

Appendices B - G
& Plans 1 to 4

Appendix B

Household Survey Questionnaire

J8441 Skegness Household Survey – Final Version

Telephone Introduction:

Good morning/ afternoon. My name is AgentName and I am calling from an independent research agency called 'R&M'. Firstly, can I assure you that we are NOT a sales company, we're simply conducting a short shopping survey in your area. Would you be kind enough to spare a few minutes of your time?

F1 Are you the person responsible for the main food shopping in your household?

If not ask for person who is. If not available please thank respondent and close interview.

- Yes
- No

If = 2, Prompt interviewee with message 'Please thank respondent and close interview'

**S_Address1 S_Address2 S_Address3 S_Address4 S_Address5
S_Postcode**

F2 Can I just ask you to confirm your postcode please?

If not on list please thank respondent and close interview.

- LN9
- LN11
- LN12
- LN13
- PE22
- PE23
- PE24
- PE25
- Not on list

If = 9, Prompt interviewee with message 'Please thank respondent and close interview'

To begin with, I would like to ask you some questions about shopping for food:

Q1. Which supermarket do you visit most often for your household's main food shopping?

**IF OTHER, PLEASE SPECIFY STORE AND LOCATION, E.G.
Aldi, Blackwood Town Centre**

MARK ONE BOX ONLY

- Asda, Boston
- Asda, Grimsby
- Co-op, Alford
- Co-op, Coningsby
- Co-op, Louth
- Co-op, Mablethorpe
- Co-op, Market Rasen
- Co-op, Spilsby
- Co-op, Woodhall Spa
- Iceland, Skegness
- J Sainsbury, Grimsby
- J Sainsbury, Lincoln
- Kwik Save, Boston
- Kwik Save, Louth
- Kwik Save, Skegness
- Lidl, Skegness
- Morrisons, Grimsby
- Morrisons, Lincoln
- Morrisons, Skegness
- Ramsden's, Grimsby
- Safeway, Lincoln
- Somerfield, Boston
- Somerfield, Cambridge Road, Grimsby
- Somerfield, Horncastle
- Somerfield, Lincoln
- Somerfield, Louth
- Somerfield, Osbourne Street, Grimsby
- Somerfield, Spilsby
- Somerfield, Tattershall
- Tesco, Boston
- Tesco, Cleethorpes
- Tesco, Horncastle
- Tesco, Lincoln (Pelham Bridge)
- Tesco, Lincoln (Wragby)
- Tesco, Skegness
- Waitrose, Lincoln
- Internet
- Don't do main food shopping (DO NOT READ OUT)
- Other (specify)

If = 38, goto 'Q6'

If = 37, do not ask 'Q4'

If = 37, do not ask 'Q5'

If <> 10, 15, 16, 19, 35, do not ask 'Q19'

If <> 10, 15, 16, 19, 35, do not ask 'Q20'

Q2. How often do you visit Q1 for your main food shopping?

MARK ONE BOX ONLY

- Every day / 6-7 times a week
- Twice a week
- More than twice a week

- Weekly
- Fortnightly
- Once a month
- Less than once a month

Q3. What is your main reason for using Q1 ?

MARK ONE BOX ONLY

- Better quality goods
- Better range of goods
- Better value
- I can get there by public transport
- I can park there
- I do other shopping there
- I like the area
- I live there
- I work there
- Shops offer choice/variety
- Undercover shops
- Other (specify)

Q4. While you were on your last main food shop, did you (or anyone else with you)...

READ OUT LIST - MARK ALL THAT APPLY

(4 maximum responses)

- shop for non-food items? e.g. clothes
- use sports/leisure/entertainment facilities
- go to the bank, building society or cash point
- None (DO NOT READ OUT)
- Other (specify)

Q5. How far do you travel to your main food shopping destination?

MARK ONE BOX ONLY

- Half a mile or less
- 1 mile
- 1½ miles
- 2 miles
- 2½ miles
- 3 miles
- 4 miles
- 5 miles
- 6 miles
- 7 miles

- 8 miles
- more than 8 miles
- Don't know/Can't remember (DO NOT READ OUT)

Q6. Where do you do MOST of your household's shopping for small scale "top-up" food and convenience goods purchases?

IF OTHER, PLEASE SPECIFY STORE AND LOCATION, E.G. Aldi, Blackwood Town Centre

MARK ONE BOX ONLY

- Asda, Boston
- Asda, Grimsby
- Co-op, Coningsby
- Co-op, Louth
- Co-op, Mablethorpe
- Co-op, Market Rasen
- Co-op, Spilsby
- Co-op, Woodhall Spa
- Iceland, Skegness
- J Sainsbury, Grimsby
- J Sainsbury, Lincoln
- Kwik Save, Boston
- Kwik Save, Louth
- Kwik Save, Skegness
- Lidl, Skegness
- Morrisons, Grimsby
- Morrisons, Lincoln
- Morrisons, Skegness
- Ramsden's, Grimsby
- Safeway, Lincoln
- Somerfield, Boston
- Somerfield, Cambridge Road, Grimsby
- Somerfield, Horncastle
- Somerfield, Lincoln
- Somerfield, Louth
- Somerfield, Osbourne Street, Grimsby
- Somerfield, Spilsby
- Somerfield, Tattershall
- Tesco, Boston
- Tesco, Cleethorpes
- Tesco, Horncastle
- Tesco, Lincoln (Pelham Bridge)
- Tesco, Lincoln (Wragby)
- Tesco, Skegness
- Waitrose, Lincoln
- Internet
- Don't do top-up food shopping (DO NOT READ OUT)

Other (specify)

If = 37, goto 'Q8'

Q7. How often do you visit Q6 for top-up food shopping?

MARK ONE BOX ONLY

- Every day / 6-7 times a week
- Twice a week
- More than twice a week
- Weekly
- Fortnightly
- Once a month
- Less than once a month

I would like to ask you some questions about shopping for non-food items:

Q8. Can I ask you which is your main shopping town/area for non-food shopping? (such as clothes, shoes, household goods etc.)

MARK ONE BOX ONLY

- Boston Town Centre
- Grantham Town Centre
- Grimsby Town Centre
- Horncastle Town Centre
- Lincoln Town Centre
- Louth Town Centre
- Newark Town Centre
- Scunthorpe Town Centre
- Skegness Town Centre
- Internet
- Catalogue/Mail order
- Other (specify)

If = 10, 11, goto 'Q10'

Q9. How often do you visit Q8 for your main non-food shopping?

MARK ONE BOX ONLY

- More than 3 times a week
- 2-3 times a week
- Weekly
- Once a fortnight
- Once a month
- Less often

Q10. Where do you do MOST of your household's shopping for clothes, footwear and other fashion goods?

IF OTHER, PLEASE SPECIFY STORE AND LOCATION, E.G. Aldi, Blackwood Town Centre

MARK ONE BOX ONLY

- Boston Town Centre
- Grantham Town Centre
- Grimsby Town Centre
- Horncastle Town Centre
- Lincoln Town Centre
- Louth Town Centre
- Newark Town Centre
- Scunthorpe Town Centre
- Skegness Town Centre
- Brantano, Valantine Retail Park, Lincoln
- Brantano, Victoria Retail Park, Grimsby
- JJB Sports, St Marks Retail Park, Lincoln
- JJB Sports, Victoria Retail Park, Grimsby
- Matalan, Lindis Retail Park, Lincoln
- New Look, St Marks Retail Park, Lincoln
- Next, Valantine Retail Park, Lincoln
- Sports Soccer, St Marks Retail Park, Lincoln
- Sports World, Boston Shopping Park, Boston
- Sports World, Victoria Retail Park, Grimsby
- TK Maxx, Boston Shopping Park, Boston
- TK Maxx, St Marks Retail Park, Lincoln
- Woolworths, Victoria Street Retail Park, Grimsby
- Internet
- Catalogue/Mail order
- Don't buy (DO NOT READ OUT)
- Other (specify)

Q11. Where do you do MOST of your household's shopping for furniture, carpets and other floor coverings?

IF OTHER, PLEASE SPECIFY STORE AND LOCATION, E.G. Aldi, Blackwood Town Centre

MARK ONE BOX ONLY

- Boston Town Centre
- Grantham Town Centre
- Grimsby Town Centre
- Horncastle Town Centre
- Lincoln Town Centre
- Louth Town Centre
- Newark Town Centre
- Scunthorpe Town Centre
- Skegness Town Centre
- Allied Carpets, Alban Retail Park, Boston
- Allied Carpets, Valantine Retail Park, Lincoln
- B&Q, Grimsby
- B&Q, Lincoln
- Carpetright, High Point Retail Park, Grimsby
- Carpetright, Skegness Retail Park, Skegness
- Carpetright, St Marks Retail Park, Lincoln
- Carpetright, Tritton Retail Park, Lincoln
- Debenhams, St Marks Retail Park, Lincoln
- Homebase, Alban Retail Park, Boston
- Homebase, St Marks Retail Park, Lincoln
- MFI, Valantine Retail Park, Lincoln
- Multi York, St Marks Retail Park, Lincoln
- Rosebys, Alexandra Retail Park, Grimsby
- Rosebys, St Marks Retail Park, Lincoln
- Staples, Victoria Retail Park, Grimsby
- Topps Tiles, St Marks Retail Park, Lincoln
- Wickes, Alexandra Retail Park, Grimsby
- Internet
- Catalogue/Mail order
- Don't buy (DO NOT READ OUT)
- Other (specify)

Q12. Where do you do MOST of your household's shopping for household textiles and soft furnishings including bedding?

IF OTHER, PLEASE SPECIFY STORE AND LOCATION, E.G. Aldi, Blackwood Town Centre

MARK ONE BOX ONLY

- Boston Town Centre
- Grantham Town Centre
- Grimsby Town Centre
- Horncastle Town Centre
- Lincoln Town Centre
- Louth Town Centre
- Newark Town Centre
- Scunthorpe Town Centre
- Skegness Town Centre

- Argos Extra - Alexandra Retail Park, Grimsby
- Argos, St Marks Retail Park, Lincoln
- B&Q, Grimsby
- B&Q, Lincoln
- Debenhams, St Marks Retail Park, Lincoln
- Homebase, Alban Retail Park, Boston
- Homebase, St Marks Retail Park, Lincoln
- Multi York, St Marks Retail Park, Lincoln
- Poundstretcher, The Carlton Centre, Lincoln
- Rosebys, Alexandra Retail Park, Grimsby
- Rosebys, St Marks Retail Park, Lincoln
- Woolworths, Victoria Street Retail Park, Grimsby
- Internet
- Catalogue/Mail order
- Don't buy (DO NOT READ OUT)
- Other (specify)

Q13. Where do you do MOST of your household's shopping for domestic electrical appliances, such as fridges, washing machines, kettles or hairdryers?

