

1.1 Introduction

- 1.1.1 Drawing on the findings of the household telephone survey completed by NEMS this appendix analyses the convenience and comparison goods retail market share patterns within the Study Area.
- 1.1.2 This section contains a summary of the convenience and comparison goods shopping patterns within the study area. Both main food and top-up convenience goods shopping patterns are analysed and for comparison goods, combined comparison goods shopping patterns are examined. A comparison with the market share findings of the previous 2016 retail study is also provided.
- 1.1.3 An analysis of leisure market share patterns is included as part of the commercial leisure need assessment set out in Appendix I of the study.
- 1.1.4 A plan showing the household telephone survey area and zones is attached at **Appendix Ci**.

1.2 Convenience Goods Shopping Patterns

- 1.2.1 The tables at **Appendices Cii & Ciii** provide a breakdown of the convenience goods shopping patterns within the study area. The tables show that less than 6% of all food shopping trips (both main & top-up) are made to stores outside of Wirral. This strong retention rate reflects the good convenience goods provision distributed throughout Wirral and the geography of Wirral as a relatively self-contained peninsula.

Main Food Shopping

- 1.2.2 Reflecting the overall convenience goods shopping patterns, more than 95% of trips from each survey zone are made to destinations inside Wirral. With the exception of Zones 2b (Woodchurch, Upton and Greasby), 5a (Bromborough) and 6 (Heswall), most of these main food shopping trips are made to foodstores within Birkenhead or in each of the other town or district centres.
- 1.2.3 Popular foodstores in out-of-centre destinations include Asda on Welton Road, Bromborough (41% of trips from Zone 5a and 29% of trips from Zone 5b), Aldi at Port Causeway (24% of trips from Zone 5a), and Sainsbury's at Upton (12% of trips from Zone 1 and 28% from Zone 2b).
- 1.2.4 In terms of the main towns and district centres in Wirral, the following observations can be made:



Birkenhead

- 1.2.5 Due to its size, number of foodstores in the town and favourable transport links, Birkenhead not only retains a high proportion of the main-food market share from its own survey zone (Zone 4a) at 73%, but it also draws trips from each of the other zones across the study area. Notably, 35% of trips from Zone 2a (Moreton) are made to Birkenhead, 30% are made from Zone 4b (Birkenhead South), 29% from Zone 4c (Birkenhead West) and 25% from Zone 3a (New Brighton and Liscard North).
- 1.2.6 As expected, however, most of the trips to stores in Birkenhead Town Centre are from the surrounding area (32% of all trips from Zone 4a compared with >1% – 9% of trips made from elsewhere), with most of the trips from other survey zones being made to out of centre stores elsewhere in Zone 4a. Of the town centre stores, Asda on Grange Road is by far the most popular store, attracting most of the trips.
- 1.2.7 Popular stores outside of Birkenhead Town Centre include Aldi on Laird Street (17% of trips from Zone 4a) and Tesco Extra at Bidston Moss, which attracts 23% of trips from Zone 2a (Moreton).

Liscard

- 1.2.8 Foodstores in Liscard Town Centre and town centre stores attract 44% and 40% of trips from nearby survey zones (Zones 3a and 3b). The Asda store on Seaview Road attracts most of these trips (38% from Zone 3a, and 35% from Zone 3b) with a comparatively small proportion of trips made to other stores in Liscard Town Centre.
- 1.2.9 Of the stores outside of Liscard Town Centre, Morrisons on King's Parade (New Brighton) attracts 12% and 18% of trips from Zones 3a and 3b respectively, while the next most popular store is Lidl on Leasowe Road (4% from 3a and 10% from 3b).
- 1.2.10 Foodstores in Liscard have a moderate influence on trips from across the survey area, notably attracting 13% from Zone 2a, Moreton (7% to town centre stores, 6% to out of centre stores) and 5% and 4% of trips from Zones 4a (Birkenhead North) and 2b (Woodchurch, Upton & Greasby) respectively.



Heswall

- 1.2.11 Almost three quarters of main food shopping trips from its Zone (Zone 6) are made to facilities in Heswell (74%), with 67% of trips being made to facilities within the town centre. Tesco on Telegraph Road captures the biggest market share of town centre trips (38%), followed by Aldi on May Road (24%) and then M&S at Telegraph Road (5%). Tesco Express at 323-327 Pensby Road is the most popular out-of-centre store in Heswall attracting 5% of trips from Zone 6, with the nearby Sainsbury's Local at 143 Pensby Road attracts 1% of trips.
- 1.2.12 A limited number of trips are made to Heswall from adjacent survey zones, including 5% from Zone 1 (Hoylake and West Kirby) and 4% each from Zone 2b (Moreton) and 5b (Bebington).

Moreton

- 1.2.13 Foodstores in Moreton attract 28% of trips from those within its survey zone (2a) but have a limited influence elsewhere across Wirral attracting 1% of trips from Zone 1 (Hoylake and West Kirby) and 8% from Zone 2b (Woodchurch, Upton and Greasby). The out-of-centre Aldi store on Hoylake Road is the most popular destination in the town, followed by Iceland, within the defined town centre.

