Town Centre, Argyle & Bute	0.5%	1	0.0%	0	0.6%	1
Silverburn Shopping Centre, Barrhead Road, Glasgow	0.5%	1	0.0%	0	0.6%	1
Troon Town Centre, Ayrshire	0.5%	1	0.0%	0	0.6%	1
(Don't know / can't remember)	5.5%	11	4.2%	1	5.7%	10
(Don't do)	13.0%	26	25.0%	6	11.4%	20
Base:		200		24		176

Q26 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?

	Total		No car in Hhold		Car in Hhold	
Braehead	4.5%	9	4.2%	1	4.5%	8
Erskine	1.5%	3	0.0%	0	1.7%	3
Glasgow	13.5%	27	25.0%	6	11.9%	21
Greenock	2.0%	4	0.0%	0	2.3%	4
Paisley	2.5%	5	8.3%	2	1.7%	3
Port Glasgow	0.5%	1	0.0%	0	0.6%	1
Renfrew	0.5%	1	0.0%	0	0.6%	1
Braehead Retail Park, Kings Inch Drive, Glasgow	3.5%	7	0.0%	0	4.0%	7
Braehead Shopping Centre, Kings Inch Drive, Glasgow	19.5%	39	12.5%	3	20.5%	36
Internet / delivered	23.5%	47	4.2%	1	26.1%	46
TV/Interactive Shopping	1.0%	2	4.2%	1	0.6%	1
Other - outside catchment area	0.5%	1	0.0%	0	0.6%	1
Ayr Town Centre	0.5%	1	0.0%	0	0.6%	1
Govan Town Centre	1.0%	2	0.0%	0	1.1%	2
Helensburgh Town Centre, Argyle & Bute	0.5%	1	0.0%	0	0.6%	1
Inverness Town Centre	0.5%	1	0.0%	0	0.6%	1
Newton Mearns Town Centre	0.5%	1	0.0%	0	0.6%	1
Silverburn Shopping Centre, Barrhead Road, Glasgow	1.0%	2	0.0%	0	1.1%	2
St. Andrews Town Centre	0.5%	1	0.0%	0	0.6%	1
(Don't know / can't remember)	9.5%	19	16.7%	4	8.5%	15
(Don't do)	13.0%	26	25.0%	6	11.4%	20
Base:		200		24		176

GEN Gender of respondent.

	Total		No car in Hhold		Car in Hhold	
Male	37.5%	75	12.5%	3	40.9%	72
Female	62.5%	125	87.5%	21	59.1%	104
Base:		200		24		176

AGE Could I ask, how old are you?

	Total		No car in Hhold		Car in Hhold	
18 to 24	2.5%	5	0.0%	0	2.8%	5
25 to 34	2.5%	5	0.0%	0	2.8%	5
35 to 44	9.5%	19	0.0%	0	10.8%	19
45 to 54	21.5%	43	16.7%	4	22.2%	39
55 to 64	21.0%	42	16.7%	4	21.6%	38
65 +	42.0%	84	66.7%	16	38.6%	68
(Refused)	1.0%	2	0.0%	0	1.1%	2
Base:		200		24		176

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

	Total		No car in Hhold		Car in Hhold	
None	12.0%	24	100.0%	24	0.0%	0
One	43.0%	86	0.0%	0	48.9%	86
Two	35.5%	71	0.0%	0	40.3%	71
Three or more	8.0%	16	0.0%	0	9.1%	16
(Refused)	1.5%	3	0.0%	0	1.7%	3
Base:		200		24		176

SEG Socioeconomic Grouping

	Total		No car in Hhold		Car in Hhold	
AB	26.0%	52	8.3%	2	28.4%	50
C1	29.5%	59	25.0%	6	30.1%	53
C2	18.5%	37	8.3%	2	19.9%	35
DE	18.0%	36	50.0%	12	13.6%	24
(Refused)	8.0%	16	8.3%	2	8.0%	14
Base:		200		24		176

Appendix 2:

Composite Expenditures by Zone

210212 Bishopton Analysis incl. SFT
Results Summary

Percentage of Spend by Zone

		Total	No car in H	Car in Hhold
Composite Non-food:				
CE	Bishopton	4.1%	7.4%	3.7%
LO	Local - Buffer zone 1	2.0%	1.5%	2.1%
ME	Buffer zone 3	59.8%	48.7%	60.4%
MW	Buffer zone 2	0.2%	0.0%	0.2%
NE	Buffer zone 5	0.2%	0.0%	0.2%
NW	Buffer zone 4	4.2%	0.5%	4.6%
SE	Buffer zone 6	17.8%	20.9%	17.6%
OU	Outside catchment area	1.7%	0.8%	1.8%
XX	SFT	9.9%	20.3%	9.4%
Composite food:				
CE	Bishopton	18.9%	18.6%	18.9%
LO	Local - Buffer zone 1	38.8%	44.2%	38.1%
ME	Buffer zone 3	23.0%	25.7%	22.6%
MW	Buffer zone 2	1.2%	1.5%	1.2%
NE	Buffer zone 5	0.0%	0.0%	0.0%
NW	Buffer zone 4	11.1%	2.2%	12.2%
SE	Buffer zone 6	4.5%	1.5%	4.8%
OU	Outside catchment area	0.0%	0.0%	0.0%
XX	SFT	2.6%	6.2%	2.1%

210212 Bishopton Analysis excl. SFT
Results Summary

Percentage of Spend by Zone

		Total	No car in H	Car in Hhold
Composite Non-food:				
CE	Bishopton	4.2%	7.6%	3.7%
LO	Local - Buffer zone 1	2.2%	1.7%	2.3%
ME	Buffer zone 3	66.2%	53.6%	66.5%
MW	Buffer zone 2	0.2%	0.0%	0.2%
NE	Buffer zone 5	0.2%	0.0%	0.2%
NW	Buffer zone 4	4.7%	0.6%	5.2%
SE	Buffer zone 6	20.3%	35.7%	19.9%
OU	Outside catchment area	1.9%	0.8%	2.0%
Composite food:				
CE	Bishopton	19.1%	19.1%	19.1%
LO	Local - Buffer zone 1	40.0%	47.7%	39.0%
ME	Buffer zone 3	23.7%	27.5%	23.2%
MW	Buffer zone 2	1.3%	1.7%	1.2%
NE	Buffer zone 5	0.0%	0.0%	0.0%
NW	Buffer zone 4	11.4%	2.3%	12.5%
SE	Buffer zone 6	4.6%	1.7%	4.6%
OU	Outside catchment area	0.0%	0.0%	0.3%

Appendix 3:

Sample Questionnaire

Job Number: 210212

Bishopton Retail Survey

Good morning / afternoon / evening, I am ...... from NEMS market research, and we are conducting a short survey in your area about shopping. Do you have time to answer some questions ? It will take about 5 minutes.

QA **Are you the main shopper in your household?**

1 Yes GO TO Q01
2 No **CLOSE**

FIRST WE HAVE A FEW QUESTIONS ABOUT WHERE YOU UNDERTAKE FOOD AND GROCERIES SHOPPING. IN ANSWERING THESE QUESTIONS THE LOCATION MAY BE A SUPERMARKET, A SMALLER STORE OR INDEPENDENT RETAILER, OR A TOWN CENTRE, OR COULD BE THE USE OF FACILITIES SUCH AS THE INTERNET.

