

# Retail and Leisure Flows in the East Midlands

## A report for *emda*

Experian

August 2007

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# Retail and leisure flows in the East Midlands

East Midlands Development Agency

August 2007

<b>For and on behalf of Experian</b>	
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# 1 Executive Summary

## 1.1 INTRODUCTION

This report is the second phase of research for EMDA, analysing retail and leisure patterns around the East Midlands region, which follows on from phase one analysing commuter flows.

Understanding city and town regions is important to understanding the dynamics of the economy in a region. City and town regions are characterised by flows (travel patterns) into and out of them, and these flows differ depending on the dataset / activity being monitored. Good data already exists about commuting flows, but there is less good data available about the flows to retail and leisure facilities.

## 1.2 STUDY INTO RETAIL AND LEISURE FLOWS

The study presents data from a range of Experian surveys that has enabled an analysis of flows from home to leisure and home to retail facilities. The data is presented in maps of catchment areas and tables of proportional flows. The data is based on surveys from 2004 and 2005. The analysis has been carried out using postal geography, either at postal sector level (NG10 1) or postal district level (NG10). We have summarised the flows at Local and Unitary Authority level. The retail and leisure destinations chosen have been dictated by (1) the urban areas with the biggest impact on flows (2) those centres with the strongest response rate.

The report covers:

- comparison goods catchments/flows for 30 retail centres
- flows and catchments of 16 leisure destinations

## 1.3 RETAIL FLOWS

All of the catchments overlap with surrounding areas to varying degrees which is consistent with the national picture, with the majority of this (over 60%) found within Tertiary postal sectors where overall penetrations are quite low.

Five of the East Midlands catchments (Derby, Hinckley, Northampton, Wellingborough and Worksop) attract shoppers from across the border, in some cases due to the proximity of the centre to the East Midlands boundary and in others influenced by the presence of major roads. In spite of this, the catchments are mostly restricted to the East Midlands region, which illustrates the appropriateness of the area as a government defined region, but is in contrast to the commuter flows out of the region which are far greater than retail flows and continuing to rise.

The largest catchments are found towards the West of the region, show significant interaction with one another and are often heavily influenced by major transport routes. This replicates the flow of commuters within the region, which are drawn towards the largest urban centres. To the East of the region, with the exception of Lincoln, there are relatively small urban areas which also have considerable retail flow interaction.

The influence of external centres is highlighted quite vividly by Sheffield’s catchment, which spreads into Chesterfield’s Primary and covers all of Worksop’s Primary and Secondary postal sectors. Nevertheless, Worksop’s catchment still crosses the East Midlands border towards Dinnington and Anston to the North West. Like Nottingham, the catchment around Sheffield is skewed in one direction due to the presence of Rotherham in the East and relative absence of competition further West.

## **1.4 LEISURE FLOWS**

In most cases, leisure catchment areas are more localised and do not reflect the wider retail catchments seen in that section, and are therefore leisure flow is far more localised than commuter flow. Commonly, the core penetration (50% of visitors) comes from one or two postal districts, covering only residents of that town. Since the catchment areas are so localised and have been mapped at postal district level, we do not recommend that their boundaries be used to make assumptions about inclusion or penetration of individual estates.

Two of the cities with the largest Big Night Out catchments in the East Midlands are Northampton and Nottingham, again mirroring their importance as destinations for commuter flow. Whilst these are still reduced compared to the Where Britain Shops retail catchments, they are relatively large considering the number of rival towns neighbouring them.

In many cases the East Midlands boundary replicates the extent of influence of the towns’ catchments. To a degree, this is because the postal districts used to construct the catchments are very similar to the East Midlands boundary, but it again demonstrates the appropriateness of the area as a government defined region.

The catchments along the South of the region are naturally influenced by towns and cities outside of the boundary such as Milton Keynes and Peterborough, and a similar “penning-in” of catchments can be seen to the North where for example Chesterfield is restricted by Sheffield’s catchment.

## **1.5 CONTACTS**

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## 2 Methodology

### 2.1 DATA SOURCES: WHERE BRITAIN SHOPS AND BIG NIGHT OUT

We have based this study on Experian's proprietary datasets derived from shopper and leisure surveys (Where Britain Shops and Big Night Out). The surveys are carried out as part of Experian's regular lifestyle questionnaire programme. They are continual, and canvas consumers on their retail spend patterns for comparison and convenience goods, and leisure trips. They now generate approximately 1 million responses annually across the UK, using lifestyle surveys through magazine inserts, target mail and doordrops.

Where Britain Shops and Big Night Out are used by many of the UK's retailers and property investors and developers, as well as public sector clients who purchase data through our Goad town plan business.

The surveys reveal distinct trading patterns and overlaps that are not revealed when notional drivetime catchments or synthesised models are used. Such models, which might provide smoother catchment areas and are useful in the case of what-if analysis, can conceal distinct localised trading patterns. This is especially true in the case of the East Midlands where shopper loyalty and convenience often defies the modelled "attraction" and "vitality" scores used in gravity modelling. The raw responses from our surveys have been weighted using Experian's consumer lifestyle classification Mosaic UK to take account of people's likelihood to fill in lifestyle questionnaires, but have not been modelled further.

The specific questions relevant to this study are:

- Shopping (Where Britain Shops) – Where do you shop most often for non-food goods like clothes, shoes, jewellery?
- Leisure (Big Night Out) – Which town centre do you normally visit for a 'big night out'? (Visiting pubs, restaurants or clubs)

While such questions cannot always adequately assess the breadth or penetration of a centre's catchment, we have highlighted in the text situations where we believe the responses are not reflective. In such cases, individual surveys would be needed to confirm the catchment. However, in the vast majority of cases the surveys reflect reality and are a much more cost effective way to measure catchments and flows. They have been validated on a national basis by comparing responses with observed customer spend patterns provided by retailers and leisure clients with whom Experian has a close collaborative relationship.

We have aggregated responses since 2004 to generate our retail and leisure flows for the East Midlands. Our source response count is over 51,000 for Where Britain Shops from within the East Midlands (2004/2005 data), and just over 10,000 responses from our Big Night Out survey (2004 data only).

## **2.2 CATCHMENT BANDING**

Our catchment area maps are segmented according to how important each area is to the centre. They are colour coded to show the relative penetration of different areas. The inner band ('Primary' or 'Core') represents the area with the highest penetration, which 50% of the shoppers come from. The middle band ('Secondary') shows the next strongest area of penetration such that it represents the next 30% of shoppers (that is, the 50-80% band). The outer band ('Tertiary') shows the weakest area of penetration representing 10% of shoppers (the 80-90% band). As the banding reaches 100%, catchment areas increase rapidly and have much less relevance to retailers and leisure operators.

The catchment area maps do not show the absolute level of penetration of individual areas, since it would not be possible to band the maps consistently. Instead, the supporting tables should be used.

## **2.3 THE USE OF POSTAL GEOGRAPHY**

The flow analysis in this report has been carried out using postal geography to map catchment areas, rather than using administrative boundaries. This makes analysis of survey data much easier, since:

- survey respondents usually know their postcode
- the different layers of a postcode (NG, NG10, NG10 1, NG10 1FP) cover a range of appropriate levels of geography with which to map a catchment area depending on the level of survey response

We use postal sectors (as in NG10 1) to collate our survey responses. They form the finest level of geography that is both significant (enough responses) and known by most survey respondents. For leisure catchments, we use postal districts (NG10) because of the more limited level of response.

In areas of low population, including rural parts of the East Midlands, postal sectors can have irregular shapes, occasionally concave. An end user of these maps should check boundary definitions where making assumptions based on the shape of border areas. Additionally, the presence of these low-density outer postal sectors in a catchment area may rely on a small number of responses despite potentially thousands of total responses, since the catchment areas are mapped according to penetration rather than simply response rate. The user should not overestimate the inclusion or exclusion of a particular postal brick in the outer band.

## **2.4 REPORTING CENTRE PENETRATION: LOCAL & UNITARY AUTHORITIES**

We have summarised the flows (in terms of the proportion of visits to a centre, or penetration) at Local & Unitary Authority level. This level was chosen firstly because it has a fine granularity which allows small scale analysis, and secondly because the boundaries fit exactly into the East Midlands which facilitates consideration of flows into and out of the region. Local & Unitary Authority data is also comparable with the many of the results of the commuting study.

## 3 Town Centre Shopping

### 3.1 DESTINATION-BASED CATCHMENTS

This section looks at catchment areas and shopper flows for 21 retail destinations within the East Midlands, as well as 9 destinations outside this area whose catchments extend into EMDA.

The top 20 town centres were selected based on volume of responses from the Where Britain Shops survey. Corby was also included despite falling outside the top 20, as it was felt that the raw responses underestimated it as an East Midlands shopping centre. The 9 external centres chosen were Birmingham, Coventry, Grimsby, Lichfield, Manchester, Milton Keynes, Peterborough, Rotherham and Sheffield.

### 3.2 COMMENTARY

All of the catchments overlap with surrounding areas to varying degrees which is consistent with the national picture, with the majority of this (over 60%) found within Tertiary postal sectors where overall penetrations are quite low.

Five of the East Midlands catchments (Derby, Hinckley, Northampton, Wellingborough and Worksop) attract shoppers from across the border, in some cases due to the proximity of the centre to the East Midlands boundary and in others influenced by the presence of major roads. In spite of this, the catchments are mostly restricted to the East Midlands region, which illustrates the appropriateness of the area as a government defined region, but is in contrast to the commuter flows out of the region which are far greater than the retail flows and continuing to rise

The largest catchments are found towards the West of the region, and show significant interaction with one another and are often heavily influenced by major transport routes. This replicates the flow of commuters within the region, which are drawn towards the largest urban centres.

- Nottingham's catchment stretches as far as Grantham in the East but is restricted towards the West due to competition from Derby. This dynamic also leads to stronger penetrations in the East of the city particularly within the Primary catchment. There is considerable competition between Nottingham and Derby, with some overlap between Secondary catchments around Heanor and South of Ilkeston.
- The impact of competition between two neighbouring centres is underlined by the relationship between Mansfield and Sutton in Ashfield. The latter clearly restricts Mansfield's core catchment to the West but still resides within the Secondary catchment, which suggests that residents of Sutton in Ashfield tend to stay within the town to carry out typical shopping trips but travel to Mansfield for a more major outing. The M1 acts as a barrier to any further penetration to the West and it is apparent that very few people would consider travelling from the Alfreton area to shop in Mansfield. The Sutton in Ashfield catchment stretches away from Mansfield as would be expected, and does so broadly to the South West due to competing retail offers (Chesterfield and Nottingham) and the A38.

- Derby's catchment extends towards Uttoxeter in the West, Matlock in the North and Coalville to the South. The M1 acts as a very sharp boundary between the maximum extent of its Secondary catchment and the start of the Tertiary, revealing that only a limited number of shoppers are willing to cross this motorway to do their shopping. The same influence of the M1 can also be seen in Chesterfield, whose catchment extends significantly further to the West than the East.
- The Tertiary Northampton catchment covers Kettering, Wellingborough and Rushden towards the East and most of Daventry in the West. The catchment also crosses over the East Midlands region and attracts some shoppers from Newport Pagnell and South of Rushden, a pattern which is influenced by the M1 and the A428. Similarly, Derby's catchment pulls shoppers from across the border in Burton upon Trent, which is partly due to the A38.
- The Primary Leicester catchment is mostly contained within the outer ring road, but stretches along the A6 to the South East. The catchment is over 2,000 square kilometres in size and covers Market Harborough and Lutterworth to the South, Hinckley to the West and beyond Loughborough to the North. The Loughborough catchment is almost entirely contained within Leicester's catchment, which reflects both ease of access along the A6 and also the flattening effect of being surrounded by three major centres (Nottingham, Derby and Leicester). A similar effect is seen in both Long Eaton and Ilkeston, which are both compressed by the presence of major centres to the East and West.

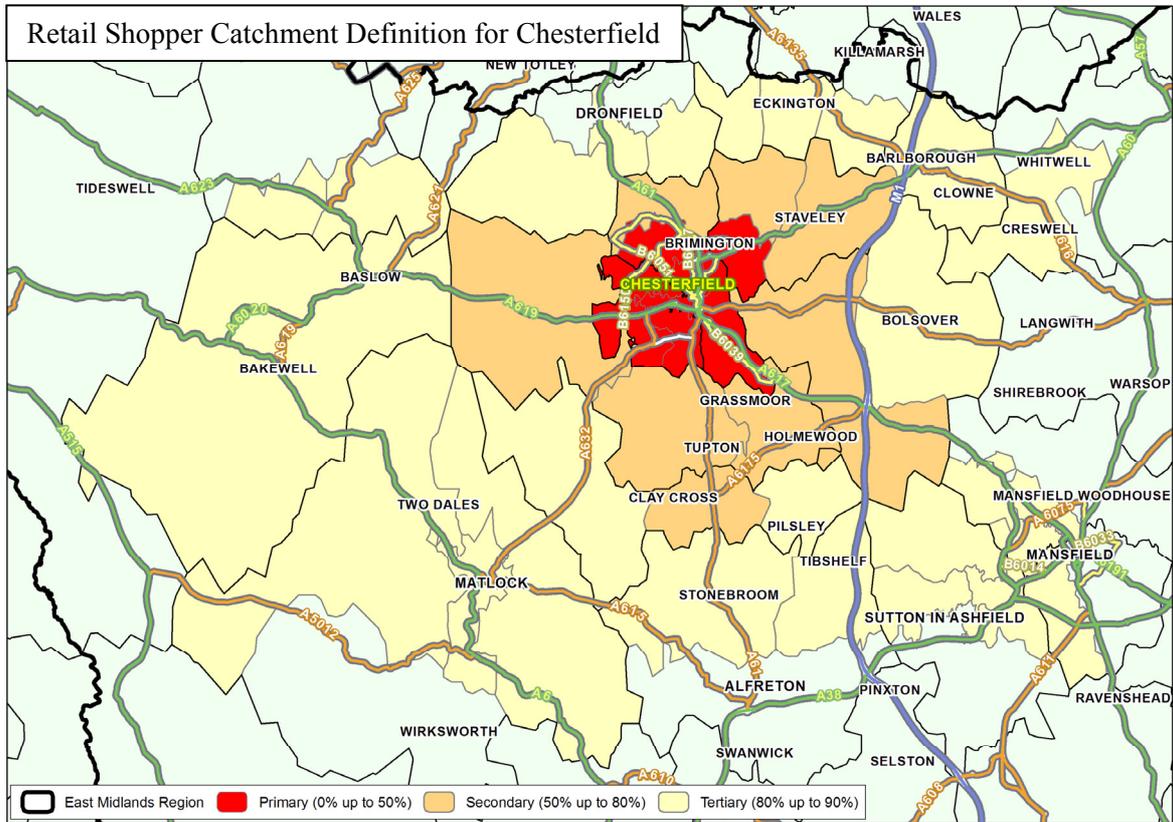
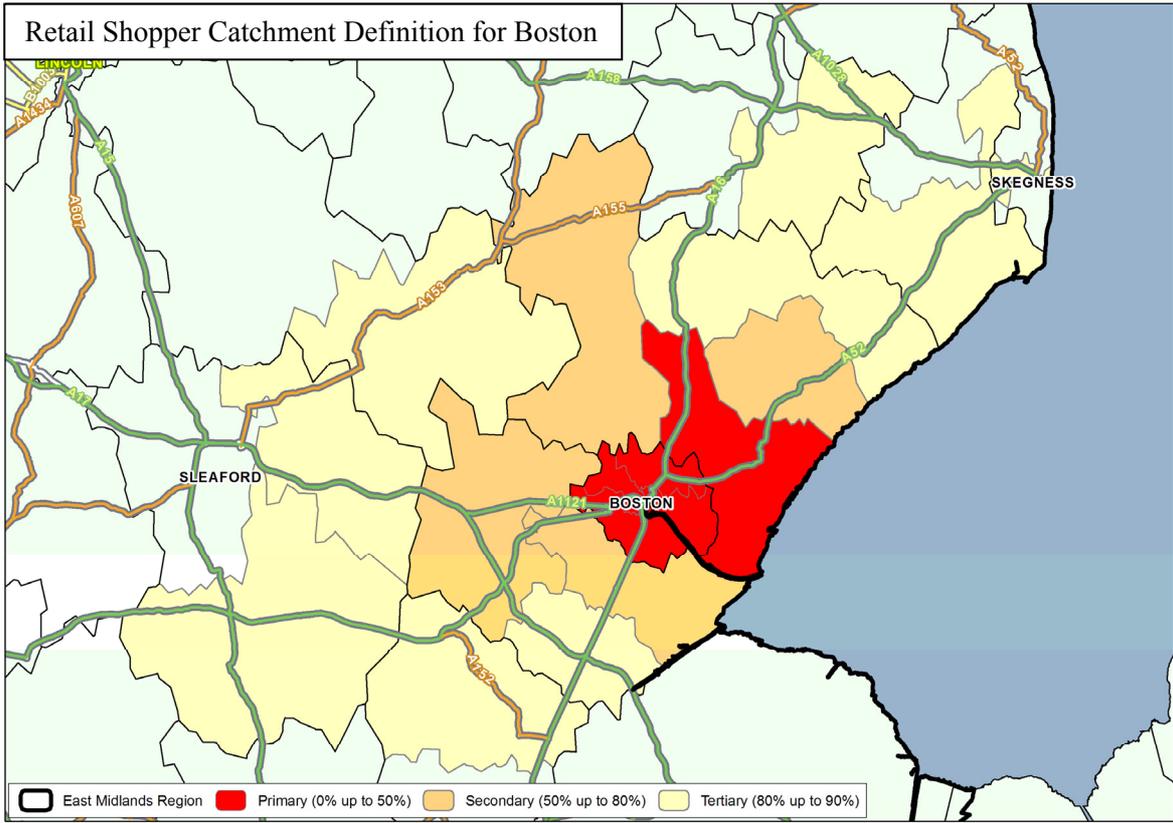
To the East of the region, with the exception of Lincoln, there are relatively small urban areas which also have considerable retail flow interaction. Towards the North East, some of the catchments such as Louth are shaped by competition from external centres.

