Nathaniel Lichfield & Partners
Planning. Design. Economics.

Retail Update 2013

Retail and Town Centre Uses Study

Colchester Borough Council

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Registered Office:
14 Regent's Wharf
All Saints Street
London N1 9RL

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Appendices

1.0 Introduction

1.1 Nathaniel Lichfield & Partners (NLP) has been commissioned by Colchester Borough Council to prepare a Retail Study Update. This study updates and supersedes the findings of the North Essex Authorities Retail Study (GVA – 2006) and the North Essex Retail Capacity Update Colchester Borough Council (GVA Grimley - 2009).

1.2 The key objectives of the Retail Study Update will be to provide a robust and credible evidence base to inform the Council's work on the next stages of the Local Development Plan preparation, taking into account changes since the previous study. The objectives of the study are to:

1. assess changes in circumstances and shopping patterns since the 2006 study was undertaken;
2. assess the future need and (residual) capacity for retail floorspace within Colchester, Mersea and Tiptree in the period up to 2026 in both quantitative and qualitative terms.

1.3 This report provides a further update, identifying recent changes and trends in retail planning, including the National Planning Policy Framework (NPPF) and provides an update of the retail capacity assessment based on the latest available information, e.g. population, expenditure and turnover levels. This report includes an update of the household survey for the Colchester part of the North Essex study area.

1.4 Section 2 of this report summarises recent relevant changes to the retail capacity assessments and outlines retail trends. Section 3 summarises the retail hierarchy and provides an audit of the existing centres in Colchester Borough. Section 4 sets out the updated retail capacity and quantitative need assessment. Section 5 reassesses the scope for accommodating growth. Section 6 provides the recommendations and conclusions.

2.0 Recent Changes and Trends

The Need for the Study Update

2.1 The previous retail study (2006) and update (2009) provided projections up to 2024 and these figures now need to be updated.

2.2 Central government guidance has been replaced by the NPPF and this will have implications for plan making and development control decisions.

The National Planning Policy Framework

2.3 The 2009 study update was based on the guidance set out in PPS6: 'Planning for Town Centres' published in 2005. This guidance has now been superseded by the NPPF published by the Department for Communities and Local Government on 27 March 2012. It sets out the Government's planning policies for England and replaces all previously issued Planning Policy Statements (PPSs) and Planning Policy Guidance Notes (PPGs) with a single national planning policy document.

2.4 At the heart of the NPPF is a presumption in favour of sustainable development, which should be seen as a golden thread running through both plan-making and decision-taking. In terms of plan-making this means that (para. 14):

- Local planning authorities should positively seek opportunities to meet development needs of their area;
- Local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change, unless:
  - any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as a whole; or
  - specific policies in this Framework indicate development should be restricted.

2.5 All plans should be based upon and reflect the presumption in favour of sustainable development, with clear policies that will guide how the presumption should be applied locally (para. 15).

2.6 A set of 12 core land-use planning principles should underpin both plan-making and decision-taking (para. 17), including:

- proactively drive and support sustainable economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. Every effort should be made objectively to meet the needs of an area, and respond positively to wider opportunities for growth. Plans should take account of market signals, such as land prices and housing affordability, and set out a clear strategy for allocating sufficient land which is suitable for development in their area, taking account of the needs of residential and business communities;

- take account of the different roles and character of different areas, promoting the vitality of main urban areas;
- encourage the effective use of land by reusing land that has been previously developed (brownfield land), provided that it is not of high environmental value.

2.7 Local Planning Authorities should plan proactively to meet the development needs of business and support an economy fit for the 21st century (para. 20).

2.8 In terms of plan making, the NPPF (para. 161) states that Local Planning Authorities should use their evidence base to assess:

- the need for land or floorspace for economic development, including both quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including retail and leisure development.
- the role and function of town centres and the relationship between them, including any trends in the performance of centres.
- the capacity of existing centres to accommodate new development.

2.9 In terms of retail development, the NPPF states (para. 23) that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, local planning authorities should:

- recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;

- allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and
- where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

2.10 Applications for retail and town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan will be assessed against NPPF policies and the key sequential and impact tests.

2.11 In terms of the sequential test, the policy requirements are largely unchanged. Applications for main town centre uses should be located in town centres, then in edge of centre locations and only if suitable sites are not available should out of centre sites be considered. When considering edge and out of centre proposals, preference should be given to accessible sites that are well connected to the town centre. Both applicants and local planning authorities should demonstrate flexibility on issues such as format and scale (para. 24).

2.12 The NPPF states that Local Planning Authorities should require an impact assessment for applications for retail, leisure and office development outside of town centres, which are not in accordance with an up-to-date development plan and are over a proportionate, locally set floorspace threshold. If there is not a locally set threshold, the default threshold is 2,500 sq.m (para. 26). This should include an assessment of:

- the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and
- the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, the impact should be assessed up to ten years from the time the application is made.

2.13 Where an application fails to satisfy the sequential test <u>or</u> is likely to have a significant adverse impact on one of more of the above factors, it should be refused (para. 27).

The Economic Downturn

2.14 The economic downturn is still having a significant impact on the retail sector. A number of national operators have failed, leaving major voids within centres and retail parks (e.g. Comet, Jessops, HMV, JJB Sports, Borders, Clinton Cards, Woolworths, MFI, Land of Leather, Game, Firetrap, Peacocks, La Senza, Past Times, Barratts and Habitat). Many town centre development schemes have been delayed and the demand for traditional retail warehouse operators has also been affected. Even some of the main food store operators have seen a reduction in growth.

2.15 Projecting expenditure levels within this study update takes into account the economic downturn, particularly in the short term. Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the Local Plan period. This study takes a long term view for the Local Plan period recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency will also need to be carefully considered. We believe the study should take a balanced approach.

Retail Trends

2.16 A revised assessment of the need for retail facilities in Colchester Borough is set out in Section 4 of this report. This section provides an overview of national tends within the retail sector.

Retail Spending

2.17 Past retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future. However, the current economic downturn is expected to lead to limited growth over the next few years.

2.18 In the past expenditure growth has fuelled the growth in retail floorspace, including major out-of-centre development particularly in the 1980s and 1990s. The economic downturn suggests that recent rates of growth during the past few years are unlikely to be achieved in the short term. However, the underlying trend over the medium and long terms is expected to lead to a need for further retail floorspace. We anticipate these wider trends will be mirrored in Colchester.

Forms of Retailing

2.19 New forms of retailing have emerged in recent years as an alternative to more traditional shopping facilities. Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the internet. Trends within this sector may well have implications for retailing within Colchester. The growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Colchester includes rural areas where access to retail facilities is limited and we would anticipate that home shopping will be high, and therefore growth in home shopping needs to be considered.

2.20 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains an insignificant percentage of total retail expenditure (Experian Briefing Note 10, Sept 2012). Recent trends suggest continued strong growth in this sector, from 4.7% of retail transactions in 2008 to nearly 9% in 2012 (Experian Briefing Note 10), but there is still uncertainty about its longer-term prospects and the potential effects on the high street. Experian's figures suggest that the growth in e-tailing has to a certain extent been at the expense of other forms of home shopping such as catalogue and mail order shopping. Experian's Retail Planning Note 10 states:

"Non-store retailing continues to grow rapidly, despite the tough retail environment. We retain our assumption that non-store retailing will increase at a faster pace than total retail sales well into the medium term. It is estimated that 85% of the UK adult population were internet users at the end of 2011, so growth of the internet user base will be less of a driver than in the past decade. But growth momentum will be sustained as new technology such as browsing and purchasing through mobile phones and the development of interactive TV shopping boost internet retailing. We now expect that the SFT market share will continue to increase over the forecast period, although the pace of e-commerce growth will moderate markedly after about 2020. Our new forecast has the SFT share of total retail sales reaching 17.4% by 2020 (15.4% in Retail Planner Briefing Note 9 of September 2011), rising to 20% by the end of the 2020s (15.5% previously)."

2.21 This study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

2.22 The implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators. Therefore, growth in on-line sales may not always mean there is a reduction in the need for retail floorspace. Given the uncertainties relating to internet shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure.

2.23 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. For example, extended opening hours and Sunday trading increased significantly in the 1990s. Retailers also responded to stricter planning controls by changing their trading formats to include smaller store formats capable of being accommodated within town centres (such as the Tesco Metro, Sainsbury Central/Local store and Marks and Spencer's Simply Foods formats). The main food store operators have also increasingly sought representation in small towns in predominantly rural areas. The expansion of European discount food operators Aldi and Lidl has also been rapid during the last decade.

2.24 Food store operators have also had a recent programme of store extensions, particularly Tesco, Sainsbury and Asda. These operators, faced with limited growth in food expenditure, have often increased the sale of non-food products within their food stores, including clothing and electrical goods. The recent recession has though first halted this trend, and is now reversing it.

2.25 Comparison retailers have also responded to market conditions. The bulky goods warehouse sector has rationalised, including a number of mergers and failures, and scaled down store sizes. Other traditional high street retailers often seek large out-of-centre stores, for example Boots, TK Maxx and Poundstretcher. Matalan has also opened numerous discount clothing stores across Great Britain. Sports clothing retail warehouses including Decathlon have also expanded out-of-centre.

2.26 Within town centres, many high street multiple comparison retailers have changed their format. High street national multiples have increasingly sought larger modern shop units (over 200 sq.m - 2,150 sq.ft) with an increasing polarisation of activity into the larger regional and sub-regional centres.