Q01 **Where did your household last undertake a main food and grocery shop?**
DO NOT PROMPT, ONE ANSWER ONLY
IF 'OTHER' PLEASE SPECIFY STORE NAME AND LOCATION

#Convenie ConvenienceList

Those who do a main food shop at Q01:

Q02 **And where did your household go the time before that for a main food and grocery shop?**
DO NOT PROMPT. ONE ANSWER ONLY.

#Convenie ConvenienceList

Q03 **Approximately how much money does your household normally spend on a main food and grocery shop?**
DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

X £.........................
Y (Don't know / varies)
Z (Refused)

Q04 **How often does your household do a main food and grocery shop?**
DO NOT READ OUT. ONE ANSWER ONLY

1 More than once a week
2 Once a week
3 Once a fortnight
4 Once a month
5 Less often
6 (Don't know / varies / no particular pattern)

Q05 **Where did your household last undertake a 'top-up' food and grocery shop?**
DO NOT READ OUT. ONE ANSWER ONLY

#Convenie ConvenienceList
IF DON'T DO, GO TO Q09

Those who do top-up shopping at Q05:

Q06 **And where did your household shop the time before that for a 'top-up' food**
DO NOT PROMPT. ONE ANSWER ONLY.

#Convenie ConvenienceList

Those who do top-up shopping at Q05 / Q06:

Q07 **Approximately how much money does your household normally spend on a**
DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

X £.........................
Y (Don't know / varies)
Z (Refused)

Those who do top-up shopping at Q05 / Q06:

Q08 **How often does your household normally do its top-up food shopping?**
DO NOT READ OUT. ONE ANSWER ONLY

1 Daily
2 More than 3 times a week
3 Two or three times a week
4 Once a week
5 Once a fortnight
6 Less often
7 (Don't know / varies / no particular pattern)

IF RESPONDENT GIVES SUPERMARKET LOCATIONS IN EACH OF Q01, Q02, Q05 AND Q06 THEN ASK Q09, IF NOT GO TO Q13

Q09 **Does your household also spend money on food and groceries in small shops?**
DO NOT PROMPT. ONE ANSWER ONLY.

1	Yes	GO TO Q10
2	No	**GO TO Q13**

Those who also buy food and groceries in small shops at Q09

Q10 **Where are these small shops located?**
DO NOT READ OUT. ONE ANSWER ONLY.

#LocalSho LocalShops

Q11 **Approximately how much money does your household spend on food and groceries on a typical trip to these small shops?**
DO NOT PROMPT. PLEASE WRITE IN TO THE NEAREST £

X £.........................
Y (Don't know / varies)
Z (Refused)

Q12 **How often do you normally visit these other small shops for food and**
DO NOT READ OUT. ONE ANSWER ONLY

1 Daily
2 More than 3 times a week
3 Two or three times a week
4 Once a week
5 Once a fortnight
6 Less often
7 (Don't know / varies / no particular pattern)

WE NOW HAVE A FEW QUESTIONS ABOUT WHERE YOU GO FOR NON-FOOD

Q13 **So, speaking as an individual, can you tell me where you last made a purchase of clothes or shoes?**
DO NOT PROMPT. ONE ANSWER ONLY.

#Comparis ComparisonList
IF DON'T BUY THESE GOODS, GO TO Q15

Those who mentioned a specific location to buy clothes and shoes at Q13:

Q14 **And the time before that, where did you go to make a purchase of clothes or shoes?**
DO NOT PROMPT. ONE ANSWER ONLY.

#Comparis ComparisonList

Q15 **Now can you tell me where your household last made a purchase of furniture, carpets, or soft household furnishings?**
DO NOT PROMPT. ONE ANSWER ONLY.

#Comparis ComparisonList
IF DON'T BUY THESE GOODS, GO TO Q17

Those who mentioned a specific location to buy furniture, carpets or soft household furnishings at Q15:

Q16 **And the time before that, where did your household go to make a purchase of furniture, carpets, or soft household furnishings?**
DO NOT PROMPT. ONE ANSWER ONLY.

#Comparis ComparisonList

Q17 **Now can you tell me where your household last made a purchase of DIY and decorating goods?**
DO NOT PROMPT. ONE ANSWER ONLY.

#Comparis ComparisonList
IF DON'T BUY THESE GOODS, GO TO Q19

Those who mentioned a specific location to buy DIY and decorating goods at Q17:

Q18 **And the time before that, where did your household go to make a purchase of DIY and decorating goods?**
DO NOT PROMPT. ONE ANSWER ONLY.

#Comparis ComparisonList

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 or domestic appliances, such as washing machines, fridges or cookers?**
DO NOT PROMPT. ONE ANSWER ONLY.

#Comparis ComparisonList
IF DON'T BUY THESE GOODS, GO TO Q21

Those who mentioned a specific location to buy electrical items at Q19:

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, computers or domestic appliances, such as washing machines, fridges or cookers?**
DO NOT PROMPT. ONE ANSWER ONLY.

#Comparis ComparisonList

Q21 **Can you tell me where you or your household last made a purchase of health, beauty or chemist items?**
DO NOT PROMPT. ONE ANSWER ONLY.

#Comparis ComparisonList
IF DON'T BUY THESE GOODS, GO TO Q23

Those who mentioned a specific location to buy health, beauty or chemist items at Q21:

Q22 **And the time before that, where did you or your household go to make a purchase of health, beauty or chemist items?**
DO NOT PROMPT. ONE ANSWER ONLY.

#Comparis ComparisonList

Q23 **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?**
DO NOT PROMPT. ONE ANSWER ONLY.

#Comparis ComparisonList
IF DON'T BUY THESE GOODS, GO TO Q25

Those who mentioned a specific location to buy recreational goods at Q23:

Q24 **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?**
DO NOT PROMPT. ONE ANSWER ONLY.

#Comparis ComparisonList

Q25 **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?**

DO NOT PROMPT. ONE ANSWER ONLY.

#Comparis ComparisonList
IF DON'T BUY THESE GOODS, GO TO GEN

Those who mentioned a specific location to buy other non-food items at Q25:

Q26 **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?**
DO NOT PROMPT. ONE ANSWER ONLY.

#Comparis ComparisonList

GEN	**Gender of respondent.** DO NOT READ OUT. CODE FROM OBSERVATION.
1	Male
2	Female
AGE	**Could I ask, how old are you?** DO NOT READ OUT. ONE ANSWER ONLY.
1	18 to 24
2	25 to 34
3	35 to 44
4	45 to 54
5	55 to 64
6	65 +
7	(Refused)
CAR	**How many cars does your household own or have the use of?** DO NOT READ OUT. ONE ANSWER ONLY.
1	None
2	One
3	Two
4	Three or more
5	(Refused)
OCC	**What is the occupation of the chief income earner in your household?** (IF RETIRED, ASK PREVIOUS OCCUPATION)
1	Occupation / job description (PLEASE WRITE IN)
2	Retired - Basic State Pension
3	(Refused)

Thank & close

Appendix C

Household Survey - Addendum
August 2012

Bishopton Retail Study
for Montagu Evans
Report Addendum, August 2012

Background and Objectives

In March of this year, a household retail study was undertaken to assess the shopping habits of the residents of Bishopton, a small settlement to the west of Glasgow and south of the M8. At the time of this fieldwork, the Co-op store in Bishopton was temporarily closed prior to re-opening in larger premises. This coincidence of events clearly had a potential impact on residents' shopping patterns.