**IF OTHER, PLEASE SPECIFY STORE AND LOCATION, E.G.
Aldi, Blackwood Town Centre**

MARK ONE BOX ONLY

- Boston Town Centre
- Grantham Town Centre
- Grimsby Town Centre
- Horncastle Town Centre
- Lincoln Town Centre
- Louth Town Centre
- Newark Town Centre
- Scunthorpe Town Centre
- Skegness Town Centre
- Comet, Alban Retail Park, Boston
- Comet, Alexandra Retail Park, Grimsby
- Comet, Tritton Retail Park, Lincoln
- Currys, Alban Retail Park, Boston
- Currys, High Point Retail Park, Grimsby
- Currys, Skegness Retail Park, Skegness
- Currys, Tritton Retail Park, Lincoln
- Maplin, High Point Retail Park, Grimsby
- PC World, Tritton Retail Park, Lincoln
- PC World, Victoria Street Retail Park, Grimsby
- Internet
- Catalogue/Mail order
- Don't buy (DO NOT READ OUT)

Other (specify)

Q14. Where do you do MOST of your household's shopping for radio, TV, hi-fi, musical instruments and photography equipment?

**IF OTHER, PLEASE SPECIFY STORE AND LOCATION, E.G.
Aldi, Blackwood Town Centre**

MARK ONE BOX ONLY

- Boston Town Centre
- Grantham Town Centre
- Grimsby Town Centre
- Horncastle Town Centre
- Lincoln Town Centre
- Louth Town Centre
- Newark Town Centre
- Scunthorpe Town Centre
- Skegness Town Centre
- Comet, Alban Retail Park, Boston
- Comet, Alexandra Retail Park, Grimsby
- Comet, Tritton Retail Park, Lincoln
- Currys, Alban Retail Park, Boston
- Currys, High Point Retail Park, Grimsby
- Currys, Skegness Retail Park, Skegness
- Currys, Tritton Retail Park, Lincoln
- Maplin, High Point Retail Park, Grimsby
- PC World, Tritton Retail Park, Lincoln
- PC World, Victoria Street Retail Park, Grimsby
- Internet
- Catalogue/Mail order
- Don't buy (DO NOT READ OUT)
- Other (specify)

Q15. Where do you do MOST of your household's shopping for glass and hardware?

**IF OTHER, PLEASE SPECIFY STORE AND LOCATION, E.G.
Aldi, Blackwood Town Centre**

MARK ONE BOX ONLY

- Boston Town Centre
- Grantham Town Centre
- Grimsby Town Centre
- Horncastle Town Centre
- Lincoln Town Centre
- Louth Town Centre
- Newark Town Centre
- Scunthorpe Town Centre
- Skegness Town Centre
- B&Q, Grimsby
- B&Q, Lincoln
- Debenhams, St Marks Retail Park, Lincoln
- Focus, Skegness Retail Park, Skegness
- Homebase, Alban Retail Park, Boston
- Homebase, St Marks Retail Park, Lincoln
- Poundstretcher, Alexandra Retail Park, Grimsby
- Wickes, Alexandra Retail Park, Grimsby
- Woolworths, Victoria Street Retail Park, Grimsby
- Internet
- Catalogue/Mail order
- Don't buy (DO NOT READ OUT)
- Other (specify)

Q16. Where do you do MOST of your household's shopping for DIY goods and decorating supplies?

**IF OTHER, PLEASE SPECIFY STORE AND LOCATION, E.G.
Aldi, Blackwood Town Centre**

MARK ONE BOX ONLY

- Boston Town Centre
- Grantham Town Centre
- Grimsby Town Centre
- Horncastle Town Centre
- Lincoln Town Centre
- Louth Town Centre
- Newark Town Centre
- Scunthorpe Town Centre
- Skegness Town Centre
- B&Q, Grimsby
- B&Q, Lincoln
- Focus, Alexandra Retail Park, Grimsby
- Focus, Skegness Retail Park, Skegness
- Homebase, Alban Retail Park, Skegness
- Homebase, St Marks Retail Park, Lincoln
- Wickes, Alexandra Retail Park, Grimsby
- Internet
- Catalogue/Mail order

- Don't buy (DO NOT READ OUT)
- Other (specify)

Q17. Where do you do MOST of your household's shopping for books, jewellery, watches, recreational and luxury goods?

**IF OTHER, PLEASE SPECIFY STORE AND LOCATION, E.G.
Aldi, Blackwood Town Centre**

MARK ONE BOX ONLY

- Boston Town Centre
- Grantham Town Centre
- Grimsby Town Centre
- Horncastle Town Centre
- Lincoln Town Centre
- Louth Town Centre
- Newark Town Centre
- Scunthorpe Town Centre
- Skegness Town Centre
- American Golf, Valantine Retail Park, Lincoln
- Argos Extra, Alexandra Retail Park, Grimsby
- Debenhams, St Marks Retail Park, Lincoln
- Mothercare World, St Marks Retail Park, Lincoln
- PC World, Tritton Retail Park, Lincoln
- PC World, Victoria Street Retail Park, Grimsby
- Poundstretcher, Alexandra Retail Park, Grimsby
- Poundstretcher, The Carlton Centre, Lincoln
- Woolworths, Victoria Street Retail Park, Grimsby
- Internet
- Catalogue/Mail order
- Don't buy (DO NOT READ OUT)
- Other (specify)

Q18. When you shop for non-food goods, how do you usually travel?

**PLEASE REMEMBER TO ASK "DRIVER" OR "PASSENGER",
IF RESPONDENT TRAVELS BY CAR/VAN.**

MARK ONE BOX ONLY

- Car/Van (as driver)
- Car/Van (as passenger)

- Bus
- Motorcycle
- Walk
- Taxi
- Train
- Cycle
- Park and Ride
- Goods delivered
- Other (specify)

If ((??Q1??=10) OR (??Q1??=15) OR (??Q1??=16) OR (??Q1??=19) OR (??Q1??=35))=FALSE, do not ask 'Skegness'

Finally, I would like to ask you a few questions about Skegness town centre:

INTERVIEWERS NOTE: DO NOT ASK THIS QUESTION IF RESPONDENT DOES NOT VISIT SKEGNESS FOR THEIR MAIN FOOD SHOPPING

Q19. What do you like about Skegness town centre for shopping and services?

PROBE, IF NECESSARY - MARK ONE BOX ONLY

- Attractive environment/nice place
- Close to friends or relatives
- Close to home
- Close to work
- Easy to get to by bike
- Easy to get to by bus
- Easy to get to by car
- Easy to park
- Good food stores
- Good pubs, cafes or restaurants
- Good range of non-food shops
- Particular shops or stores in the town centre
- Park and Ride
- Safe and secure
- Traffic free shopping centre
- Nothing/very little
- Don't know
- Don't shop in Skegness town centre
- Other (specify)

If = 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 13, 14, 15, 16, 17, 18, 19, do not ask 'Q20'

Q20. Which particular shops or stores do you like in Skegness town centre?

DO NOT READ OUT LIST - MARK ALL THAT APPLY

(28 maximum responses)

- Argos

- Boots
- Burton
- Contessa
- Co-op
- Dorothy Perkins
- Drapers
- Edinburgh
- Greenwoods
- H Samuel
- Iceland
- JD Sports
- Lidl
- M & Co
- Marks & Spencer
- Morrisons
- New Look
- Options Discount Store
- Savers
- Shoe Express
- Shoe Zone
- Specsavers
- Superdrug
- Tesco
- WH Smith
- Woollen Mill
- Woolworths
- Other (specify)

I would now like to ask you a few questions about leisure activities:

Q21. Which of the following leisure activities do you or members of your household regularly participate in?

INTERVIEWERS NOTE: PLEASE READ OUT THE LIST ONE AT A TIME

MARK ALL THAT APPLY

(9 maximum responses)

- Bingo
- Tenpin Bowling
- Visiting cafes/restaurants
- Visiting the cinema
- Visiting a nightclub
- Going to pubs/bars
- Visiting a sports, leisure centre/gym
- Visiting the theatre/other cultural activities
- Organised sport
- Don't participate in any leisure activity (DO NOT READ OUT)

If = 10, goto 'SEAFRONT'
If <> 1, do not ask 'BINGO'
If <> 1, do not ask 'BINGO OFTEN'
If <> 2, do not ask 'TENPIN BOWLING'
If <> 2, do not ask 'TENPIN BOWLING OFTEN'
If <> 3, do not ask 'CAFE/RESTAURANTS'
If <> 3, do not ask 'CAFE/RESTAURANTS OFTEN'
If <> 4, do not ask 'CINEMA'
If <> 4, do not ask 'CINEMA OFTEN'
If <> 5, do not ask 'NIGHTCLUBS'
If <> 5, do not ask 'NIGHTCLUBS OFTEN'
If <> 6, do not ask 'PUBS/BARS'
If <> 6, do not ask 'PUBS/BARS OFTEN'
If <> 7, do not ask 'SPORTS, LEISURE CENTRE/GYM'
If <> 7, do not ask 'SPORTS, LEISURE CENTRE/GYM OFTEN'
If <> 8, do not ask 'THEATRE/OTHER CULTURAL ACTIVITIES'
If <> 8, do not ask 'THEATRE/OTHER CULTURAL ACTIVITIES OFTEN'
If <> 9, do not ask 'ORGANISED SPORT'
If <> 9, do not ask 'ORGANISED SPORT OFTEN'

Q21a_1. In which town do you participate in playing BINGO?

DO NOT READ OUT LIST. MARK ONE BOX ONLY.

- Boston
- Grimsby
- Horncastle
- Lincoln
- Louth
- Mablethorpe
- Skegness
- Other (specify)

Q21aa. How often do you normally participate in playing BINGO?

DO NOT READ OUT LIST. MARK ONE BOX ONLY.

- Daily
- 2-3 Times A Week
- 4-6 Times A Week
- Once A Week
- Once A Fortnight
- Once A Month
- Less Often
- Don't know/Can't remember (DO NOT READ OUT)

Q21b_2. In which town do you participate in playing TENPIN BOWLING?

DO NOT READ OUT LIST. MARK ONE BOX ONLY.

- Boston
- Grimsby

- Horncastle
- Lincoln
- Louth
- Mablethorpe
- Skegness
- Other (specify)

Q21bb. How often do you normally participate in playing TENPIN BOWLING?

DO NOT READ OUT LIST. MARK ONE BOX ONLY.

- Daily
- 2-3 Times A Week
- 4-6 Times A Week
- Once A Week
- Once A Fortnight
- Once A Month
- Less Often
- Don't know/Can't remember (DO NOT READ OUT)

Q21c_3. In which town do you visit CAFES/RESTAURANTS most often?

DO NOT READ OUT LIST. MARK ONE BOX ONLY.

- Boston
- Grimsby
- Horncastle
- Lincoln
- Louth
- Mablethorpe
- Skegness
- Other (specify)

Q21cc. How often do you visit CAFES/RESTAURANTS?

DO NOT READ OUT LIST. MARK ONE BOX ONLY.

- Daily
- 2-3 Times A Week
- 4-6 Times A Week
- Once A Week
- Once A Fortnight
- Once A Month
- Less Often
- Don't know/Can't remember (DO NOT READ OUT)

Q21d_4. In which town do you visit the CINEMA?

DO NOT READ OUT LIST. MARK ONE BOX ONLY.