West Kirby

- 1.2.14 West Kirby retains 52% of the main food shopping market share from its zone (Zone 1) and it also has an influence on other zones, notably capturing 11% of the market share from Zone 2b (Woodchurch, Upton and Greasby). A smaller proportion of trips (between >1% and 3%) are also made from Zones 2a (Moreton), 4a (Birkenhead North), 4c (Birkenhead West), and Zone 6 (Heswall). The Morrisons store at Dee Lane is the most popular main food shopping destination followed by the Aldi at Bridge Road.

District Centres

- 1.2.15 Given that Woodchurch Road District Centre is centrally located within Wirral and accommodates a Sainsbury's and Aldi, its influence across the study area is to be expected. Foodstores at Woodchurch Road have the biggest influence on Zones 4b and 4c (Birkenhead South and Birkenhead West), with Sainsbury's capturing 15% of the market share and the Aldi store capturing 12% from each zone. These stores capture between >1% and 5% of the market share from each of the other zones apart from Zones 1 (Hoylake and West Kirby) and 2a (Moreton) which are in the far north and northwest of the district.



1.2.16 The absence of a large foodstore in Hoylake and Bromborough Village district centres means that their influence on the rest of the Wirral is limited. In Hoylake, the Sainsbury's Local store on Market Street attracts 9% of main food shopping from its study zone (Zone 1), while in Bromborough, the Co-op on Allport Road captures 1% of the main food shopping market from Zones 5a (Bromborough) and 5b (Bebington).

Top Up Food Shopping

1.2.17 **Appendix Ciii** summarises the proportion of 'top-up' food shopping trips made at retailers located within Wirral, based upon the results of the household survey.

1.2.18 From scrutiny of the household survey results, we note that a broadly similar proportion of top-up and main-food shopping trips are made at stores within Wirral (>94%), however the proportion of trips made to the different retailers within the district differs.

1.2.19 As is to be expected, a higher proportion of top-up food shopping trips are made to smaller convenience stores which serve a different market to larger foodstores/supermarkets. This is particularly apparent in Hoylake and Bromborough Village district centres where convenience stores attract a much higher proportion of top-up food shopping trips from their associated survey zones than for main-food shopping. This trend is also apparent in stores outside of the main town and district centres.

1.2.20 Trends evident within the main towns and district centres in Wirral are outlined below:

Birkenhead

1.2.21 Birkenhead retains 84% of top-up food shopping trips from Zone 4a, 11% more than main-food shopping. Of these, 29% of trips from this zone are made to town centre destinations and 54% to destinations outside of the town centre.

1.2.22 Of the stores in Birkenhead Town Centre, Asda on Grange Road is the most popular top-up food destination attracting 12% of trips. 7% of trips are made to Iceland and 11% are made to other stores including 4% to the local market and 3% at Home Bargains at the Grange Shopping Centre.

1.2.23 Popular destinations outside of Birkenhead Town Centre include Aldi at Laird Street (10% of trips from Zone 4a), and Tesco at Bidston Moss, Lidl on Oxton Rd and Asda on Stanley Road (each attracting 7% of trips).



1.2.24 As with main-food shopping, stores within Birkenhead have an influence across Wirral, drawing trips from each study Zone, albeit to a lesser extent. Across each zone, a lower proportion of top-up food shopping trips are made to Birkenhead compared to main-food trips apart from Zones 4b (Birkenhead South) and 4c (Birkenhead West).

Liscard

1.2.25 Facilities within the Liscard area retain a higher proportion of top-up food shopping trips from the associated study zones (Zones 3a and 3b) than main-food shopping trips (82% vs 66% from Zone 3a and 81% vs 73% from Zone 3b).

1.2.26 Within Liscard Town Centre, Asda on Seaview Road attracts the highest proportion of trips (18% from Zone 3a and 23% from Zone 3b), while the Morrisons at King's Parade is a popular out-of-centre destination from Zones 3a and 3b with the Tesco Express on Poulton Road attracting 11% of trips from Zone 3a and Lidl on Leasowe Road capturing 13% of the market share from Zone 3b.

1.2.27 Liscard attracts a small proportion of the top-up food market share from each of the other zones apart from Zones 4b (Birkenhead South), 5b (Bebington) and 6 (Heswall).

Heswall

1.2.28 A similar proportion of top-up food trips from Zone 6 are retained within Heswell compared with main food shopping trips (77% v 74%), although it is noted that a higher proportion of trips are made to stores outside of the town centre for top-up food shopping than main food shopping (32% vs 7%).

1.2.29 Of the town centre stores, M&S Simply Food and Iceland on Telegraph Road attract higher numbers of top-up food shopping trips compared to main food shopping, although Tesco at Telegraph Road and Aldi on May Road attract more trips overall.

1.2.30 The Sainsbury's Local convenience store outside of the town centre at Pensby Road attracts a high proportion of trips (19%) while the One Stop store at Brimstage Road is another popular out-of-centre destination.

1.2.31 Facilities within Heswall Town Centre attract a limited number of top-up shopping trips from adjacent survey zones, including 10% of trips from Zone 1 (Hoyle and West Kirby) to the Tesco on Telegraph Road, and 5% from Zone 5b made to the M&S Food at Telegraph Road.