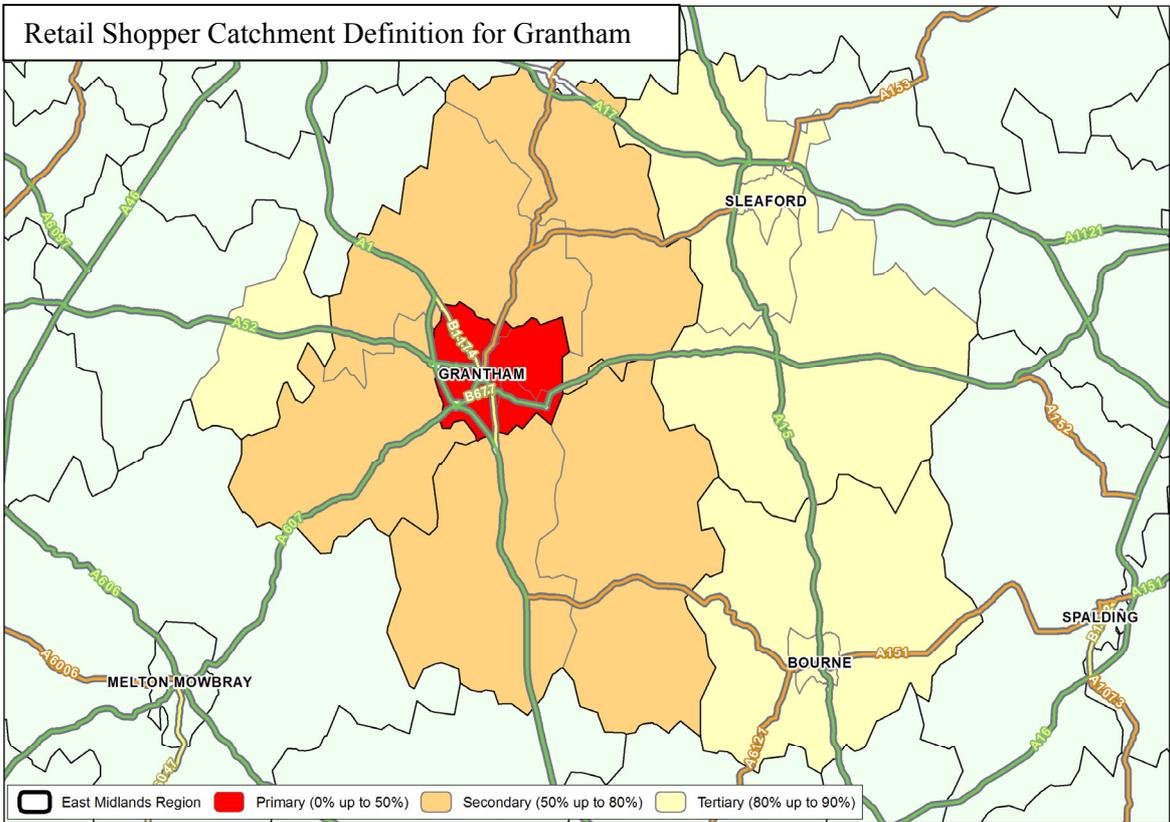
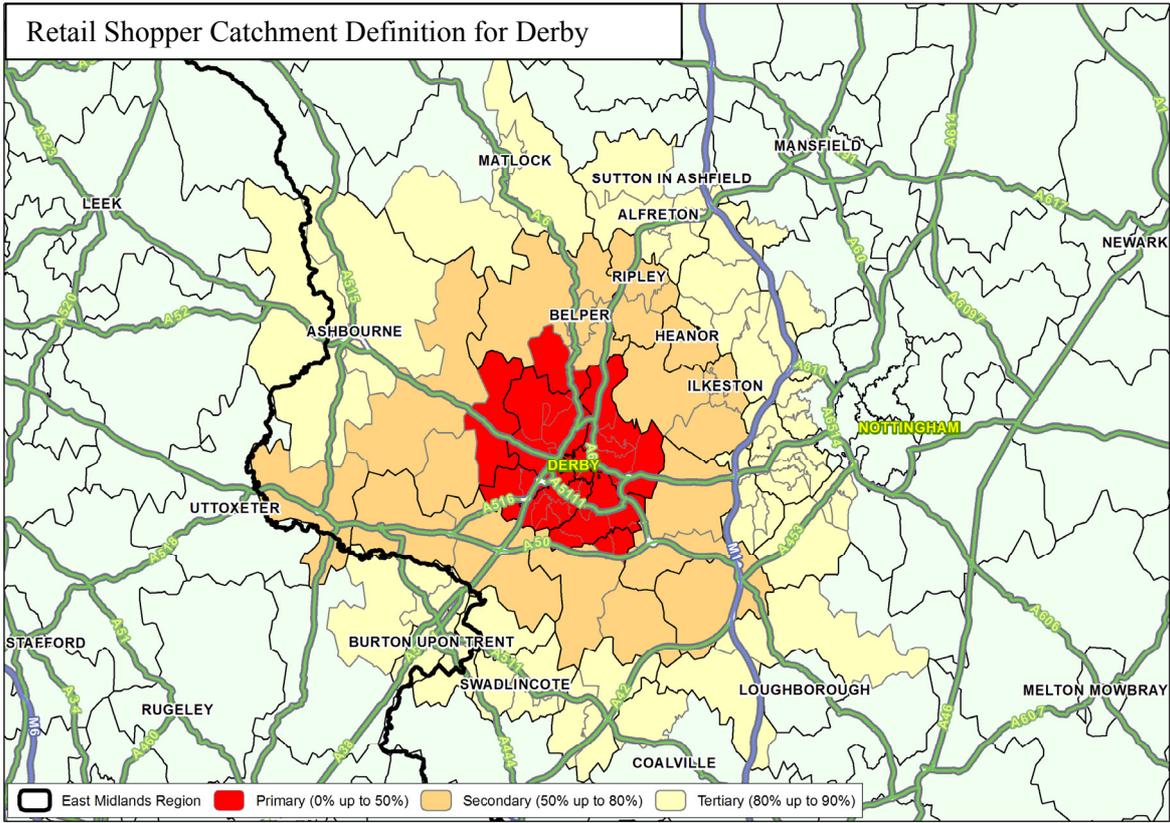
- Lincoln contrasts with the other East Midlands centres in that it is further from large competitors than the others. This leads to the catchment having a greater total area than Leicester despite receiving fewer raw responses in the Where Britain Shops survey. The Primary catchment extends further South than North because of the influence of the A15, which draws shoppers from Sleaford within its Tertiary catchment.
- The Boston catchment displays no areas of overlap with either Lincoln or Peterborough, which suggests that shopping habits in this area are distinct. The Eastern limit of Boston's Tertiary catchment reaches into Skegness along the A52 and shows a limited degree of penetration into the latter's Primary catchment. Skegness itself is quite restricted by both Boston and Louth but nevertheless pushes into Mablethorpe in the North.
- Louth's catchment is quite heavily influenced by Grimsby, which is illustrated by the Secondary catchment reaching much further South than North. Part of Grimsby's Primary catchment extends across the East Midlands border into Tetney, and its Secondary reaches as far South as Manby. This Southern extent should perhaps not be overestimated because the postal sectors here are large and many of the shoppers may come from the North of these areas around towns such as Marshchapel.
- Grantham's Secondary catchment also seems to be overestimated slightly by large postal sectors surrounding the centre. The Tertiary catchment covers Sleaford and Bourne in the East but does not reach as far as either Newark or Melton Mowbray in the West due to the impact of Nottingham and Leicester. Newark's catchment is similar in nature, since its Secondary postal sectors extend further North-South than East-West due in this instance to both Nottingham and Lincoln.

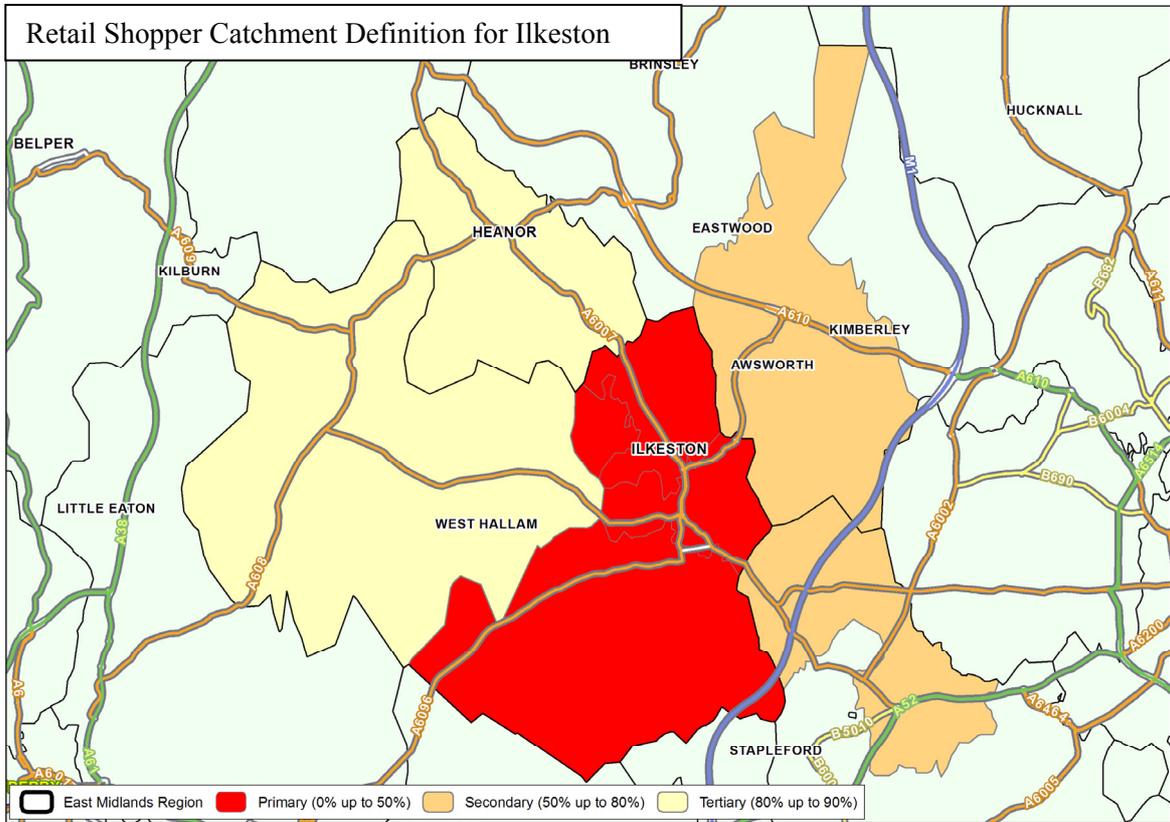
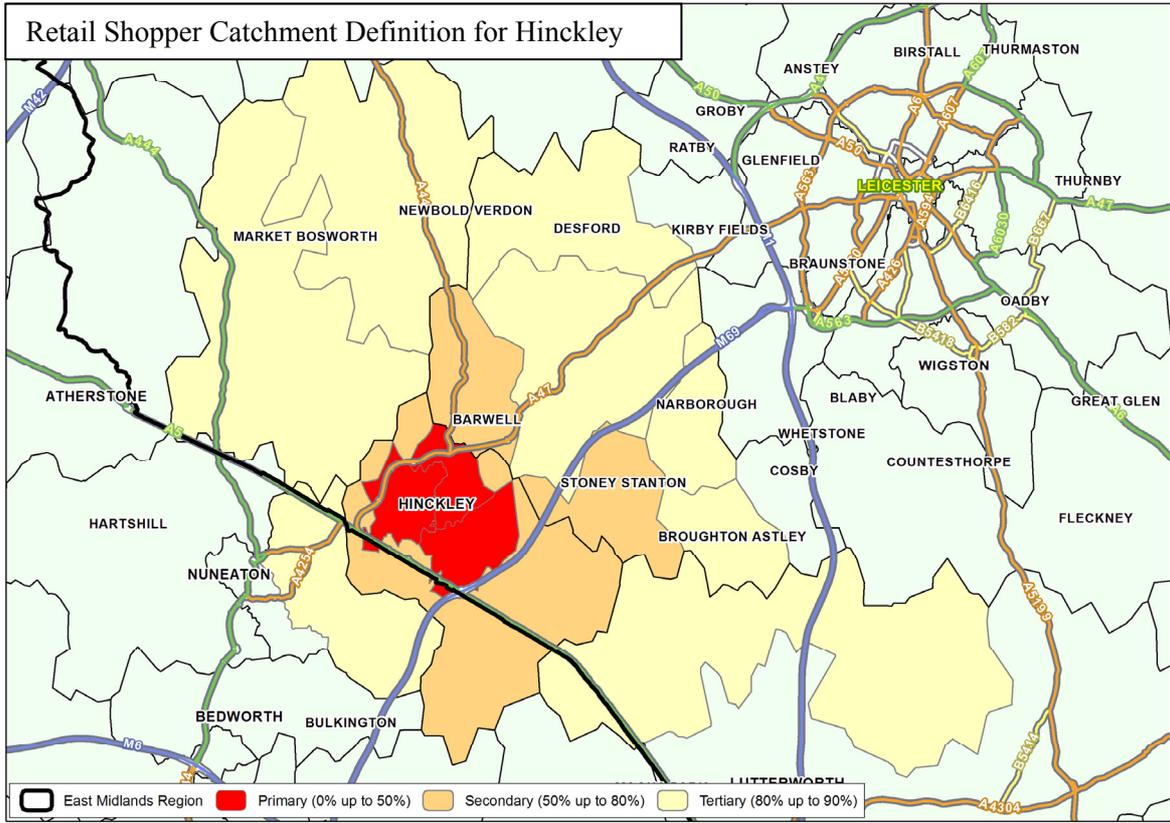
- Corby's catchment is quite irregular in shape, with the Secondary postal sectors extending to the North rather than the South, but this is explained by the fact that Kettering is not only closer to Corby than Oakham in the North but is also a much more important East Midlands shopping centre. It is likely that the Where Britain Shops survey data has underestimated the true extent of this catchment because it does not take into account the proposed new developments within the centre. Further South, Kettering's catchment extends to Brixworth in the West, just past Thrapston to the East along the A14 and three quarters of the way towards Wellingborough to the South. The proximity of Corby to the North leaves an indentation in Kettering's Secondary catchment illustrating the competing attractions of the two centres.
- The influence of Northampton to the West distorts Wellingborough's catchment towards the East where there is more limited competition. Rushden is firmly within the centre's Secondary catchment, highlighting the fact that many people living in Rushden carry out their major shopping trips in Wellingborough to take advantage of the additional choice. To the South, this catchment is pulled towards Newport Pagnell and Bedford due to the A509 and A6 respectively, yet is held back by Milton Keynes in particular.

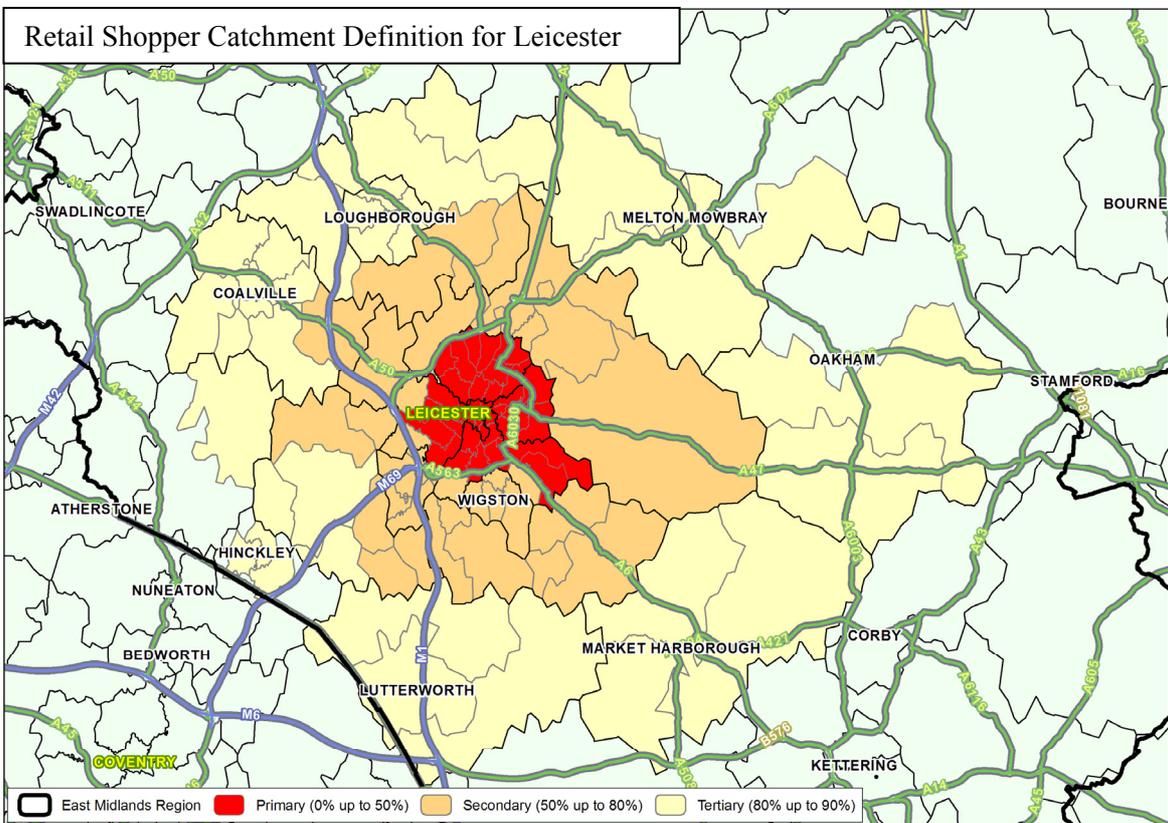
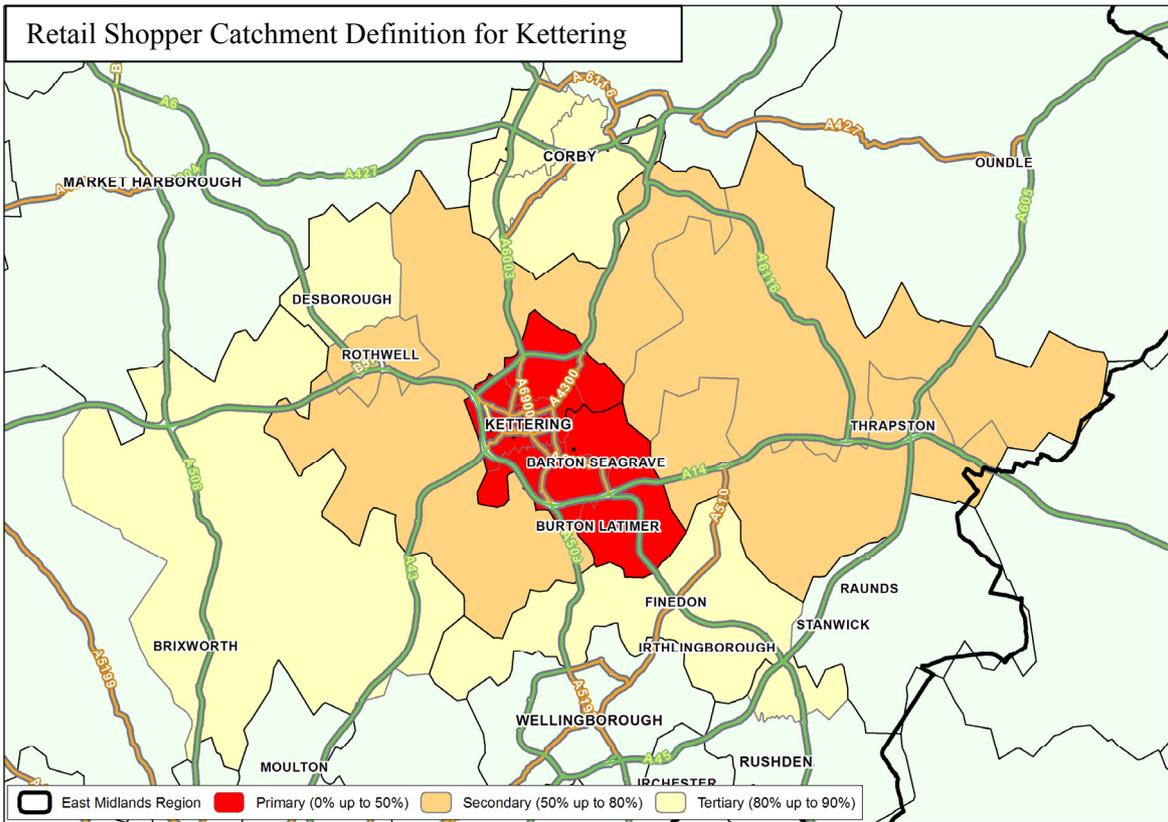
The influence of external centres is highlighted quite vividly by Sheffield's catchment, which spreads into Chesterfield's Primary and covers all of Worksop's Primary and Secondary postal sectors. Nevertheless, Worksop's catchment still crosses the East Midlands border towards Dinnington and Anston to the North West. Like Nottingham, the catchment around Sheffield is skewed in one direction due to the presence of Rotherham in the East and relative absence of competition further West.