- Boston
- Grimsby
- Horncastle
- Lincoln
- Louth
- Mablethorpe
- Skegness
- Other (specify)

Q21dd How often do you normally go to the CINEMA?

DO NOT READ OUT LIST. MARK ONE BOX ONLY.

- Daily
- 2-3 Times A Week
- 4-6 Times A Week
- Once A Week
- Once A Fortnight
- Once A Month
- Less Often
- Don't know/Can't remember (DO NOT READ OUT)

Q21e_5. In which town do you visit NIGHTCLUBS most often?

DO NOT READ OUT LIST. MARK ONE BOX ONLY.

- Boston
- Grimsby
- Horncastle
- Lincoln
- Louth
- Mablethorpe
- Skegness
- Other (specify)

Q21ee. How often do you visit NIGHTCLUBS?

DO NOT READ OUT LIST. MARK ONE BOX ONLY.

- Daily
- 2-3 Times A Week
- 4-6 Times A Week
- Once A Week
- Once A Fortnight
- Once A Month
- Less Often
- Don't know/Can't remember (DO NOT READ OUT)

Q21f_6. In which town do you visit PUBS/BARS most often?

DO NOT READ OUT LIST. MARK ONE BOX ONLY.

- Boston
- Grimsby
- Horncastle
- Lincoln
- Louth
- Mablethorpe
- Skegness
- Other (specify)

Q21ff. How often do you visit PUBS/BARS?

DO NOT READ OUT LIST. MARK ONE BOX ONLY.

- Daily
- 2-3 Times A Week
- 4-6 Times A Week
- Once A Week
- Once A Fortnight
- Once A Month
- Less Often
- Don't know/Can't remember (DO NOT READ OUT)

Q21g_7. In which town do you visit the SPORTS, LEISURE CENTRE/GYM?

DO NOT READ OUT LIST. MARK ONE BOX ONLY.

- Boston
- Grimsby
- Horncastle
- Lincoln
- Louth
- Mablethorpe

- Skegness
- Other (specify)

Q21gg. How often do you normally visit the SPORTS, LEISURE CENTRE/GYM?

DO NOT READ OUT LIST. MARK ONE BOX ONLY.

- Daily
- 2-3 Times A Week
- 4-6 Times A Week
- Once A Week
- Once A Fortnight
- Once A Month
- Less Often
- Don't know/Can't remember (DO NOT READ OUT)

Q21h_8. In which town do you visit the THEATRE OR ANY OTHER CULTURAL ACTIVITIES?

DO NOT READ OUT LIST. MARK ONE BOX ONLY.

- Boston
- Grimsby
- Horncastle
- Lincoln
- Louth
- Mablethorpe
- Skegness
- Other (specify)

Q21hh. How often do you normally visit the THEATRE OR ANY OTHER CULTURAL ACTIVITIES?

DO NOT READ OUT LIST. MARK ONE BOX ONLY.

- Daily
- 2-3 Times A Week
- 4-6 Times A Week
- Once A Week
- Once A Fortnight
- Once A Month
- Less Often
- Don't know/Can't remember (DO NOT READ OUT)

Q21i_9. In which town do you play an ORGANISED SPORT most often?

DO NOT READ OUT LIST. MARK ONE BOX ONLY.

- Boston
- Grimsby
- Horncastle
- Lincoln
- Louth
- Mablethorpe
- Skegness
- Other (specify)

Q21ii. How often do you normally play an ORGANISED SPORT?

DO NOT READ OUT LIST. MARK ONE BOX ONLY.

- Daily
- 2-3 Times A Week
- 4-6 Times A Week
- Once A Week
- Once A Fortnight
- Once A Month
- Less Often
- Don't know/Can't remember (DO NOT READ OUT)

Q22a. Do you or members of your household visit the seafront?

- Yes
- No

If = 2, goto 'Q23a'

Q22b. In which area do you visit the seafront?

DO NOT READ OUT LIST - MARK ONE BOX ONLY

- Boston
- Grimsby
- Horncastle
- Lincoln
- Louth
- Mablethorpe
- Skegness
- Other (specify)

Demographics. Please READ OUT Statement:

I would now like to ask you a few questions about yourself and your household. These are for survey control purposes only and the results will not be released identifying you by name.

Q23a. May I ask the occupation of the chief wage earner?

Q23b. SEG

- A/B
- C1
- C2
- D/E
- Refused

Q24. May I ask which age group you are in?

PLEASE READ OUT

- 18 - 24 years
- 25 - 34 years
- 35 - 44 years
- 45 - 54 years
- 55 - 64 years
- 65 years or above
- Refused (DO NOT READ OUT)

Q25. How many cars does your household own or have the use of for shopping?

- None
- One
- Two
- Three or more
- Refused (DO NOT READ OUT)

Q26. Gender of respondent

RECORD BY OBSERVATION

- Male
- Female

Q27. Would you be willing to be recontacted for future quality control purposes?

INTERVIEWER NOTE: This will involve an interviewer contacting you and asking you a few brief questions to verify and monitor the quality of this call.

- Yes
- No

INTERVIEWERS PLEASE READ OUT TO ALL RESPONDENTS:

Thank you for participating in this survey. If you wish to check the credentials of Research and Marketing, I can provide the telephone number for the Market Research Society, who will be able to verify our company.

Would you like to take the number? 0500 39 69 99

Please check your work because once you move on you will not be able to return to this record.

- Checking (Return to start of survey)
- Continue to end of survey

If = 1, goto 'Intro'

Enter your initials to complete the survey

Appendix C

**National multiple retailers – Boston,
Grimsby, Lincoln, Skegness**

**BOSTON: MULTIPLE RETAILER REPRESENTATION
MARCH 2007**

A1 OPERATORS

Department Stores

Variety Stores

Marks & Spencer
Woolworths

Fashion & Accessories

Bon Marche	New Look
Burton	Next
Claire's Accessories	Peacocks
Dorothy Perkins	Select
Evans	The Officers Club
Greenwoods	TK Maxx
Milletts	Yours

Footwear & Repairs

Clarks
Shoezone
Stead & Simpson
Timpson

Childrenswear & Accessories

Adams

Jewellers, Watchmakers and Engravers

F Hinds
H Samuel

TV, Electrical, Radio and Records, Telephone

Carphone Warehouse
HMV
O2
PC World
Phones 4 U
T-Mobile

Pharmaceutical; health and beauty

Boots
Savers
Superdrug
The Body Shop

Opticians

Dolland & Aitchison
Specsavers

Books, Art, Stationery, Cards, Printing and Photo

Card Fair	Stationery Box
Clinton Cards x 2	The Works
Jessops	Waterstones
Past Times	WH Smith

Furniture, Furnishings, Carpet Outlets, DIY, Household

Bathstore
Dunelm x 2
Wickes
Wilkinsons

Hobbies, Crafts and Toys

Game
Gamestation

Sports, Camping and Outdoor

JJB Sports
Sportsdirect

Travel Agencies

Thomas Cook
Thomson

Charity Shops

British Heard Foundation
British Red Cross
Help The Aged
Oxfam
The Salvation Army

Miscellaneous

Argos	Motorworld
Bakers Oven	Poundstretcher
Blockbuster	Tchibo
Choices	Thorntons
Costa Coffee	

Foodstores, Off-Licences, CNT

ASDA	Julian Graves
Co-op	Kwik-Save
Holland & Barrett	Netto
Iceland	Threshers

A2 OPERATORS

Alliance & Leicester
Barclays
Coral x 3
Halifax
HSBC
Ladbrokes

Lloyds TSB
Nationwide
NatWest
Norwich & Peterborough
Swinton
Woolwich

A3 OPERATORS

KFC
Pizza Hut

A4 OPERATORS

A5 OPERATORS

**GRIMSBY: MULTIPLE RETAILER REPRESENTATION
NOVEMBER 2005**

A1 OPERATORS

Department Stores

Variety Stores

Bhs
Marks & Spencer

Fashion & Accessories

Ann Summers
Bank
Bay Trading Company
Bone Marche
Evans
Greenwoods
Internacionale
Monsoon
New Look

Next
Original Shoe Company
Pilot
Primark
Republic
River Island
Tie Rack
TK-Maxx
Top Shop

Footwear & Repairs

Clarks
Faith
Jonathan James

Childrenswear & Accessories

Adams
Early Learning Centre
Mothercare

Jewellers, Watchmakers and Engravers

Beaverbrooks
H Samuel
Warren James

TV, Electrical, Radio and Records, Telephone

HMV
O2
Orange
Phones 4 U
The Link
Zavvi

Pharmaceutical; health and beauty

Boots
Savers
Superdrug
The Body Shop
The Perfume Shop
Toni & Guy

Opticians

Dolland & Aitchison
Specsavers
Vision Express

Books, Art, Stationery, Cards, Printing and Photo

Card Warehouse
Clinton Cards x 2
Jessops
Stationery Box
The Works
Waterstones
WH Smith

Furniture, Furnishings, Carpet Outlets, DIY, Household

Allied Carpets
MFI
Ponden Mill
Poundworld
Wilkinson

Hobbies, Crafts and Toys

Game
Game Station
Games Workshop

Sports, Camping and Outdoor

All Sports
JJB Sports
Sports Soccer

Travel Agencies

Thomas Cook x 2
Thomson x 2

Charity Shops

Oxfam

Miscellaneous

Argos Extra
Bakers Oven
Greggs
Millie's Cookies
Skeltons
Thorntons
Woolworths

Foodstores, Off-Licences, CNT

Holland & Barratt
Iceland
Somerfield

A2 OPERATORS

Abbey
Alliance & Leicester
Barclays
Bradford & Bingley
Cheltenham & Gloucester
Co-op Bank
Halifax Estate Agents
Woolwich
Yorkshire Bank

HSBC
Ladbroke's
Lloyds TSB x 2
Nationwide
NatWest
Royal Bank of Scotland

A3 OPERATORS

McDonalds
Pizza Hut

A4 OPERATORS

Chicago Rock
Lloyds No. 1
The Litten Tree
Walkabout
Yates

A5 OPERATORS

**LINCOLN: MULTIPLE RETAILER REPRESENTATION
DECEMBER 2004**

A1 OPERATORS

Department Stores

Debenhams

Variety Stores

Bhs
Marks & Spencer
Littlewoods

Fashion & Accessories

Accessorize
Ann Summers
Bay Trading Company
Bon Marche
Claire's
Contessa
Dorothy Perkins
Earth Collection
Edinburgh Woollen Mill
Envy
River Island
Select
The Officers Club
TK Maxx
Top Shop
Wallis

Etam
Evans
French Connection
Internationale
MK One
Monsoon
New Look
Next x 2
Oasis
Primark

Footwear & Repairs

Barratts
Shoezone
Timpson

Childrenswear & Accessories

Adams
Mothercare

**Jewellers, Watchmakers and
Engravers**

Ernest Jones
Goldsmiths
H Samuel
Warren James

TV, Electrical, Radio and Records, Telephone

Sevenoaks	HMV
Carphone Warehouse	Phones 4 U
The Link	Sony Centre
O2	Comet
Currys x 2	PC World
T-Mobile x 2	