2.27 As noted above, the economic downturn has had, and is likely to continue to have, an impact on the retail sector. Many town centre development schemes have been delayed and the demand from traditional retail warehouse operators has also been affected. Even some of the main food store operators have seen a reduction in growth.

2.28 Factory Outlet Centres continue to offer a distinct retail mix, focused around providing branded goods at discounted prices. Due to the specialist nature of factory outlets their catchments tend to cover a large geographical area as shoppers are willing to travel considerable distances for the unique retail offer.

2.29 The continuation of these trends may also influence future operator requirements in Colchester Borough. Multiple retailers are likely to prefer to locate in larger centres. As the largest centre in the Borough, Colchester town centre will have better prospects for attracting multiple retailers than other centres in the Borough.

3.0 The Shopping Hierarchy and Audit of Centres

3.1 This section considers the shopping hierarchy in the borough and the surrounding study area, before outlining existing retail provision in the borough's main settlements of Colchester, West Mersea, Tiptree and Wivenhoe.

Shopping Hierarchy

3.2 The Core Strategy (Table CE1a) sets out the classification and hierarchy of centres within the Borough. Colchester town centre is at the top of the hierarchy. The Core Strategy identifies three "rural district centre" at Tiptree, West Mersea and Wivenhoe. Within Colchester urban area five "urban district centres" are identified in the Core Strategy, i.e. Highwoods, Tollgate, Peartree Road, Greenstead Road and Turner Rise. Neighbourhood centres and local shops are at the bottom of the hierarchy.

3.3 Colchester competes with other centres in the wider sub-region, in particular Ipswich to the north, Braintree to the west and Chelmsford to the south west. Management Horizon Europe's UK Shopping Index 2008 ranks retail centres across the country. While this data is somewhat dated, it remains the most up to date national ranking of centres available. It should therefore be viewed in the context that the data will not take account of recent changes that may affect rankings. Management Horizon's rank for centres in Colchester and nearby centres outside the borough is shown in Table 3.1 overleaf.

3.4 The MHE score does not necessarily reflect the overall size of the town centre or the number of shops, but the presence of national multiples and the relative draw and importance that stores have. Each centre is given a weighted score which takes account of its provision of multiple retailers and anchor store strengths. For example, anchor department stores such as John Lewis or Debenhams receive a higher score (10) than other multiple operators such as H&M (3) in order to reflect their major influence on non-food shopping patterns.

3.5 A location which has stronger retailers which attract more visitors to the centre and have a greater influence on shopping patterns will receive a higher score than those that do not. Towns with a higher number of independent shops may have a low MHE score in relation to their overall size because of the weight that is given to national multiple retailers and their influence on shopping patterns.

3.6 Based on MHE's scores, Colchester town centre clearly the dominant comparison shopping centre in the Borough, with all other centres ranking no higher than a "minor district" centre, reflecting their local role and function in comparison with other larger centres in the sub-region.

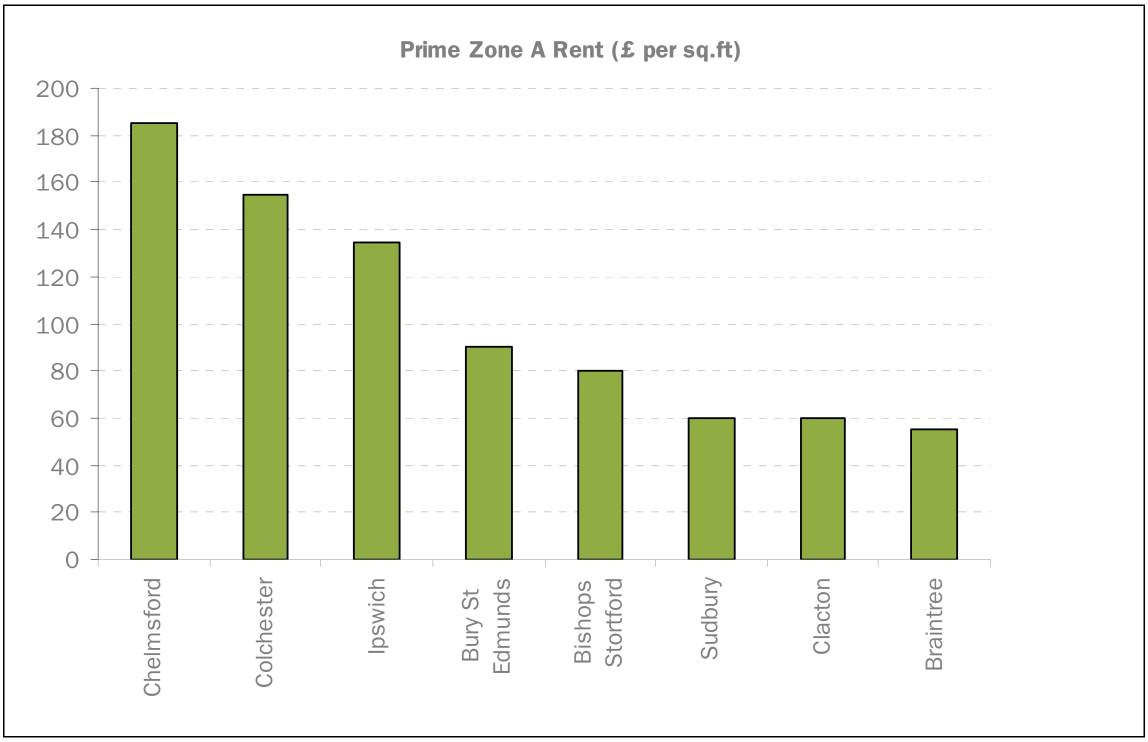
Table 3.1: Management Horizons Europe Shopping Index (2008)

Centre	Rank	MHE Score	Classification
Ipswich	50	264	Major Regional
Colchester	**59**	**247**	**Regional**
Lakeside	65	242	Regional
Chelmsford	114	194	Regional
Lakeside Retail Park	143	176	Sub-Regional
Bishops Stortford	210	133	Sub-Regional
Bury St Edmunds	221	127	Major District
Sudbury	309	101	Major District
Braintree	343	93	Major District
Clacton	399	83	District
Haverhill	835	43	Minor District
Tollgate Retail Park	**874**	**41**	**Minor District**
Maldon	1,095	33	Minor District
Stanway (incl. Peartree Road)	**1,660**	**21**	**Local**
Tiptree	**1,950**	**17**	**Local**
Shrub End	**3,321**	**17**	**Minor Local**
Wivenhoe	**3,575**	**6**	**Minor Local**
West Mersea	**4,226**	**4**	**Minor Local**

*Source: Management Horizon Europe 2008 (**Bold** indicates centres within Colchester Borough)*

3.7 The relative performance and importance of town centres can be demonstrated by reviewing commercial property values for example Zone A rental levels achieved for retail property. Colchester is the only centre in the Borough where information is available from Colliers CRE on prime Zone A rent figures (£155 per sq.ft). The retail rents are higher in Chelmsford (£185 per sq.ft) but lower in Ipswich (£135 per sq.ft). These figures indicate that commercial property values are reasonably buoyant in Colchester town centre, which should assist the viability of new development in the future. Prime retail rents for selected centres are shown in Figure 3.1.

Figure 3.1 Retail Zone A Rents



Source: Colliers CRE (2010)

Audit of Centres

Colchester Town Centre

3.8 Colchester is classified as a town centre in the adopted Core Strategy (Policy CE2). It is the largest centre within Colchester Borough and one of the largest centres in Essex. Colchester fulfils an important role as the administrative centre of the borough, supporting a range of retail, service and community facilities.

Diversity of Uses

3.9 The most recent Experian GOAD plan for Colchester was prepared in January 2012, and identifies that Colchester has 619 ground floor units within retail and service uses occupying 126,850 sq.m gross floorspace.

3.10 Tables 3.2 and 3.3 below illustrate the diversity of uses present in Colchester in January 2012, compared against the national average (GOAD, June 2012).

Table 3.2: Colchester Town Centre Retail Composition by no. of units

	No. of Units	% of Units	
	2012	2012	UK Ave.
Convenience	39	6.3%	8.5%
Comparison	281	45.4%	41.4%
Service	225	36.3%	35.3%
Vacant	74	12.0%	13.7%
Total	**619**	**100.0%**	**100.0%**