Supplementary interviews were undertaken to evaluate the possible effect of this and the impact on the new larger Co-op store on food and grocery shopping patterns.

Research Methodology

The research methodology was identical to that used earlier for the main study in March (see main report), albeit with a new questionnaire to address the specific issues. A total of 200 telephone interviews were conducted between Monday 9 July and Saturday 14 July 2012.

Main Food and Grocery Shopping

The top main food and grocery destination for Bishopton residents is Morrisons in Erskine, recording a share of visits of 41% and 50% respectively in each of the two waves of fieldwork. Residents also travel further afield to stores of each of the other main food and grocery operators; Tesco Extra at Port Glasgow, Asda in Paisley and Sainsbury's in Braehead.

At the time of the fieldwork in March, the Costcutter in Bishopton enjoyed a small patronage for main food and grocery shopping (4%). With the re-opening of the new Co-op store this figure dropped to just 1%, while the new Co-op store attracted 9% for the main shop.

This patronage of the new Co-op store is a mix of customers of the old store (accounting for 41% of current customers) and those who shopped elsewhere. Business was mainly attracted from those who previously shopped at the Morrisons in Erskine (35% of current main food and grocery shoppers), while 1 respondent for each of Aldi in Erskine, Asda in Clydebank and Tesco Extra in Port Glasgow were also recorded.

Top-up Food and Grocery Shopping

While the Costcutter enjoyed high levels of patronage for top-up shopping at the time of the Co-op closure (44% of all respondents), the new Co-op now assumes that leading position with 54% share of visits, with Costcutter and other Bishopton stores accounting for a further 10%.

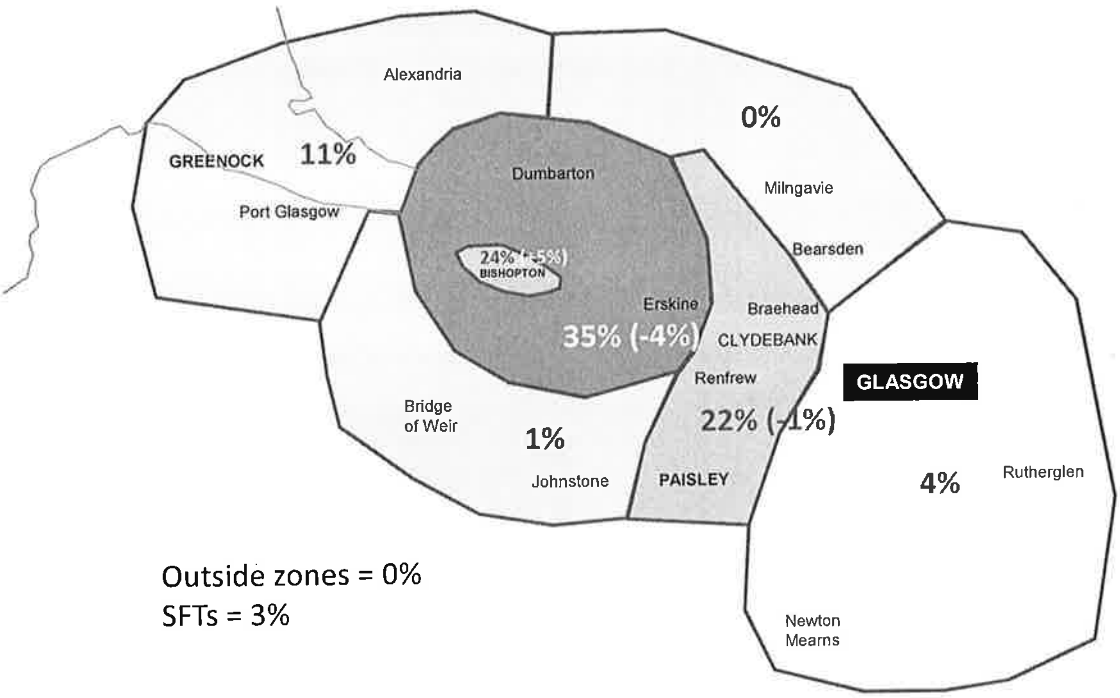
As with main food and grocery shopping, much of the new patronage to the Co-op store has been attracted from those top-up shopping at the Morrisons in Erskine (reducing from 18% share of visits to 11%).

Food and Grocery Expenditure Flows

As part of the main study, store destinations and shopping expenditure were used in a composite analysis to determine expenditure flows. This analysis showed that 19% of all food and grocery expenditure was retained in Bishopton.

The overall impact of the new Co-op store has increased retention of convenience expenditure in Bishopton by 5 percentage points to 24%. This has predominantly come from zone B1 immediately surrounding Bishopton, where share of expenditure has dropped by 4 percentage points to 35%, though this zone still retains the largest share of expenditure.

Proportion of Food Expenditure to Zones:



Numbers in brackets show impact of new Co-op store in Bishopton

Usage and Non-usage of the New Co-op Store in Bishopton

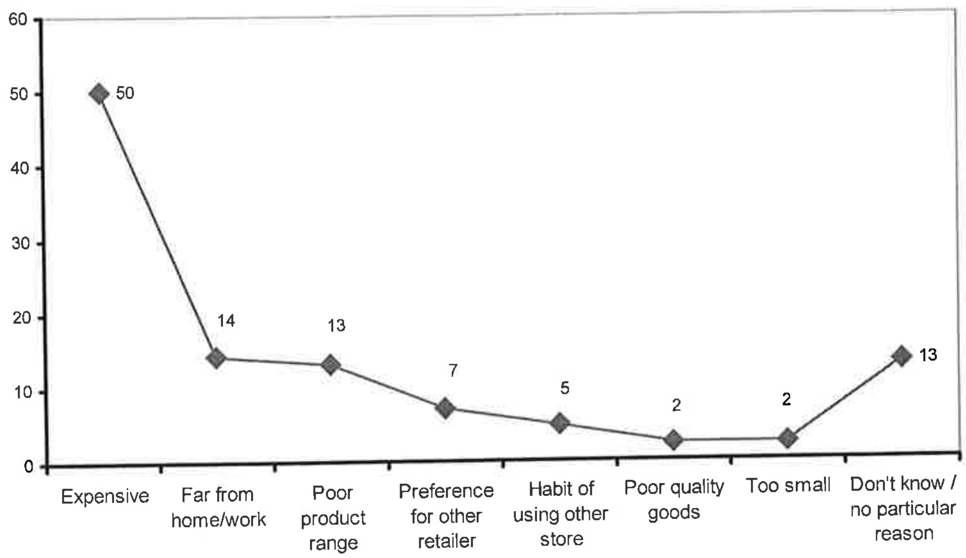
As indicated earlier, 9% of respondents use the Co-op for their main food shopping and over half (54%) for their top-up. Average frequency of usage among those shoppers is twice a week for both main and top-up; in other words a high number of smaller baskets.

The average weekly spends for those using the new Co-op store are £78 on main and £28 on top-up.

Over half (58%) of all residents use the Co-op for some form of food and grocery shopping. As would be expected with any new store, even among those not currently using the store, the majority (88%) have visited it since it opened.

The main reason that residents do not use the new Co-op is that they find it expensive (50% of respondents), not convenient for home/work (14%) and that is has a poor range of products (13%).