Pharmaceutical; health and beauty

Boots x 2
Fragrance Shop
Savers
Superdrug x 2
The Body Shop
Toni & Guy

Opticians

Dolland & Aitchison
Specsavers
Vision Express

Books, Art, Stationery, Cards, Printing and Photo

Card Warehouse	Ottakar's
Cardfair	Pronta Print
Clinton Cards x 3	Snappy Snaps
Kall-Kwik	Staples
Klick	
The Stationery Box	
The Works	
WH Smith	

Furniture, Furnishings, Carpet Outlets, DIY, Household

Bathstore	Pondenmill
Carpetright	Poundland
Homebase	Rosebys
Lakeland	Topps Tiles
Laura Ashley	Wilkinson
Multyork	

Hobbies, Crafts and Toys

Early Learning Centres
Game Station
Games Workshop
Game
Toys R Us

Sports, Camping and Outdoor

Intersport
JD Sports
JJB Sports
Millets
Sports Soccer

Travel Agencies

Thomas Cook
Travelcare

Charity Shops

Age Concern
Barnardo's
British Heart Foundation
British Red Cross
Cancer Research UK x 2
Mind
Oxfam x 2
Scope

Miscellaneous

Argos Extra	Money Shop
Bakers Oven	Pets At Home
Blockbuster	Starbucks
Cash Convertors	Subway
Halfords	Thornton's
Martin	

Foodstores, Off-Licences, CNT

Co-op	Lidl
Heron	One-Stop
Holland & Barratt	Spar x 2
Iceland	Threshers
Julian Graves	

A2 OPERATORS

Abbey	Ladbrokes
Alliance & Leicester	Ladbrokes
Barclays	Lloyds TSB x 3
Bradford & Bingley	Nationwide
Britannia	NatWest
Co-operative Bank	Norwich & Peterborough
Coral	Royal Bank of Scotland
Done Bookmakers	Skipton
Haart	Swinton
Halifax	Woolwich
Halifax Estate Agent	Yorkshire Bank
Household Bank	Your Move
HSBC	

A3 OPERATORS

Burger King
KJFC
McDonalds
Pizza Express

A4 OPERATORS

ASK
Deep Pan Pizza
The Slug & Lettuce
Walkabout
Yates

A5 OPERATORS

Papa John's

**SKEGNESS: MULTIPLE RETAILER REPRESENTATION
MAY 2007**

A1 OPERATORS

Department Stores

Co-op

Variety Stores

Marks & Spencer
Woolworths

Fashion & Accessories

Bon Marche
Burton
Claire's Accessories
Contessa
Dorothy Perkins
Edinburgh Woollen Mill
Etam

Evans
Greenwoods
M & Co
New Look
Peacocks
QS
Select

Footwear & Repairs

Clarks
Shoe Express
Shoezone

Jewellers, Watchmakers and Engravers

H Samuel

TV, Electrical, Radio and Records, Telephone

Phones 4U
The Link

Pharmaceutical; health and beauty

Boots the Chemist
Savers
Superdrug
The Body Shop

Opticians

Dolland & Aitchison
Specsavers

Books, Art, Stationery, Cards, Printing and Photo

Birthdays
Clinton Cards
Klick
WH Smith

Furniture, Furnishings, Carpet Outlets, DIY, Household

Wilkinson

Hobbies, Crafts and Toys

Game

Sports, Camping and Outdoor

All Sports

Travel Agencies

Going Places

Charity Shops

British Heart Foundation
Cancer Research UK
Help the Aged
Oxfam

Miscellaneous

Argos
Holland & Barrett
Julian Graves
Thorntons

Foodstores, Off-Licenses, CNT

Co-op Supermarket
Iceland
Lidl
Morrisons
Victoria Wine

A2 OPERATORS

Bairstow Eves
Barclays
Coral
HSBC
Ladbroke's (x2)
Lloyds TSB
Nationwide Building Society
Natwest

A3 OPERATORS

Little Frankies

A4 OPERATORS

Litten Tree

A5 OPERATORS

KFC

McDonalds

Appendix D

Business Survey Results – Skegness

Q1 Size of Premises

	Size of premises	Count	
a.	Up to 500 sq ft	15	25.00%
b.	501-1000 sq ft	14	23.33%
c.	1001-1500 sq ft	13	21.67%
d.	Over 1501 sq ft	18	30.00%
	Total respondents	60	

Q2 Type of business

	Business type	Count	
a.	Retailer	51	70.83%
b.	Restaurant/Take Away/Pub	9	12.50%
c.	Prof/Fin Services	4	5.56%
d.	Other	8	11.11%
	Total respondents	72	

Q3 Multiple/independent

		Count	
a.	National multiple chain	25	35.21%
b.	Regional multiple chain	5	7.04%
c.	Independent	41	57.75%
	Total respondents	71	

Q4. How long has business been trading?

Length of time	Count	
< 1 year	2	2.78%
1-5 years	23	31.94%
6-10 years	10	13.89%
> 10 years	37	51.39%
Total respondents	72	

Q5 Turnover

		0-25%	26-50%	51-75%	76-100%	Total
a.	Local Residents	16	29	21	6	72
b.	People working locally	65	7	0	0	72
c.	Others (eg visitors/tourists)	18	43	9	2	72
		0-25%	26-50%	51-75%	76-100%	
	Local Residents	22.22%	40.28%	29.17%	8.33%	
	People working locally	90.28%	9.72%	0.00%	0.00%	
	Others (eg visitors/tourists)	25.00%	59.72%	12.50%	2.78%	

Q6 Geographical area

	Area	Count	%
a	Mablethorpe, or:	36	50.00%
b	Mablethorpe and Skegness	10	13.89%
c	Mablethorpe, Skegness, Louth and Boston	26	36.11%
	Total respondents	72	

Q7 Satisfied with accommodation

	Count	%
Satisfied	61	85.92%
Unsatisfied	10	14.08%
	71	

Q8 If unsatisfied...

	Reason	Count	%
a	Too large	0	0.00%
b	Too small	4	36.36%
c	Poor condition	2	18.18%
d	Lacking separate service access	4	36.36%
e	Other	1	9.09%
		11	

Q9 Upper Floors

1. Do premises have upper floors?			2. If yes, are they used?		
	Count	%		Count	%
Yes	50	69.44%	Yes	43	89.58%
No	22	30.56%	No	5	10.42%
	72			48	
3. If used, for what?			4. Are they occupied by you?		
	Count	%		Count	%
Office	6	12.50%	Yes	29	61.70%
Retail sales	2	4.17%	No	18	38.30%
Storage	28	58.33%			
Residential	11	22.92%		47	
	48				

Q10 Owner Occupation

		Count	%
a.	Owner Occupier	14	19.72%
b.	Tenant/Lessee	57	80.28%
		71	

Q11 Relocation

Short Term Intentions			
	Intentions	Count	%
a	Remain in existing uni	53	88.33%
b	Relocate elsewhere w	2	3.33%
c	Relocate to a nearby t	0	0.00%
d	Relocate elsewhere	0	0.00%
e	Intend to sell business	5	8.33%
f	Closing down	0	0.00%
		60	
Medium Term Intentions			
	Intentions	Count	%
a	Remain in existing uni	50	84.75%
b	Relocate elsewhere w	2	3.39%
c	Relocate to a nearby t	0	0.00%
d	Relocate elsewhere	0	0.00%
e	Intend to sell business	5	8.47%
f	Closing down	2	3.39%
		59	

Q12 Turnover

1. Last 12 Months			
		Count	%
	Turnover		0.00%
a	Increasing	11	16.67%
b	Static	24	36.36%
c	Decreasing	31	46.97%
		66	
2. Comparison			
		Count	%
	Turnover		
a	Below average	15	20.83%
b	Similar to average	44	61.11%
c	Above average	13	18.06%
		72	

Q13 Car Parking

	Count	%
Yes	15	21.74%
No	54	78.26%
	69	

Q14 Town Centre Survey

	Good	Average	Poor	Total respondents	Good	Average	Poor
Number of Shops Specifically:							
- Multiples	8	44	14	66	12.12%	66.67%	21.21%
- Independents	6	37	26	69	8.70%	53.62%	37.68%
- Leisure	5	44	19	68	7.35%	64.71%	27.94%
- Specialist	0	21	48	69	0.00%	30.43%	69.57%
- Other	0	28	13	41	0.00%	68.29%	31.71%
Range of shops	4	41	24	69	5.80%	59.42%	34.78%
Quality of shops	4	37	27	68	5.88%	54.41%	39.71%
Price of goods compared w	11	54	34	99	11.11%	54.55%	34.34%
Access by car	6	35	28	69	8.70%	50.72%	40.58%
Car Parking	2	30	37	69	2.90%	43.48%	53.62%
Access by public transport	7	42	20	69	10.14%	60.87%	28.99%
Leisure/recreational facilitie	9	45	15	69	13.04%	65.22%	21.74%
Restaurants/cafes/takeawa	28	33	8	69	40.58%	47.83%	11.59%
For moving around on foot	35	29	5	69	50.72%	42.03%	7.25%
Appearance and character	6	45	18	69	8.70%	65.22%	26.09%
Crime	1	51	13	65	1.54%	78.46%	20.00%
Public toilet facilities	0	27	42	69	0.00%	39.13%	60.87%
Cleanliness	1	42	26	69	1.45%	60.87%	37.68%

Q15 Three Most Important Things

	1s	2s	3s							SCORE	%
a	7	2	4	21	4	4	4	4		29	14.80%
b	4	0	4	12	0	4	4	4		16	8.16%
c	8	7	3	24	14	3	3	3		41	20.92%
d	2	1	5	6	2	5	5	5		13	6.63%
e	0	1	2	0	2	2	2	2		4	2.04%
f	0	0	2	0	0	2	2	2		2	1.02%
g	0	0	0	0	0	0	0	0		0	0.00%
h	1	2	1	3	4	1	1	1		8	4.08%
i	0	0	0	0	0	0	0	0		0	0.00%
j	3	3	0	9	6	0	0	0		15	7.65%
k	0	8	1	0	16	1	1	1		17	8.67%
l	9	6	7	27	12	7	7	7		46	23.47%
m	0	1	3	0	2	3	3	3		5	2.55%
										196	
1s score 3 points											
2s score 2 points											
3s score 1 point											