- Rotherham does not manage to draw shoppers away from the East Midlands because it is held back to the South and West by Sheffield. Milton Keynes shows the same broad pattern as Sheffield because even though its Secondary catchment pushes into the East Midlands along the A5 towards Towcester, it does not penetrate far into Northampton's core catchment.
- Birmingham's catchment has the most limited impact on the East Midlands out of the external centres considered due to its distance from the East Midlands border, highlighted by the fact that its Tertiary catchment does not penetrate into Swadlincote and Coalville. The Northern reach of Coventry's core catchment is curtailed by the M6, but this same road together with the proximity of Birmingham leads to a catchment that is skewed to the East. To the North East, the Tertiary catchment penetrates into Lutterworth and Hinckley and reaches almost as far as the Leicester ring road.
- Despite Hinckley being roughly equidistant from both Coventry and Leicester, its catchment is skewed more in the direction of Leicester. This pattern can be explained by the presence of Nuneaton and Bedworth to the South West, but even with these competing centres Hinckley manages to draw some shoppers from across the border around small towns such as Wolvey.
- Manchester's catchment does not appear to directly influence any of the 21 East Midlands centres reviewed. However, its Secondary catchment reaches around 10 kilometres inside the border and covers the majority of Glossop with the Tertiary extending a further 8 kilometres, stopping just short of Buxton. At its greatest extent, Peterborough's Secondary catchment stretches a full 18 kilometres into the East Midlands around Spalding to the North but less than half of this distance to the West around Spalding. Lichfield's catchment achieves only minor penetration into the East Midlands despite its proximity to the border, not managing to push all of the way through Swadlincote.

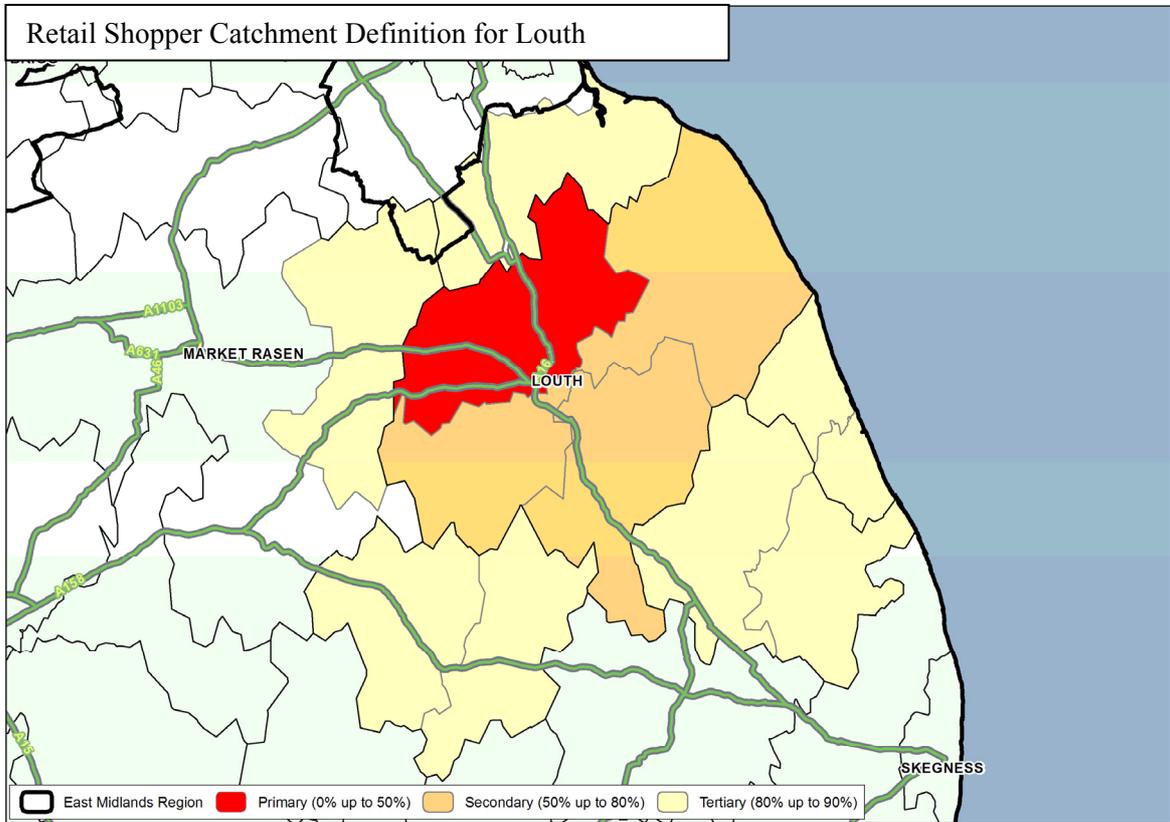
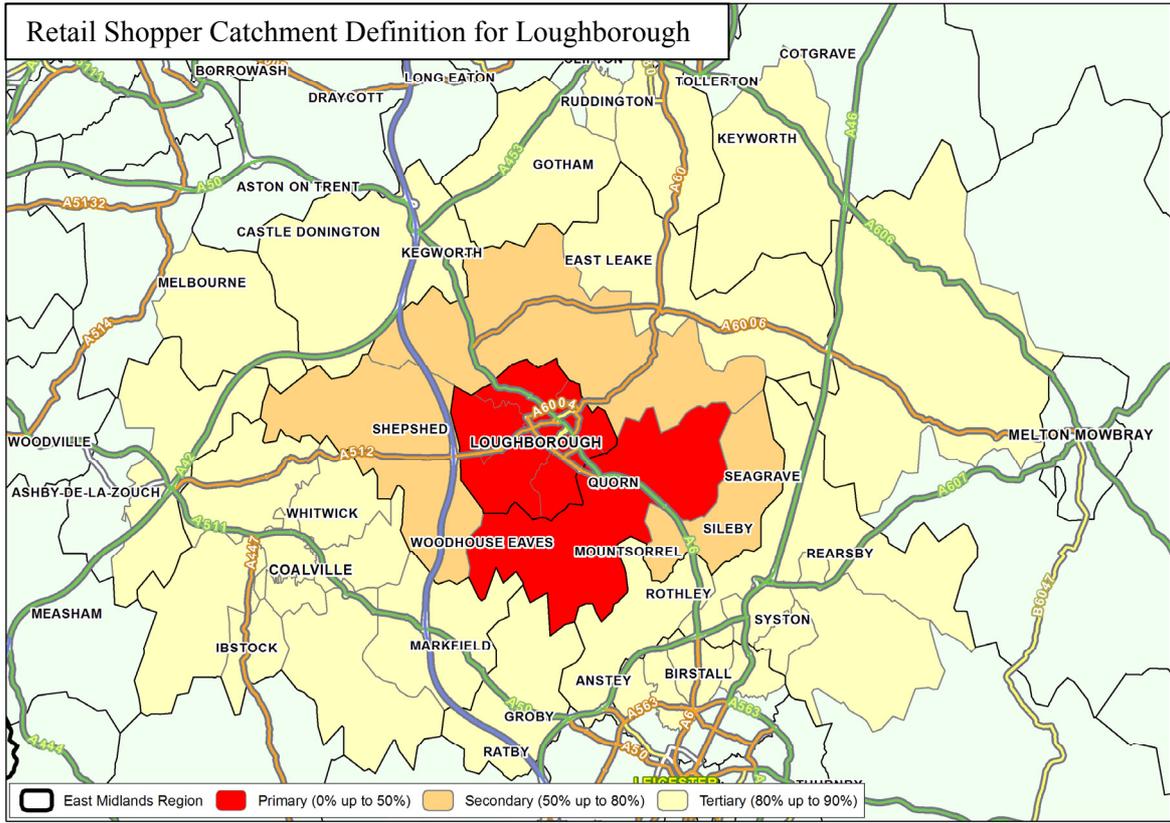


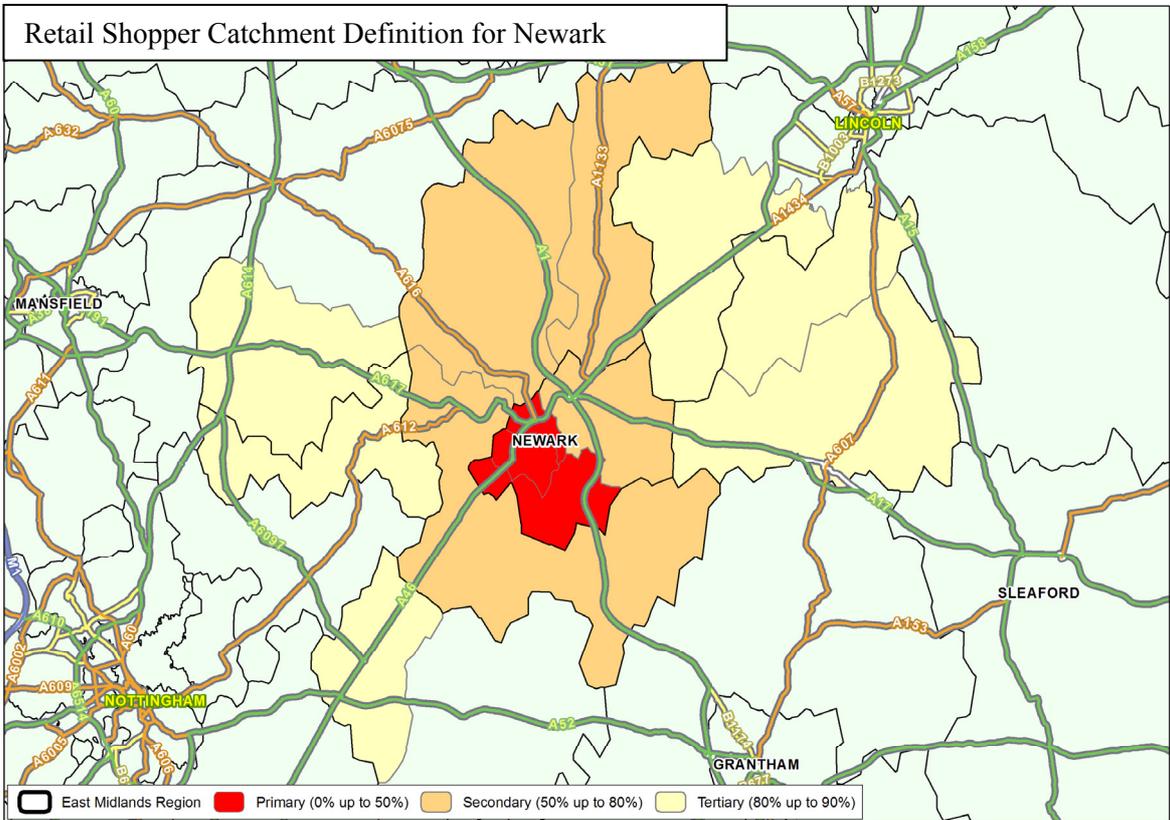
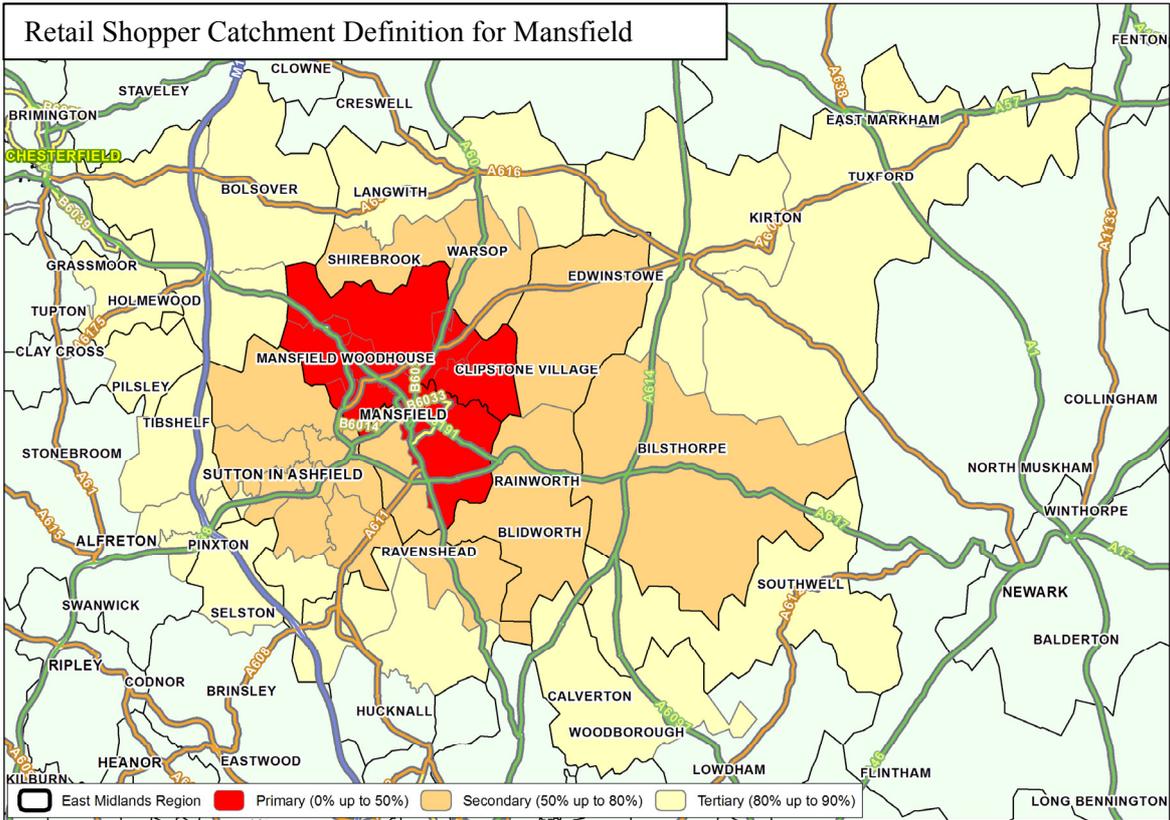


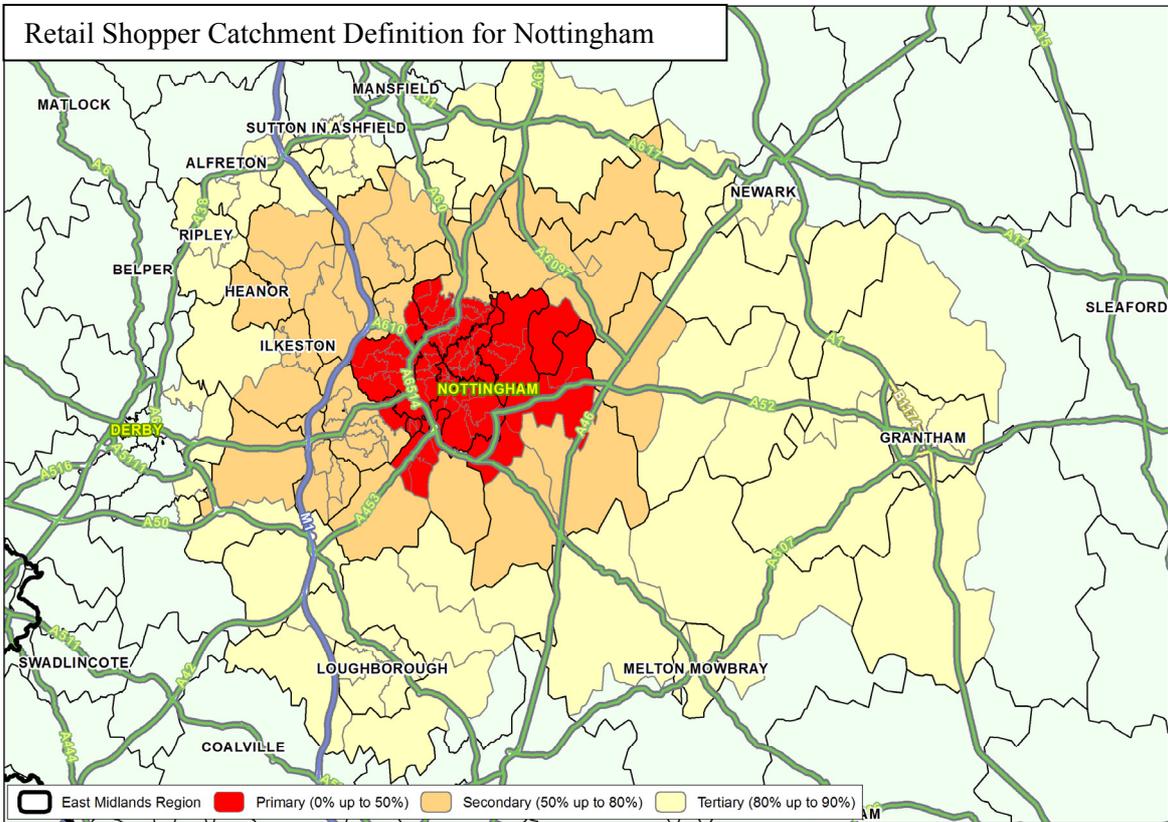
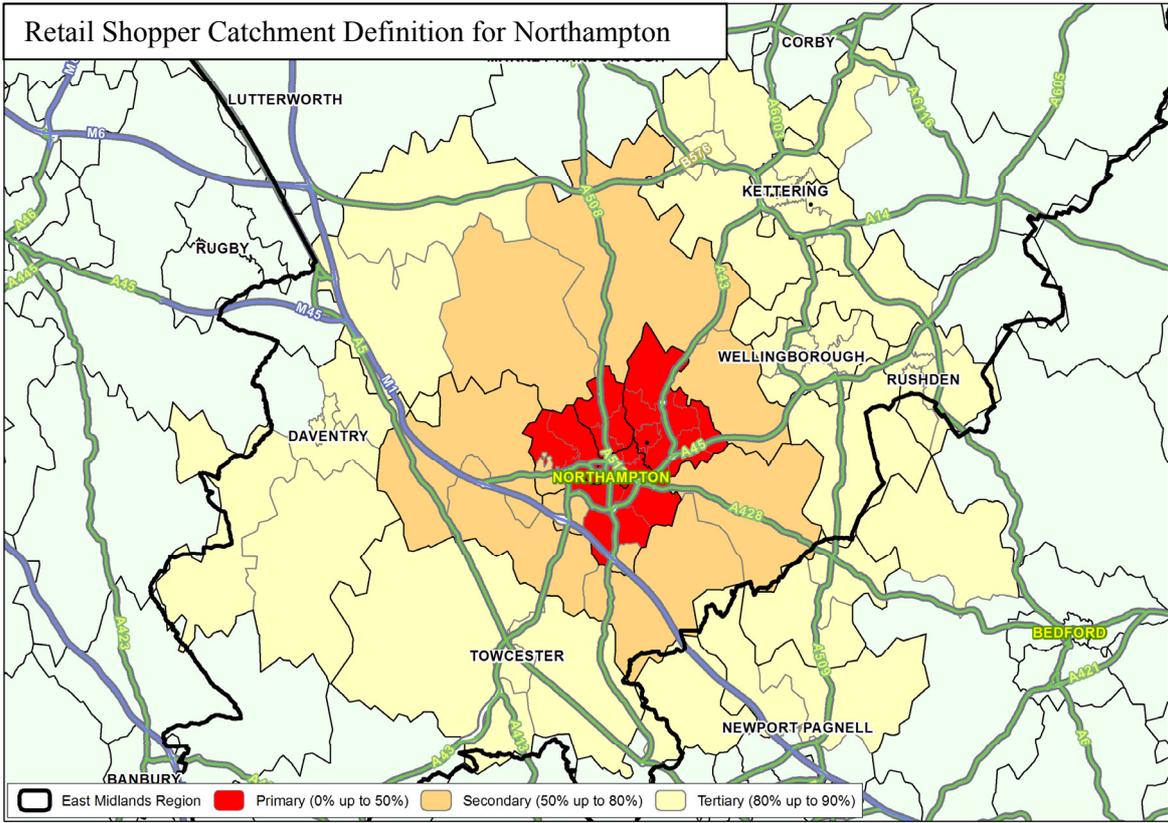