Reasons Don't Use Co-op in Bishopton
[Base: those who don't shop there, 84]



Effect of Car Ownership

While usage of the Co-op store in Bishopton for top-up shopping is equally popular among households with or without a car (share of shoppers 54% and 52% respectively), those with a car are more likely to use a larger more distant store for their main food and grocery shopping. For example, while a fifth of households without a car use the Co-op for their main shopping, this figure is only 6% among car owners.

Conclusions

During the temporary Co-op store closure much of that food and grocery expenditure was retained in Bishopton with an increase in patronage of the Costcutter. The opening of the new store retained the Co-ops previous customer base, but also attracted new customers. The enhanced retail provision increased the retention of convenience goods expenditure in Bishopton by 5 percentage points, increasing it to 24%, primarily at the expense of zone B1 surrounding Bishopton (itself dominated by the Morrisons store at Erskine).

The majority of residents in Bishopton have tried the new Co-op store, and over half (58%) use it for food and grocery shopping. The main reason for shoppers not using the store is that many (50%) find it expensive, not convenient, and the range of goods on offer insufficient for their needs.

Appendices

Data tabulations

Sample questionnaire

Q01 At which store or centre do you do most of your household's main food shopping ? If Internet please state.

	Total		No car in Hhold		Car in Hhold	
Aldi, Bridgewater Shopping Centre, Erskine	2.0%	4	3.4%	1	1.8%	3
Asda, Britannia Way, Clydebank	2.0%	4	6.9%	2	1.2%	2
Asda, Helen Street, Govan, Glasgow	0.5%	1	0.0%	0	0.6%	1
Asda, Phoenix Retail Park, Paisley	5.5%	11	0.0%	0	6.4%	11
Co-op, Greenock Road, Bishopton	8.5%	17	20.7%	6	6.4%	11
Costcutter, Greenock Road, Bishopton	1.0%	2	3.4%	1	0.6%	1
Marks & Spencer, King's Inch Road, Glasgow	3.0%	6	0.0%	0	3.5%	6
Marks & Spencer, High Street, Paisley	2.5%	5	0.0%	0	2.9%	5
Morrisons, Paisley Road West, Cardonald	0.5%	1	0.0%	0	0.6%	1
Morrisons, Bridgewater Shopping Centre, Erskine	50.0%	100	44.8%	13	50.9%	87
Morrisons, Rue End Street, Greenock	1.0%	2	0.0%	0	1.2%	2
Morrisons, Anchor Mills, Paisley	0.5%	1	3.4%	1	0.0%	0
Sainsbury's, Kings Inch Drive, Braehead	5.5%	11	0.0%	0	6.4%	11
Tesco Extra, Greenock Road, Port Glasgow	9.5%	19	0.0%	0	11.1%	19
Tesco, East Lane, Paisley	2.0%	4	3.4%	1	1.8%	3
Tesco, Newmains Road, Renfrew	2.0%	4	0.0%	0	2.3%	4
Bishopton	0.5%	1	3.4%	1	0.0%	0
Internet / delivered	2.5%	5	6.9%	2	1.8%	3
(Don't know)	0.5%	1	0.0%	0	0.6%	1
(Don't do this type of shopping)	0.5%	1	3.4%	1	0.0%	0
Base:		200		29		171

Q02 Approximately how much money does your household spend on a main food and grocery shop?
Those that use the new Co-op on Greenock Road, Bishopton at Q01

	Total		No car in Hhold		Car in Hhold	
£1 - £10	5.9%	1	0.0%	0	9.1%	1
£11 - £20	5.9%	1	16.7%	1	0.0%	0
£21 - £30	23.5%	4	33.3%	2	18.2%	2
£31 - £40	29.4%	5	16.7%	1	36.4%	4
£41 - £50	11.8%	2	16.7%	1	9.1%	1
£51 - £60	0.0%	0	0.0%	0	0.0%	0
£61 - £70	5.9%	1	16.7%	1	0.0%	0
£71 - £80	0.0%	0	0.0%	0	0.0%	0
£81 - £90	0.0%	0	0.0%	0	0.0%	0
£91 - £100	5.9%	1	0.0%	0	9.1%	1
£101 - £110	0.0%	0	0.0%	0	0.0%	0
£111 - £120	0.0%	0	0.0%	0	0.0%	0
£121 - £130	0.0%	0	0.0%	0	0.0%	0
£131 - £140	0.0%	0	0.0%	0	0.0%	0
£141 - £150	0.0%	0	0.0%	0	0.0%	0
£151 - £175	0.0%	0	0.0%	0	0.0%	0
£176 - £200	5.9%	1	0.0%	0	9.1%	1
(Don't know / varies)	5.9%	1	0.0%	0	9.1%	1
(Refused)	0.0%	0	0.0%	0	0.0%	0
Mean:		*50.3*		*39.2*		*57.0*
Base:		17		6		11

Q03 How often does your household do a main food and grocery shop?
Those that use the new Co-op on Greenock Road, Bishopton at Q01

	Total		No car in Hhold		Car in Hhold	
More than once a week	70.6%	12	83.3%	5	63.6%	7
Once a week	17.6%	3	16.7%	1	18.2%	2
Once a fortnight	11.8%	2	0.0%	0	18.2%	2
Once a month	0.0%	0	0.0%	0	0.0%	0
Less often	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies / no particular pattern)	0.0%	0	0.0%	0	0.0%	0
Mean:		*2.00*		*2.25*		*1.86*
Base:		17		6		11

X02 Approximately how much money does your household normally spend on main food and grocery shopping per week?
Those that use the new Co-op on Greenock Road, Bishopton at Q01

	Total		No car in Hhold		Car in Hhold	
£1 - £10	0.0%	0	0.0%	0	0.0%	0
£11 - £20	5.9%	1	0.0%	0	9.1%	1
£21 - £30	5.9%	1	0.0%	0	9.1%	1
£31 - £40	5.9%	1	0.0%	0	9.1%	1
£41 - £50	5.9%	1	16.7%	1	0.0%	0
£51 - £60	0.0%	0	0.0%	0	0.0%	0
£61 - £70	11.8%	2	33.3%	2	0.0%	0
£71 - £80	11.8%	2	16.7%	1	9.1%	1
£81 - £90	5.9%	1	0.0%	0	9.1%	1
£91 - £100	29.4%	5	16.7%	1	36.4%	4
£101 - £110	0.0%	0	0.0%	0	0.0%	0
£111 - £120	0.0%	0	0.0%	0	0.0%	0
£121 - £130	11.8%	2	16.7%	1	9.1%	1
(Don't know / varies)	5.9%	1	0.0%	0	9.1%	1
(Refused)	0.0%	0	0.0%	0	0.0%	0
Mean:		*78.0*		*80.4*		*76.5*
Base:		17		6		11

Q04 What are the main reasons that you choose Co-op, Greenock Road, Bishopton for most of your households main food and grocery shopping? [MR]
Those that use the new Co-op on Greenock Road, Bishopton at Q01