Moreton

1.2.32 Moreton retains 69% of the top-up food market share from its zone (Zone 2a), with 40% made to stores in the town centre and 29% to stores elsewhere in the town. Iceland and Tesco Express on Hoylake Road attract the highest number of trips within the town centre (12% and 13% respectively), while Tesco Express and Aldi stores outside of the town centre on Hoylake Road attract 16% and 11% of trips from Zone 2a respectively.

West Kirby

1.2.33 45% of the top-up food market share is retained within the town's survey zone (Zone 1), with 36% of trips made to stores in the town centre and 8% to stores elsewhere in West Kirby. In the town centre, Morrisons and Aldi remain popular for top-up-food shopping attracting 18% and 15% of the market share respectively.

1.2.34 Outside of the town centre, the Co-op store on Frankby Road captures 8% of the market share with 1% of trips being made to other stores in the town.

1.2.35 Only the Morrisons Store at Dee Lane attracts trips from other zones with a limited proportion of trips to the store made from Zones 2b (Woodchurch, Upton and Greasby), 4c (Birkenhead West), and 5a (Bromborough).

District Centres

1.2.36 As noted previously, a much greater proportion of top-up food shopping trips are made to each of the district centres compared to main food shopping trips.

1.2.37 Woodchurch Road District Centre retains 22% of top-up food shopping trips from its zone (Zone 4b) and due to its position along a key arterial road in/out of Birkenhead, it attracts 33% of trips from Zone 4c (Birkenhead West) and a small proportion of trips from each of the other zones apart from Zones 3b (Liscard South) and 6 (Heswall). Sainsbury's is the most popular store in the centre overall for top-up shopping, although Aldi captures more of the market share from Zone 4c (18% vs 14%).

1.2.38 Hoylake District Centre attracts 30% of the top-up food market share from its zone (Zone 1) with 25% of trips made to Sainsbury's Local and 5% to Co-op on Market Street. The Sainsbury's convenience store is the only shop to attract trips from elsewhere in the study area, with 1% of trips from Zone 4a (Birkenhead North) being made to the store.



1.2.39 Bromborough Village District Centre retains 29% of trips from its zone (Zone 5a) with 26% of trips made to the Co-op on Allport Road and 3% elsewhere. The Co-op also attracts 13% of trips from Zone 5b (Bebington).

1.3 Comparison Goods Shopping Patterns

1.3.1 A table detailing the comparison goods shopping patterns across Wirral is provided at **Appendix Civ** with a plan illustrating the distribution of trips at **Appendix Cv**. Overall, facilities in Wirral retain 60% of comparison shopping trips, with 19% of trips made to locations outside of the district, and 21% of comparison shopping 'trips' made online.

1.3.2 Liverpool City Centre, as the closest large major centre to Wirral is the most popular shopping destination outside of the Borough, attracting 10% of all shopping trips from the study area, while Cheshire Oaks Outlet Centre is another reasonably popular destination, attracting 3% of all trips.

Birkenhead Town Centre

1.3.3 A plan illustrating the comparison goods catchment for Birkenhead Town Centre is provided at **Appendix Cvi**. As shown, the town centre attracts trips from across the study area. In terms of Birkenhead's immediate survey zones, the town centre attracts 41% trips from Zone 4a (Birkenhead North), 30% of trips are made from Zone 4b (Birkenhead South) and 23% of trips from Zone 4c (Birkenhead West).

Liscard

1.3.4 Retail facilities in Liscard Town Centre capture 8-13% of comparison goods market share from the immediate survey zones 3a (Liscard South) and 3b (New Brighton and Liscard North), but they only have a small influence across the rest of the study area. They attract 3% of trips from Zone 2a (Moreton) and less than 1% from Zones 2b (Woodchurch, Upton and Greasby), 4c (Birkenhead West), 5a (Bromborough), 5b (Bebington) and Zone 6 (Heswall).

Heswall

1.3.5 Heswall Town Centre retains 16% of the market share from its zone (Zone 6) but, like Liscard, has a limited influence on the other survey areas, with only 2% of trips made to the town centre from across Wirral.



Moreton

- 1.3.6 Survey responses indicate that retailers in Moreton Town Centre attract just 1% of comparison goods shopping trips from across the study area, including only 8% of trips from its zone (Zone 2a).
- 1.3.7 As identified in our vitality and viability health check assessment of Moreton Town Centre (**Appendix F**), the comparison goods offer in Moreton is assessed to be relatively limited and shopping patterns in the town may therefore be influenced by the nearby out-of-centre shopping facilities at Upton Retail Park and Bidston Moss and the towns close proximity to Birkenhead.

West Kirby

- 1.3.8 As with the other smaller town centres, West Kirby Town Centre attracts some 12% of trips from its zone (Zone 1). It has a limited influence on shopping patterns outside of its zone. Elsewhere, 1-2% of convenience shopping trips to the town are made from Zones 2a (Moreton), 2b (Woodchurch, Upton & Greasby) and 6 (Heswall).

District and Local Centres

- 1.3.9 Due to their small size and relatively limited comparison goods offer, only 7% of trips from across the study area are made to district and local centres in Wirral. Brombrough Village attracts the largest proportion of trips (2% overall) including retaining 10% of trips from its survey zone (Zone 5a), attracting 8% from the adjacent Zone 5b (Bebington) and a small proportion of trips from each of the other zones.