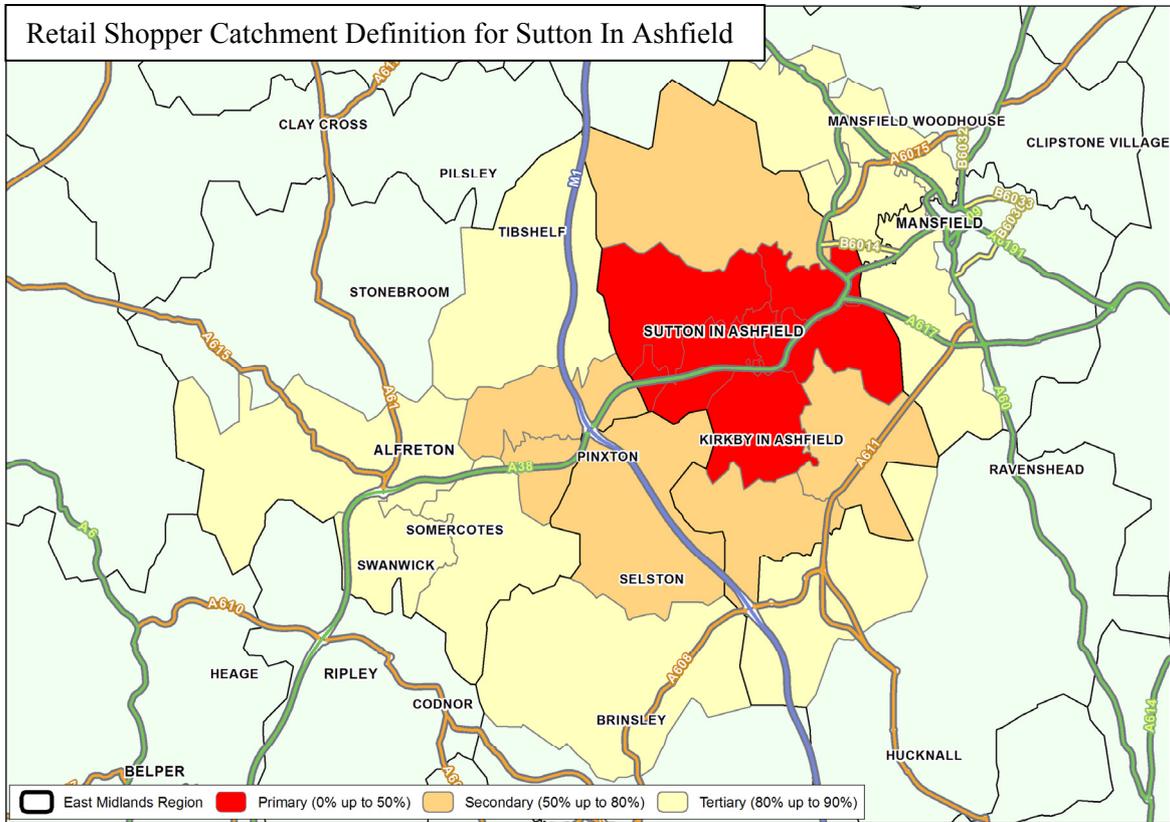
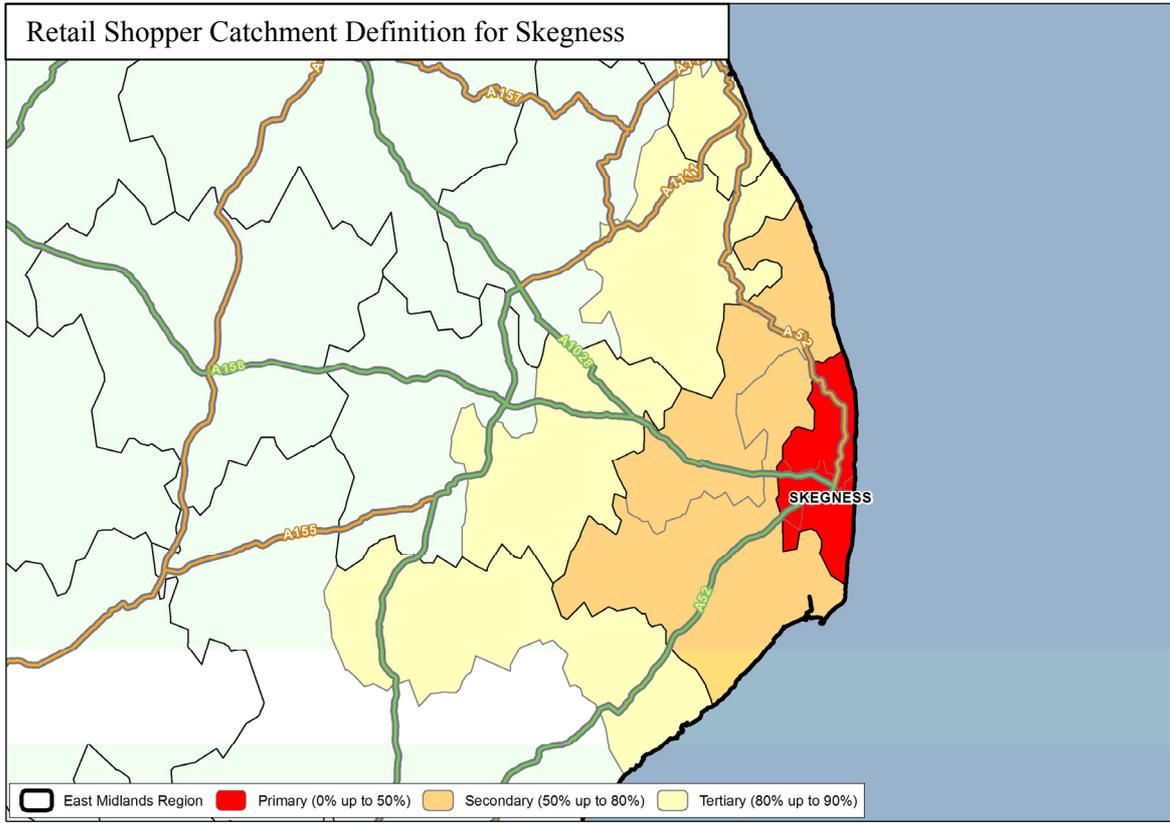


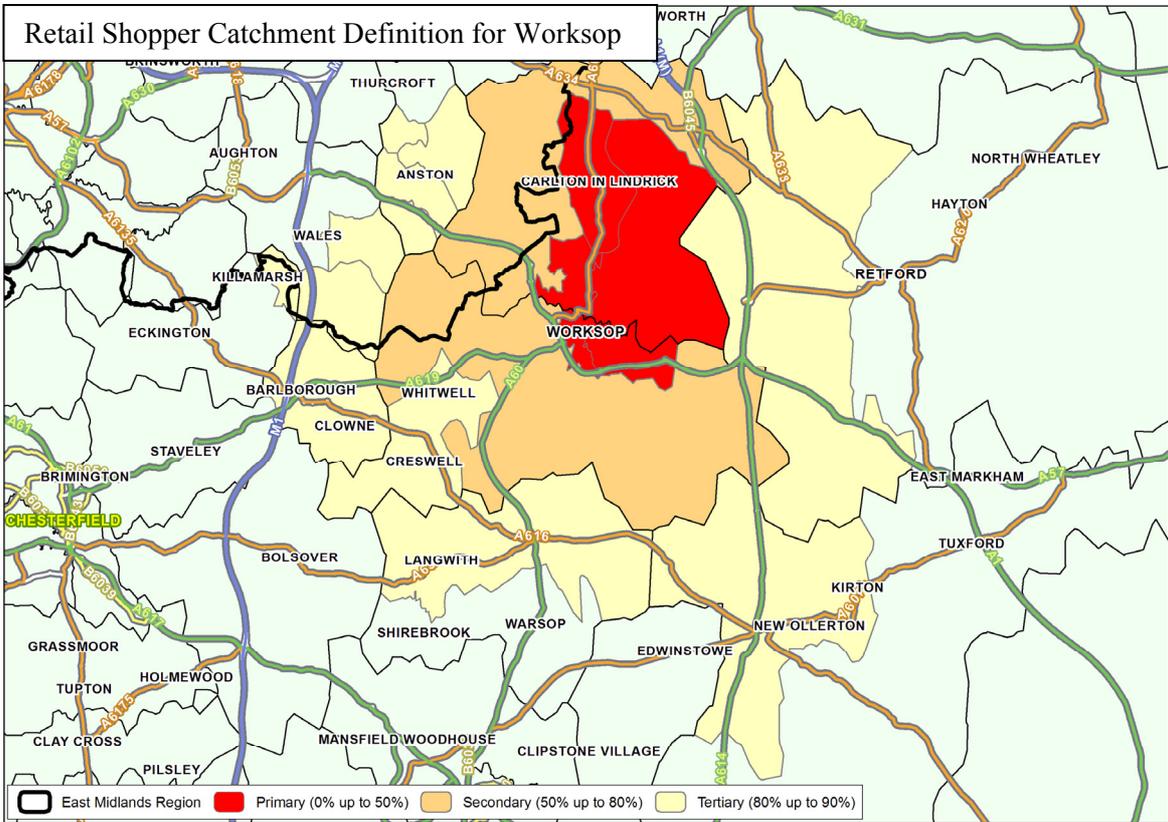
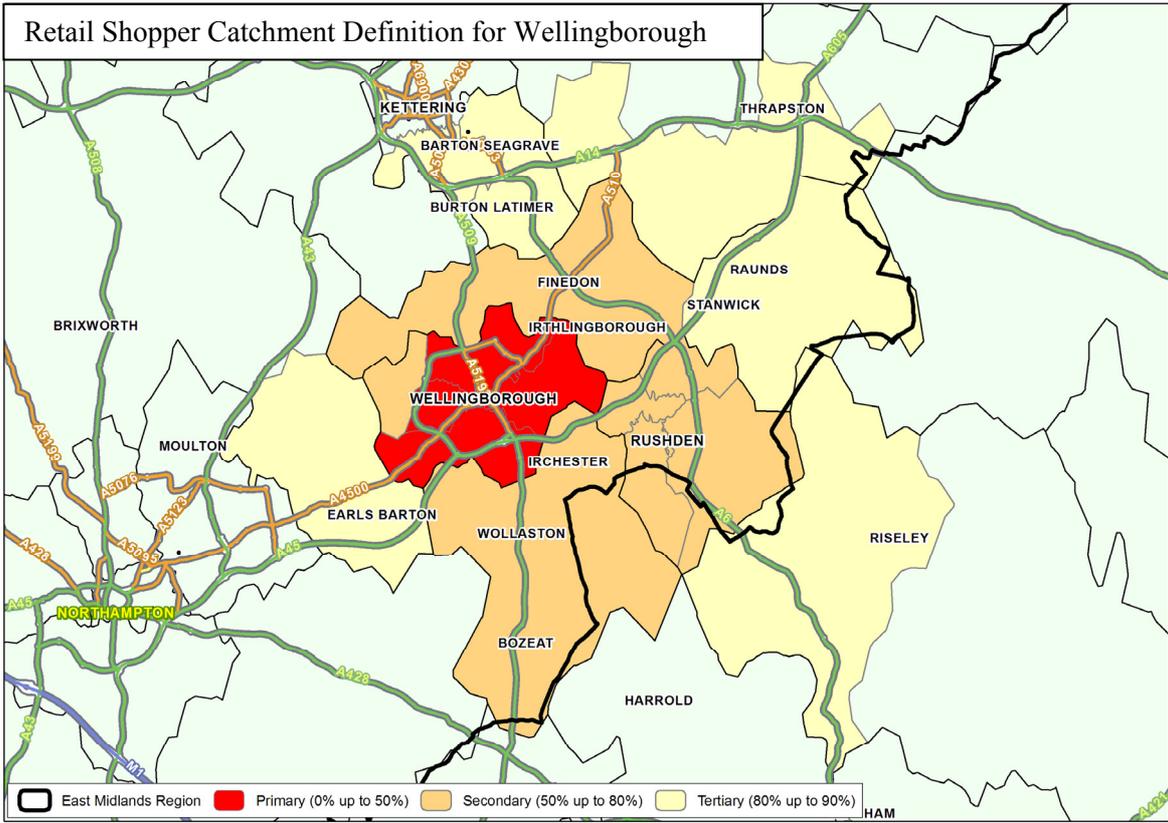


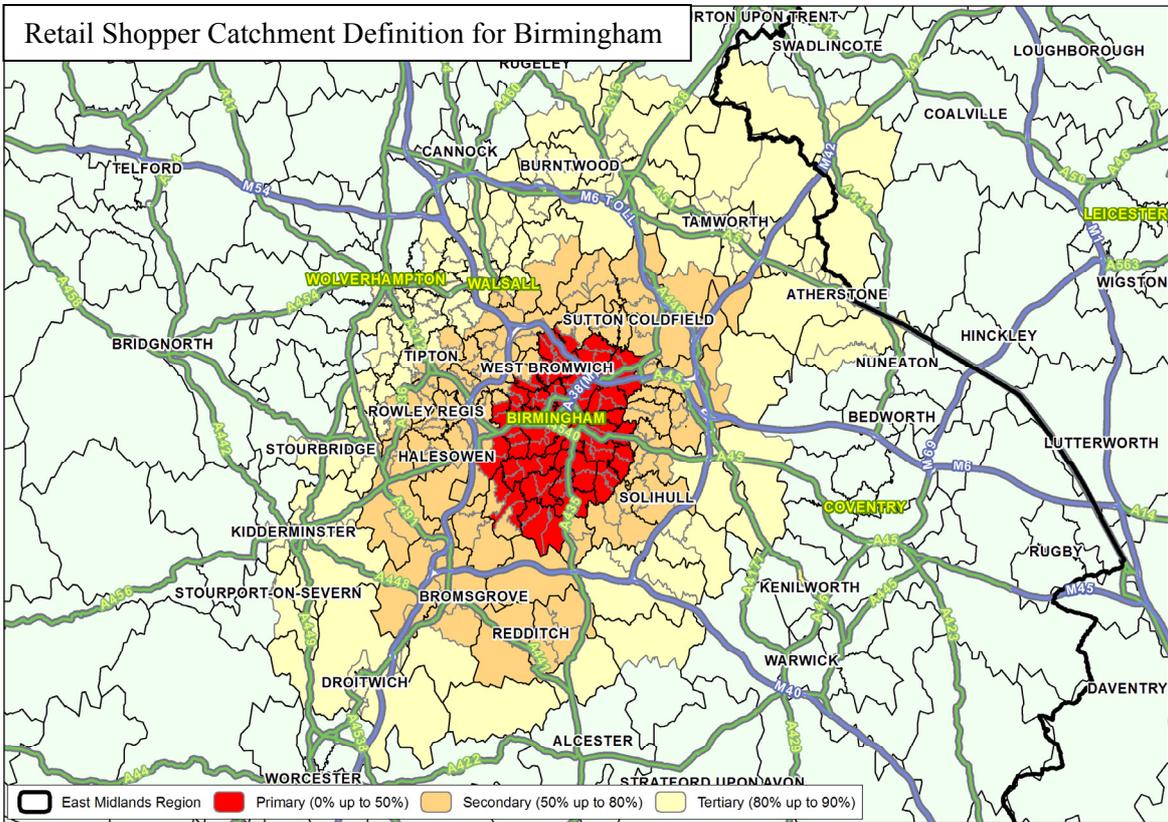
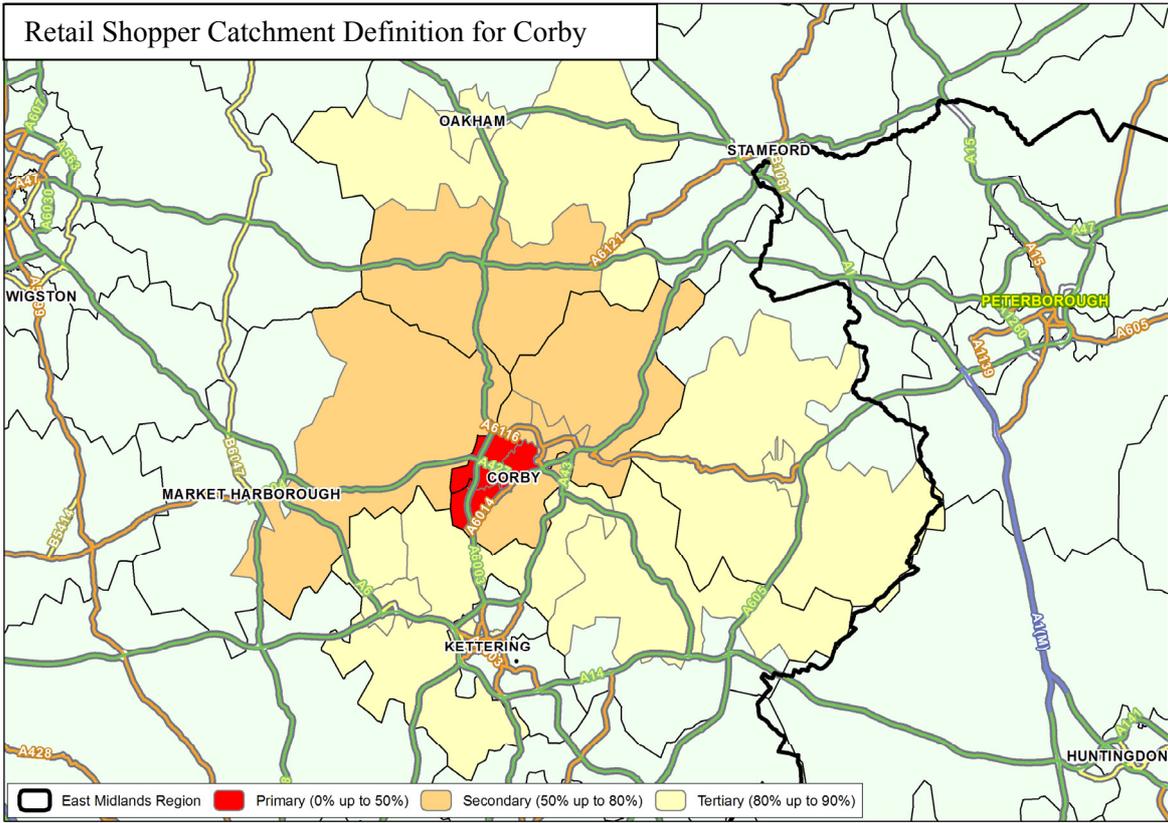