Table 3.3: Colchester Town Centre Composition by floorspace

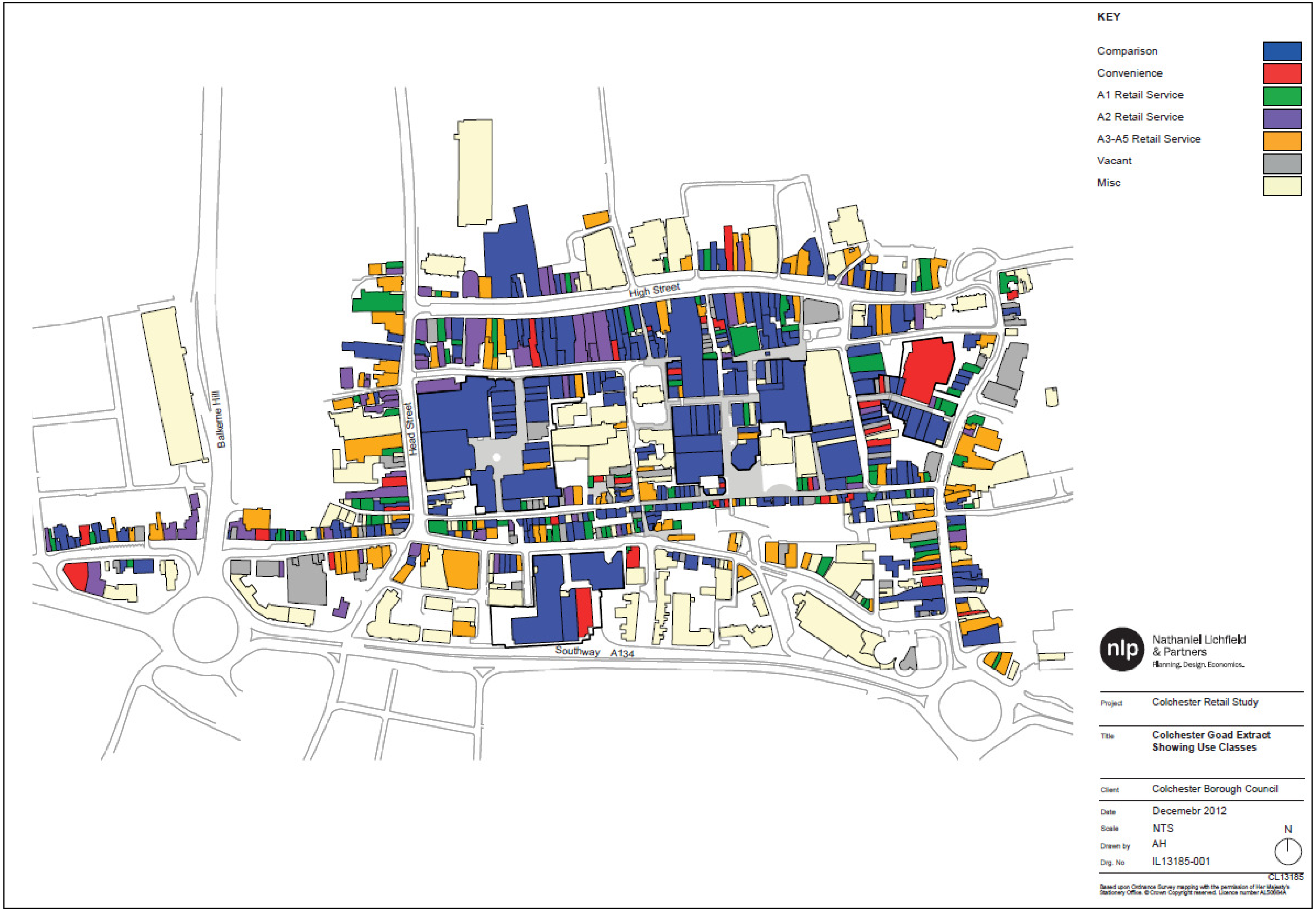
Gross Floorspace	sq.m	%	UK Ave. %
Convenience	8,830	6.9%	17.1%
Comparison	84,800	66.9%	46.5%
Service	23,540	18.6%	24.4%
Vacant	9,680	7.6%	12.0%
Total	**126,850**	**100.0%**	**100.0%**

Source: *Goad January 2012*
UK Average sourced from GOAD (June 2012)

3.11 The proportion of convenience units and convenience floorspace is below the national average, despite the presence of three medium sized food stores in the town centre operated by Tesco, Marks & Spencer and Sainsbury's. Convenience floorspace within the centre accounts for 6.9% of all retail and service floorspace within the centre, compared to a national average of 17.1%. Health food shops are well represented in the centre with six outlets and there is a good mix of other convenience facilities.

3.12 Comparison representation in the centre is around 45.4% of all units, which is slightly higher than the national average. Of these units about 21% are occupied by clothing retailers which is well above the national average of 9.0%. Around 7% of units are charity shops. Consistent with its position in the retail hierarchy, the proportion of comparison goods floorspace within the centre is significantly higher than the national average, largely due to the presence of a number of department stores.

3.13 In addition to the 225 retail service uses (non convenience and comparison A1 uses, A2, A4 and A5 uses), Colchester also comprises a further 78 ground floor uses which are occupied by a range of entertainment and community facilities which contribute to the vitality and viability of the centre. Community facilities include a library, museums, town hall and medical/health facilities, whilst entertainment uses include a range of bookmakers, pubs, bars and nightclubs.



High Street
Balkerne Hill
Head Street
Southway
A134
KEY
Comparison
Convenience
A1 Retail Service
A2 Retail Service
A3-A5 Retail Service
Vacant
Misc
nlp
Nathaniel Lichfield & Partners
Planning. Design. Economics.
Project
Colchester Retail Study
Title
Colchester Goad Extract Showing Use Classes
Client
Colchester Borough Council
Date
Decemebr 2012
Scale
NTS
Drawn by
AH
Drg. No
IL13185-001
N
CL13185

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Retailer Representation

3.14 It is considered that Colchester has a excellent range of national multiples represented, across both the comparison and convenience categories with two of the 'big four' food store operators and an M&S located within the centre and major comparison retailers including Debenhams, William & Griffin (a Fenwick Department Store), H&M, Next, Boots, Superdrug, Argos, WH Smith, Carphone Warehouse and H Samuel. This indicates the attractiveness of the town to major retailers.

3.15 We are not aware of any current proposals or firm commercial interest from any other retailers not currently represented in Colchester, seeking representation in the town. We are, however, aware of proposals from William & Griffin for the redevelopment and expansion of their current store, while the Debenhams has undergone and the M&S is currently undergoing revamping.

Vacancies

3.16 It can be seen from Table 3.2 that the vacancy rate within the centre is 12.0% of units which is below the national average of 13.7%. However, in terms of vacant floorspace, at 7.6% this is significantly below the national average of 12%. This implies that the majority of vacant units are created by smaller retailers with the average size of the unit being around 42 sq.m.

3.17 Consideration has been given to the nature of the vacant units and the distribution across the centre. Whilst the vacant units are generally dispersed throughout the centre, the GOAD survey identifies seven vacant units along the east part of Crouch Street with the majority of these being long term vacancies. There are also six vacant units in close proximity located on the north-eastern frontage of centre. This could indicate weakness in these parts of the centre.

West Mersea

3.18 West Mersea is classified as a rural district centre in the adopted Core Strategy (Policy CE2). West Mersea provides an important range of shopping, services and facilities to the Island of Mersea.

Diversity of Uses

3.19 A site survey for West Mersea was performed by NLP in September 2012. The survey recorded the shops present on the main High Street and the surrounding area. It identified that West Mersea has 32 ground floor units within retail and service uses occupying 2,559 sq.m gross floorspace.

3.20 Tables 3.4 and 3.5 below illustrate the diversity of uses present in West Mersea in September 2012, compared against the national average (GOAD, June 2012).

Table 3.4: West Mersea District Centre Retail Composition by no. of units

	No. of Units	% of Units	
	2012	2012	UK Ave.
Convenience	9	28.1%	8.5%
Comparison	10	31.3%	41.4%
Service	11	34.4%	35.3%
Vacant	2	6.2%	13.7%
Total	**32**	**100.0%**	**100.0%**

Table 3.5: West Mersea District Centre Composition by floorspace

Gross Floorspace	sq.m	%	UK Ave. %
Convenience	1,368	53.4%	17.1%
Comparison	631	24.7%	46.5%
Service	462	18.1%	24.4%
Vacant	98	3.8%	12.0%
Total	**2,559**	**100.0%**	**100.0%**

Source: *NLP Site Survey September 2012*
UK Average sourced from GOAD (June 2012)

3.21 Convenience uses in West Mersea are above the national average in terms of number of units which is to be expected for the role performed by the centre. Due to the presence of one medium sized Co-op and a Tesco Express in the district centre, the proportion of floorspace used for the sale of convenience goods is also significantly higher than the national average. Convenience floorspace within the centre accounts for 53.4% of all retail and service floorspace within the centre, compared to a national average of 17.1%.

3.22 Comparison representation in the centre is around 24.6% of all units, which is less than the national average. Most of the comparison shops provide day to day goods only, rather than higher order goods such as clothing.