Other Facilities in Wirral

- 1.3.10 33% of all comparison goods shopping trips made in Wirral are to out-of-centre destinations. The Croft Retail Park just outside Bromborough is the most popular out-of-centre destination, attracting 15% of all trips from the study zone, while stores at Upton Retail Park and those at Bidston Moss also attract a statistically significant number of trips.

1.4 Internet

- 1.4.1 The NEMS survey results identify that, for certain comparison goods, many residents in the study area prefer shopping online. The goods most commonly bought online are books, CDs and DVDs (between 16% and 65% of the market share), small electrical goods (11-39%), large household electrical items (15-42%) and toys, games, bicycles & other sporting or recreational goods (12-



50%). As expected, Chemist goods and DIY items are the least common comparison goods to be purchased online, at 0-13% and 0-10% respectively.

1.4.2 For convenience goods, the level of online main food shopping varies between 1% and 8%.

Figure 1.1 Internet Shopping Market Share (%)

	Zone										
	1	2a	2b	3a	3b	4a	4b	4c	5a	5b	6
Main Food Shopping	8	4	1	2	1	4	3	1	7	5	2
Clothing and Footwear	25	25	25	23	24	24	19	21	19	29	24
Books, CDs & DVDs	65	55	48	46	53	16	30	63	51	43	44
Furnishings & Textiles	26	36	27	20	11	18	13	13	15	20	17
Small Household Goods	15	27	7	23	2	4	5	12	3	4	4
Clocks, Jewellery & Watches	29	32	17	26	17	24	13	20	33	33	33
Toys/Games, Bikes & Others	50	37	23	25	24	12	18	23	13	25	44
Chemist Goods	11	13	8	10	4	-	6	1	7	9	6
Large Household Electrical	42	35	24	36	31	28	19	29	15	26	35
Small Electrical Goods	32	39	15	23	34	11	23	24	16	27	25
Furniture, Carpets, Flr	7	16	19	14	10	13	13	14	3	8	10
DIY & Gardening Goods	1	10	7	2	3	1	-	1	1	3	1

Source: Derived from NEMS Household Survey Results (August 2019)

1.4.3 In terms of how items purchased online are received, Figure 1.2 sets out the proportion that were via home delivery and those by click and collect.

Figure 1.2: Online Purchases Delivery Method

Goods Category	Online Delivery Method (%)		
	Delivery	Click and Collect	Downloaded
Main Food	100	0	N/A
Clothing & Footwear	94	6	N/A
Books, CDs & DVDs	87	0	13
Furnishings & Household Textile Goods	97	3	N/A
Small Household Goods	94	6	N/A
Clocks, Jewellery, Watches	100	0	N/A
Toys/Games, Bikes & Others	100	0	N/A
Chemist Goods	89	11	N/A
Large Household Electricals	100	0	N/A
Small Electrical Goods	91	8	N/A
Furniture, Carpets & Floor Coverings	99	1	N/A
DIY incl. Gardening Goods	98	2	N/A

Source: Derived from NEMS Household Survey Results

Note: Figures may not add due to rounding



1.4.4 In summary, the results show that:

- for online convenience goods shopping, all were received via home delivery;
- over 89% of all comparison goods categories were home delivered;
- purchases of chemist goods were the most commonly collected from store (11%); and
- roughly 13% of purchases for books, CDs and DVDs were downloaded rather than delivered or collected from store.

1.5 Change in Shopping Patterns between 2016 & 2019

1.5.1 The 2016 Retail & Leisure Study used retail expenditure rather than trip rates when examining shopping patterns across Wirral. The following section therefore provides a broad comparison between the 2016 Retail Study expenditure shopping patterns and those identified in this study (see Appendix I for full expenditure shopping patterns data). It should be noted that the expenditure patterns exclude internet shopping.

1.5.2 Caution should be exercised when comparing the data from each study due to potential methodological variances in the design and interpretation of household survey results. Notwithstanding this however, it is possible to draw broad patterns and conclusions when assessing changes in expenditure patterns between 2016 and 2019.

Convenience Goods

1.5.3 Figure 1.3 provides a summary of convenience goods expenditure in defined centres and other destinations in 2016 and 2019.



Figure 1.3: Convenience Goods Expenditure Market Share 2016 - 2019

Centre	2016 Market Share (%)	2019 Market Share (%)
Birkenhead Town Centre	8	5
Liscard Town Centre	10	9
Heswall Town Centre	9	9
Moreton Town Centre	2	1
West Kirby Town Centre	8	7
Bromborough Village	1	1
Hoylake District Centre	1	1
Woodchurch Road District Centre	8	7
Other Stores		
Asda, Croft Retail Park	7	7
Asda, Woodchurch Road	5	6
Sainsbury's, Upton Retail Park	6	6
Morrisons, Kings Parade, New Brighton	3	4
Tesco, Bidston Moss	5	6
Aldi, Hoylake Road, Moreton	3	2
Other Stores	24	28
Wirral Borough Total	98	98
Leakage	2	2

Source: 2016 NLP Retail & Leisure Study and derived from NEMS household survey 2019.