Questionnaires	201
Responses	46
	22.89%

Appendix E

Retailer Requirements – Skegness

Report : Requirements : Results Report

Name	Size	Date
ALDI STORES LTD	14,600 sq ft	23/07/2007
ASK CENTRAL PLC	2,500 - 5,000 sq ft	18/07/2007
BAKERS OVEN LTD	2,000 - 2,500 sq ft	14/08/2007
BATHSTORE.COM LTD	2,500 - 5,000 sq ft	23/03/2007
BODY SHOP INTERNATIONAL PLC (THE)	1,000 sq ft	03/04/2007
BRITISH HEART FOUNDATION	6,000 sq ft	13/07/2007
CELLINI COLLECTION PLC	600 - 900 sq ft	26/01/2007
DESIRE BY DEBENHAMS	17,500 - 22,500 sq ft	11/04/2007
ETHEL AUSTIN LTD	2,500 - 5,000 sq ft	23/07/2007
FARMFOODS LTD	5,000 - 8,000 sq ft	15/08/2007
FRANKIE & BENNY'S	3,500 - 4,000 sq ft	30/07/2007
GAMESTATION LTD	1,300 - 1,800 sq ft	12/04/2007
NETTO FOODSTORES LTD	8,000 - 12,000 sq ft	01/03/2007
O2 UK LTD	800 - 2,000 sq ft	30/01/2007
PEACOCKS STORES LTD	5,000 - 15,000 sq ft	01/08/2007
PETS AT HOME LTD	5,000 - 12,000 sq ft	14/08/2007
PETS AT HOME LTD	5,000 - 12,000 sq ft	19/09/2007
PETS AT HOME LTD	4,000 - 12,000 sq ft	01/03/2007
PIZZAEXPRESS PLC	2,500 - 5,000 sq ft	18/07/2007
POUNDLAND	3,000 - 10,000 sq ft	22/06/2007
TJ HUGHES LTD	20,000 - 30,000 sq ft	23/08/2007
TJ HUGHES LTD	25,000 - 40,000 sq ft	23/08/2007
WHITBREAD GROUP PLC	6,070 sq ft	25/04/2007
WORKS PUBLISHERS OUTLET (THE)	1,500 - 2,500 sq ft	21/08/2007
ZIZZI	2,500 - 5,000 sq ft	18/07/2007

(Total Records Displayed 25)

Appendix F

Business Survey Results – Mablethorpe

Q1 Size of Premises

	Size of premises	Count	
a.	Up to 500 sq ft	12	36.36%
b.	501-1000 sq ft	16	48.48%
c.	1001-1500 sq ft	2	6.06%
d.	Over 1501 sq ft	3	9.09%
	Total respondents	33	

Q2 Type of business

	Business type	Count	
a.	Retailer	18	52.94%
b.	Restaurant/Take Away/Pu	9	26.47%
c.	Prof/Fin Services	4	11.76%
d.	Other	3	8.82%
	Total respondents	34	

Q3 Multiple/independent

		Count	
a.	National multiple chain	0	0.00%
b.	Regional multiple chain	2	5.88%
c.	Independent	32	94.12%
	Total respondents	34	

Q4 How long has business been trading?

Length of	Count	
< 1 year	2	5.88%
1-5 year	5	14.71%
6-10 year	2	5.88%
> 10 year	25	73.53%
Total res	34	

Q5 Turnover

		0-25%	26-50%	51-75%	76-100%		Total
a.	Local Residents	15	10	5	4		34
b.	People working locally	28	0	0	1		29
c.	Others (eg visitors/tourists	7	7	8	11		33
		0-25%	26-50%	51-75%	76-100%		
	Local Residents	44.12%	29.41%	14.71%	11.76%		
	People working locally	96.55%	0.00%	0.00%	3.45%		
	Others (eg visitors/tourists	21.21%	21.21%	24.24%	33.33%		

Q6 Geographical area

	Area	Count	%
a	Mablethorpe, or:	22	64.71%
b	Mablethorpe and Skegness	0	0.00%
c	Mablethorpe, Skegness, Louth and Boston	12	35.29%
	Total respondents	34	

Q7 Satisfied with accommodation

	Count	%
Satisfied	26	76.47%
Unsatisfied	8	23.53%
	34	

Q8 If unsatisfied...

	Reason	Count	%
a	Too large	0	0.00%
b	Too small	5	33.33%
c	Poor condition	7	46.67%
d	Lacking separate service access	1	6.67%
e	Other	2	13.33%
		15	

Q9 Upper Floors

1. Do premises have upper floors?			2. If yes, are they used?		
	Count	%		Count	%
Yes	21	61.76%	Yes	21	100.00%
No	13	38.24%	No	0	0.00%
	34			21	

3. If used, for what?

4. Are they occupied by you?

	Count	%		Count	%
Office	6	28.57%	Yes	9	45.00%
Retail sales	1	4.76%	No	11	55.00%
Storage	3	14.29%			
Residential	14	66.67%		20	
	21				

Q10 Owner Occupation

		Count	%
a.	Owner Occupier	4	11.76%
b.	Tenant/Lessee	30	88.24%
		34	

Q11 Relocation**Short Term Intentions**

	Intentions	Count	%
a	Remain in existing unit	18	62.07%
b	Relocate elsewhere w	0	0.00%
c	Relocate to a nearby t	0	0.00%
d	Relocate elsewhere	0	0.00%
e	Intend to sell business	10	34.48%
f	Closing down	1	3.45%
		29	

Medium Term Intentions

	Intentions	Count	%
a	Remain in existing unit	17	70.83%
b	Relocate elsewhere w	2	8.33%
c	Relocate to a nearby t	1	4.17%
d	Relocate elsewhere	0	0.00%
e	Intend to sell business	3	12.50%
f	Closing down	1	4.17%
		24	

Q12 Turnover**1. Last 12 Months**

		Count	%
	Turnover		0.00%
a	Increasing	2	6.90%
b	Static	5	17.24%
c	Decreasing	22	75.86%
		29	

2. Comparison

		Count	%
	Turnover		
a	Below average	9	28.13%
b	Similar to average	17	53.13%
c	Above average	6	18.75%
		32	

Q13 Car Parking

	Count	%
Yes	4	12.50%
No	28	87.50%
	32	

Q14 Town Centre Survey

	Good	Average	Poor	Total respondants	Good	Average	Poor
Number of Shops Specifically:							
- Multiples	0	6	26	32	0.00%	18.75%	81.25%
- Independents	2	19	11	32	6.25%	59.38%	34.38%
- Leisure	2	5	25	32	6.25%	15.63%	78.13%
- Specialist	0	2	30	32	0.00%	6.25%	93.75%
- Other	1	2	20	23	4.35%	8.70%	86.96%
Range of shops	4	4	24	32	12.50%	12.50%	75.00%
Quality of shops	4	5	23	32	12.50%	15.63%	71.88%
Price of goods compared with	6	13	13	32	18.75%	40.63%	40.63%
Access by car	3	25	4	32	9.38%	78.13%	12.50%
Car Parking	1	26	5	32	3.13%	81.25%	15.63%
Access by public transport	2	16	14	32	6.25%	50.00%	43.75%
Leisure/recreational facilities	0	13	19	32	0.00%	40.63%	59.38%
Restaurants/cafes/takeaways	12	19	1	32	37.50%	59.38%	3.13%
For moving around on foot	15	15	2	32	46.88%	46.88%	6.25%
Appearance and character	1	13	17	31	3.23%	41.94%	54.84%
Crime	2	17	12	31	6.45%	54.84%	38.71%
Public toilet facilities	5	14	11	30	16.67%	46.67%	36.67%
Cleanliness	4	18	10	32	12.50%	56.25%	31.25%

Q15 Three Most Important Things

	1s	2s	3s							SCORE	%
a	7	2	4	21	4	4	4	4		29	14.80%
b	4	0	4	12	0	4	4	4		16	8.16%
c	8	7	3	24	14	3	3	3		41	20.92%
d	2	1	5	6	2	5	5	5		13	6.63%
e	0	1	2	0	2	2	2	2		4	2.04%
f	0	0	2	0	0	2	2	2		2	1.02%
g	0	0	0	0	0	0	0	0		0	0.00%
h	1	2	1	3	4	1	1	1		8	4.08%
i	0	0	0	0	0	0	0	0		0	0.00%
j	3	3	0	9	6	0	0	0		15	7.65%
k	0	8	1	0	16	1	1	1		17	8.67%
l	9	6	7	27	12	7	7	7		46	23.47%
m	0	1	3	0	2	3	3	3		5	2.55%
										196	
1s score 3 points											
2s score 2 points											
3s score 1 point											

Questionnaires	201
Responses	46
	22.89%

Appendix G

MapInfo Brief 07/02



Goods Based Retail Expenditure Estimates and Price Indices

INFORMATION BRIEF

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August 2007

This Information Brief sets out the latest trends in consumer retail expenditure per head on convenience and comparison goods in the United Kingdom. Estimates of expenditure per head are given for the years 1980 to 2006 in constant 2003 prices, together with price indices of consumer retail expenditure to enable conversion between different price bases. Alternative projections of growth in consumer retail expenditure per head are given, derived from trends over differing time periods, as well as Oxford Economics' forecast growth rates.

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Data are based on the latest official estimates of expenditure according to the classification of individual consumption by purpose (COICOP) as part of the European System of Accounts 1995. Data are compatible with the latest first release of the National Accounts, and are compatible with the 2007 Blue Book dataset (United Kingdom National Accounts).

Definitions

Convenience and comparison goods categories are defined as follows (COICOP category in brackets):

Convenience goods:

- Food and non-alcoholic beverages (01)
- Alcoholic drink (*off-licence sales*) (02.1)
- Tobacco (02.2)
- Non-durable household goods (05.6.1)
- Newspapers and magazines (09.5.2)

Comparison goods:

- Books (09.5.1)
- Clothing and footwear (03)
- Furniture, floor coverings and household textiles (05.1.1, 05.1.2, 05.2)
- Audio-visual equipment and other durable goods (05.3.1, 05.3.2, 05.4, 05.5, 08.2, 09.1)
- Hardware and DIY supplies (04.3.1)
- Chemists' goods (06.1.1, 06.1.3, 12.1.2)
- Jewellery, watches and clocks (12.3.1)
- Bicycles (07.1.3)
- Recreational and other miscellaneous goods (09.2.2, 09.3, 09.5.4)

All estimates are inclusive of VAT and Special Forms of Trading, and are given in 2003 prices.

Methodology

These consumer retail expenditure estimates and price indices by goods type are estimates for the United Kingdom derived from household final consumption expenditure (HHFCE) reported in the ONS Consumer Trends, (compatible with the ONS Blue Book), and from time series data supplied by the ONS. The Blue Book provides the most reliable source of information on consumer retail expenditure, since it draws upon a wide range of sources, including the ONS Expenditure and Food Survey (published as Family Spending), the ONS Annual Business Inquiry (ABI), the Retail Sales Inquiry (RSI), government departments, nationalised industries and manufacturers.

The Blue Book compatible figures are used to calculate total consumer expenditure on those

goods normally purchased through retail outlets. This includes all types of retail outlets, comprising all permanent and temporary shops, markets, roadside stalls, mobile shops, farm shops, roundsmen operating from depots, mail order, party plan and automatic vending machines, and credit traders.

Consumer retail expenditure per capita is obtained by dividing the resulting expenditure by goods type by the latest ONS estimates of mid-year home population for the United Kingdom, as published in the ONS Population Trends.

Data Developments

Household final consumption expenditure (HHFCE) data, as reported by the consumer trends publication, moved to a new classification system in 2001 as part of the move to conform to the European System of Accounts 1995. Data are now presented according to the Classification of Individual Consumption by Purpose (COICOP) but are still available back to 1964.