3.23 In addition to the 11 retail service uses, West Mersea also provides a library and community centre.

Retailer Representation

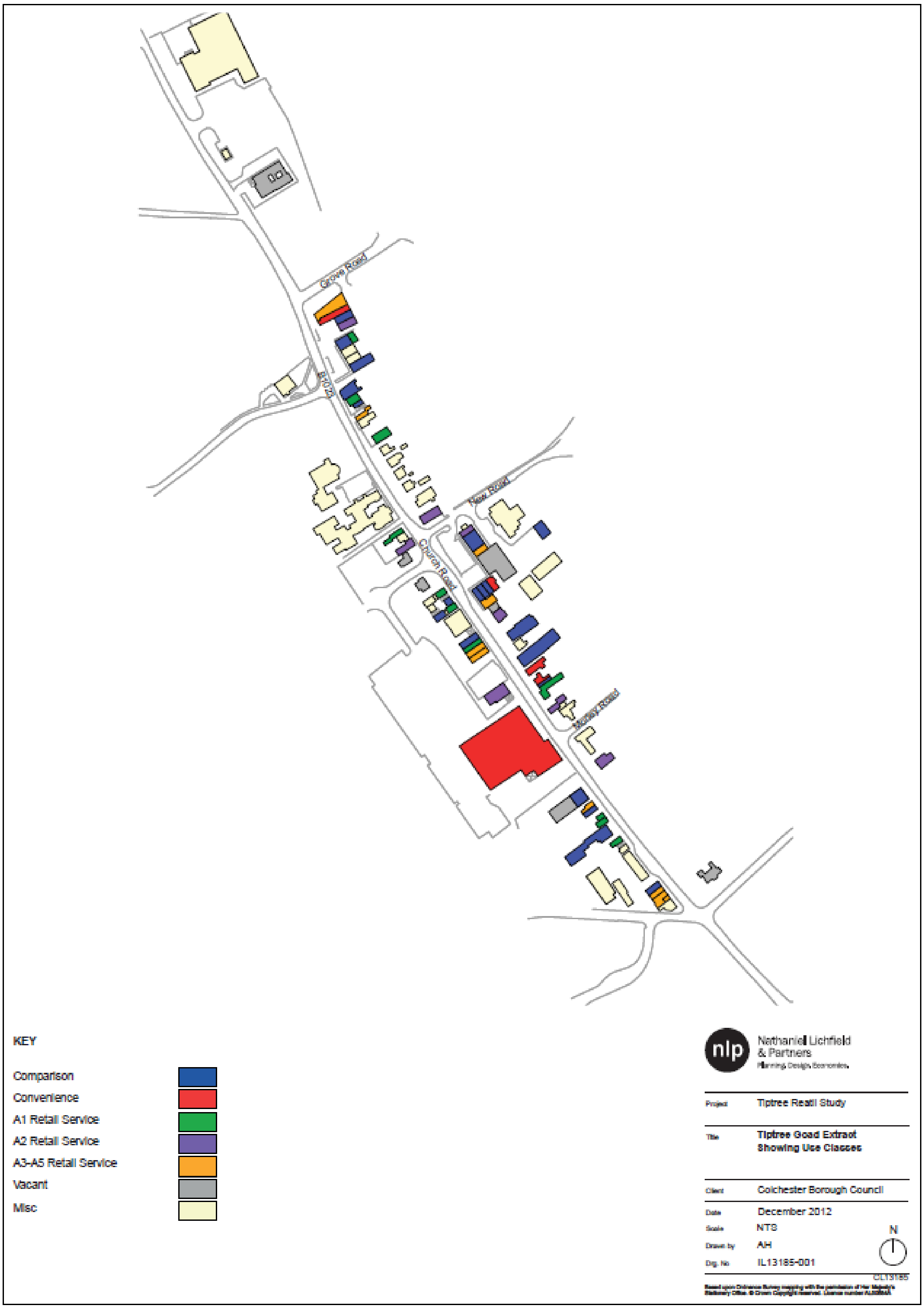
3.24 West Mersea has a poor range of national multiples represented, across both the comparison and convenience categories with only one of the 'big four' food store operators (Tesco Express) and a Co-op located within the centre and a Boots local.

3.25 We are not aware of any current proposals or firm commercial interest from any other retailers not currently represented in West Mersea seeking representation in the centre.

Vacancies

3.26 It can be seen from Table 3.4 that the vacancy rate within the centre of 6.2% of units is significantly below the national average of 13.7%. The proportion of vacant floorspace is also very low, at 3.8% compared with the national average of 12%.

Tiptree



3.27 Tiptree is classified as a rural district centre in the adopted Core Strategy (Policy CE2). It is the second largest centre within Colchester Borough. Tiptree supports a range of retail, service and community facilities.

Diversity of Uses

3.28 The most recent Experian GOAD plan for Tiptree was prepared in July 2011, this was updated in September 2012 through an NLP site visit. The survey identifies that Tiptree has 62 ground floor units within retail and service uses occupying 10,990 sq.m gross floorspace.

3.29 Tables 3.6 and 3.7 below illustrate the diversity of uses present in Tiptree in September 2012, compared against the national average (GOAD, June 2012).

Table 3.6: Tiptree District Centre Retail Composition by no. of units

	No. of Units	% of Units	
	2012	2012	UK Ave.
Convenience	5	8.1%	8.5%
Comparison	22	35.5%	41.4%
Service	31	50.0%	35.3%
Vacant	4	6.4%	13.7%
Total	**62**	**100.0%**	**100.0%**

Table 3.7: Tiptree District Centre Composition by floorspace

Gross Floorspace	sq.m	%	UK Ave. %
Convenience	5,690	51.8%	17.1%
Comparison	2,750	25.0%	46.5%
Service	1,660	15.1%	24.4%
Vacant	890	8.1%	12.0%
Total	**10,990**	**100.0%**	**100.0%**

Source: Goad July 2011 and NLP Site Survey
UK Average sourced from GOAD (June 2012)

3.30 The proportion of convenience units in Tiptree is similar to the national average, however due to the presence of two medium sized food stores in the town centre, operated by Tesco and Asda, the proportion of floorspace is significantly higher than the national average. Convenience floorspace within the centre accounts for 51.8% of all retail and service floorspace within the centre, compared to a national average of 17.1%, however this includes an element of comparison goods floorspace within the main food stores.

3.31 Comparison representation in the centre is around 35.5% of all units, which is less than the national average. There is a good mix of retailers within the centre with no particular type dominating.

3.32 In addition to the 31 retail service uses, Tiptree also comprises a further seven ground floor uses which are occupied by a range of community facilities which contribute to the vitality and viability of the centre. Community facilities include a library, council offices and medical/health facilities.

Retailer Representation

3.33 It is considered that Tiptree has an average range of convenience national multiples and a limited range of comparison national multiples. Two of the 'big four' food store operators are located within the centre however the only comparison national multiples are the Boots Pharmacy and Age Concern Charity shop.

3.34 We are not aware of any current proposals or firm commercial interest from any other retailers not currently represented in Tiptree seeking representation in the centre.

Vacancies

3.35 Tables 3.6 and 3.6 identify that the vacancy rate of units (6.4%) and floorspace (8.1%) are both significantly below the national average.

Wivenhoe

3.36 Wivenhoe is classified as a rural district centre in the adopted Core Strategy (Policy CE2). Wivenhoe is the smallest of the rural district centres in the borough serving its surrounding rural area.

Diversity of Uses

3.37 A site survey along the High Street for Wivenhoe was performed by NLP in September 2012. It identifies that Wivenhoe has 10 ground floor units within retail and service uses occupying 923 sq.m gross floorspace.

3.38 Tables 3.8 and 3.9 below illustrate the diversity of uses present in Wivenhoe in September 2012, compared against the national average (GOAD, June 2012).

Table 3.8: Wivenhoe District Centre Retail Composition by no. of units

	No. of Units	% of Units	
	2012	2012	UK Ave.
Convenience	3	30.0%	8.5%
Comparison	3	30.0%	41.4%
Service	3	30.0%	35.3%
Vacant	1	10.0%	13.7%
Total	**10**	**100.0%**	**100.0%**

Table 3.9: Wivenhoe District Centre Composition by floorspace

Gross Floorspace	sq.m	%	UK Ave. %
Convenience	724	78.4%	17.1%
Comparison	80	8.7%	46.5%
Service	107	11.6%	24.4%
Vacant	12	1.3%	12.0%
Total	**923**	**100.0%**	**100.0%**

Source: NLP Site Survey September 2012
UK Average sourced from GOAD (June 2012)

3.39 Convenience uses in Wivenhoe are significantly above the national average in terms of the proportion of units, however this needs to be viewed in terms of the small number of units within the centre. The centre contains a medium sized Co-op, which results in the proportion of floorspace used for the sale of convenience goods being considerably higher than the national average. Convenience floorspace within the centre accounts for 78.4% of all retail and service floorspace within the centre, compared to a national average of 17.1%.

3.40 Comparison representation in the centre comprises three units, which equates to 30% of all units, which is less than the national average.

3.41 In addition to the three retail service uses, Wivenhoe also includes a library.

Retailer Representation

3.42 Wivenhoe has a very poor range of national multiples represented, across both the comparison and convenience categories with only a Co-op and a Post Office located within the centre.

3.43 We are not aware of any current proposals or firm commercial interest from any other retailers not currently represented in Wivenhoe, seeking representation in the centre.

Vacancies

3.44 Tables 3.8 and 3.9 identify that there is just one vacant unit within the centre , which gives a vacancy rate in terms of units of 10% and floorspace of just 1.3%, which is significantly below the national average of 12%.

Urban District Centres

3.45 The Core Strategy identifies five Urban District Centres. An audit is set out below. In terms of the description of “District Centres” within the central government’s town centres and retail practice guidance, none of the five urban District Centres provide all of the characteristics listed. District centres are described as usually comprising a group of small shops containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.

3.46 The five designated centres are purpose built retail parks or large food superstores, and do not provide an integrated centre with a broad mix of retail and non-retail uses. All of the centres are currently anchored by large food superstores but the range of non-retail uses is limited in all centres.

3.47 The Core Strategy recognises this issue and Policy CE2b recommends that intensification within centres will be supported where the quality of the public realm and the built character is improved. Development within the centres is expected to deliver a more diverse range of uses, including community facilities, services, offices and housing. Development is expected to be orientated towards pedestrians and present active frontages to the streets.

Highwoods

3.48 Highwoods Urban District Centre is located in the north east of Colchester urban area. The centre includes a large Tesco Extra store, surface car park and petrol station. Other uses within the centre boundary include a coffee house, doctor's surgery and community uses.

Tollgate

3.49 The designated Urban District Centre located in Stanway to the west of Colchester urban area, close to the junction 26 o the A12. The designated centre is formed by three separate areas, i.e. the new Sainsbury's superstore to the north of the centre, the Tollgate West Retail Park and retail warehouses at Tollgate East.