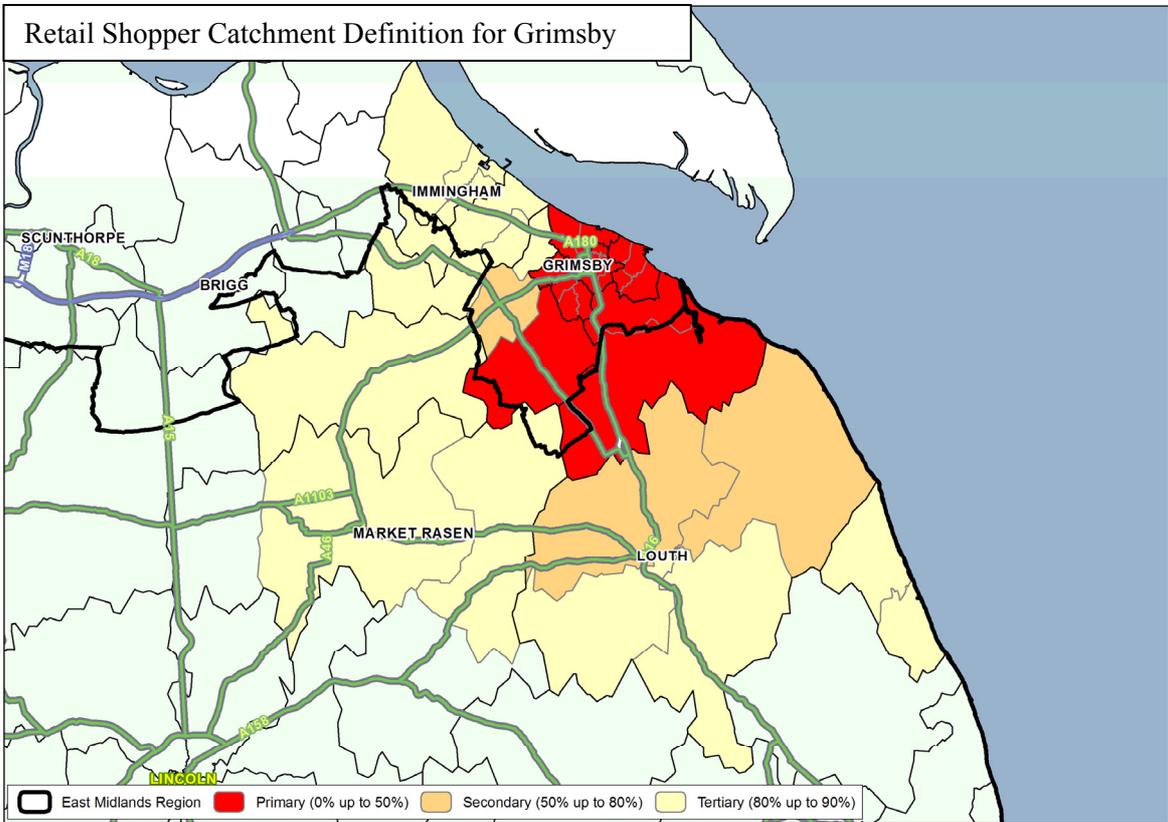
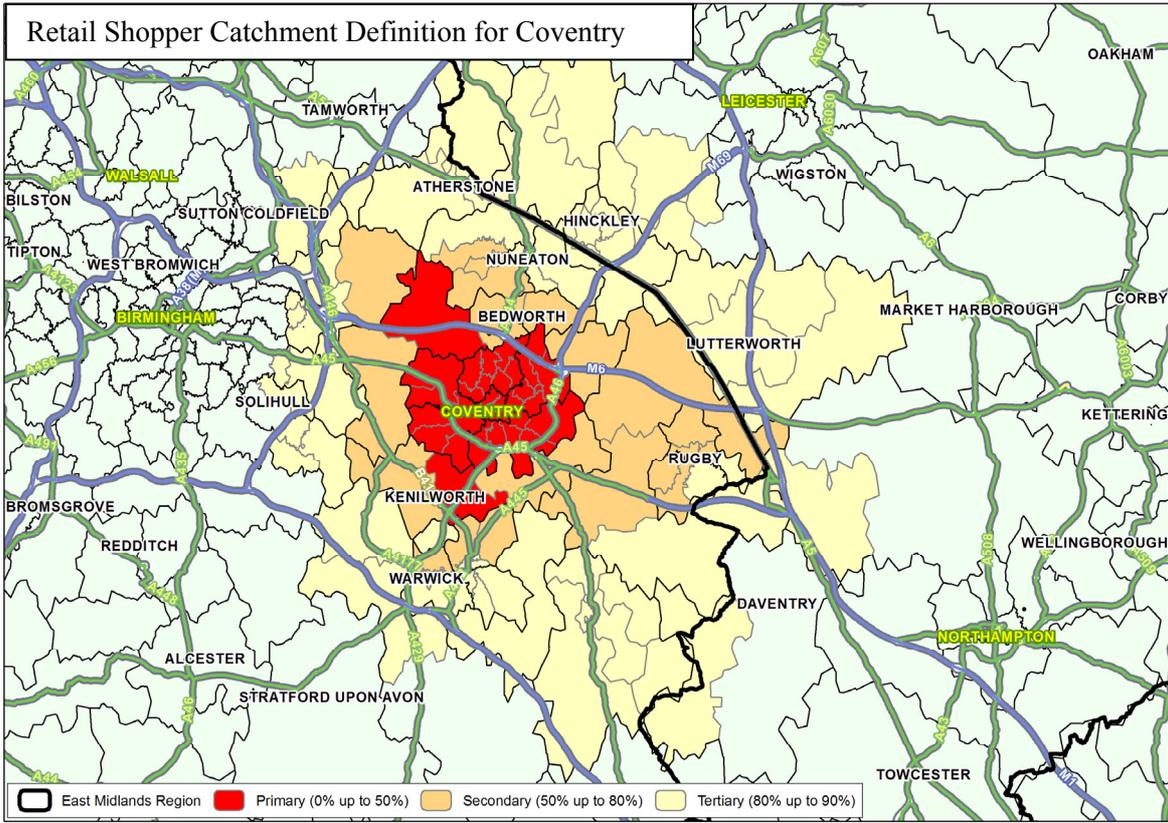


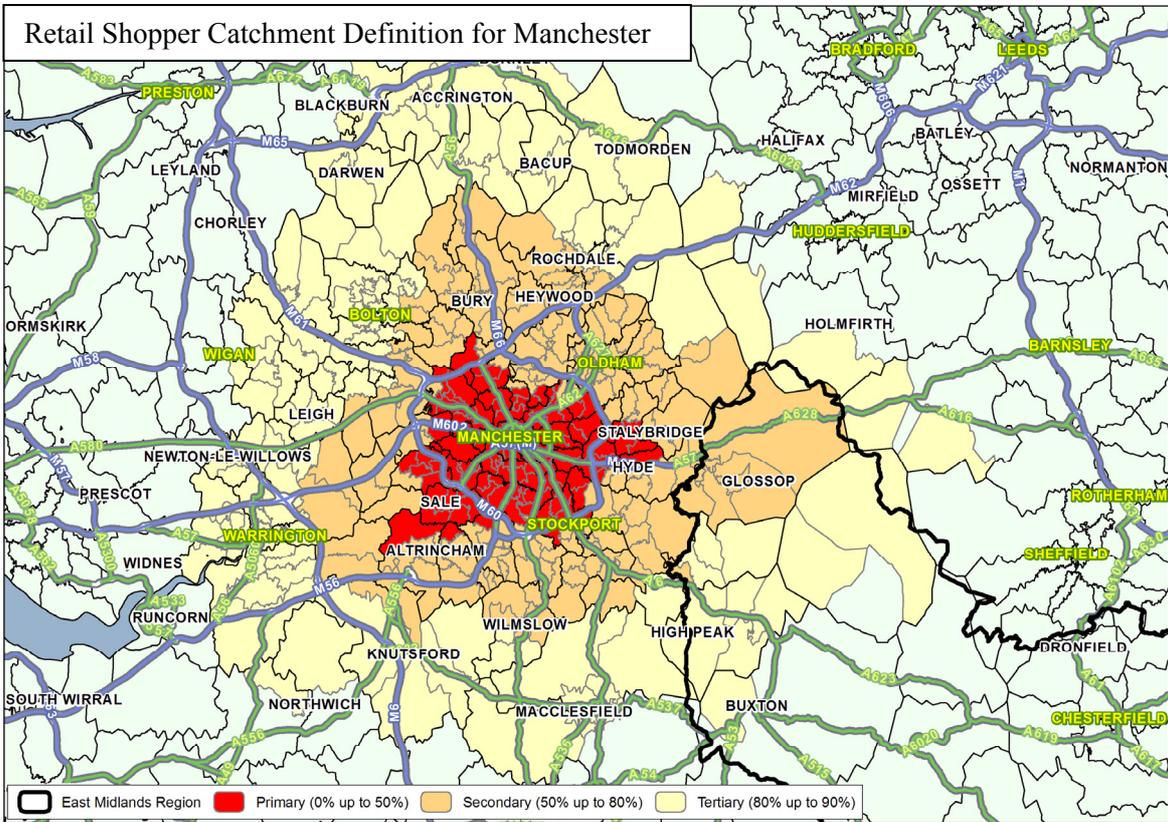
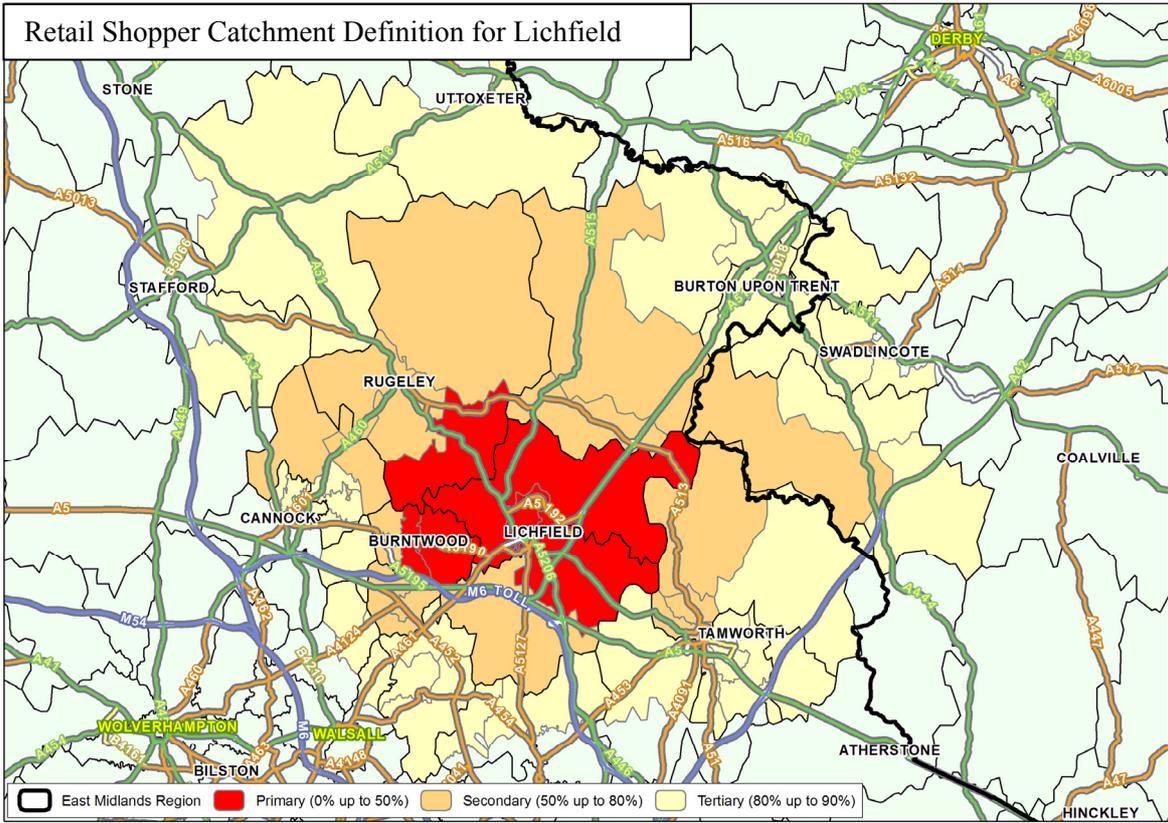


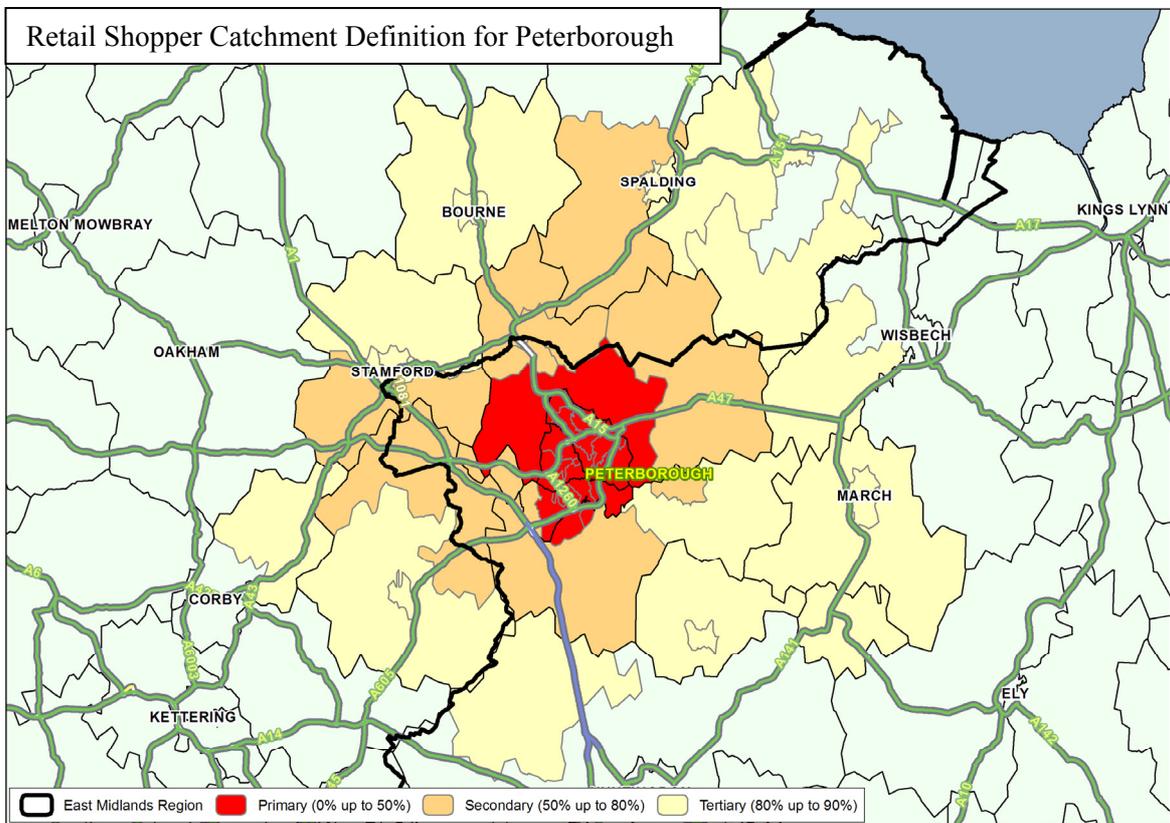
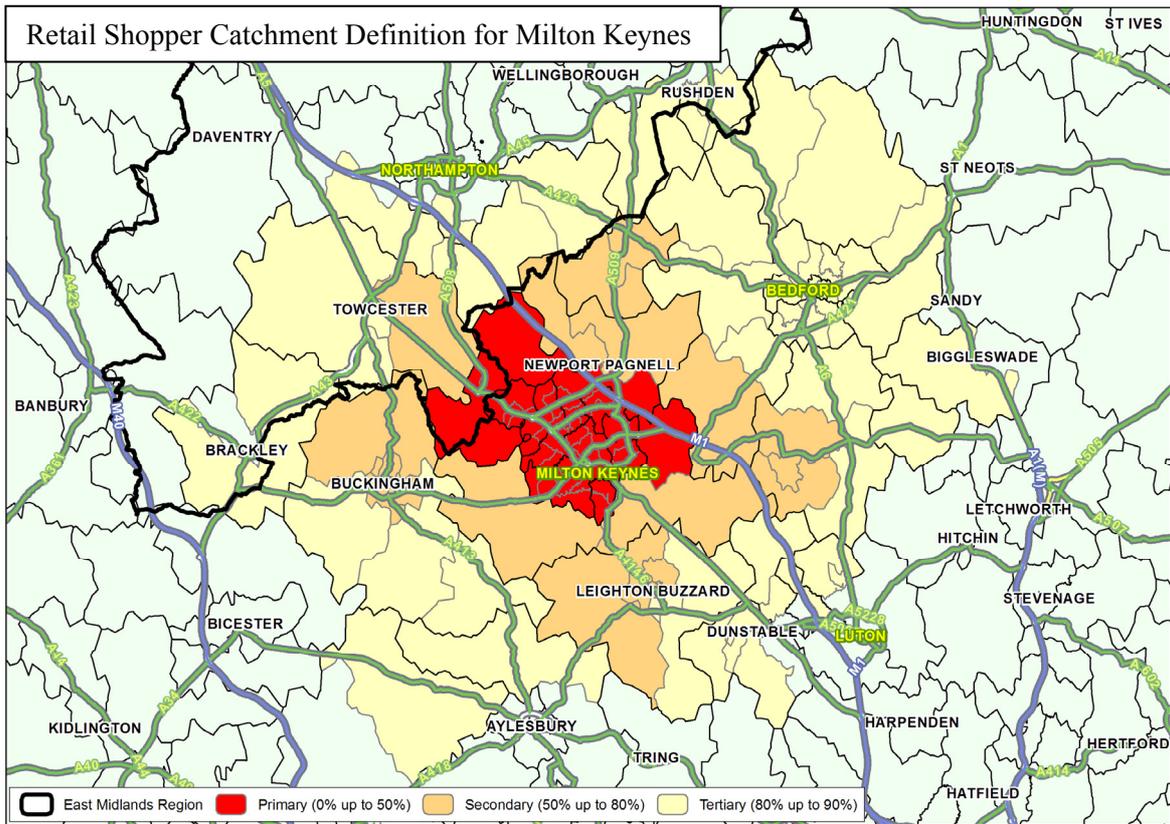