Note: Figures may not add due to rounding

- 1.5.4 Between 2016 and 2019 the retention of convenience goods expenditure within Wirral has remained at a high 98% with only 2% of spending made outside of the district. There are some minor variances in indicated expenditure, but the proportion of expenditure in Liscard and Heswall Town Centres, and Bromborough Village and Hoylake District Centres have broadly remained at the same or similar levels.
- 1.5.5 We note that survey results indicate a declining trend in expenditure at Birkenhead Town Centre reducing from 8% in 2016 to 5% in 2019 which may reflect the closure of foodstores including Marks and Spencer and the growth of stores in out of centre locations. This is supported by the indicated increase in market share captured by each of the out-of-centre stores aside from Aldi on Hoylake Road, Moreton.

Comparison Goods

- 1.5.6 Figure 1.4 provides a summary of comparison goods expenditure in Wirral centres, out-of-centre destinations and destinations outside Wirral at 2016 and 2019.



Figure 1.4: Comparison Goods Expenditure Market Share 2015 - 2019

Centre	2016 Market Share (%)	2019 Market Share (%)
Birkenhead Town Centre	17	17
Liscard Town Centre	3	3
Heswall Town Centre	2	3
Moreton Town Centre	1	1
West Kirby Town Centre	2	2
Bromborough Village District Centre	4	3
Hoyle District Centre	<1	<1
Woodchurch Road District Centre	<1	1
Local Centres Combined	6	4
Other Destinations		
Croft Retail Park	17	18
Junction One Retail Park	7	9
Other Stores	8	11
Wirral Total	68	72
Cheshire Oaks	4	6
Chester	5	2
Liverpool	18	15
Other Outside of Wirral	5	4
Leakage	32	28

Source: 2016 NLP Retail & Leisure Study and derived from NEMS household survey 2019.
Note: Figures may not add due to rounding

- 1.5.7 As with convenience goods, the comparison goods expenditure patterns in 2019 remain comparable with those from 2016, though we note that the retention of expenditure within the borough has increased from 68% to 72%. This increased retention rate indicates a strengthening of the comparison goods sector across Wirral and may also point to a trend of people shopping more locally. This is supported by proportionate increase in expenditure in Birkenhead, Liscard, Moreton and Heswall Town Centres, although we do note that the market share captured by district centres and local centres appears to have reduced.
- 1.5.8 Out-of-centre facilities in general across Wirral have more of an influence on expenditure patterns and this is shown the increase in market share captured by both Croft Retail Park in Bromborough and Junction One Retail Park in Bidston Moss.
- 1.5.9 Outside of Wirral, figures suggest that Liverpool and Chester both now have less of an influence on shopping patterns than 2016 whilst Cheshire Oaks' influence has increased.



Appendices



Appendix Ci: Household Survey Zone Plan



Appendix Cii: Main Food Shopping Patterns

	Zone										
	1	2a	2b	3a	3b	4a	4b	4c	5a	5b	6
Birkenhead Town Centre	0%	3%	2%	4%	2%	32%	9%	5%	-	2%	2%
Birkenhead Out of Centre	7%	32%	14%	21%	20%	41%	20%	24%	2%	6%	1%
Liscard Town Centre	-	7%	2%	44%	40%	4%	0%	2%	-	-	0%
Liscard Out of Centre	1%	6%	2%	22%	33%	1%	2%	2%	2%	1%	-
Heswall Town Centre	5%	-	4%	2%	-	-	-	1%	3%	4%	67%
Heswall Out of Centre	-	-	-	-	-	1%	-	-	-	-	7%
Moreton Town Centre	-	7%	1%	-	-	-	-	-	-	-	-
Moreton Out of Centre	1%	21%	7%	-	-	-	-	-	-	-	-
West Kirby Town Centre	50%	3%	11%	-	-	2%	0%	3%	0%	-	2%
Bromborough Village	-	-	-	0%	-	-	-	-	1%	1%	-
Hoylake District Centre	10%	-	-	-	-	0%	-	-	-	-	-
Woodchurch Rd Centre	-	-	5%	1%	0%	5%	28%	27%	1%	3%	0%
Other Stores in Wirral	16%	14%	51%	3%	2%	7%	36%	35%	83%	73%	13%
Outside Study Area	1%	4%	0%	-	2%	2%	2%	1%	2%	5%	5%
Internet	8%	4%	1%	2%	1%	4%	3%	1%	7%	5%	2%