3.50 The Tollgate West area includes 15 retail warehouses e.g. Bennetts, Curry's, Staples, PC World, Boots, Next, ScS, Iceland and Carpetright and a MacDonald's. The Tollgate East area includes Homebase, Sea Pets and employment uses. The centre has the most extensive range and choice of comparison shopping when compared with other urban district centres, but the range of non-retail facilities is limited.

3.51 Located between Tollgate West and the Sainsbury's store, but outside the urban district centre boundary, there is a medical centre and Franke and Benny's restaurant.

Peartree Road

3.52 Peartree Road Urban District Centre is located in the south west of Colchester urban area. It is an employment area where a number of bulky goods retail and trade outlets have established, including Fiveways retail park. The area includes a Co-op superstore, Topps Tiles, Paul Simon and World of Beds. Other uses include a petrol station and employment uses.

Greenstead

3.53 Greenstead designated Urban District Centre is located to the east of Colchester town centre near the Hythe railway station. The centre includes a large Tesco superstore, surface car park and petrol station. At present this shopping destination operates as an out-of-centre food store rather than a district centre.

Turner Rise

3.54 Turner Rise is a purpose built retail park located about one kilometre north of the town centre, to the north of the railway line. The main uses are a large Asda superstore and seven retail warehouse units, a Fitness First Gym and Pizza Hut. Other retailers include Dunelm, Go Outdoors, Carpetright and Home Bargains. Turner Rise has the second most extensive range and choice of comparison shopping after Tollgate Urban District Centre, but the range of non-retail facilities is limited.

4.0 # Retail Capacity

Introduction

4.1 This section assesses the quantitative scope for new retail floorspace in Colchester Borough up to 2026. It sets outs the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping.

4.2 All monetary vales expressed in this analysis are at 2011 prices unless stated otherwise. The previous 2009 Study Update was based on 2007 prices, therefore the expenditure and turnover figures in this report are not directly comparable with the figures in the 2009 study update.

4.3 The 2009 study update provided projections from 2009 to 2014, 2019 and 2024. The projections in this report have been rolled forward and figures are provided from 2012 to 2016, 2021 and 2026.

Methodology and Data

4.4 The quantitative analysis is based on the study area defined for the 2006 North Essex Authorities Retail Study. For this study update, we have redrawn the five zones around Colchester, which we consider better reflect actual shopping patterns established by the household survey results, i.e. the new zones are more contiguous in terms of shopping patterns. We have also used data obtained for the Braintree Retail Study Update 2012, also prepared by NLP, for four adjacent zones from which Colchester draws trade.

4.5 The study area is shown in Appendix A. The extent of the study area is based on postcode area boundaries and the proximity of major competing shopping destinations i.e. shopping facilities within the study area are expected to attract a significant proportion of their trade from residents within the study area.

4.6 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2011 have been obtained.

4.7 Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 10, September 2012) has been used to forecast expenditure within the study area. Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.

4.8 Experian's EBS growth forecast rates for 2011 to 2014 reflect the current economic circumstances and provide an appropriate growth rate for the short term (for convenience goods: 0.1% for 2011-2012, -0.1% for 2012-2013 and 0% for 2013 to 2014; for comparison goods: 1.4% for 2011-2012, 1.8% for 2012-2013 and 2.4% for 2013-2014).

4.9 In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's longer term growth average forecasts have been adopted i.e. 0.6% per annum for convenience goods up to 2019 and 0.8% per annum after 2019, and 2.9% per annum growth for comparison goods. These growth rates are relatively cautious when compared with past growth rates, but in our view represent realistic forecast for future growth. These growth figures relate to real growth and exclude inflation.

4.10 To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors, but primarily information gathered within the household survey undertaken in September 2012 for Zones 1 to 5 (Colchester zones) and July/August 2012 for Zones 6 to 9 (undertaken on behalf of Braintree District Council). A copy of the September 2012 household survey results commissioned by NEMS Market Research can be found in Appendix D.

4.11 The total turnover of identified shops within Colchester Borough is estimated based on penetration rates. The turnover estimate for retail floorspace is then compared to average benchmark or average sales floorspace densities derived from Verdict Information 2012, which provides an indication of how food stores are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail floorspace.

Population and Spending

4.12 The study area population for 2012 to 2026 is set out in Table 1B in Appendix B. For Zones 1-5, population estimates have been obtained from Experian for 2011 and the ONS 2011 sub-national population projections have been applied. For Zones 6-9, population estimates have been obtained from the Braintree District Council Retail Study Update 2012.

4.13 Table 2B in Appendix B sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2026. Comparison forecasts of per capita spending are shown in Table 1C in Appendix C.

4.14 The level of available spending are derived by combining the population in Table 1B and per capita spending figures in Tables 2B and 1C. For both convenience and comparison spending, a reduction has been made for special forms of trading such as mail order, e-tail (non-retail businesses) and vending machines.

4.15 Special Forms of Trading (SFT) or non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. SFT includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship with the demand for retail floorspace. The growth in home computing, Internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Experian provides projections for special forms of trading and e-tailing. This Experian information suggests that non-store retail sales in 2011 is:

- 6.1% of convenience goods expenditure; and
- 11.9% of comparison goods expenditure.

4.16 Experian predicts that these figures will increase in the future. Experian recognises that not all of this SFT expenditure should be excluded from a retail capacity analysis, because some of it relates to internet sales through traditional retail businesses, rather than internet companies. The turnover attributable to e-tail through retail businesses is included in the company average turnovers, and therefore expenditure figures should not exclude this expenditure. Experian has provided adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace. The adjusted figures suggest that SFT sales in 2011 are:

- 1.8% of convenience goods expenditure; and
- 8.9% of comparison goods expenditure.

4.17 The projections provided by Experian suggest that these percentages could increase to 3.1% and 13.6% by 2017, and estimated at 4.5% and 16.0% by 2027.

4.18 As a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 21.6% from £811.46 million in 2012 to £986.35 million in 2026, as shown in Table 3B in Appendix B.

4.19 Comparison goods spending is forecast to increase by 56.4% between 2012 and 2026, increasing from £1,187.12 million to £1,857.13, as shown in Table 2C in Appendix C.

4.20 These figures relate to real growth and exclude inflation.

Existing Retail Floorspace

4.21 Existing convenience goods retail sales floorspace within Colchester Borough is 37,058 sq.m net as set out in Table 1A in Appendix A. Most (88%) of this floorspace is concentrated in the Colchester urban area (including Stanway). This floorspace figure excludes comparison sales floorspace within food stores (13,556 sq.m net).

4.22 Comparison goods retail sales floorspace within Colchester Borough is estimated as 124,613 sq.m net as shown in Table 2A in Appendix A, which includes comparison sales within food stores. About half of this sales floorspace (48%) is located within Colchester town centre.

Existing Spending Patterns 2012

Convenience Shopping

4.23 The results of the household shopper questionnaire survey, undertaken by NEMS in September 2012 have been used to estimate existing shopping patterns with Zones 1 to 5 of the study area (Appendix D). For Zones 6 to 9, the results of the household survey undertaken by NEMS for the Braintree Retail Study Update in July/August 2012 have been used. The estimates of market share or penetration within each study area zone are shown in Table 4B in Appendix B.

4.24 The Borough's convenience goods expenditure retention within the core Colchester zone (zone 1) is high at 98.4%, which suggests there is limited scope to claw back expenditure leakage.

4.25 Table 5B indicates that the level of convenience goods expenditure attracted to shops/stores in the Borough in 2012 is estimated to be £397.56 million. Colchester Borough's market share of total convenience expenditure in the study area as a whole is estimated to be about 47% (£377.68 million of £811.46 million), i.e. the sum of Zones 1 to 9 in Table 5B, excluding inflow.

4.26 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Verdict. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores listed in Table 1A in Appendix A, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.

4.27 The estimated convenience goods sales areas have been derived from a combination of the Goad data and the Institute of Grocery Distribution (IGD). Estimates for comparison sales floorspace within large food stores has been deducted from the figures, for consistency with the use of goods based expenditure figures.

4.28 Average sales densities are not widely available for small convenience shops, particularly independent retailers. An average sales density of £4,500 per sq.m has been adopted for small convenience shops. The total benchmark turnover of existing convenience sales floorspace within Colchester Borough is estimated to be £371.18 million. This figure excludes local shops not within the main centres.

4.29 The assessment of shopping patterns suggests that convenience goods expenditure available to facilities in Colchester Borough in 2012 is £397.56 million. These figures suggest that collectively convenience retail facilities in Colchester Borough are trading at slightly above (2%) company average levels.

Comparison Shopping

4.30 The estimated comparison goods expenditure available within the study area is £1,187.12 million in 2012, as shown in Table 2C in Appendix C. This is expected to increase to £1,857.13 million in 2026.

4.31 Table 4C indicates that the level of comparison goods expenditure attracted to shops/stores in the Borough in 2012 is estimated to be £713.39 million. Colchester Borough's market share of total comparison goods expenditure generated within the study area is about 57%, i.e. the sum of Zones 1 to 9, minus inflow (£677.72 million out of the total of £1,187.12 million). Therefore 43% of comparison expenditure is spent elsewhere, in particular Braintree, Clacton, Ipswich and Chelmsford.

4.32 Company average sales densities are only available for a selection of multiple retailers. Available information indicates that the sales densities amongst comparison retailers vary significantly.