Instead of the old split between goods and services, COICOP splits HHFCE into 12 divisions by purpose:

- 01 - Food and non-alcoholic beverages
- 02 - Alcohol and tobacco
- 03 - Clothing and footwear
- 04 - Housing, water, electricity, gas and other fuels
- 05 - Furnishing, household equipment and maintenance
- 06 - Health
- 07 - Transport
- 08 - Communication
- 09 - Recreation and culture
- 10 - Education
- 11 - Restaurants and hotels
- 12 - Miscellaneous goods and services

Further breakdown of these categories allows calculation of retail spending on convenience goods, comparison goods and all goods, as above.

Alcohol and Tobacco Expenditure

Alcoholic beverages are treated differently to under the previous system, which combined both off-licence spending and that in pubs, restaurants, hotels etc. Under COICOP, spending on alcohol in category 2 relates only to the proportion spent in retail establishments, i.e. off-licence sales for

alcohol, with the rest included under restaurants and hotels.

Data for both alcohol and tobacco are distorted by estimates of smuggled goods that are included in the official data. These should not be included in convenience good expenditure. In Consumer Trends, National Statistics published estimates of smuggling for these goods. Alcohol smuggling only represents a small share of the total spending, with no split available for on and off-licence sales.

Tobacco smuggling is more important, representing almost 16% of total sales in 2003 – and has been increasing over the past decade. Data supplied on smuggling for 1994 to 2003 have been subtracted from total spending, with a suitable share of total tobacco spending also subtracted for other years.

Even after this adjustment for smuggling, expenditure on tobacco appears to be too large. This still includes both retail and non-retail spending. Only the retail element is required. ABI data on retail turnover by commodity closely match other elements of spending defined on the COICOP system. The clear exception is for tobacco. Looking at the ABI data over a number of years suggests that only around 72% of the COICOP spending on tobacco, net of smuggling, is in retail establishments. The remainder is non-retail spending and has been removed from calculation.

Recent Trends

Consumer spending growth has remained volatile. It was strong during the final quarter of 2006, rising by 1.3% on the quarter despite interest rate rises. Consumption slowed markedly in 2007Q1. This suggests that the slow down in growth in 2007Q1 may have reflected a delayed reaction to the interest rate rises.

That said, retail sales rebounded in 2007Q2 up 1.2% on the quarter and 3.8% on the year. Sales in household goods performed well after a poor start to the year and increased while food sales remained steady throughout the first two quarters of 2007. Sales in clothing and footwear are up in 2007Q2 with the good weather in April providing an early boost to summer clothes sales.

However, retail sales account for a third of consumer expenditure and other indicators are not as positive, Consumer confidence fell for the first time in 6 months in June 2007 and this is expected to remain low with high energy prices and rising petrol prices. Confidence in E-commerce has also fallen with the increased awareness and risk about financial and identity fraud. This may be a sign that the increases in interest rates are starting to take their toll on the economy. The fall in consumer

confidence coincided with a fall in household incomes in 2007Q1 on the previous quarter, although spending is being sustained by a fall in the savings ratio.

Moreover, growth in consumer credit has fallen markedly over the past year, signalling that appetites for debt-financed spending are waning. Households are being constrained by historically high levels of debt in relation to incomes. Following the Bank of England's increase in base rates to 5.75% in July these constraints have increased and debt-financed spending would be expected to fall especially given the likelihood of further rate rises.

Longer-Run Trends

Comparison goods have accounted for a larger share of household spending, since 1993. As household incomes have risen, annual growth rates in spend on comparison goods have been much higher compared to convenience goods. Indeed average annual growth rates for comparison goods have been increasing rapidly in recent years, with the average growth in 1998-06 of 7.2%, more than double the average rate over a forty-year period. Consequently, comparison goods represented two-thirds of all goods expenditure in 2006. With increases in interest rates growth in spending on comparison goods could slow as debt based purchasing becomes more costly.

Growth in expenditure per capita on convenience goods has been much lower. The ultra-long run trend calculation (1964-2006) suggests that there is virtually no growth in this category although there has been some increases since 2001. This reached a high in 2006 of just over £1,600 per capita.

A clearer growth trend is visible looking at more recent data periods. Medium-term trend growth (from the mid 1980s) is 0.6% and a further jump in the trend calculation is visible for more short-run data, once the recession and period of higher inflation in the early 1990s is excluded. Average growth calculated since the mid-1990s is 0.9%.

Price Indices

Price indices for convenience goods, comparison goods and all goods are calculated directly from the series of consumer expenditure by type at current and constant prices. The price indices are therefore fully compatible with the estimates of consumer retail expenditure per head given in this

Table 1: UK annual average consumer retail expenditure by goods type (2003 prices)

	Expenditure per capita (£) (percentage change from the previous year)			Price Indices (2003=100)		
	Convenience Goods	Comparison Goods	All Goods	Convenience Goods	Comparison Goods	All Goods
1980	1,454	895	2,349	39.2	58.4	46.5
	-1.0%	-3.1%	0.1%			
1981	1,422	886	2,308	43.3	62.3	50.6
	-2.2%	-1.0%	-1.7%			
1982	1,389	902	2,291	47.2	66.1	54.7
	-2.3%	1.8%	-0.7%			
1983	1,397	945	2,343	49.8	70.0	58.0
	0.6%	4.8%	2.3%			
1984	1,380	986	2,365	53.2	72.9	61.4
	-1.3%	4.3%	1.0%			
1985	1,385	1,035	2,420	55.9	77.1	64.9
	0.4%	5.0%	2.3%			
1986	1,409	1,117	2,526	58.3	79.9	67.9
	1.8%	7.9%	4.4%			
1987	1,433	1,200	2,633	60.4	82.5	70.5
	1.7%	7.4%	4.2%			
1988	1,452	1,300	2,752	62.8	85.4	73.5
	1.3%	8.3%	4.5%			
1989	1,470	1,340	2,810	66.2	89.0	77.1
	1.2%	3.1%	2.1%			
1990	1,466	1,359	2,825	71.4	93.3	81.9
	-0.3%	1.4%	0.5%			
1991	1,445	1,351	2,796	76.6	98.4	87.2
	-1.4%	-0.6%	-1.0%			
1992	1,435	1,392	2,827	79.4	100.6	89.8
	-0.7%	3.1%	1.1%			
1993	1,443	1,451	2,894	81.5	101.6	91.6
	0.5%	4.2%	2.4%			
1994	1,448	1,550	2,999	82.7	101.4	92.3
	0.4%	6.8%	3.6%			
1995	1,433	1,604	3,037	85.9	104.0	95.5
	-1.1%	3.5%	1.3%			
1996	1,468	1,687	3,156	89.1	106.3	98.3
	2.5%	5.2%	3.9%			
1997	1,480	1,779	3,259	90.1	108.3	100.0
	0.8%	5.4%	3.3%			
1998	1,477	1,877	3,354	92.1	109.3	101.7
	-0.2%	5.5%	2.9%			
1999	1,508	2,013	3,521	93.7	107.9	101.8
	2.1%	7.3%	5.0%			
2000	1,525	2,175	3,700	94.4	105.4	100.8
	1.1%	8.1%	5.1%			
2001	1,500	2,327	3,827	97.0	104.0	101.0
	-1.6%	7.0%	3.4%			
2002	1,527	2,549	4,076	98.0	102.0	100.0
	1.8%	9.6%	6.5%			
2003	1,548	2,751	4,299	100.0	100.0	100.0
	1.3%	7.9%	5.5%			
2004	1,581	2,957	4,538	100.5	97.9	98.8
	2.1%	7.5%	5.6%			
2005	1,593	3,049	4,642	101.9	95.2	97.5
	0.8%	3.1%	2.3%			
2006	1,609	3,216	4,825	104.6	93.2	97.0
	1.0%	5.5%	3.9%			

Average annual growth rates (calculated by fitting a log-linear regression line by the method of least squares to give a compound growth rate)

1964-06	0.1%	3.9%	1.8%	7.3%	5.8%	7.0%
1973-06	0.2%	4.4%	2.3%	5.8%	4.2%	5.4%
1978-06	0.4%	4.9%	2.7%	4.3%	2.7%	3.8%
1983-06	0.6%	5.3%	3.1%	3.5%	1.6%	2.8%
1988-06	0.6%	5.6%	3.4%	2.8%	0.6%	1.9%
1993-06	0.9%	6.6%	4.2%	2.0%	-0.6%	0.7%
1998-06	1.0%	7.2%	4.8%	1.6%	-2.2%	-0.6%

report. Use of these calculated indices with the expenditure estimates is preferable to the use of either the retail price index (RPI) or the “new” consumer price index (CPI) because these incorporate a significant number of items not purchased through retail outlets.

Total goods price deflation has occurred since 2001 and prices have fallen at an average annual rate of 0.6%. Prices of comparison goods fell by an average of 2.2% per year in the period 1998-2006 dominated by decreasing prices of electrical goods. Prices of both domestic appliances and audio, photographic and optical equipment have fallen since 1993, but the largest falls have been in the last five years. This is in line with technological advances and the movement of production to lower cost countries, especially China and India, feeding through into prices. This trend is also evident for clothing and textiles.

Convenience goods price inflation has historically been higher than that for comparison goods and prices have continued to rise, but have slowed in recent years. Recent trends are likely to continue.

Trend Projections

Projections of United Kingdom annual average retail expenditure per capita by goods type, including Special Forms of Trading and in constant 2003 prices, are presented in Table 3, and illustrated in Figures 1 to 9. These projections are based on time series analysis of past trends in expenditure per capita data from 1964 (the earliest year for which data are available), and are derived by fitting log-linear regression lines to the data using the method of least squares. The projections are derived solely from past trends and take no account of current economics or future expectations.

Convenience goods retail expenditure has been erratic over the last 40 years, with low trend growth over the period as a whole. But the statistical relationship is unreliable and there appear to have been some trend breaks. Using a shorter run of data, the correlation coefficient rises, as does the trend growth rate. The most statistically robust estimate of trend growth calculated is for the period 1998-2006, when the annual growth rate averaged 1%.

Trend growth rates of comparison goods expenditure per capita are statistically robust for all periods, with the strongest relationship noticeable in the short-term data. However, growth in this period is significantly stronger than in the longer run and appears to be unsustainable, similar to the boom in the 1980s, which was followed by a period of slower growth. Projected sales per capita based on medium and long-term trends (which give similar trend results) look more believable.

Unsurprisingly, for sales of all goods per capita, stronger average growth is noticeable in more recent years than in longer-run trends, while the statistical relationship improves. But medium term trends are still statistically robust and are more realistic.

Oxford Economics' Forecasts

As an alternative to pure trend-based projections, forecasts from the UK consumer spending model are shown in Table 2. These forecasts are consistent with past trends, but are also based upon expected changes in other economic variables of interest according to historic relationships. Short-term growth rates, particularly for comparison goods are clearly unsustainable and some correction is necessary to revert to levels dictated by medium and long-term trends.