Source: NEMS household Survey

Note: Figures may not add up to 100% due to rounding



Appendix Ciii –Top-up Food Shopping Patterns

	Zone										
	1	2a	2b	3a	3b	4a	4b	4c	5a	5b	6
Birkenhead Town Centre	-	-	7%	1%	0%	29%	14%	7%	-	1%	-
Birkenhead Out of Centre	1%	13%	1%	11%	7%	54%	15%	25%	2%	2%	5%
Liscard Town Centre	-	8%	1%	34%	39%	3%	2%	3%	-	-	-
Liscard Out of Centre	0%	4%	3%	48%	42%	3%	-	2%	1%	-	-
Heswall Town Centre	10%	-	1%	-	-	1%	2%	-	1%	5%	45%
Heswall Out of Centre	1%	-	2%	-	-	1%	-	-	2%	1%	32%
Moreton Town Centre	1%	40%	6%	-	-	1%	-	-	4%	-	-
Moreton Out of Centre	3%	29%	2%	-	1%		-	-	-	-	-
West Kirby Town Centre	36%	0%	4%	-	-	1%	-	1%	1%	-	-
Bromborough Village	1%	-	-	-	-	1%	-	0%	29%	14%	-
Hoyle District Centre	30%	-	-	-	-	1%	-	-	-	-	-
Woodchurch Road	1%	-	1%	3%	-	3%	22%	33%	4%	2%	-
Other Stores in Wirral	7%	5%	68%	2%	5%	3%	44%	28%	54%	73%	16%
Outside Study Area	-	0%	1%	2%	6%	-	-	-	1%	1%	1%
Internet	-	-	1%	-	-	-	1%	1%	1%	2%	-

Source: NEMS household Survey

Note: Figures may not add up to 100% due to rounding



Appendix Civ – Comparison Goods Shopping Patterns

	Zone										
	1	2a	2b	3a	3b	4a	4b	4c	5a	5b	6
Birkenhead Town Centre	4%	9%	14%	12%	6%	41%	30%	23%	6%	9%	4%
Liscard Town Centre	-	3%	0%	13%	8%	-	-	0%	0%	0%	0%
Heswall Town Centre	2%	0%	1%	-	-	0%	0%	0%	0%	1%	16%
Moreton Town Centre	1%	8%	2%	0%	-	0%	0%	0%	0%	0%	-
West Kirby Town Centre	12%	1%	2%	0%	-	0%	0%	-	-	-	1%
Bromborough Village	0%	1%	0%	1%	0%	1%	1%	0%	10%	7%	1%
Hoylake District Centre	3%	0%	0%	-	0%	0%	-	0%	-	-	0%
Woodchurch Road District	0%	-	1%	1%	0%	0%	3%	4%	0%	0%	1%
Local Centre	0%	0%	3%	7%	10%	4%	3%	2%	4%	5%	1%
Other Stores in Wirral	22%	37%	39%	30%	26%	29%	31%	38%	48%	32%	26%
Outside Wirral	28%	12%	17%	13%	30%	11%	16%	13%	16%	25%	29%
Internet	28%	29%	20%	22%	19%	14%	15%	20%	16%	21%	22%