4.33 The household survey results suggest the comparison goods turnover of retail sales floorspace (124,613 sq.m net) within the Borough is £713.39 million. These figures suggest an average sales density of £5,725 per sq.m net. This figure is broadly consistent with the national average for selected comparison goods retailers.

4.34 On balance comparison shopping facilities within Colchester Borough appear to be trading satisfactorily in 2012.

Quantitative Capacity for Convenience Floorspace

4.35 The level of available convenience goods expenditure in 2016, 2021 and 2026 is shown at Tables 6B to 8B in Appendix B.

4.36 The total level of available convenience goods expenditure available for shops in Colchester Borough between 2012 and 2026 is summarised in Table 9B. This table takes into account the population and expenditure projections shown in Table 1B to 3B in Appendix B. The Borough's market share of convenience goods expenditure has not been increased because the level of expenditure retention is already high in the core Colchester (98.4%). It is possible major food store development could increase the Borough's market share of expenditure within the other study area zones. Conversely food store development within surrounding towns will reduce Colchester's market share. There are major food store proposals in Halstead and Hadleigh that will reduce Colchester market share in zones 2, 7, 8 and 9. On balance, we believe any increases in Colchester's convenience goods market share in zones 3 to 6 to the south and east are likely to be counter-balanced by reductions in zones to the north and west of Colchester. For these reasons market shares have been kept constant.

4.37 The benchmark turnover of existing convenience floorspace has been subtracted from the estimates of available expenditure to provide surplus expenditure estimates.

4.38 Table 9B assumes that the benchmark turnover of convenience floorspace will not increase during 2012 to 2026 due to the negative impact of the recession during the first part of the plan period. Experian suggest there could be a reduction in convenience efficiency in the short term, then 0.1% per annum growth is recommended between 2014 to 2019 and 0.2% thereafter (Source: Experian Retail Planner Briefing, September 2012). The reduction in turnover efficiency in the short term is expected to cancel out longer term growth, therefore no change in convenience goods turnover efficiency is assumed in this study.

4.39 The estimates of surplus/deficit expenditure are converted into floorspace projections in Table 9B, Appendix B. These floorspace projections relate only to convenience sales floorspace and exclude any comparison sales within food stores. Table 9B assumes an average benchmark turnover of £12,300 per sq.m for new retail floorspace, based on the average for the five main operators (Asda, Morrison's, Sainsbury's, Tesco and Waitrose).

4.40 In the Borough as a whole there is currently a surplus of convenience expenditure (£13.03 million) which could support around 1,513 sq.m gross of additional floorspace. The surplus of convenience goods expenditure will increase to £35.48 million in 2016. However the implementation of Tesco food store commitments at Blackheath and the Garrison will reduce this surplus to £19.35 million in 2016, as follows:

- Tesco, the Garrison – 1,200 sq m net convenience sales (£13.35m); and
- Tesco Express, Blackheath – 250 sq m net convenience sales (£2.78m).

4.41 Allowing for these commitments the medium and long term expenditure surpluses will be £55.50 million in 2021 and £98.40 million in 2026.

4.42 Most of the surplus convenience expenditure is within the Colchester urban area, which suggests that the existing stores are trading at levels above benchmark. Within the Colchester urban area, expenditure growth could support 7,966 sq.m net (11,429 sq.m gross) of convenience floorspace by 2026, over and above commitments.

4.43 There is currently a deficit of convenience expenditure in Tiptree, Stanway and West Mersea, indicating that the existing facilities are currently trading below company average. There remains an expenditure deficit within Tiptree and West Mersea throughout the study period, indicating that there is no requirement for additional convenience goods floorspace within these centres. Within Wivenhoe there is a small expenditure surplus that could support small scale development.

Quantitative Capacity for Comparison Floorspace

4.44 The assessment of existing shopping patterns in 2012 indicates that there is a high level of comparison expenditure leakage from the study area to centres including Braintree, Clacton, Ipswich and Chelmsford.

4.45 Major improvements to comparison retail provision within the Borough could help to claw back some additional expenditure leakage from parts of the study area. We have projected the level of comparison goods expenditure available to shops in Colchester Borough at 2016, 2021 and 2026 based on two scenarios. First, as a minimum Colchester Borough should seek to maintain its current market share of comparison goods expenditure. Second, sustainable and achievable increases in market share have been assumed.

4.46 Increased market shares within the second scenario are shown in Table 5C in Appendix C. We believe increases in market share could be achieved across the study area. In overall terms we believe the Borough's market share of comparison expenditure could increase from 57.1% to 61.4%. Higher increases in market share could have a harmful impact on town centres outside the Borough and could have sustainability dis-benefits in terms of longer shopping trips.

4.47 Shopping patterns assuming constant market shares are shown in Tables 6C to 8C in Appendix C. The level of comparison expenditure attracted to facilities in Colchester local authority area is expected to increase from £713.39 million in 2012 to £1,145.84 million in 2026, as shown in Table 9C. If the uplift in market shares shown in Table 5C can be achieved then the 2026 available expenditure figure would be £1,232.54 million, as shown in Table 10C.

4.48 The floorspace capacity projections in Table 9C and 10C assume that the existing turnover of comparison floorspace will increase its turnover in real terms. Table 9C assumes that the turnover of existing comparison floorspace will increase in the future. An average growth rate of 1.8% per annum is adopted, in line with figures provided by Experian. Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio. The likely increase in "click and collects" should help this increase in turnover density.

4.49 Based on constant market shares (Table 9C), in the short term up to 2016, surplus comparison expenditure in the Borough could support 6,029 sq.m gross (4,522 sq.m net) comparison sales floorspace, increasing to 17,407 sq.m gross (12,936 sq.m net) in 2021 and 34,700 sq.m gross (25,781 sq.m net) in 2026. The majority of this relates to the Colchester urban area, based on existing market shares.

4.50 The capacity figures for the increased market share scenario are shown in Table 10C. This scenario assumes the proposed local centre at the Garrison and proposals within Colchester town centre will be implemented, as follows: as follows:

- William & Griffin store – 3,500 sq m net additional sales (£17.5m);
- The Crescent Vineyard Gate – 9,000 sq m net sales (£63m); and
- The Garrison Local Centre – 300 sq m net comparison sales (£1.5m).

4.51 Based on increased market shares but taking into account the above proposals, in the short term up to 2016, surplus comparison expenditure in the Borough could still support 1,122 sq.m gross (842 sq.m net) comparison sales floorspace. The proposals and increases in turnover efficiency described above are sufficient to absorb the growth in comparison goods expenditure between 2012 and 2016 (£86.55 million). However increases in market share could create scope for a modest amount of additional floorspace.

4.52 Longer term growth and maintained higher market shares would increase the floorspace projections to 13,335 sq.m gross (10,101 sq.m net) in 2021 and 31,907 sq.m gross (23,930 sq.m net) in 2026.

Qualitative Need for Retail Development

4.53 Qualitative need can be assessed through consideration of the following factors:

- deficiencies or 'gaps' in existing provision;
- consumer choice and competition;
- overtrading in existing stores;
- location specific needs such as deprived and under-served areas; and
- the quality of existing provision.

Convenience Goods Shopping

4.54 The household survey results indicate that most residents in the study area undertake both a main shopping trip and top-up shopping trips. Main shopping trips are generally made once a week or less often, and the household survey identified that most respondents travel to do their main food shopping by car. The availability of a wide range of products and car parking are important requirements for bulk food shopping trips. Large supermarkets or superstores are the usual destination for these types of shopping trip.

4.55 There are five food superstores (over 2,500 sq.m net) within the Borough, i.e. Asda and two Tesco stores in Colchester and Co-op and Sainsbury's at Tollgate, Colchester. Waitrose (2,209 sq.m net) in Colchester is just below the 2,500 sq.m net superstore threshold. The provision of superstores is excellent within the central, east and northeast parts of Colchester urban area, and the Stanway area to the west. Access to superstores is more limited in the south of Colchester urban area. The proposed Tesco at the Garrison and Tesco Express at Blackheath will help to improve food store provision in this area.

4.56 In addition to these food superstores, there is a good range of large and small supermarkets and convenience stores, including seven large supermarkets (over 1,000 sq.m net). Superstore and large food stores within Colchester are supported by twelve smaller Co-op and Tesco Express convenience stores. The discount food sector is represented with two Aldi stores in Colchester.

4.57 For a small town, Tiptree has a good provision of food stores with Asda and Tesco supermarkets. Provision within West Mersea and Wivenhoe primarily caters for top up food and grocery shopping rather than main and bulk food shopping.

Comparison Goods Shopping

4.58 An assessment of the shopping hierarchy and an audit of centres are shown in Section 3.

4.59 Colchester town centre provides a good range of comparison shops, including many national multiples and independent specialists. The town centre provides about 85,000 sq.m gross of comparison floorspace with 281 shops/stores. Based on the household survey results, Colchester town centre appears to hold its own and competes effectively with other major centres in Ipswich, Braintree, Lakeside and Chelmsford.

4.60 Colchester has excellent retail warehouse representation as shown in Table 2A in Appendix A, with over 60,000 sq.m gross of floorspace within 45 retail warehouse. Colchester has representation from the three main DIY operators i.e. B&Q, Wickes and Homebase (x2). Colchester has five main retail warehouse parks that provide a good mix of bulky and non-bulky comparison good retailers.

4.61 Comparison shopping within the other centres in Tiptree, Wivenhoe and West Mercia is limited, but reflects their role as local shopping facilities serving day to day needs.