Overall, consumption is expected to be robust, but grow slightly below incomes in the near term. Interest rates have risen and are likely to rise further as the Bank of England targets 2% inflation. Rising employment and earnings may offset any negative effects which may result from this rise in interest rates. Real consumption is expected to grow by an average of 2.9% over the period 2005-07 and in the longer term this is expected to increase to 3.4% over the period 2005-12. We would be very surprised to see a return to the boom conditions of the last decade, when spending rose on average by 4.2% per annum in real terms and house prices almost trebled.

We anticipate spending on comparative goods to increase by 4.3% on average per annum over the period 2005-2007, with average annual growth rates increasing marginally over the forecast period. This is compared to short run trend (1998-2006) rates of 7.2%. Convenience good annual expenditure growth is expected to be 0.9% over the period 2005-2007, with average annual growth rates projected to increase in line with short run trends of 1.0% over time.

Despite mixed news this year, we expected activity in the housing market to remain healthy though with downside risks. RICS reports that new buyer enquiries have been robust month on month for the past year despite interest rate rises and house prices rose by 1.1% between May and June according to the Nationwide. However it is expected that interest rates may rise to 6% in August 2007, which could slow housing activity and reduce affordability further for first-time buyers.

Table 2: Oxford Economics' forecasts of UK goods based retail expenditure and trends by goods type (2003 prices)

Expenditure per capita (£): Oxford Economics' forecasts									
	Convenience goods	Comparison goods	All goods	Convenience Goods Detail		Food	Clothing & Footwear	Comparison Goods Detail	Audio-vis Goods
				Alcohol (off-licence)	Tobacco			H/hold Goods	
2005	1,593	3,049	4,642	210	151	1104	773	596	458
2006	1,609	3,216	4,825	207	147	1128	816	611	517
2007	1,625	3,354	4,980	214	141	1143	834	630	582
2012	1,726	4,288	6,014	252	123	1213	1011	698	1033
2017	1,848	5,687	7,534	304	107	1287	1231	782	1819
Average annual forecast growth rates									
2005-07	1.0%	4.6%	3.5%	0.9%	-3.3%	1.8%	3.8%	2.8%	12.7%
2005-12	1.2%	4.6%	3.6%	2.7%	-2.9%	1.4%	3.9%	2.3%	12.3%
2005-17	1.2%	4.9%	3.9%	3.1%	-2.8%	1.3%	3.9%	2.3%	12.2%
Average annual trend growth rates (calculated by fitting a log-linear regression line by the method of least squares to give a compound growth rate)									
1964-06	0.1%	3.9%	1.8%	2.2%	-2.6%	0.8%	3.8%	2.7%	10.5%
1973-06	0.2%	4.4%	2.3%	2.1%	-3.3%	1.0%	4.5%	3.2%	11.3%
1978-06	0.4%	4.9%	2.7%	2.3%	-3.4%	1.1%	4.8%	3.6%	12.2%
1983-06	0.6%	5.3%	3.1%	2.7%	-3.6%	1.2%	5.0%	4.1%	12.8%
1988-06	0.6%	5.6%	3.4%	3.2%	-4.3%	1.2%	5.7%	4.3%	12.6%
1993-06	0.9%	6.6%	4.2%	4.3%	-4.6%	1.4%	6.7%	5.0%	14.8%
1998-06	1.0%	7.2%	4.8%	3.9%	-3.6%	1.3%	8.1%	5.1%	15.3%

Table 3: Growth and projections of UK annual average consumer retail expenditure per capita by goods type (2003 prices)

	Ultra long term trends 1964-2006			Long term trends 1978-2006			Medium term trends 1988-2006			Short term trends 1998-2006		
	Conv. goods	Comp. goods	All goods	Conv. goods	Comp. goods	All goods	Conv. goods	Comp. goods	All goods	Conv. goods	Comp. goods	All goods
Correlation coefficient	0.250	0.955	0.880	0.663	0.974	0.938	0.776	0.967	0.947	0.911	0.991	0.993
Average annual growth	0.1%	3.9%	1.8%	0.4%	4.9%	2.7%	0.6%	5.6%	3.4%	1.0%	7.2%	4.8%
95% confidence limits	(+/-0.07)	(+/-0.26)	(+/-0.21)	(+/-0.11)	(+/-0.31)	(+/-0.27)	(+/-0.16)	(+/-0.51)	(+/-0.4)	(+/-0.29)	(+/-0.61)	(+/-0.34)
Actual and projected expenditure per capita (2003 prices) and 95% confidence limits for the regression points and lines												
2005 expenditure	£ 1,593	£ 3,049	£ 4,642	£ 1,593	£ 3,049	£ 4,642	£ 1,593	£ 3,049	£ 4,642	£ 1,593	£ 3,049	£ 4,642
2005 projected expenditure	1,506	2,531	3,925	1,543	2,800	4,263	1,564	2,924	4,458	1,588	3,088	4,669
95% limits:	(+/-96)	(+/-566)	(+/-719)	(+/-82)	(+/-426)	(+/-562)	(+/-67)	(+/-408)	(+/-491)	(+/-51)	(+/-212)	(+/-178)
-Line	(+/-29)	(+/-176)	(+/-224)	(+/-32)	(+/-165)	(+/-217)	(+/-32)	(+/-199)	(+/-239)	(+/-38)	(+/-156)	(+/-132)
2006 expenditure	1,609	3,216	4,825	1,593	3,216	4,825	1,609	3,216	4,825	1,609	3,216	4,825
2006 projected expenditure	1,508	2,629	3,997	1,549	2,937	4,377	1,573	3,087	4,608	1,604	3,311	4,892
95% limits:	(+/-96)	(+/-590)	(+/-735)	(+/-83)	(+/-451)	(+/-582)	(+/-68)	(+/-439)	(+/-518)	(+/-57)	(+/-251)	(+/-206)
-Line	(+/-31)	(+/-189)	(+/-237)	(+/-34)	(+/-182)	(+/-235)	(+/-35)	(+/-227)	(+/-268)	(+/-45)	(+/-199)	(+/-163)
2007 projected expenditure	1,510	2,730	4,071	1,555	3,081	4,495	1,582	3,260	4,763	1,621	3,549	5,127
95% limits:	(+/-96)	(+/-615)	(+/-660)	(+/-84)	(+/-477)	(+/-602)	(+/-70)	(+/-474)	(+/-547)	(+/-63)	(+/-296)	(+/-238)
-Line	(+/-32)	(+/-203)	(+/-249)	(+/-36)	(+/-201)	(+/-254)	(+/-38)	(+/-259)	(+/-299)	(+/-53)	(+/-247)	(+/-198)
2012 projected expenditure	1,520	3,300	4,462	1,586	3,912	5,130	1,627	4,275	5,623	1,705	5,029	6,479
95% limits:	(+/-99)	(+/-758)	(+/-841)	(+/-90)	(+/-636)	(+/-722)	(+/-81)	(+/-701)	(+/-727)	(+/-101)	(+/-636)	(+/-454)
-Line	(+/-37)	(+/-287)	(+/-320)	(+/-46)	(+/-320)	(+/-363)	(+/-54)	(+/-468)	(+/-486)	(+/-94)	(+/-592)	(+/-423)
2017 projected expenditure	1,530	3,988	4,890	1,617	4,967	5,855	1,674	5,608	6,637	1,794	7,125	8,187
95% limits:	(+/-102)	(+/-938)	(+/-943)	(+/-97)	(+/-854)	(+/-871)	(+/-95)	(+/-1043)	(+/-973)	(+/-144)	(+/-1231)	(+/-784)
-Line	(+/-43)	(+/-399)	(+/-402)	(+/-56)	(+/-490)	(+/-501)	(+/-72)	(+/-785)	(+/-734)	(+/-139)	(+/-1185)	(+/-755)

**UK Annual Average Consumer Retail Expenditure Per Capita by Goods Type—
Actual and Projected Figures (2003 Prices)**

Figure 1: Convenience Goods - ultra long term trends (1964 - 2006)

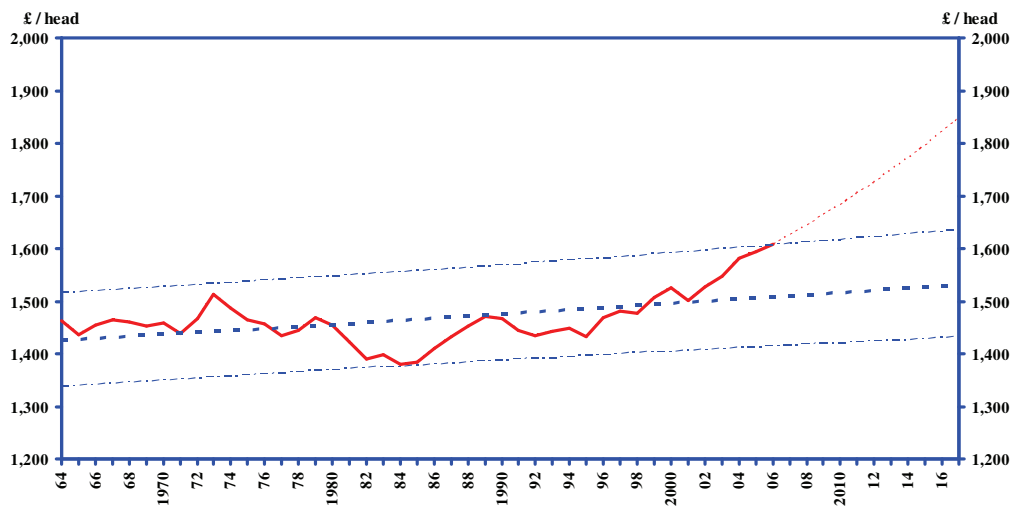


Figure 2: Convenience Goods - long term trends (1978 - 2006)

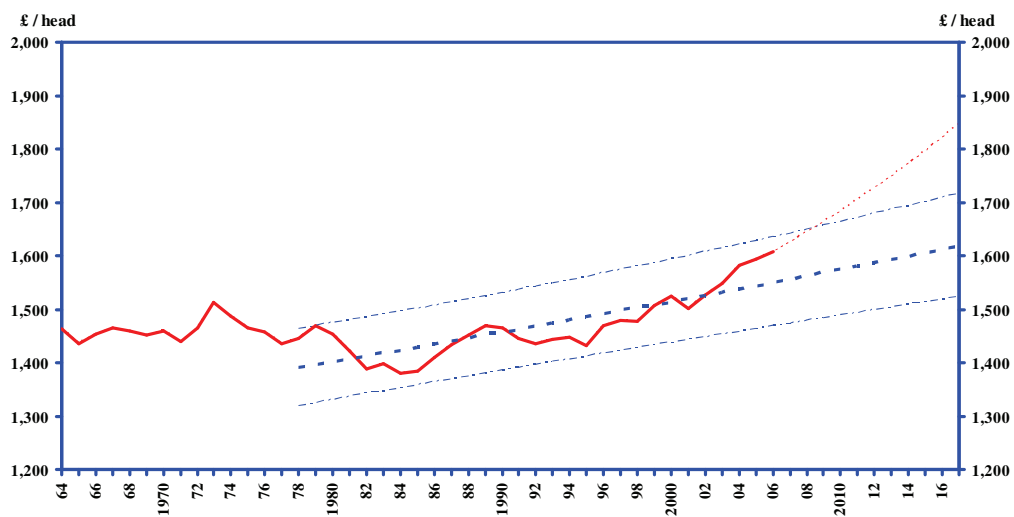


Figure 3: Convenience Goods - short term trends (1998 - 2006)