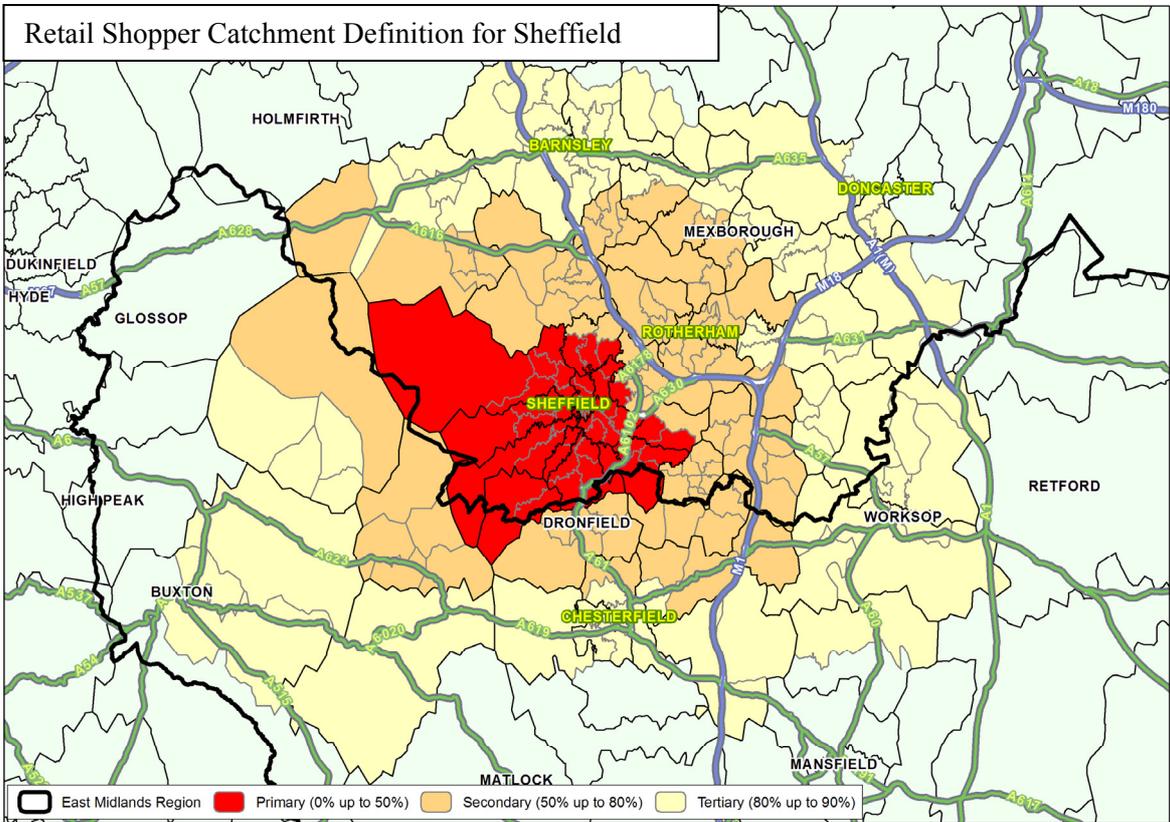
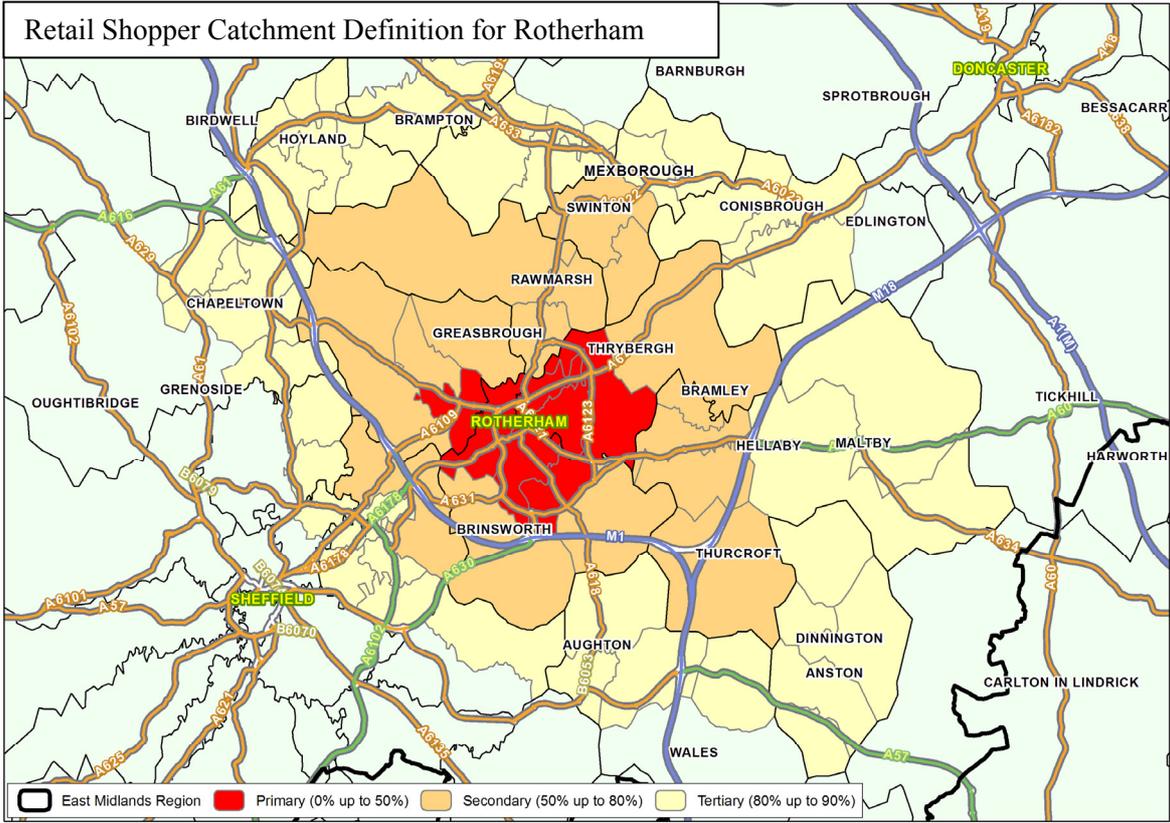












### 3.3 TABLES OF ORIGIN BASED FLOWS

The following tables show the distribution of comparison (non-grocery) shopper spend from every Local & Unitary Authority in the East Midlands, along with those that contain the external centres analysed. The data source is the same as in the destination-based maps above. Only destinations with greater than 5% market share are included. The table shows:

- the dominance of major centres in the region (Nottingham, Derby, Leicester, Northampton)
- penetration of smaller centres whose catchment areas are not displayed above, such as Alfreton, Daventry, Gainsborough and Stamford
- external leakage from bordering Local Authorities, for example 30% of Bassetlaw shoppers going to Sheffield and 11% of Corby residents shopping in Peterborough. Similar patterns are apparent in commuting flows, where large proportions of all commuters travel to Sheffield and Peterborough.

### 3.4 ORIGIN-BASED SHOPPER FLOWS AT LOCAL & UNITARY AUTHORITY LEVEL

LA / UA of Origin	Shopping Destination	%age Flow
Amber Valley	Derby	56%
Amber Valley	Nottingham	12%
Amber Valley	Ripley	8%
Amber Valley	Alfreton	8%
Ashfield	Nottingham	41%
Ashfield	Mansfield	28%
Ashfield	Sutton In Ashfield	21%
Bassetlaw	Sheffield	30%
Bassetlaw	Worksop	26%
Bassetlaw	Doncaster	18%
Bassetlaw	Retford	15%
Bassetlaw	Lincoln	6%
Birmingham	Birmingham	63%
Birmingham	Sutton Coldfield	10%
Birmingham	Solihull	5%
Blaby	Leicester	91%
Blaby	Hinckley	7%
Bolsover	Chesterfield	26%
Bolsover	Mansfield	26%
Bolsover	Worksop	16%
Bolsover	Sheffield	16%
Boston	Boston	81%
Boston	Lincoln	9%
Boston	Peterborough	6%
Broxtowe	Nottingham	71%
Broxtowe	Beeston	14%

<b>LA / UA of Origin</b>	<b>Shopping Destination</b>	<b>%age Flow</b>
Charnwood	Leicester	50%
Charnwood	Loughborough	42%
Charnwood	Nottingham	6%
Chesterfield	Chesterfield	87%
Chesterfield	Sheffield	12%
Corby	Corby	47%
Corby	Kettering	23%
Corby	Peterborough	11%
Corby	Northampton	8%
Corby	Leicester	8%
Coventry	Coventry	93%
Daventry	Northampton	51%
Daventry	Rugby	14%
Daventry	Daventry	11%
Daventry	Banbury	9%
Daventry	Milton Keynes	8%
Derby	Derby	95%
Derbyshire Dales	Derby	35%
Derbyshire Dales	Chesterfield	33%
Derbyshire Dales	Sheffield	13%
East Lindsey	Grimsby	26%
East Lindsey	Skegness	23%
East Lindsey	Lincoln	22%
East Lindsey	Louth	14%
East Lindsey	Boston	10%
East Northamptonshire	Northampton	24%
East Northamptonshire	Rushden	16%
East Northamptonshire	Peterborough	15%
East Northamptonshire	Wellingborough	12%
East Northamptonshire	Kettering	12%
East Northamptonshire	Milton Keynes	10%
East Northamptonshire	Bedford	5%
Erewash	Nottingham	36%
Erewash	Derby	32%
Erewash	Long Eaton	15%
Erewash	Ilkeston	15%
Gedling	Nottingham	80%
Gedling	Arnold	14%
Harborough	Leicester	60%
Harborough	Market Harborough	16%
Harborough	Rugby	13%

<b>LA / UA of Origin</b>	<b>Shopping Destination</b>	<b>%age Flow</b>
High Peak	Buxton	26%
High Peak	Stockport	25%
High Peak	Manchester	23%
High Peak	Macclesfield	6%
High Peak	Glossop	5%
Hinckley and Bosworth	Leicester	54%
Hinckley and Bosworth	Hinckley	31%
Hinckley and Bosworth	Nuneaton	7%
Kettering	Kettering	72%
Kettering	Northampton	11%
Leicester	Leicester	99%
Lichfield	Lichfield	43%
Lichfield	Burton Upon Trent	11%
Lichfield	Birmingham	10%
Lichfield	Sutton Coldfield	10%
Lichfield	Walsall	10%
Lichfield	Tamworth	8%
Lincoln	Lincoln	97%
Manchester	Manchester	74%
Manchester	Stockport	11%
Mansfield	Mansfield	88%
Mansfield	Nottingham	8%
Melton	Leicester	33%
Melton	Melton Mowbray	30%
Melton	Nottingham	23%
Melton	Grantham	10%
Milton Keynes	Milton Keynes	89%
Milton Keynes	Bletchley	6%
Newark and Sherwood	Newark	35%
Newark and Sherwood	Mansfield	26%
Newark and Sherwood	Nottingham	20%
Newark and Sherwood	Lincoln	12%
North East Derbyshire	Chesterfield	63%
North East Derbyshire	Sheffield	31%
North East Lincolnshire	Grimsby	97%
North Kesteven	Lincoln	80%
North Kesteven	Sleaford	7%
North Kesteven	Boston	5%
North West Leicestershire	Leicester	32%
North West Leicestershire	Coalville	24%
North West Leicestershire	Burton Upon Trent	14%

<b>LA / UA of Origin</b>	<b>Shopping Destination</b>	<b>%age Flow</b>
North West Leicestershire	Loughborough	8%
North West Leicestershire	Nottingham	8%
North West Leicestershire	Derby	6%
Northampton	Northampton	91%
Northampton	Milton Keynes	7%
Nottingham	Nottingham	92%
Oadby and Wigston	Leicester	86%
Oadby and Wigston	Wigston	11%
Peterborough	Peterborough	96%
Rotherham	Sheffield	51%
Rotherham	Rotherham	41%
Rushcliffe	Nottingham	92%
Rutland	Peterborough	33%
Rutland	Leicester	21%
Rutland	Stamford	13%
Rutland	Oakham	11%
Rutland	Melton Mowbray	5%
Sheffield	Sheffield	97%
South Derbyshire	Burton Upon Trent	58%
South Derbyshire	Derby	25%
South Derbyshire	Swadlincote	7%
South Holland	Peterborough	43%
South Holland	Spalding	35%
South Holland	Boston	12%
South Holland	Kings Lynn	5%
South Kesteven	Grantham	35%
South Kesteven	Peterborough	33%
South Kesteven	Nottingham	10%
South Kesteven	Stamford	9%
South Northamptonshire	Banbury	38%
South Northamptonshire	Northampton	32%
South Northamptonshire	Milton Keynes	27%
Wellingborough	Northampton	41%
Wellingborough	Wellingborough	39%
Wellingborough	Milton Keynes	13%
West Lindsey	Lincoln	66%
West Lindsey	Grimsby	12%
West Lindsey	Gainsborough	11%
West Lindsey	Scunthorpe	5%

### 3.5 LEAKAGE FROM THE EAST MIDLANDS

The table below is summarised from all of the raw Where Britain Shops data for the East Midlands and shows the percentage flow of shoppers broken down by government office region. Just over 85% of shoppers stay within the region with the largest external flows being to Yorkshire And The Humber, the East and the South East, in contrast to the commuter flows which shows more emphasis on travel to the South East and West of England. This suggests a trend of travelling further for work than shopping.

<b>Government Office Region</b>	<b>%age Flow</b>
East Midlands	85.6%
Yorkshire And The Humber	5.4%
East	3.1%
South East	2.2%
West Midlands	2.2%
North West	1.3%
London	0.1%

The following table shows the same data again but is summarised by government office region and by shopping destination, with only those flows above 1% shown. The majority of the leakage out of the East Midlands to Yorkshire And The Humber is accounted for by both Sheffield at 2.9% (which is also the town that draws the most shoppers away from the region) and Grimsby at 1.7%. Peterborough is the second biggest source of leakage from the East Midlands, drawing 2.7% of shoppers away from the region to the East region. Over half of the leakage to the South East is explained by the 1.4% of people heading to Milton Keynes, and Burton Upon Trent is the most important centre in the West Midlands, drawing a further 1.4% of shoppers away from the East Midlands. Interestingly the pattern of top shopping destinations outside of the East Midlands is similar to the pattern of top commuter destinations outside of the region, with Sheffield and Peterborough topping the rankings according to both measures. The only anomaly in the top five is Grimsby which ranks third as a shopping destination but is ranked 8<sup>th</sup> as a commuter destination (defined as North East Lincolnshire district). The remaining two places are filled by Milton Keynes (ranked 3<sup>rd</sup> as a commuter destination) and Burton Upon Trent (4<sup>th</sup> in commuting as East Staffordshire district).

<b>Government Office Region</b>	<b>Shopping Destination</b>	<b>%age Flow</b>
East Midlands	Nottingham	14.0%
East Midlands	Leicester	13.0%
East Midlands	Lincoln	9.5%
East Midlands	Derby	9.2%
East Midlands	Northampton	6.3%
East Midlands	Chesterfield	5.6%
East Midlands	Mansfield	4.2%
Yorkshire And The Humber	Sheffield	2.9%
East	Peterborough	2.7%
East Midlands	Boston	2.4%
East Midlands	Loughborough	2.2%
East Midlands	Kettering	1.8%
Yorkshire And The Humber	Grimsby	1.7%
East Midlands	Grantham	1.6%
South East	Milton Keynes	1.4%
West Midlands	Burton Upon Trent	1.4%
East Midlands	Skegness	1.3%
East Midlands	Newark	1.1%
East Midlands	Worksop	1.0%

## 4 Leisure Trips

Experian's lifestyle surveys with the Big Night Out question have a smaller print run than Where Britain Shops. Our catchment area maps and tables are based on a smaller response rate and therefore cover only 11 major towns from the East Midlands and 5 external centres. The methodology used to interpret the responses and convert the flows to catchment areas is the same as with the Where Britain Shops data.

### 4.1 COMMENTARY

In most cases, leisure catchment areas are more localised and do not reflect the wider retail catchments seen in that section, and are therefore leisure flow is far more localised than commuter flows. Commonly, the core penetration (50% of visitors) comes from one or two postal districts, covering only residents of that town. Since the catchment areas are so localised and have been mapped at postal district level, we do not recommend that their boundaries be used to make assumptions about inclusion or penetration of individual estates.

Two of the cities with the largest Big Night Out catchments in the East Midlands are Northampton and Nottingham, again mirroring their importance as destinations for commuter flows. Whilst these are still reduced compared to the Where Britain Shops retail catchments, they are relatively large considering the number of rival towns neighbouring them.

- Nottingham, with its mix of upmarket, student-themed and also value-based bars, pubs and clubs clearly benefits from having large populations in the surrounding area. Its Primary and Secondary catchments dominate the local area, with the Tertiary extending as far as Mansfield, Grantham and Loughborough. These towns have significant catchments in their own rights, which goes to prove Nottingham's impressive draw.
- Mansfield's catchment is compressed by its proximity to both Chesterfield and Nottingham. However, its Primary catchment is larger than expected of a relatively small market town, as the leisure offer in Sutton In Ashfield is poor and Mansfield's market town pub offer is enough to attract customers. The overall catchment also mirrors the surrounding road system, South West to Alfreton along the A38 and North East along Mansfield Road to Ollerton.
- The Loughborough catchment suffers from being caught between two of the biggest cities, in Nottingham and Leicester, and is also hemmed in by Melton Mowbray. The offer here, whilst enough to support a relatively affluent town, has a distinct student orientation and therefore is not enough to make a big impact into its neighbours.
- South of Loughborough, Leicester has a similar catchment to that of Nottingham. They display the almost "doughnut ring" look of a gravity modelled catchment, as they have the leisure offer to attract people from all of the surrounding area, and local competition does not have such an impact.
- To the West of Nottingham, Derby also has a sizeable catchment – neatly fitting between the M1 and the East Midlands boundary. These represent the impacts of Nottingham and West Midland conurbations like Stoke-on-Trent and Uttoxeter, despite Derby's reasonable leisure offer.
- Chesterfield also fits fairly neatly within the East Midlands boundary, as the catchment is constricted to the North by Sheffield, and to the West travel is restricted around the Peak District.

This trend is repeated for many of the Big Night Out catchments, where the East Midlands boundary replicates the extent of influence of the towns' catchments. To a degree, this is because the postal districts used to construct the catchments are very similar to the East Midlands boundary, but again demonstrates the appropriateness of the area as a government defined region.

- The Northampton catchment is another example of this as it fits in to the Southern tail of the region. As with Nottingham, the leisure offer found in the city is enough to create a large catchment taking in several other urban conurbations – including Towcester, Daventry, Kettering and Wellingborough.
- Kettering maintains an area you would expect for a town with its location and offer, drawing in people from the surrounding small towns and villages, but unable to make an impact on a wider scale. The Tertiary catchment does cover the Postal District in which Corby is located, due to its proximity and the A43.
- However, the distorted catchment of Corby also hints that the offer here is relatively poor. The Primary and Secondary are in effect the Postal Districts that encompass the town itself, and the Tertiary catchment is a very large District in to which the A427 provides a fast link. This District is clearly only included due to people going in to town from the villages, and should not be taken to mean that people travel regularly from Market Harborough.

The catchments along the South of the region are naturally influenced by towns and cities outside of the boundary, which is shown by the maps of Milton Keynes and Peterborough.

- Milton Keynes has an impressive, and growing, leisure offer, attracting people from a wide area. To the South this extends as far as Thame, Aylesbury and Dunstable, and it now draws from people from areas considered Primary territory for Northampton and Wellingborough.
- However only Milton Keynes' Tertiary catchment covers the East Midlands region – Peterborough is close enough, and has a good enough supply, for its Secondary catchment to overlap the region. This is partly due to the low level of competition in this area of the East Midlands.

A similar “penning in” of catchments is also seen to the North of the region:

- As has previously been mentioned, Sheffield exerts a great amount of influence over Chesterfield's catchment, as its Primary and Secondary catchments stretch down in to the East Midlands. This is a very large catchment area with one of the biggest Primary catchments, reflecting the level of leisure supply and also the good transport links to and around the city.
- In contrast, Manchester's sphere of influence does not impact the East Midlands. Whilst people will undoubtedly go there for one-off leisure trips, such as to see a band, visit a specific club, or even for a general Big Night Out, the trips are not regular enough to show up in Experian's surveys. This may be because of the difficulty in traversing the Peak District by car – the A roads providing adequate but not easy access.
- Also, on the Eastern coast, Grimsby sits just outside of the East Midlands boundary but has a catchment that leaks into the region. It is often considered an East Midlands town, but contributes to the outflow of leisure spend from the region.
- However, Grimsby's catchment overlaps with that of Lincoln, with the latter seemingly having the greater leisure pull. It has an unusually shaped Primary, but this is due more to postal geography than

the effect of competing centres, as the Secondary and Tertiary catchments extend out in all directions despite competing centres such as Skegness, Newark, and the aforementioned Grimsby.

- Boston also interacts with Lincoln, but has a very localised leisure offer. While the Primary demonstrates that the town retains local leisure spend, the effect of competing towns can clearly be seen on its Secondary and Tertiary catchments. The effect of Skegness to the North is not as pronounced as may be expected, as the Boston Tertiary is still evident there – Skegness is more of a national leisure “destination” rather than a local night out. The towns to the West however have more of an impact on Boston, resulting in the strangely shaped catchment.