Changes Since 2009

4.62 The 2009 Update identified retail capacity to 2024. The updated convenience retail floorspace projections are higher than the 2009 figures, whilst the comparison retail floorspace projections are lower. These differences are due to a number of factors including:

Convenience

- the 2009 capacity assessment assumed equilibrium at 2009, rather than comparing actual turnover with benchmark national averages;
- a slight increase in convenience retail expenditure per capita for the study area;
- reductions to the average sales densities of food store operators.

Comparison

- a decrease in the comparison retail expenditure per capita for the study area; and
- lower forecast annual expenditure growth rates.

5.0 Scope for Accommodating Growth

Retail Floorspace Projections

5.1 The potential capacity for new retail floorspace set out within the previous section suggests there is scope for new convenience and comparison retail development within Colchester Borough, over and above existing commitments. The projections in the previous section indicate that the following additional retail floorspace could be required over and above existing commitments (as listed at paragraphs 4.40 and 4.50 in the previous section):

2012 to 2021 (short to medium term)

- convenience goods floorspace = 8,000 sq.m gross (4,512 sq.m net)

- comparison goods floorspace* = 13,335 sq.m gross (10,001 sq.m net)

2021 to 2026 (long term)

- convenience goods floorspace = 3,429 sq.m gross (1,934 sq.m net)

- comparison goods floorspace* = 18,872 sq.m gross (13,929 sq.m net)

* comparison floorspace projections assume increased Colchester market shares (increased retention of expenditure).

5.2 There are a number of issues that may influence the scope for new retail floorspace and the appropriate location for this development, as follows:

1 major retail developments in competing centres;

2 the re-occupation of vacant town centre floorspace;

a the availability of land to accommodate new development;

3 the reliability of long term expenditure projections, particularly after 2021;

4 the effect of internet/home shopping on the demand for retail property;

5 the level of operator demand for floorspace in Colchester Borough;

6 the likelihood that Colchester Borough's existing market share of expenditure will change in the future; and

7 the potential impact new development may have on existing centres.

5.3 The long term floorspace projections (2021 to 2026) shown in Appendix B and Appendix C should be treated with caution and should only be used as a broad guide, particularly when translated into the development plan allocations or when used to guide development control decisions. Long term forecasts may be subject to change due to unforeseen circumstances. Projected surplus expenditure is primarily attributable to projected growth in spending per capita. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. For these reasons, we recommend the long term projections should be monitored and kept under-review.

5.4 The expenditure projections in this study take into account home shopping made through non-retail businesses, because special forms of trading have been excluded. The study assumes that special forms of trading will increase in the future, including the growth of internet shopping. The increase in “click and collect” is also included and forms part of the adopted increase in turnover efficiency for existing and proposed retail floorspace.

Existing Retail Floorspace

5.5 The existing stock of shop premises should have a role to play in accommodating projected growth. The retail capacity analysis in this report assumes that existing comparison retail floorspace can, on average, increase its turnover to sales floorspace densities. A growth rate of 1.8% per annum is assumed for comparison floorspace and this represents a balanced approach and the floorspace projections reflect these assumptions. In addition to the growth in sales densities, vacant shops should help to accommodate future growth.

5.6 There are 81 vacant shop units within the Borough’s centres (September 2012), a vacancy rate of about 11.2%, which is slightly below the Goad national average at June 2012 (13.7%). Nevertheless, these vacant premises could also help to accommodate growth, for example if the current vacancy rate fell from 11.2% to 8% (i.e. the reoccupation of 23 vacant properties) they could accommodate around 2,300 sq.m gross of retail space (assuming an average of 100 sq.m gross per unit).

5.7 If a reduction in vacancy rate to 8% was achieved then the 2012 to 2021 comparison floorspace would reduce from 13,335 sq.m gross to 11,035 sq.m gross. Further development opportunities to accommodate 11,035 sq.m gross of comparison floorspace and 8,000 sq.m gross of convenience good should be identified to meet growth in the short to medium term.

Retail Development Proposals

5.8 There are a number of current and emerging retail development proposals in Colchester, in addition to the commitments, as listed at paragraphs 4.40 and 4.50 in the previous section. These proposals are summarised below:

- Colchester Northern UE – neighbourhood centre incl. food store;
- Stane Park, Stanway – large flagship comparison store;
- Tollgate Stanway – urban district centre extension;
- Northern Gateway – large food store and retail warehousing;
- Gosbecks Road – neighbourhood food store;
- Morrison’s food store at the Cowdray Centre.

5.9 Details of the potential floorspace and expected turnover of these developments are shown in Table 9B in Appendix B (convenience goods sales) and Table 11C in Appendix C (comparison goods sales).

5.10 The implications of developing all these proposals along with commitments in terms of retail capacity and impact have been assessed below.

Convenience Goods

5.11 The convenience goods projections indicate there is an existing expenditure surplus of +£13.03 million in the Borough as a whole at 2012. Within Colchester urban area there is an expenditure surplus (+£23.79 million) and within the rest of the Borough there is a deficit (-£10.76 million). There will continue to be an expenditure deficit in the rest of the Borough for the foreseeable future (beyond 2021). The priority for new food store development is Colchester urban area.

5.12 The expenditure surplus in Colchester urban area is expected to increase to +£43.87 million in 2016, but Tesco food store commitments at Blackheath and the Garrison will reduce this surplus to +£27.74 million (see Table 9B).

5.13 There are four other potential large food store proposals in Colchester, as listed above. These four stores are expected to have a combined convenience goods turnover of £102.94 million (see Table 9B in Appendix B). If all four stores were implemented by 2016 along with commitments then projected Colchester urban area surplus (+£27.74 million) to a deficit of -£75.2 million. Expenditure growth between 2016 and 2021 would only reduce this deficit to -£43.1 million, and to -£4.96 million in 2026.

5.14 The capacity figures suggest there is scope for one large food store in Colchester urban area (over and above commitments) by 2016. Medium and long term expenditure growth (2016 to 2026) could support a further two large food stores in Colchester urban area. Alternatively some of the capacity could be accommodated in food store extensions, but the physical and commercial potential for this appears to be limited. Most of the food superstores in Colchester already offer an extensive range of convenience goods. Any food store extensions are likely to focus on providing additional non-food sales.

5.15 If all three food store proposals and commitments were implemented by 2016 then the convenience goods turnover of existing facilities in Colchester urban area would reduce by 28% (£370.23 million to £266.53 million), and existing floorspace would trade 18.3% below the benchmark turnover (£326.36 million). Existing large food stores in Colchester are concentrated within the town centre and the five urban district centres. The loss of 28% convenience trade from these centres is likely the potential to be harmful to these centres and would not help to sustain the viability and viability of these centres. The capacity figures suggest that three new stores by 2016 are unlikely to be commercially attractive to food store operators.

5.16 If two food store proposals and commitments were implemented by 2016 then the convenience goods turnover of existing facilities in Colchester urban area would reduce by about 20%, and existing floorspace would trade 10% below the benchmark turnover. These figures do not necessarily suggest that two new stores by 2016 would be commercially unviable from a food store operator's perspective, but the impact on designated centres would need to be carefully considered. This will depend on the size and location of food stores proposed.

5.17 If three food stores were implemented by 2021 then the convenience goods turnover of existing facilities in Colchester urban area would be 8.5% below the benchmark turnover (£326.36 million), which suggests three store by 2021 could be commercially viable, but the impact on designated centres would need to be carefully considered.

5.18 If two food store proposals and commitments were implemented by 2021 then the convenience goods turnover of existing facilities in Colchester urban area would be around the benchmark turnover, and two stores are less likely to harm designated centres.

5.19 The analysis above suggests the following phasing of food store development in Colchester urban area:

- **up to 2016** – implementation of commitments plus one further large food store;
- **2016 to 2021** – implementation of one further large food store;
- **2021 to 2026** – implementation of one further large food store*.

* subject to monitored long term population and expenditure growth.

5.20 The impact of food store proposals will need to be assessed cumulatively with commitments, and these assessments will need to consider the scale, location and timing of proposals.

Comparison Goods

5.21 The comparison goods projections indicate there will be a comparison goods expenditure surplus of £33.78 million in the Borough as a whole at 2016, based on constant market shares (see Table 9C). Existing commitments and town centre proposals are expected to have a combined comparison good turnover of £88 million in 2016 (see Table 10C). Based on increased market shares the surplus at 2016 is £94.29 million.

5.22 Even allowing for an increase in Colchester's market share, commitments and town centre proposals and existing vacant shop floorspace should be sufficient to accommodate the projected comparison goods expenditure capacity up to 2016.

5.23 By 2021 there is a projected comparison goods expenditure surplus of £106.08 million, based on constant market shares (see Table 9C). Based on increased market shares the surplus at 2021 is £177.48 million.

5.24 There are seven potential retail development proposals in Colchester that could provide additional comparison goods sales floorspace. These proposals along with commitments are expected to have a combined comparison goods turnover of £240.16 million in 2016 million (see Table 11C in Appendix C). If all the schemes were implemented by 2016 then they would create a comparison good expenditure deficit of -£145.87 million. The comparison goods turnover of existing facilities in Colchester urban area would reduce by 22.6% (£793.78 million to £614.13 million), allowing for increased market shares. If market shares do not increase to the extent predicted then the impact would be higher. The impact on current 2012 trading levels (£761.8 million) would be -19.4%. This reduction in trade is likely to be harmful to the vitality and viability of designated centres, and investment within the town centre (e.g. Vineyard Gate could be jeopardised or delayed).