	Total		No car in Hhold		Car in Hhold	
Clean store	0.0%	0	0.0%	0	0.0%	0
Close to other shops and services	0.0%	0	0.0%	0	0.0%	0
Convenient to home	82.4%	14	83.3%	5	81.8%	9
Convenient to work	0.0%	0	0.0%	0	0.0%	0
Linked to school run	0.0%	0	0.0%	0	0.0%	0
Delivery service	0.0%	0	0.0%	0	0.0%	0
Easy to get to by car	0.0%	0	0.0%	0	0.0%	0
Easy to get to by foot	5.9%	1	0.0%	0	9.1%	1
Easy to get to by public transport	0.0%	0	0.0%	0	0.0%	0
Good car parking	0.0%	0	0.0%	0	0.0%	0
Cheap / free car parking	0.0%	0	0.0%	0	0.0%	0
Good layout / easy to get around	5.9%	1	0.0%	0	9.1%	1
Good range of goods	23.5%	4	16.7%	1	27.3%	3
Good service / friendly staff	17.6%	3	0.0%	0	27.3%	3
Has a petrol station	0.0%	0	0.0%	0	0.0%	0
Habit / always used it	0.0%	0	0.0%	0	0.0%	0
In-store café	0.0%	0	0.0%	0	0.0%	0
Large store	11.8%	2	0.0%	0	18.2%	2
Long opening hours	0.0%	0	0.0%	0	0.0%	0
Low prices / value for money	23.5%	4	16.7%	1	27.3%	3
Loyalty scheme / reward points	0.0%	0	0.0%	0	0.0%	0
No queues at tills	0.0%	0	0.0%	0	0.0%	0
Not busy / quiet store	0.0%	0	0.0%	0	0.0%	0
Internet shopping is convenient / quicker	0.0%	0	0.0%	0	0.0%	0
Preference for retailer	5.9%	1	0.0%	0	9.1%	1
Quality of goods	11.8%	2	16.7%	1	9.1%	1
Small store	5.9%	1	0.0%	0	9.1%	1
Other	0.0%	0	0.0%	0	0.0%	0
(Don't know)	0.0%	0	0.0%	0	0.0%	0
(No particular reason)	0.0%	0	0.0%	0	0.0%	0
Base:		17		6		11

Q05 You have mentioned that you currently use the Co-op in Bishopton to carry out most of your households main food shopping. Before the store opened in April, which store or centre did you use for most of your main food shopping?
Those that use the new Co-op on Greenock Road, Bishopton at Q01

	Total		No car in Hhold		Car in Hhold	
Aldi, Bridgewater Shopping Centre, Erskine	5.9%	1	16.7%	1	0.0%	0
Asda, Britannia Way, Clydebank	5.9%	1	16.7%	1	0.0%	0
Morrisons, Bridgewater Shopping Centre, Erskine	35.3%	6	0.0%	0	54.5%	6
Tesco Extra, Greenock Road, Port Glasgow	5.9%	1	0.0%	0	9.1%	1
Used old Co-op on Greenock Road	41.2%	7	50.0%	3	36.4%	4
(Don't know)	5.9%	1	16.7%	1	0.0%	0
Base:		17		6		11

Q05A In between the time that the old Co-op on Greenock Road was closed and the new Co-op store opening, which store or centre did you use for your most of your MAIN food shopping?
Those who used the 'Old Co-op on Greenock Road' at Q05

	Total		No car in Hhold		Car in Hhold	
Morrisons, Bridgewater Shopping Centre, Erskine	14.3%	1	0.0%	0	25.0%	1
Bishopton	28.6%	2	0.0%	0	50.0%	2
Internet / delivered	14.3%	1	33.3%	1	0.0%	0
(Don't know)	28.6%	2	66.7%	2	0.0%	0
(Nowhere else)	14.3%	1	0.0%	0	25.0%	1
Base:		7		3		4

Q06 At which store or centre do you do most of your household's top-up food shopping ? If Internet please state.

	Total		No car in Hhold		Car in Hhold	
Aldi, Bridgewater Shopping Centre, Erskine	3.0%	6	3.4%	1	2.9%	5
Asda, Phoenix Retail Park, Paisley	1.0%	2	0.0%	0	1.2%	2
Co-op, Greenock Road, Bishopton	54.0%	108	51.7%	15	54.4%	93
Co-op, High Street, Renfrew	0.5%	1	0.0%	0	0.6%	1
Costcutter, Greenock Road, Bishopton	2.0%	4	3.4%	1	1.8%	3
Marks & Spencer, King's Inch Road, Glasgow	1.5%	3	0.0%	0	1.8%	3
Marks & Spencer, High Street, Paisley	1.0%	2	0.0%	0	1.2%	2
Morrisons, Bridgewater Shopping Centre, Erskine	10.5%	21	0.0%	0	12.3%	21
Sainsbury's, Kings Inch Drive, Braehead	0.5%	1	0.0%	0	0.6%	1
Tesco Extra, Annick Street, Shettleston Industrial Estate, Glasgow	0.5%	1	0.0%	0	0.6%	1
Tesco Express, Glasgow Airport, Glasgow	0.5%	1	0.0%	0	0.6%	1
Tesco Express (Esso), Renfrew Road, Paisley	0.5%	1	0.0%	0	0.6%	1
Woodrows, Station Road, Bishopton	2.0%	4	6.9%	2	1.2%	2
Bishopton	7.5%	15	10.3%	3	7.0%	12
Glasgow	1.0%	2	0.0%	0	1.2%	2
Paisley	0.5%	1	0.0%	0	0.6%	1
(Don't do this type of shopping)	13.5%	27	24.1%	7	11.7%	20
Base:		200		29		171

Q07 Approximately how much money does your household spend on a top up food and grocery shop?
Those that use the new Co-op on Greenock Road, Bishopton at Q06

	Total		No car in Hhold		Car in Hhold	
£1 - £5	17.6%	19	26.7%	4	16.1%	15
£6 - £10	22.2%	24	26.7%	4	21.5%	20
£11 - £15	13.0%	14	13.3%	2	12.9%	12
£16 - £20	11.1%	12	0.0%	0	12.9%	12
£21 - £25	2.8%	3	0.0%	0	3.2%	3
£25 - £30	9.3%	10	6.7%	1	9.7%	9
£31 - £35	0.9%	1	6.7%	1	0.0%	0
£36 - £40	1.9%	2	0.0%	0	2.2%	2
£41 - £45	0.0%	0	0.0%	0	0.0%	0
£46 - £50	0.0%	0	0.0%	0	0.0%	0
£51 - £60	0.0%	0	0.0%	0	0.0%	0
£61 - £70	0.0%	0	0.0%	0	0.0%	0
£71 - £80	0.0%	0	0.0%	0	0.0%	0
£81 - £90	0.0%	0	0.0%	0	0.0%	0
£91 - £100	0.9%	1	6.7%	1	0.0%	0
(Don't know / varies)	18.5%	20	13.3%	2	19.4%	18
(Refused)	1.9%	2	0.0%	0	2.2%	2
Mean:		*15.3*		*18.8*		*14.7*
Base:		108		15		93

Q08 How often does your household usually do its top up food shopping?
Those that use the new Co-op on Greenock Road, Bishopton at Q06

	Total		No car in Hhold		Car in Hhold	
Daily	3.7%	4	0.0%	0	4.3%	4
More than 3 times a week	6.5%	7	20.0%	3	4.3%	4
Two or three times a week	42.6%	46	33.3%	5	44.1%	41
Once a week	30.6%	33	26.7%	4	31.2%	29
Once a fortnight	6.5%	7	0.0%	0	7.5%	7
Less often	2.8%	3	13.3%	2	1.1%	1
(Don't know / varies / no particular pattern)	7.4%	8	6.7%	1	7.5%	7
Mean:		*2.11*		*2.29*		*2.08*
Base:		108		15		93

Column %ges.