Source: NEMS household Survey

Note: Figures may not add up to 100% due to rounding



**Appendix Cv – Plan Showing Comparison Goods Shopping
Market Share by Town/Destination**

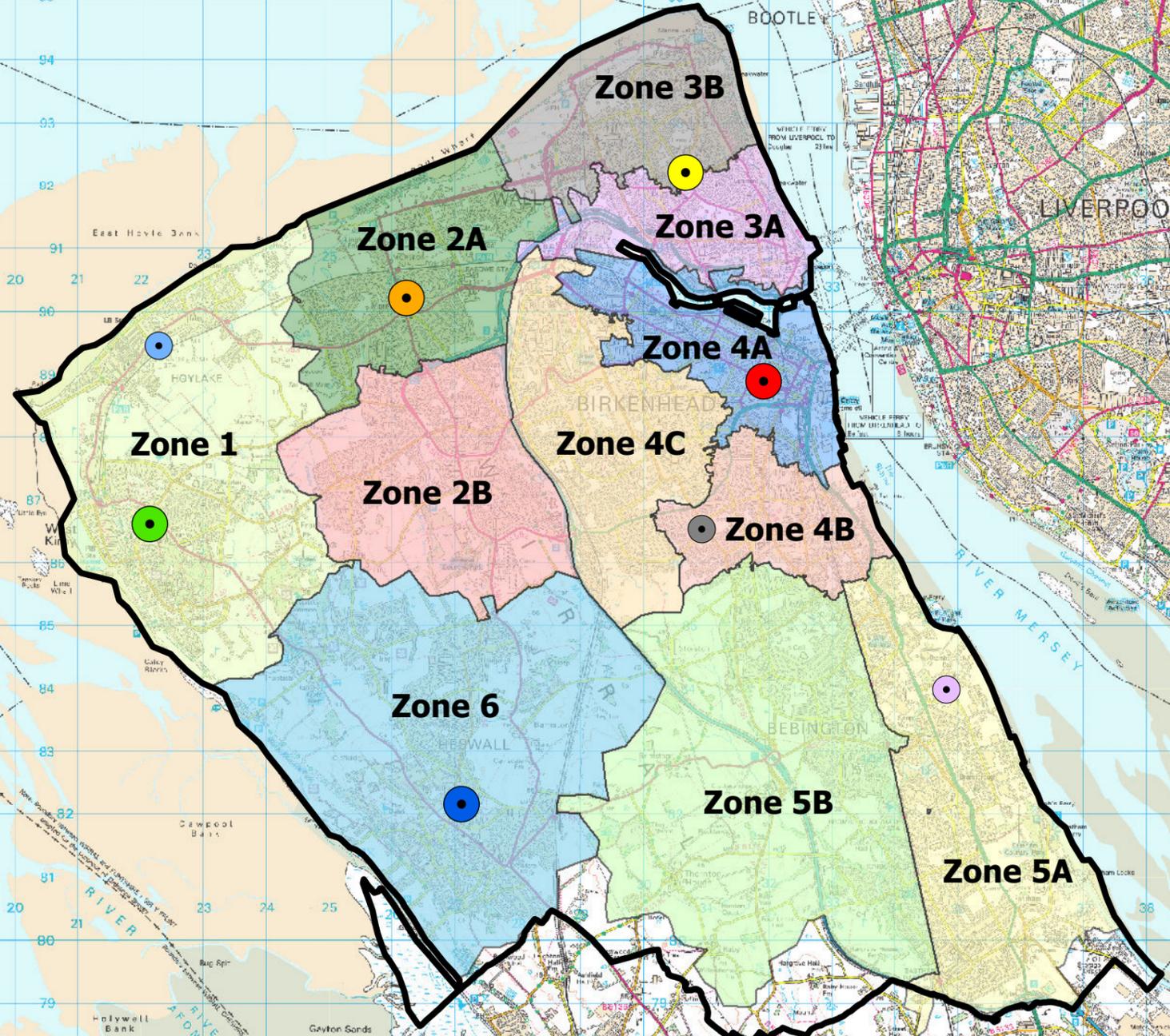


**Appendix Cvi – Birkenhead Town Centre Comparison Goods Shopping
Catchment Plan**





Wirral Council Retail and Leisure Study, 2019 Household Survey Study Area



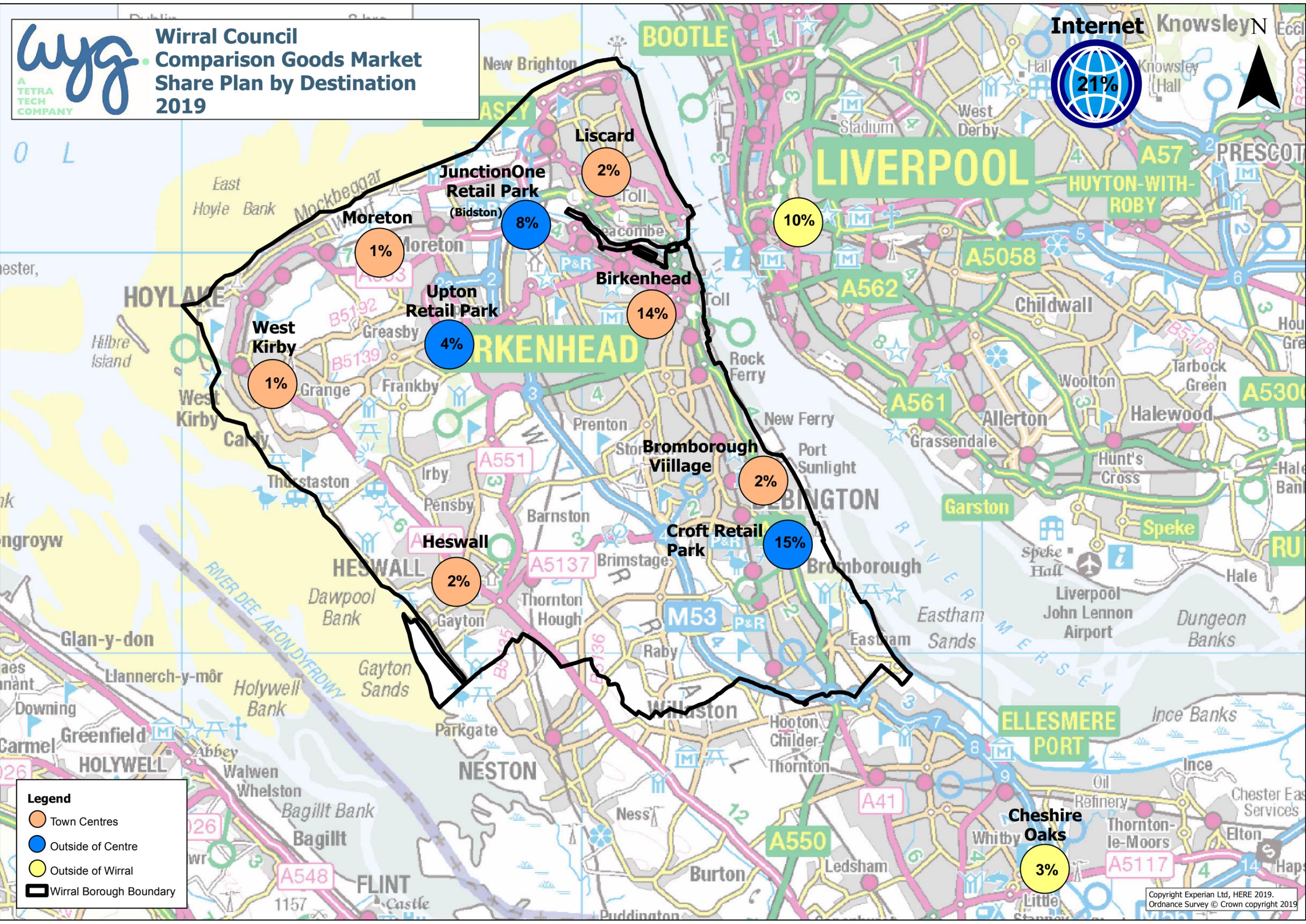
Legend

- Wirral Borough Boundary
- Birkenhead Town Centre
- Heswell Town Centre
- Liscard Town Centre
- Moreton Town Centre
- West Kirby Town Centre
- Bromborough Village District Centre
- Hoylake District Centre
- Woodchurch Road (Prenton) District Centre