## 4.2 LEAKAGE FROM THE EAST MIDLANDS

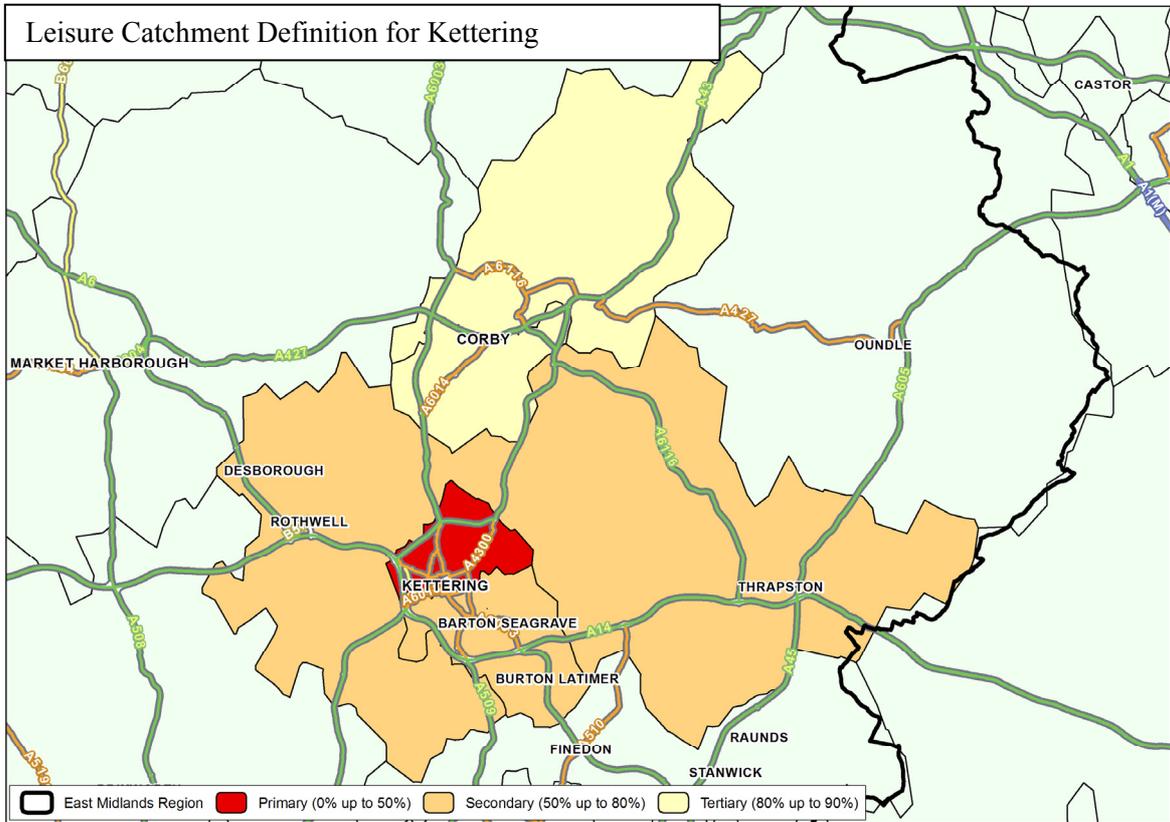
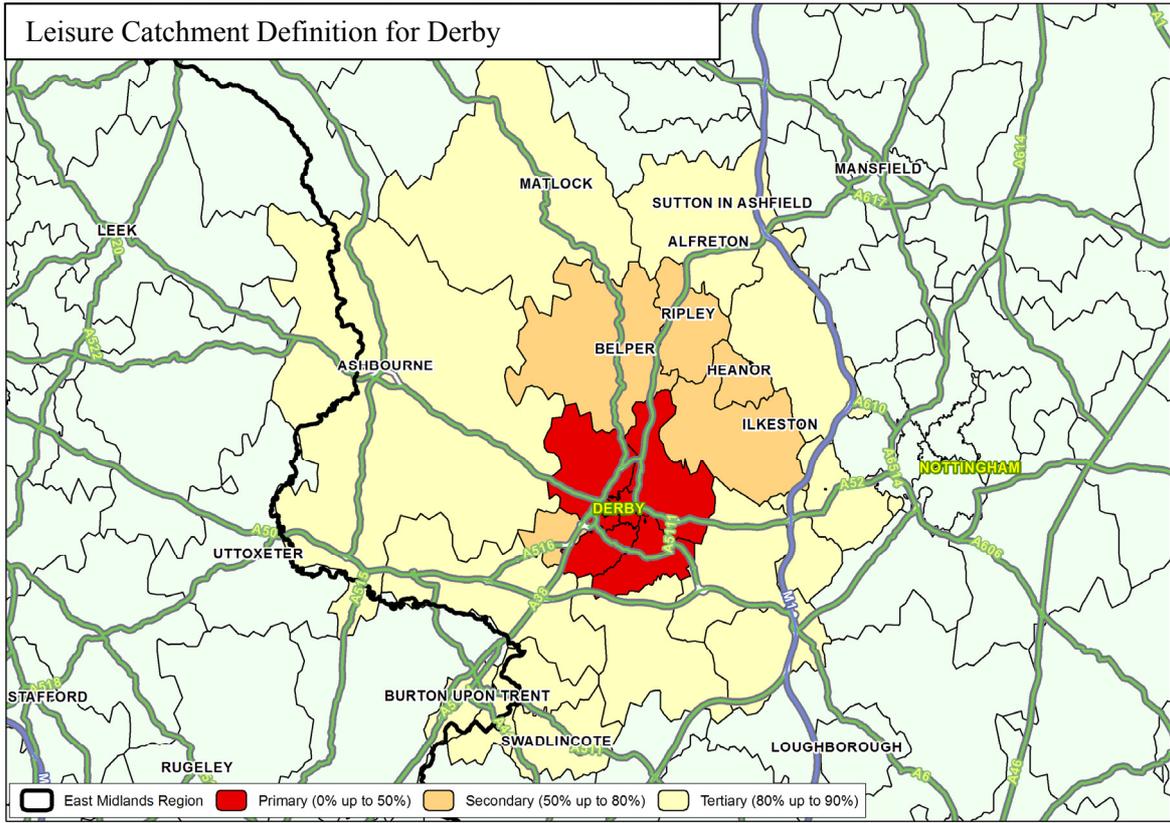
The table below shows the overall leisure flow of the East Midlands. As alluded to in the Commentary, leisure flow is a lot more localised than the shopper flow, and this is proved by 90.7% remaining within the East Midlands. Other regions which receive significant levels of flow border the region – such as Yorkshire And The Humber, East, and West Midlands. The major exception to this is London, which shows the capital draws people for a Big Night Out from all over the country.

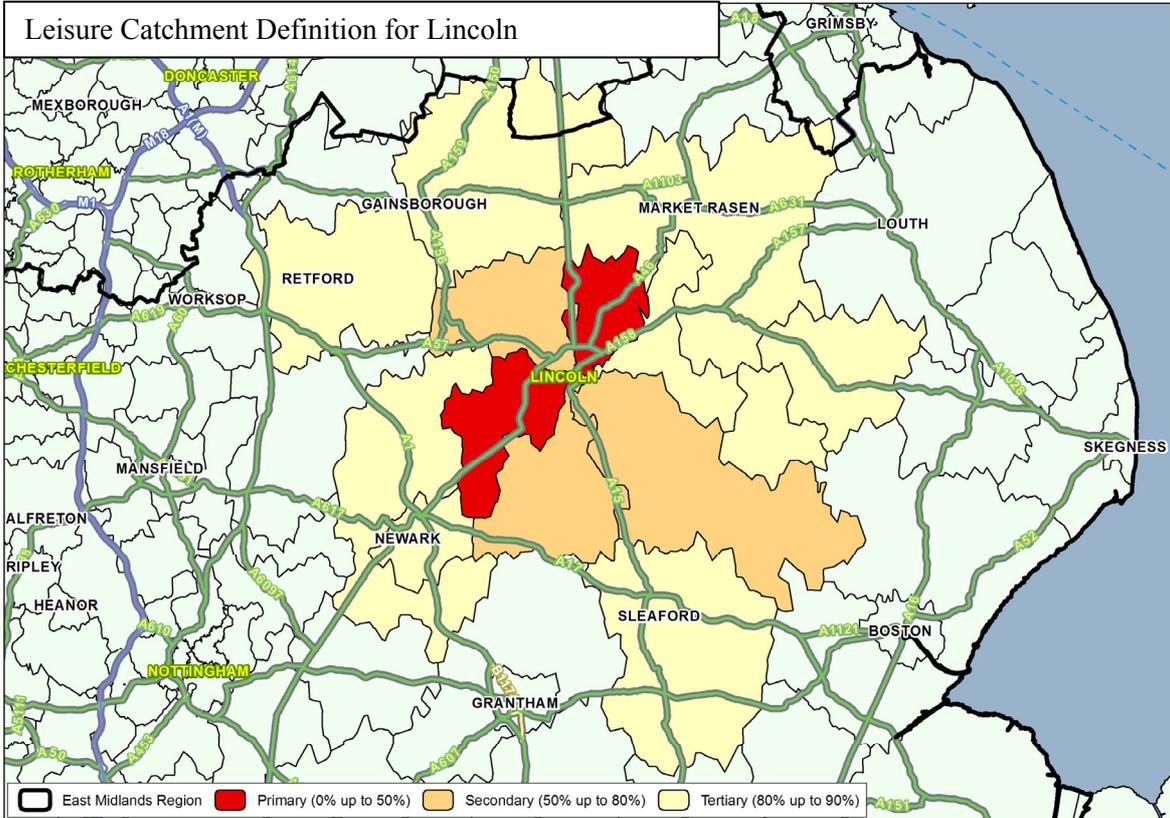
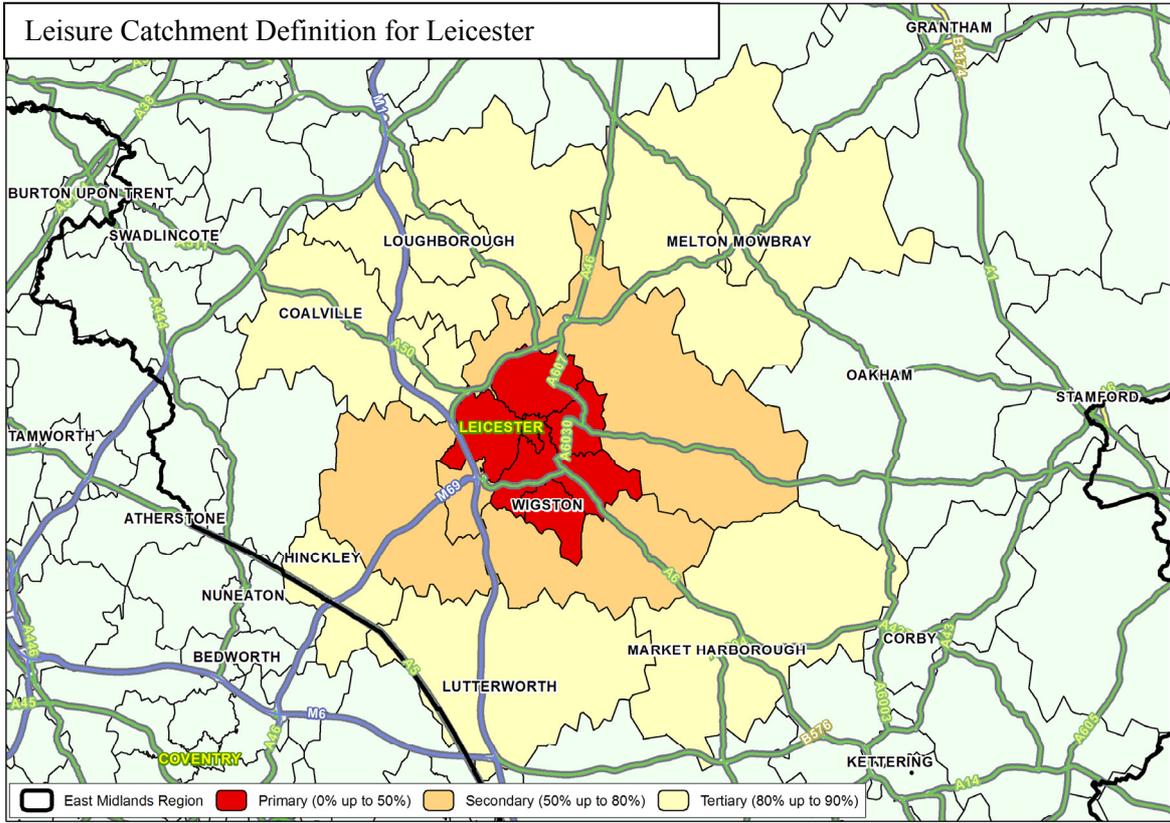
<b>Government Office Region</b>	<b>%age Flow</b>
East Midlands	90.7%
Yorkshire And The Humber	3.6%
East	2.0%
London	1.1%
West Midlands	1.1%
North West	0.7%
South East	0.7%

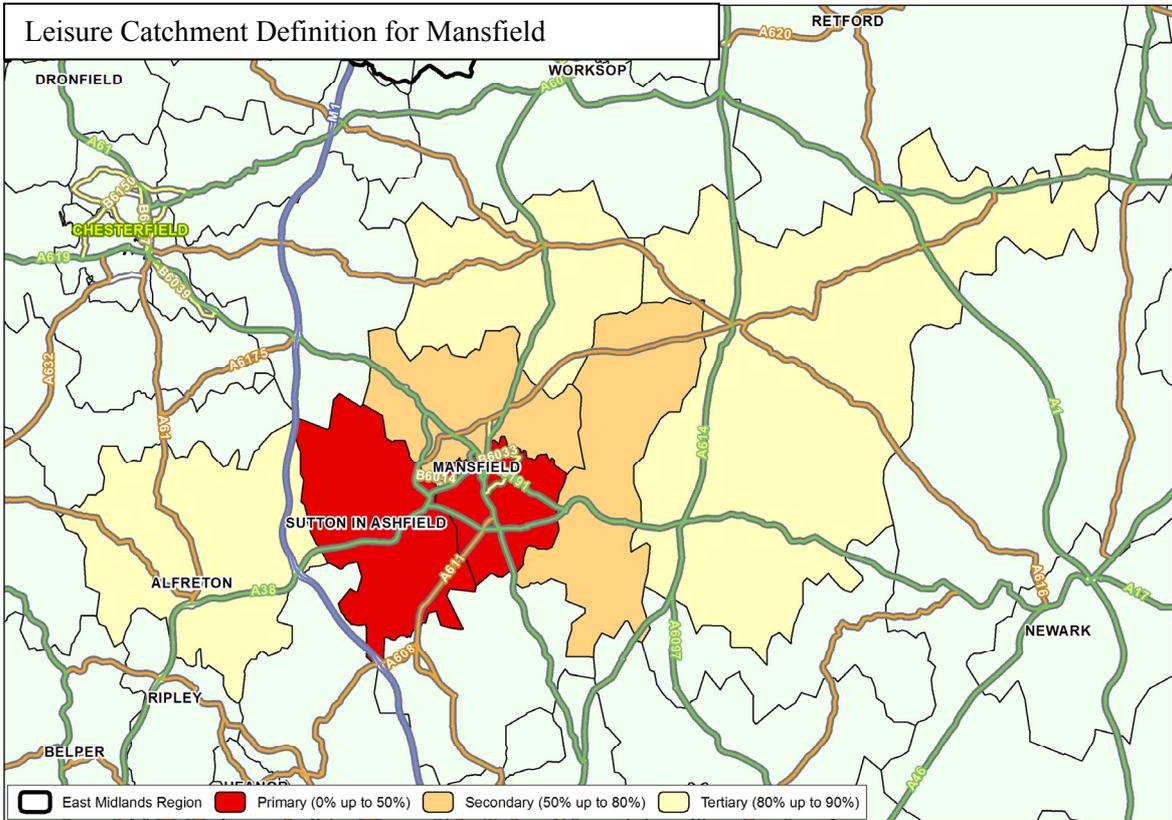
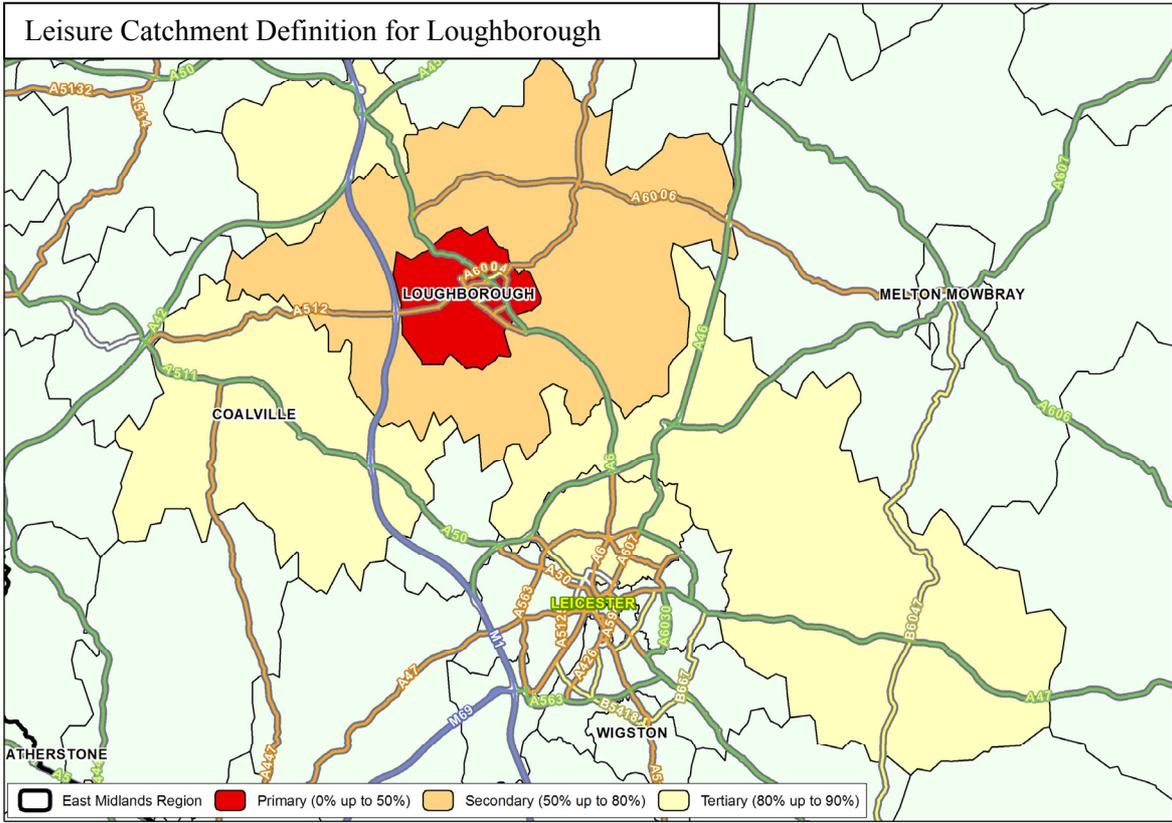
These flows can be broken down by individual Leisure Destination. As discussed, Sheffield attracts a significant amount of flow away from the East Midlands and rivals the region's small towns in terms of overall flow. Peterborough attains a significant amount of flow due to its proximity to the East Midlands boundary, and London again is shown to be a major draw from the region.