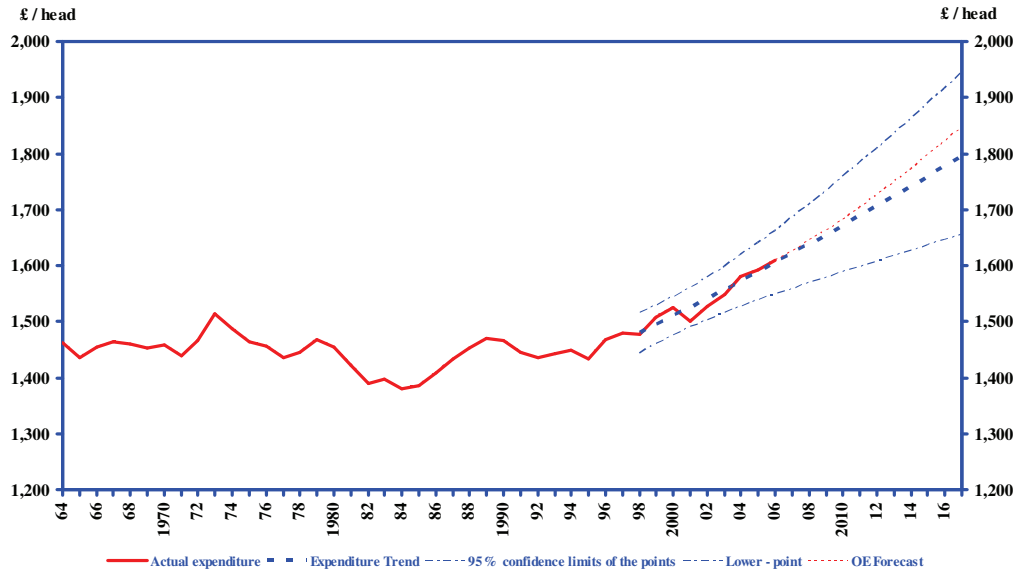


Figure 4: Comparison Goods - ultra long term trends (1964 - 2006)

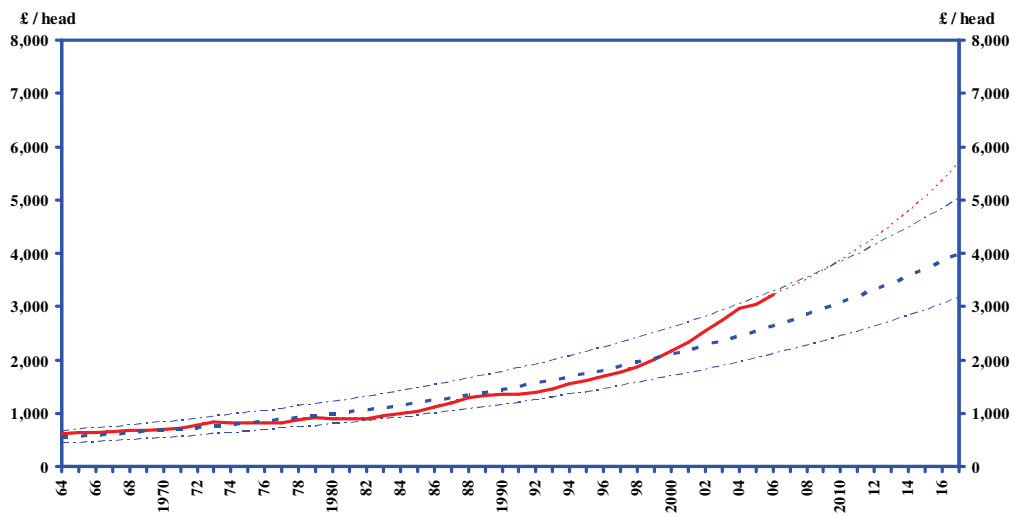


Figure 5: Comparison Goods - long term trends (1978 - 2006)

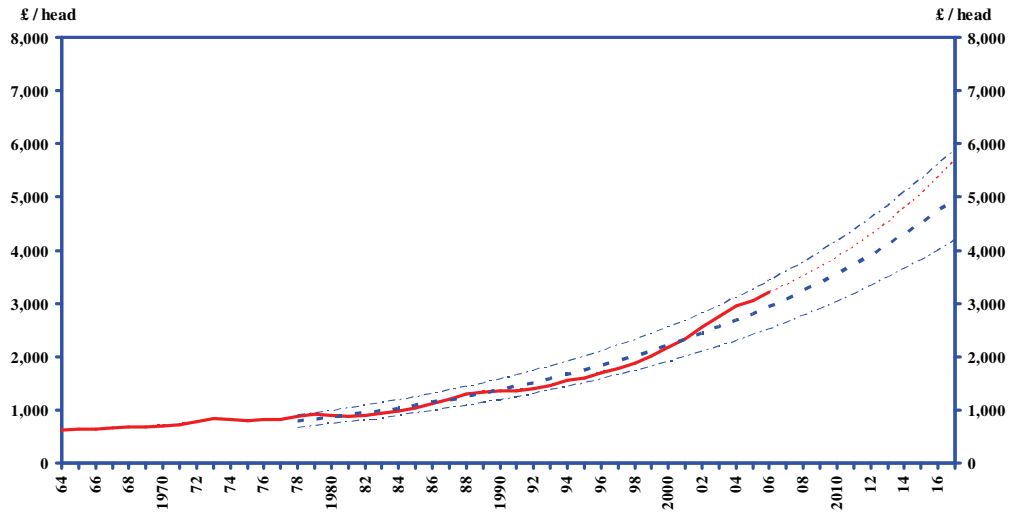


Figure 6: Comparison Goods - short term trends (1998 - 2006)

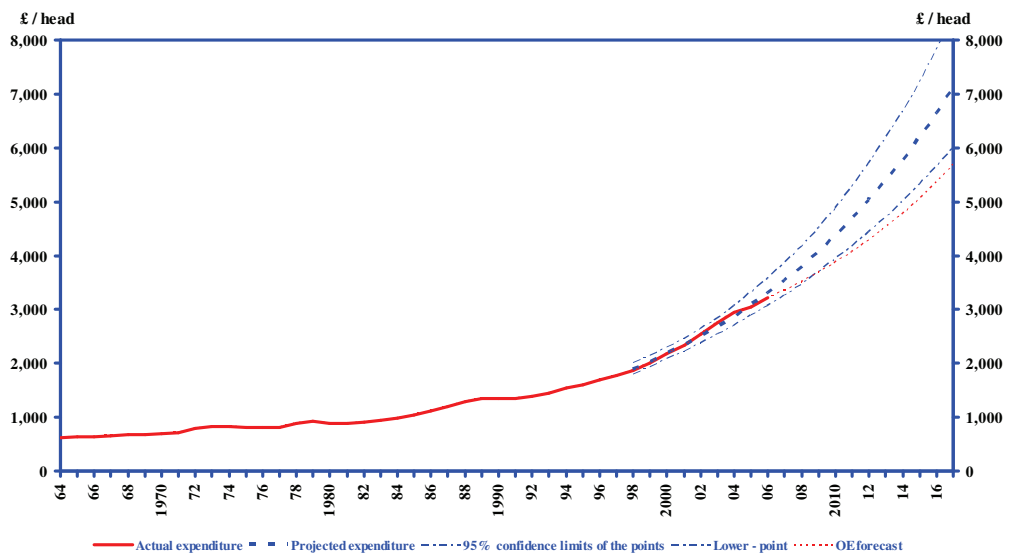


Figure 7: All Goods - ultra long term trends (1964 - 2006)

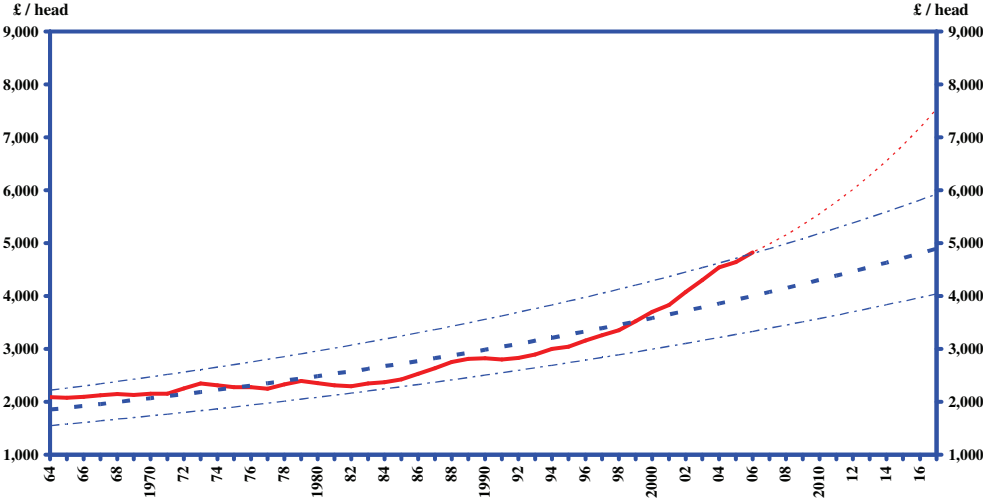


Figure 8: All Goods - long term trends (1978 - 2006)

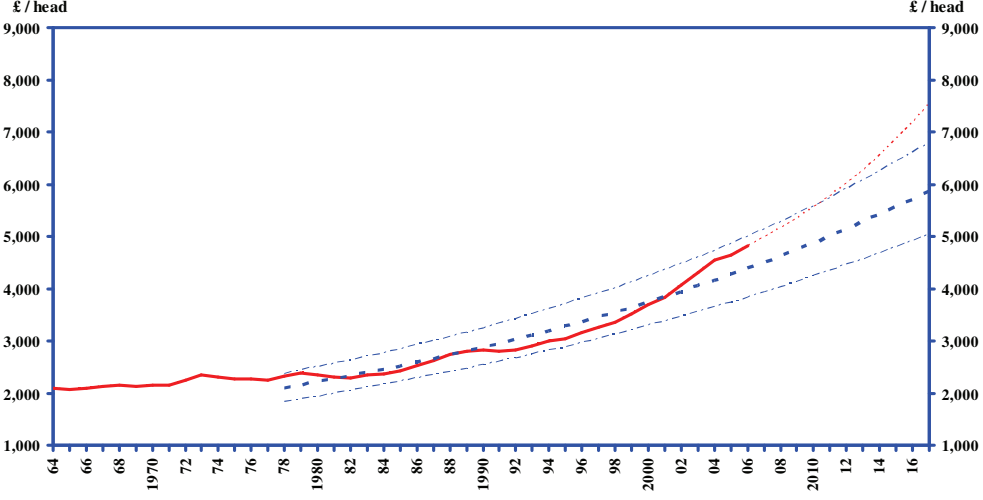


Figure 9: All Goods - short term trends (1998 - 2006)