X07 Approximately how much money does your household normally spend on 'top-up' food and grocery shopping per week?
Those that use the new Co-op on Greenock Road, Bishopton at Q06

	Total		No car in Hhold		Car in Hhold	
£1 - £5	11.1%	12	13.3%	2	10.8%	10
£6 - £10	13.0%	14	26.7%	4	10.8%	10
£11 - £15	7.4%	8	6.7%	1	7.5%	7
£16 - £20	4.6%	5	0.0%	0	5.4%	5
£21 - £25	11.1%	12	20.0%	3	9.7%	9
£25 - £30	7.4%	8	0.0%	0	8.6%	8
£31 - £35	0.9%	1	0.0%	0	1.1%	1
£36 - £40	7.4%	8	6.7%	1	7.5%	7
£41 - £45	0.0%	0	0.0%	0	0.0%	0
£46 - £50	5.6%	6	0.0%	0	6.5%	6
£51 - £60	2.8%	3	0.0%	0	3.2%	3
£61 - £70	0.0%	0	0.0%	0	0.0%	0
£71 - £80	3.7%	4	0.0%	0	4.3%	4
£81 - £90	0.0%	0	0.0%	0	0.0%	0
£90 - £100	0.0%	0	0.0%	0	0.0%	0
£101 - £150	0.9%	1	6.7%	1	0.0%	0
£151 - £200	0.9%	1	6.7%	1	0.0%	0
(Don't know / varies)	21.3%	23	13.3%	2	22.6%	21
(Refused)	1.9%	2	0.0%	0	2.2%	2
Mean:		*28.3*		*37.8*		*26.6*
Base:		108		15		93

Q09 What are the main reasons that you choose Co-op, Greenock Road, Bishopton for most of your households top up food and grocery shopping? [MR]
Those that use the new Co-op on Greenock Road, Bishopton at Q06

	Total		No car in Hhold		Car in Hhold	
Clean store	5.6%	6	0.0%	0	6.5%	6
Close to other shops and services	0.0%	0	0.0%	0	0.0%	0
Convenient to home	61.1%	66	66.7%	10	60.2%	56
Convenient to work	0.9%	1	0.0%	0	1.1%	1
Linked to school run	0.0%	0	0.0%	0	0.0%	0
Delivery service	0.0%	0	0.0%	0	0.0%	0
Easy to get to by car	0.0%	0	0.0%	0	0.0%	0
Easy to get to by foot	13.9%	15	26.7%	4	11.8%	11
Easy to get to by public transport	0.0%	0	0.0%	0	0.0%	0
Good car parking	2.8%	3	0.0%	0	3.2%	3
Cheap / free car parking	0.9%	1	0.0%	0	1.1%	1
Good layout / easy to get around	7.4%	8	0.0%	0	8.6%	8
Good range of goods	36.1%	39	20.0%	3	38.7%	36
Good service / friendly staff	7.4%	8	6.7%	1	7.5%	7
Has a petrol station	0.0%	0	0.0%	0	0.0%	0
Habit / always used it	0.9%	1	0.0%	0	1.1%	1
In-store café	0.0%	0	0.0%	0	0.0%	0
Large store	9.3%	10	0.0%	0	10.8%	10
Long opening hours	0.0%	0	0.0%	0	0.0%	0
Low prices / value for money	8.3%	9	13.3%	2	7.5%	7
Loyalty scheme / reward points	1.9%	2	6.7%	1	1.1%	1
No queues at tills	0.0%	0	0.0%	0	0.0%	0
Not busy / quiet store	0.0%	0	0.0%	0	0.0%	0
Internet shopping is convenient / quicker	0.0%	0	0.0%	0	0.0%	0
Preference for retailer	2.8%	3	0.0%	0	3.2%	3
Quality of goods	7.4%	8	6.7%	1	7.5%	7
Small store	0.9%	1	0.0%	0	1.1%	1
Other	0.0%	0	0.0%	0	0.0%	0
Good bakery	3.7%	4	0.0%	0	4.3%	4
It's new and fresh	2.8%	3	0.0%	0	3.2%	3
Like everything about the store	1.9%	2	0.0%	0	2.2%	2
Member of the society	0.9%	1	0.0%	0	1.1%	1
Ethics of the store	1.9%	2	0.0%	0	2.2%	2
Offers a cash machine	0.9%	1	0.0%	0	1.1%	1
(Don't know)	0.0%	0	0.0%	0	0.0%	0
(No particular reason)	6.5%	7	6.7%	1	6.5%	6
Base:		108		15		93

Column %ges.

Q10 You have mentioned that you currently use the Co-op in Bishopton to carry out most of your household top up food shopping, before the store opened in April, which store or centre did you use for most of your top up food shopping?
Those that use the new Co-op on Greenock Road, Bishopton at Q06

	Total		No car in Hhold		Car in Hhold	
Aldi, Bridgewater Shopping Centre, Erskine	0.9%	1	6.7%	1	0.0%	0
Asda, Phoenix Retail Park, Paisley	0.9%	1	0.0%	0	1.1%	1
Morrisons, Bridgewater Shopping Centre, Erskine	5.6%	6	6.7%	1	5.4%	5
Tesco Extra, Greenock Road, Port Glasgow	1.9%	2	0.0%	0	2.2%	2
Bishopton	13.0%	14	20.0%	3	11.8%	11
Used old Co-op on Greenock Road	76.9%	83	66.7%	10	78.5%	73
(Don't know)	0.9%	1	0.0%	0	1.1%	1
Base:		108		15		93

Q10A In between the time that the old Co-op on Greenock Road was closed and the new Co-op store opening, which store or centre did you use for your most of your TOP UP food shopping?
Those that used the 'Old Co-op on Greenock Road' at Q10

	Total		No car in Hhold		Car in Hhold	
Asda, Britannia Way, Clydebank	1.2%	1	10.0%	1	0.0%	0
Co-op, Bride Street, Linwood	1.2%	1	0.0%	0	1.4%	1
Costcutter, Greenock Road, Bishopton	4.8%	4	0.0%	0	5.5%	4
Morrisons, Bridgewater Shopping Centre, Erskine	14.5%	12	20.0%	2	13.7%	10
Morrisons, Rue End Street, Greenock	1.2%	1	0.0%	0	1.4%	1
Morrisons, Anchor Mills, Paisley	2.4%	2	0.0%	0	2.7%	2
Tesco Extra, Greenock Road, Port Glasgow	2.4%	2	0.0%	0	2.7%	2
Tesco, East Lane, Paisley	1.2%	1	0.0%	0	1.4%	1
Bishopton	26.5%	22	30.0%	3	26.0%	19
Glasgow	1.2%	1	0.0%	0	1.4%	1
Internet / delivered	1.2%	1	10.0%	1	0.0%	0
(Nowhere else)	28.9%	24	20.0%	2	30.1%	22
(Don't know)	13.3%	11	10.0%	1	13.7%	10
Base:		83		10		73

Q11 Have you visited the Co-op on Greenock Road in Bishopton since it opened?
Those that don't use the new Co-op on Greenock Road at Q01 / Q06

	Total		No car in Hhold		Car in Hhold	
Yes	88.1%	74	83.3%	10	88.9%	64
No	11.9%	10	16.7%	2	11.1%	8
Base:		84		12		72

Q12 Why don't you use the Co-op in Bishopton as your main destination for main / top up food shopping? [MR]