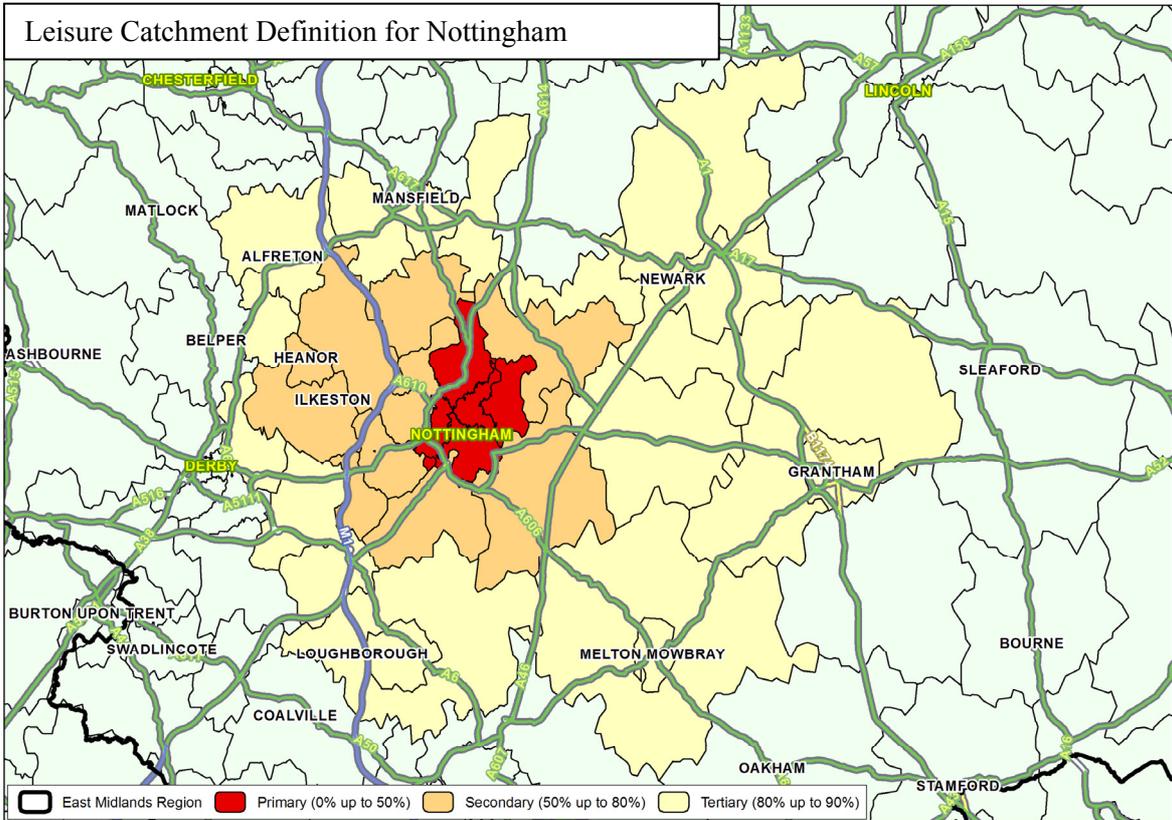
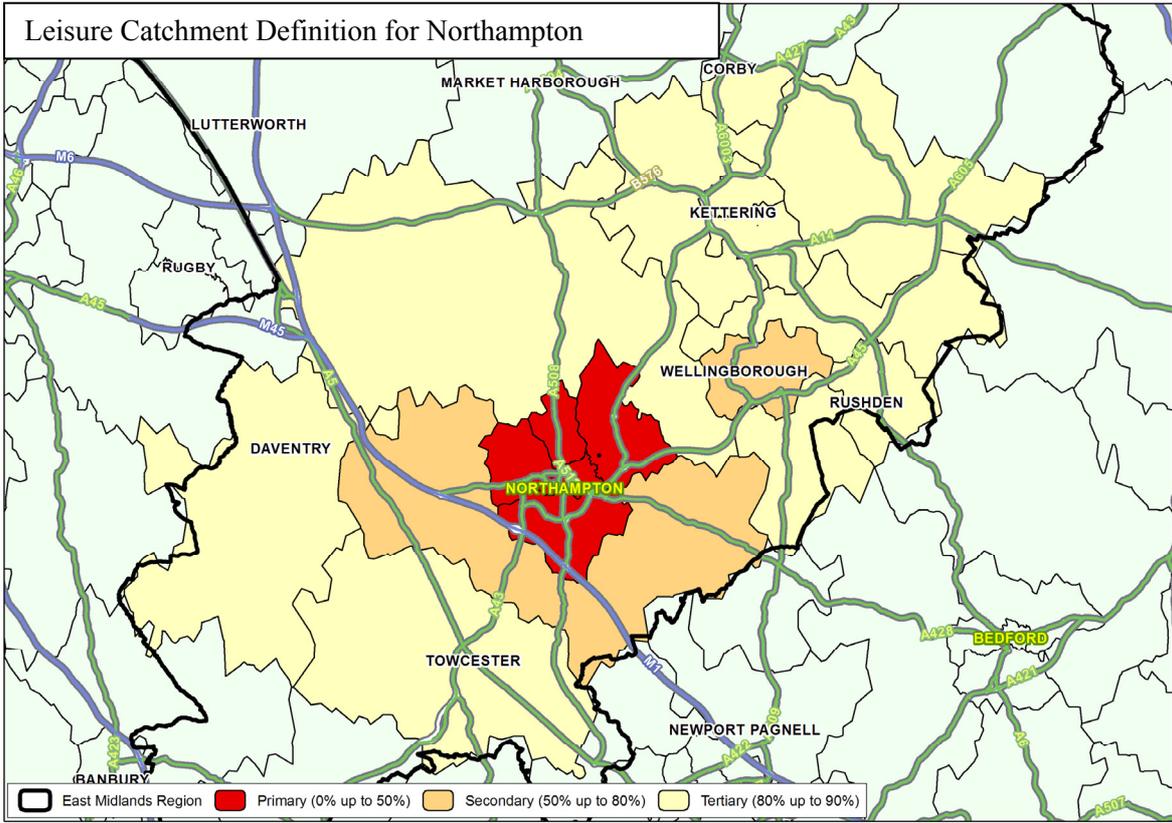
<b>Government Office Region</b>	<b>Leisure Destination</b>	<b>%age Flow</b>
East Midlands	Leicester	18.0%
East Midlands	Nottingham	17.9%
East Midlands	Derby	9.6%
East Midlands	Lincoln	7.9%
East Midlands	Chesterfield	6.2%
East Midlands	Northampton	5.2%
East Midlands	Mansfield	5.1%
Yorkshire And The Humber	Sheffield	2.1%
East Midlands	Boston	1.8%
East Midlands	Kettering	1.5%
East	Peterborough	1.5%
East Midlands	Stamford	1.4%
East Midlands	Grantham	1.4%
East Midlands	Loughborough	1.3%
East Midlands	Skegness	1.2%
London	London	1.1%
East Midlands	Newark	1.0%



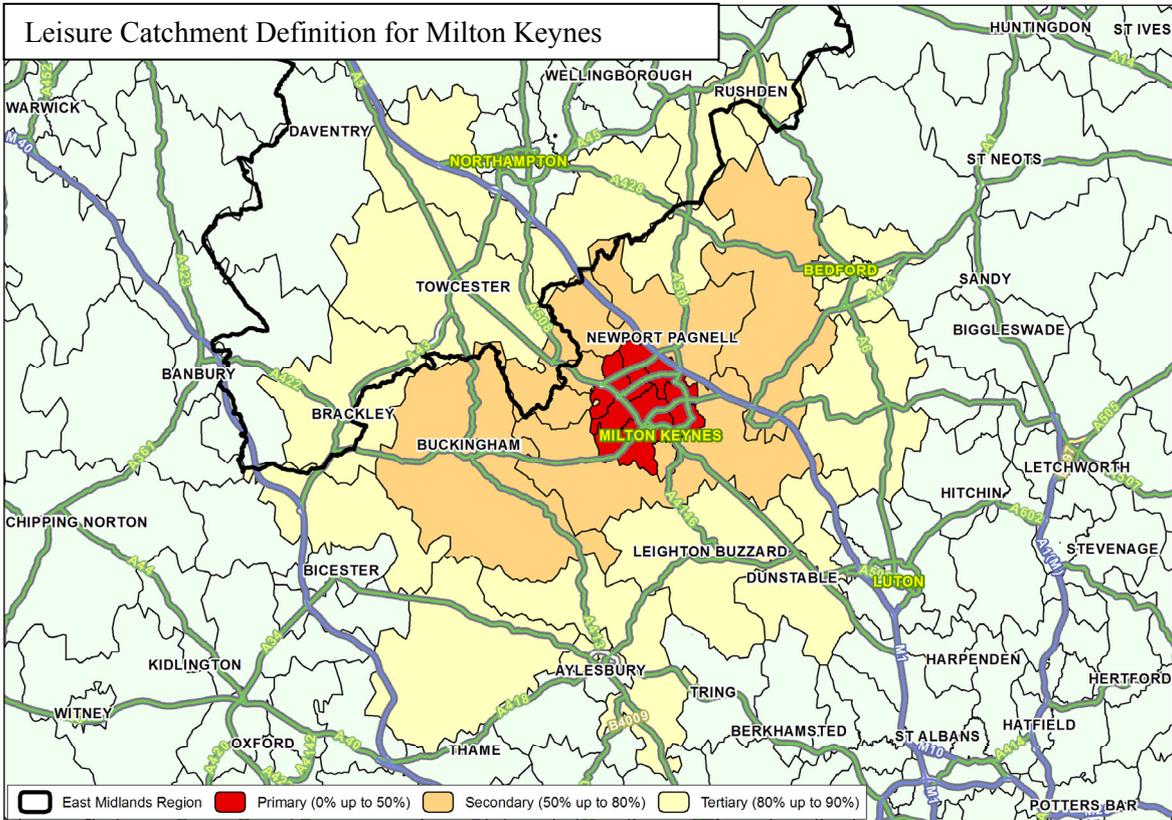
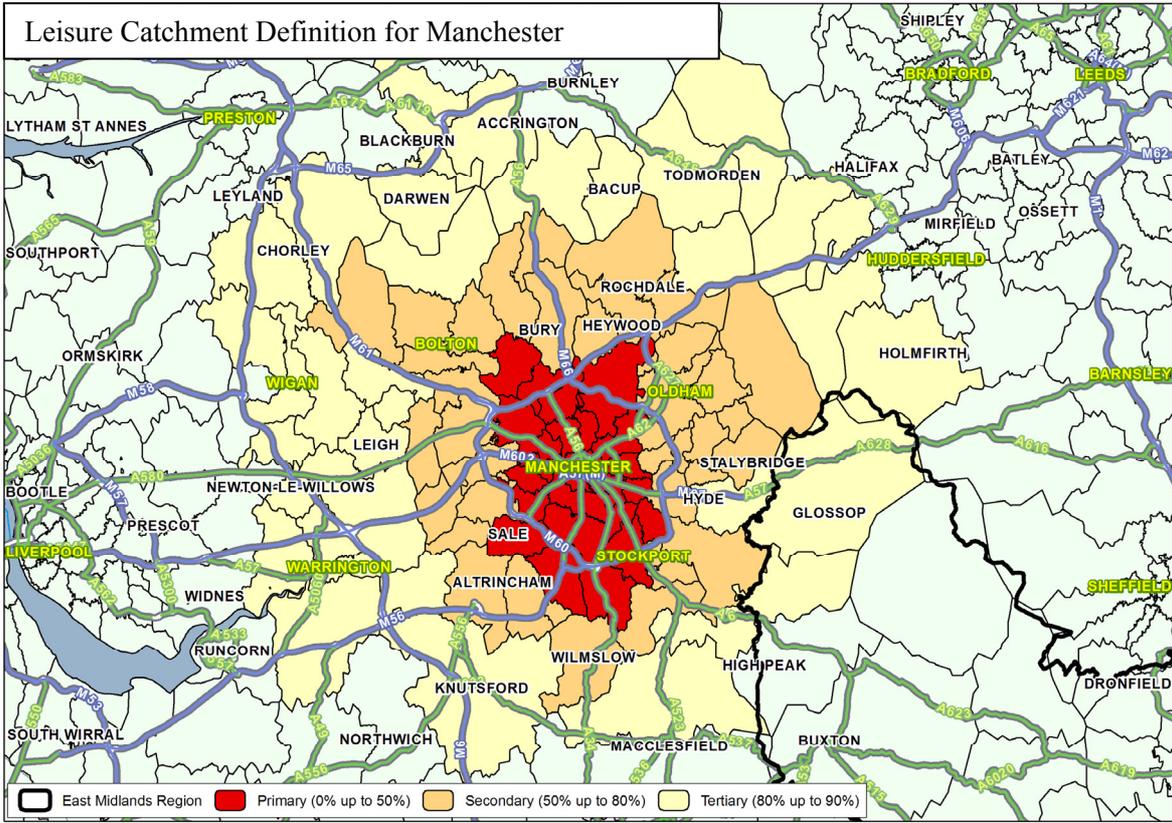


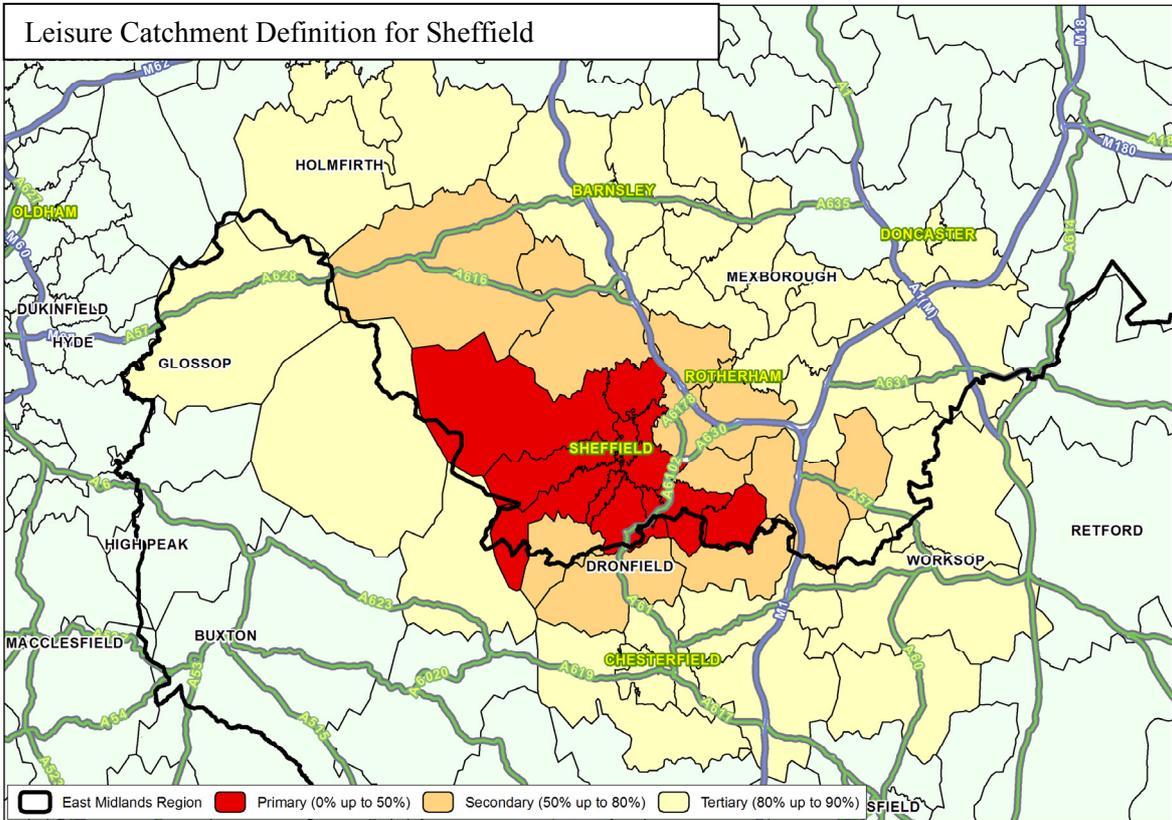
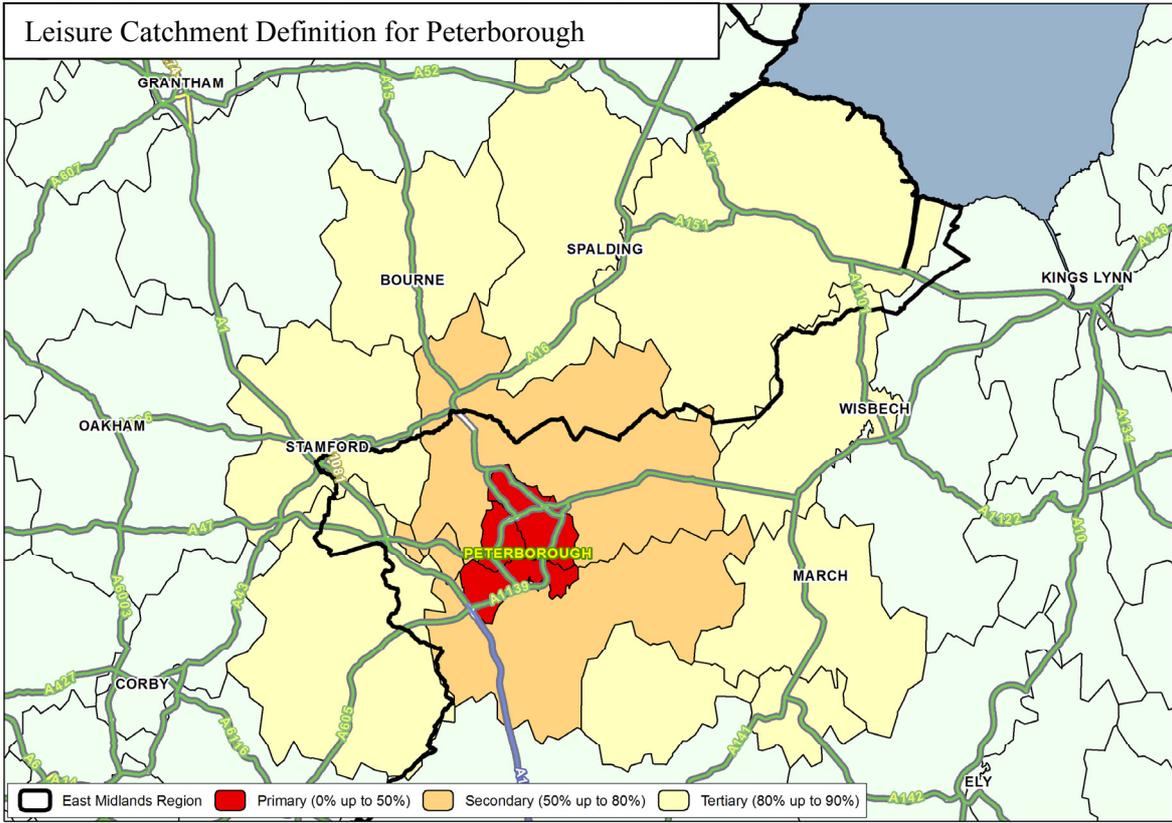












# 5 Appendices

## 5.1 ABOUT EXPERIAN

Experian is a global leader in providing information solutions to organisations and consumers. It helps organisations find, develop and manage profitable customer relationships by providing information, decision-making solutions and processing services. It empowers consumers to understand, manage and protect their personal information and assets. Experian works with more than 50,000 clients across diverse industries, including financial services, telecommunications, healthcare, insurance, retail and catalogue, automotive, manufacturing, leisure, utilities, e-commerce, property and government. Experian has headquarters in Nottingham, UK, and Costa Mesa, California. Its 12,000 people in 27 countries support clients in more than 60 countries. Annual sales exceed £1.3 billion.

For more information, visit the company's website at <http://www.experian.com/>

Experian's Business Strategies division is an established provider of retail research for both the public and private sector. It has a history of producing bespoke consultancy for retailers and for property investors, developers and managers. Its range of work spans pan-urban studies, on cities including London, Glasgow and Dublin; town centre regeneration, such as assessing the impact of the Washington Galleries expansion; and pioneering analysis of the potential in smaller towns, such as Barnsley, Scarborough and Stanley.