Wirral Council
Comparison Goods Market
Share Plan by Destination
2019

Internet Knowsley N

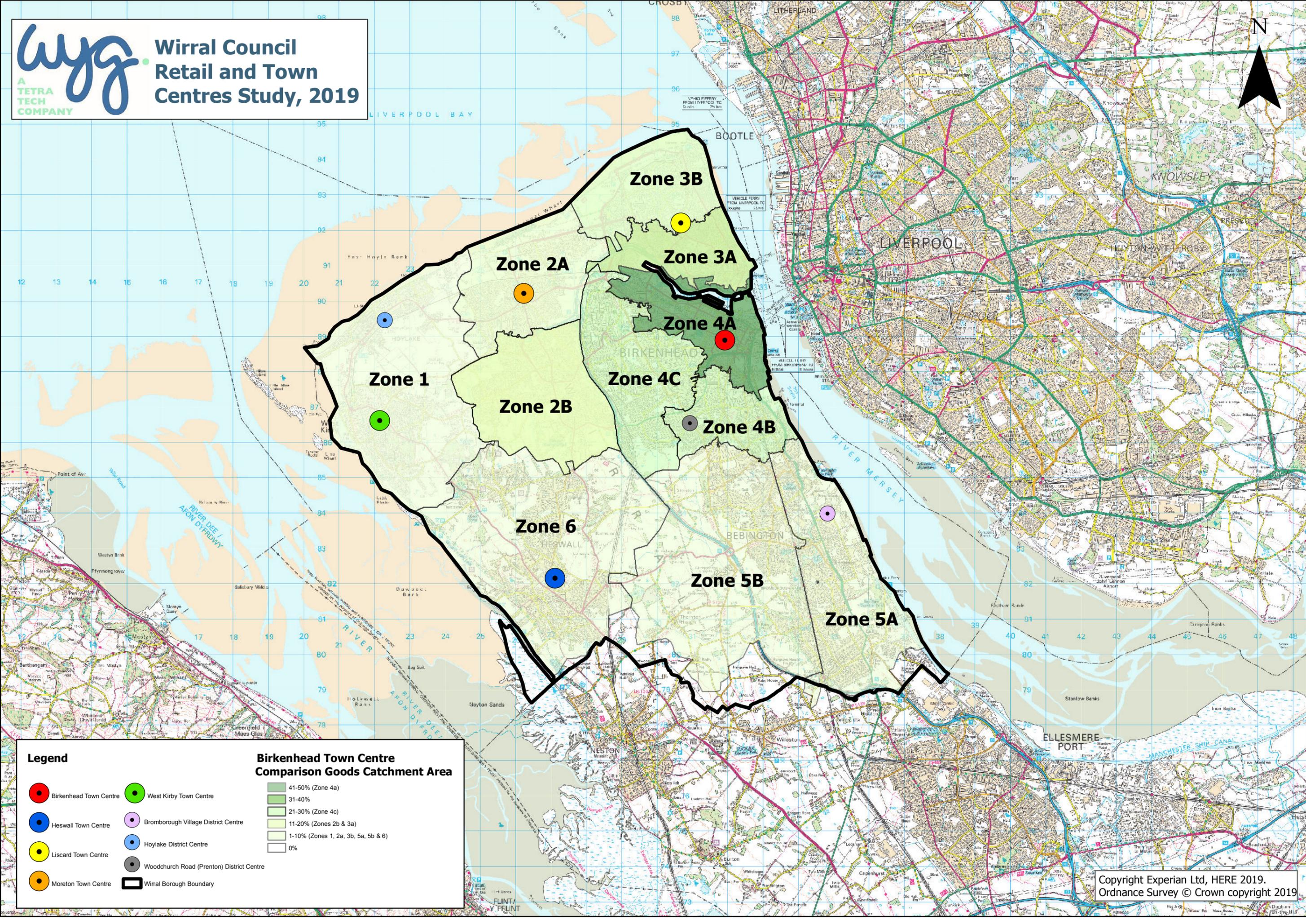


Legend

- Town Centres
- Outside of Centre
- Outside of Wirral
- Wirral Borough Boundary



Wirral Council Retail and Town Centres Study, 2019



Legend

Birkenhead Town Centre	West Kirby Town Centre
Heswall Town Centre	Bromborough Village District Centre
Liscard Town Centre	Hoylake District Centre
Moreton Town Centre	Woodchurch Road (Prenton) District Centre
Wirral Borough Boundary	

**Birkenhead Town Centre
Comparison Goods Catchment Area**

	41-50% (Zone 4a)
	31-40%
	21-30% (Zone 4c)
	11-20% (Zones 2b & 3a)
	1-10% (Zones 1, 2a, 3b, 5a, 5b & 6)
	0%