Those that don't use the new Co-op on Greenock Road at Q01 / Q06

	Total		No car in Hhold		Car in Hhold	
Change layout too often	0.0%	0	0.0%	0	0.0%	0
Expensive	50.0%	42	58.3%	7	48.6%	35
Far from home / work	14.3%	12	33.3%	4	11.1%	8
Lack of public transport links	0.0%	0	0.0%	0	0.0%	0
Lack of stock on shelves	0.0%	0	0.0%	0	0.0%	0
Lacks character / atmosphere	0.0%	0	0.0%	0	0.0%	0
Limited opening hours	0.0%	0	0.0%	0	0.0%	0
No cafe	0.0%	0	0.0%	0	0.0%	0
No petrol station	0.0%	0	0.0%	0	0.0%	0
Parking - is expensive	0.0%	0	0.0%	0	0.0%	0
Parking - spaces are limited	1.2%	1	0.0%	0	1.4%	1
Poor layout / narrow aisles	1.2%	1	0.0%	0	1.4%	1
Poor product range	13.1%	11	0.0%	0	15.3%	11
Poor quality goods	2.4%	2	0.0%	0	2.8%	2
Queues at tills	1.2%	1	0.0%	0	1.4%	1
Scruffy / rundown / needs renovating	0.0%	0	0.0%	0	0.0%	0
Too big	0.0%	0	0.0%	0	0.0%	0
Too busy / crowded	0.0%	0	0.0%	0	0.0%	0
Too small	2.4%	2	0.0%	0	2.8%	2
Traffic congestion / poor access	0.0%	0	0.0%	0	0.0%	0
Unclean / dirty store	0.0%	0	0.0%	0	0.0%	0
Unfriendly / unhelpful staff	1.2%	1	0.0%	0	1.4%	1
Other	0.0%	0	0.0%	0	0.0%	0
Preference for other retailer	7.1%	6	8.3%	1	6.9%	5
Habit of using other store	4.8%	4	0.0%	0	5.6%	4
Costcutter is nearer for me	1.2%	1	0.0%	0	1.4%	1
They don't support my local charity despite me asking	1.2%	1	0.0%	0	1.4%	1
The pub was knocked down to build it	1.2%	1	0.0%	0	1.4%	1
Don't use any of the local shops	1.2%	1	0.0%	0	1.4%	1
(Don't know)	4.8%	4	0.0%	0	5.6%	4
(No reason in particular)	8.3%	7	0.0%	0	9.7%	7
Base:		84		12		72

GEN Gender of respondent

	Total		No car in Hhold		Car in Hhold	
Male	34.0%	68	34.5%	10	33.9%	58
Female	66.0%	132	65.5%	19	66.1%	113
Base:		200		29		171

AGE Could I ask, how old are you?

	Total		No car in Hhold		Car in Hhold	
18 to 24	1.5%	3	0.0%	0	1.8%	3
25 to 34	2.0%	4	0.0%	0	2.3%	4
35 to 44	7.5%	15	3.4%	1	8.2%	14
45 to 54	22.0%	44	10.3%	3	24.0%	41
55 to 64	23.5%	47	6.9%	2	26.3%	45
65+	38.5%	77	79.3%	23	31.6%	54
(Refused)	5.0%	10	0.0%	0	5.8%	10
Base:		200		29		171

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

	Total		No car in Hhold		Car in Hhold	
None	14.5%	29	100.0%	29	0.0%	0
One	38.0%	76	0.0%	0	44.4%	76
Two	34.0%	68	0.0%	0	39.8%	68
Three or more	10.0%	20	0.0%	0	11.7%	20
(Refused)	3.5%	7	0.0%	0	4.1%	7
Base:		200		29		171

	Total		No car in Hhold		Car in Hhold	

SEG Socio- economic grouping

	Total		No car in Hhold		Car in Hhold	
AB	23.5%	47	6.9%	2	26.3%	45
C1	26.5%	53	17.2%	5	28.1%	48
C2	13.0%	26	17.2%	5	12.3%	21
DE	27.5%	55	55.2%	16	22.8%	39
(Refused)	9.5%	19	3.4%	1	10.5%	18
Base:		200		29		171

Appendix D

Existing Foodstore Locations

Tesco Extra (Port Glasgow)
Costcutter & Co op (Bishopton)
General Convenience (Bishopton)
Morrisons (Erskine)
Sainbury's (Braehead)
ASDA (Linwood)
Gourock
Greenock
Upper Ingleston
Port Glasgow
Clune Brae
Langbank
Renton
Dumbarton
Milton
Old Kilpatrick
Milngavie
Bearsden
Bishopton
Erskine
Inchinnan
Napier Street
Renfrew
Jordan Hill
Kilmacolm
Quarriers Homes
Houston
Bridge of Weir
Abbotsinch
Linwood
Paisley
Ferguslie
Glasgow Rd
Paisley Rd W
Kilbarchan
Johnstone
Johnstone Castle
Clyde Muirshiel Regional Park
Lochwinnoch
Newton of Belltrees
Barrhead
Neilston
Darnley
Patterton
Giffnock
Newton Mearns
Uplawmoor
Kilbirnie
Beith
Inverkip Rd
Ayr Rd
A78
A8
A82
A737
A726
A739
M8
M898
M77

Appendix E

Development Phasing Plan

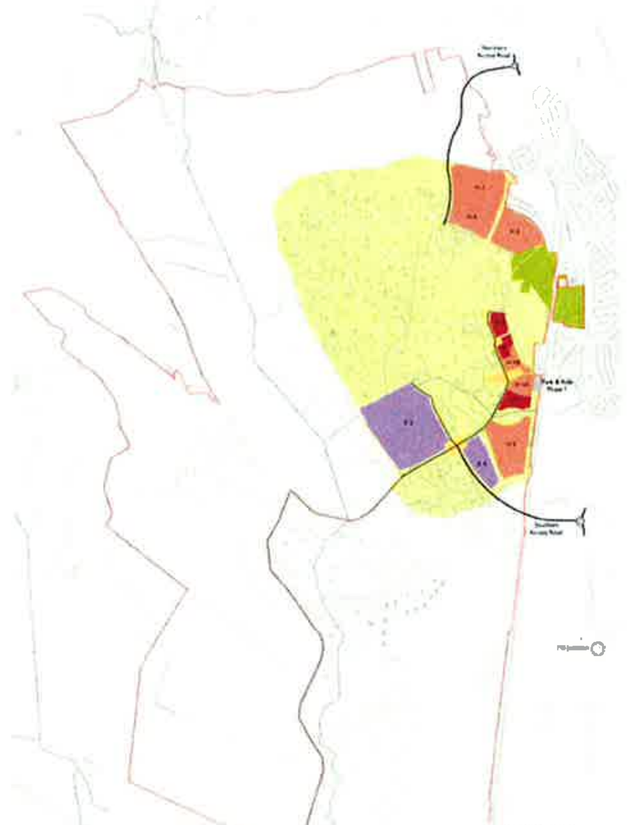
ROYAL ORDNANCE, BISHOPTON
PHASING
(REFER TO PLAN 715/350A)

Cass associates
architecture
masterplanning
planning
landscape
ecology

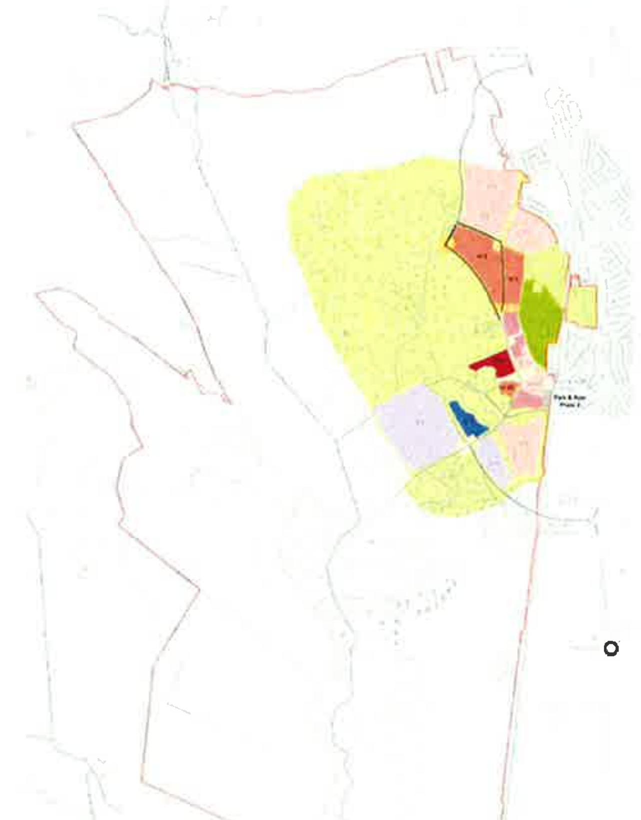
Phase	Housing				Employment / Commercial / Community			
	Reference	ha	acres	units (1)	Reference	ha	acres	m^2
1 2012-2016	H2	4.79	11.80	153				
	H3	6.48	16.01	117				
	H4A	1.37	3.38	79				
	H4B	1.06	2.62	61				
	H5	5.99	14.80	162	E2	14.60	36.08	50,000
	H6	3.40	8.40	109	E4	2.97	7.34	9,900
	M1(A)	0.35	0.86	14	M1(B)	0.35	0.86	750
	M3(A)	0.54	1.33	22	M3(B)	0.54	1.33	1,170
	M5(A)	0.67	1.71	28	M5(B)	0.67	1.66	1,394
Subtotal		**24.65**	**60.91**	**745**		**19.13**	**47.27**	**63,214**
2 2017-2018	H1	3.12	7.71	112				
	H4C	0.69	1.70	42				
	H7	6.29	15.54	195	C1	1.91	4.72	8,000
	M2A	0.95	2.35	39	M2(B)	0.95	2.35	2,055
Subtotal		**11.05**	**27.30**	**388**		**2.86**	**7.07**	**10,055**
3 2019-2022	H8	4.29	10.60	94				
	H9	5.18	12.80	93				
	H10	5.61	13.86	168				
	H11	2.37	5.86	83				
	H12	5.71	14.11	126	E1	8.80	21.75	30,100
	M4(A)	1.30	3.21	53	M4(B)	1.30	3.21	2,810
Subtotal		**24.46**	**60.44**	**617**		**10.10**	**24.96**	**32,910**
4 2023-2025	H13	3.53	8.72	78				
	H14	4.37	10.80	131				
	H15	7.49	18.51	187				
	H18	2.69	6.67	48	E3	13.94	34.45	48,000
Subtotal		**18.08**	**44.70**	**444**		**13.94**	**34.45**	**48,000**
5 2026-2027	H16	7.27	17.96	83				
	H17	3.94	9.74	131				
	H19	5.13	12.68	92				
Subtotal		**16.34**	**40.38**	**306**		**0.00**	**0.00**	**0**
TOTAL		**94.58**	**233.73**	**2,500**		**46.03**	**113.75**	**154,179**

(1) Projected units in accord with density assumptions at outline planning stage
(2) Actual units as proposed by individual developers

Revision A - 01.06.11
Revision B - 08.08.11
Revision C - 29.09.11



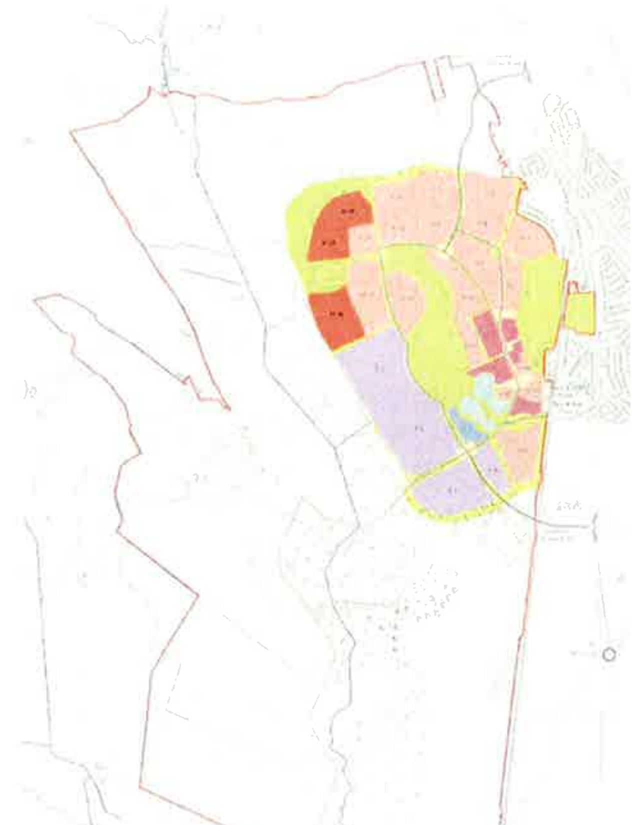
PHASE 1
(715/345A)



PHASE 2
(715/346A)

PHASE 3
(715/347)

PHASE 4
(715/348)



PHASE 5
(715/349)

NOTE
Based on Cass Associate drawing:
715/268H Landuse Plan Outline Planning Application

- Housing
- Employment
- Mixed Use
- Commercial
- Public Open Space
- Enabling works
- Key Link
- Haul Road
- BAE Systems Land Ownership

Phase	Housing			Employment / Commercial / Community		
	Reference	ha	units	Reference	ha	m^2
1	H2	4.79	153			
	H3	6.48	117			
	H4A	1.37	79			
	H4B	1.06	61			
	H5	5.99	182	E2	14.60	50,000
	H6	3.40	109	E4	2.97	9,900
	M1(A)	0.35	14	M1(B)	0.35	750
	M3(A)	0.54	22	M3(B)	0.54	1,170
	M5(A)	0.67	28	M5(B)	0.67	1,394
Subtotal		24.65	746		19.13	63,214
2	H1	3.12	112			
	H4C	6.29	195			
	H7	0.69	42	C1	1.91	8,000
	M2A	0.95	39	M2B	0.95	2,055
Subtotal		11.05	388		2.86	10,055
3	H8	4.29	94			
	H9	5.18	93			
	H10	5.61	168			
	H11	2.37	83			
	H12	5.71	126	E1	8.80	30,100
	M4(A)	1.30	53	M4(B)	1.30	2,810
Subtotal		24.49	617		10.10	32,910
4	H13	3.53	78			
	H14	4.37	131			
	H15	7.49	187			
	H16	2.69	48	E3	13.94	48,000
Subtotal		18.08	444		13.94	48,000
5	H18	7.27	83			
	H17	3.94	131			
	H19	5.13	92			
Subtotal		16.34	306		0.00	0
TOTAL		94.59	2,500		46.03	154,179

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ROYAL ORDNANCE
BISHOPTON

drawing title
FIVE PHASES
OF DEVELOPMENT

scale NTS
date 11.06.10
drn SW

715/350A