5.25 If all the schemes were implemented by 2021 then they would create a comparison good expenditure deficit of -£85.09 million. The comparison goods turnover of existing facilities in Colchester urban area would reduce by 20.4% (£936.52 million to £745.35 million), even allowing for increased market shares. The impact on current 2012 trading levels (£761.8 million) would be -2.2%. This is a relatively small reduction in trade from the 2012 position, but it would effectively mean existing facilities do not increase their turnover in real terms for the next 8-9 years. Again this is likely to harm the long term vitality and viability of designated centres and could jeopardise or delay investment within the town centre.

5.26 The analysis above suggests the following phasing of comparison goods retail development in Colchester:

- **up to 2016** – implementation of commitments/town centre proposals and the reoccupation of vacant units;
- **2016 to 2021** – implementation of up to 13,000 sq m gross of comparison retail floorspace;
- **2021 to 2026** – implementation of up to a further 19,000 sq m gross comparison retail floorspace*.

* subject to monitored long term population and expenditure growth and reoccupation of vacant space.

5.27 Again the impact of development proposals will need to be assessed cumulatively with commitments, and these assessments will need to consider the scale, location and timing of proposals.

5.28 There is insufficient available expenditure to support all of the comparison retail proposals between 2016 and 2021 (potentially up to nearly 29,000 sq m net).

Strategic Development Options

5.29 The sequential approach set out in the NPPF suggests that designated town centres should be the first choice for retail and leisure development.

5.30 The hierarchy of centres and sequential approach is clearly set out in the Core Strategy (Policies CE1 and CE2). Colchester town centre is at the top of the hierarchy, followed by three rural district centres and five urban district centres and then local centres.

5.31 Policy CE2a indicates that the sequential priority for main town centre uses including retail is the Town Centre Core, followed by Urban Gateways and the

Town Centre Fringe. This policy suggests all retail development potential identified above should if possible be accommodated in the Town Centre Core.

5.32 The NPPF does not does not differentiate between town and district centres when applying the sequential approach, because the NPPF Annex 2 glossary indicates that references to 'town centres' include town, district and local centres. The sequential approach set out in the Core Strategy could be viewed as not entirely consistent with the NPPF in this respect, but it should be noted that the Core Strategy was adopted under PPS6, which also did not differentiate between town, district and local centres when applying the sequential approach. It may be necessary for the Council to review policy to avoid confusion relating to the status of the town centre and district centres.

5.33 The NPPF requires local authorities to allocate a range of sites suitable to meet the scale and type of retail development needed. The largest unit proposed within the Crescent Vineyard Gate development has a footprint of about 2,000 sq m gross, therefore it may not be possible to accommodate all larger format stores within the Town Centre Core. Nevertheless the priority for small to medium sized retail units (up to 2,000 sq m gross) should be the Town Centre Core.

5.34 Policy CE2b relates to district centres and indicates additional retail development will be supported in rural district centres (Tiptree, West Mersea and Wivenhoe) where it provides for the needs of the local catchment. This policy implies where retail development is of a scale over and above that needed to serve the local catchment's of the three settlements then the sequential preference is to accommodate this development in Colchester. The retail capacity projections suggest the scope for retail development within these centres is limited, and there is no requirement to allocate sites for large scale development.

5.35 Within urban district centres, Policy CE2a promotes improved public realm and a more diverse mix of uses. The expansion of urban district centres is not supported. The boundaries of urban district centres are clearly defined on the proposals map. Policy CE2a implies retail expansion on edge of district centre sites will not be supported. As indicated above, Policies CE2a and CE2b suggest that the sequential preference for any main town centres uses proposed on edge of district centre sites (i.e. expansion sites) will be Colchester Town Centre Core followed by Urban Gateway and Town Centre Fringe sites.

Food Store Development Options

5.36 The convenience goods projections indicate there is scope for one large food store in Colchester urban area in the short term (up to 2016). It is unlikely that this store can be accommodated within the Town Centre Core, therefore the Core Strategy suggests the next priority should be the Urban Gateways or Town Centre Fringe, followed by the Urban District Centres.

5.37 The pre-application proposals for a Morrison's food store are located within a designated Urban Gateway, and therefore this appears to be the preferred location for a new food store from a sequential perspective. This opportunity could meet the short term need for food store development identified above.

5.38 In the medium to long term there is a requirement for 1-2 new large food stores between 2016 to 2026. There appear to be three broad options to meet this need: the provision of a new district/neighbourhood centre anchored by a large food store, expansion of one of the five urban district centres or the provision of a freestanding out-of-centre food store.

5.39 In sequential terms, one of the urban centres would be the preferred location. The five Urban District Centres already have large food superstores and the provision of a further food store is not the priority, and furthermore Policy CE2b does not support the expansion of these centres. In terms of the spatial distribution of food superstores in Colchester urban area, the priorities appear to be the south of Colchester urban area, in order to serve existing and future residents and to the northwest to serve new residential areas. The five urban district centres are not best placed to serve these two areas.

5.40 The proposed neighbourhood centre within the Colchester Northern Growth Area or the Northern Gateway site could serve proposed residential development within the northwest of the urban area.

5.41 The proposed North Colchester Urban Extension (application ref. 121272) includes a new neighbourhood centre with a large food store (5,500 sq.m gross, 3,450 sq.m net). The applicant's retail assessment suggests this food store will be implemented by 2016. Our retail analysis suggests this proposal in isolation is unlikely to harm the vitality and viability of designated centres, but the sequential approach and timing of the proposal are key issues.

5.42 If the Council concludes that the Cowdray Centre site is suitable for a large food store and is the sequentially preferred location in the short term, then the large food store in the proposed neighbourhood centre could be delayed until after 2016 and the implementation of the Cowdray Centre development, unless the applicant can demonstrate two new food stores by 2016 would not have a harmful impact. This evidence has not been provided by the applicant at this stage.

Comparison Shopping Development Options

5.43 The recommended development phasing outlined above, indicates that vacant shop premises and planned investment within Colchester town centre should be sufficient to accommodate comparison expenditure growth and operator demand for small to medium sized premises up to and beyond 2016.

5.44 If longer term growth between 2016 and 2026 cannot be accommodated within the town centre then the Council should consider the potential to expand urban district centres or the provision of new shopping destinations in the urban area.

The NPPF requires local authorities to objectively assess needs and positively seek opportunities to accommodate that need.

5.45 The continued application of the sequential approach in Policies CE2a and CE2b is consistent with the expected phasing of development, i.e. retail development should not be permitted outside the Town Centre Core unless it can clearly be demonstrated that the proposed development cannot be accommodated in the Town Centre Core, and the proposals will not harm the vitality and viability of designated centres and planned investment.

5.46 Colchester town centre is the main comparison shopping destination and the main focus for employment, leisure, entertainment and cultural activities. As the main centre in the Borough, Colchester town centre must compete effectively with other large regional/sub-regional centres, such as Chelmsford and Ipswich.

5.47 The defined urban and rural district centres should continue to complement the town centre by providing for bulk convenience food shopping and a more limited range of comparison shopping facilities and other services. The priority for urban district centres in the short term should be the broadening on non-retail services as envisaged in Policy CE2b.

5.48 Below the district centres, designated local centres should serve small localised catchment areas, providing coverage across the Colchester urban areas. District and local should not compete directly with the town centre and should not contain uses which have a town city wide catchment area, if that use can be accommodated within or at the edge of the town centre.

5.49 Urban district centres should continue to serve their respective sectors of the Colchester urban area. Tollgate and Peartree Road currently serves the south west of the urban area. Greenstead Road and Wivenhoe serve the south east area. Turner Rise and Highwoods serve the north and north east of the urban area. Potential areas of deficiency in terms of urban district centres appear to be the south and north west areas of the urban area, although the provision of local centres is strong in the south of the urban area, which compensates for the absence of a district centre.

5.50 Large scale development that has a town wide catchment should if possible be concentrated within the Town Centre Core, followed by edge of town centre sites i.e. the Town Centre Fringe. However, some forms of development may be more appropriate in district and local centres, if there are localised areas of deficiency. The key issues are the nature and scale of retail/leisure development proposed and the catchment area the development seeks to serve.

5.51 In our view Core Strategy Policy CE2a and CE2b are broadly consistent with this approach. However where retail development cannot be accommodated in the Town Centre Core or Town Centre Fringe then it may be appropriate to accommodate these uses within or on the edge of district centres, rather than out of centre sites, but only where the impact on designated centres is acceptable.

Impact Assessment Thresholds

5.52 The NPPF indicates that impact assessments should normally only be necessary for developments outside town centres of over 2,500 sq.m gross. The NPPF suggests retail impact assessment would not usually required for development over this threshold within district centres. However, Policy CE2b suggests impact assessments may be necessary.

5.53 The 2,500 sq m gross threshold is considered to be appropriate for proposals in Colchester, however for the smaller rural district centres we consider that a lower threshold should be adopted as this scale of development would represent a significant proportion of the overall retail floorspace projections in the remainder of the Borough. Development smaller than 2,500 sq.m gross could have a significant adverse impact, particularly on the smaller town centres.

5.54 Based on the retail floorspace projections and the network of centres, a threshold of 2,500 sq.m gross is recommended for retail development within Colchester town and a 500 sq.m gross threshold for other parts of the Borough.

6.0 # Conclusions and Recommendations

6.1 This report provides an update of the Borough wide needs assessment for retail development in Colchester and should be read alongside the 2006 Study and the 2009 Update. The principal conclusions of the analysis contained within this study are summarised below

Meeting Shopping Needs in Colchester

6.2 The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail development over the plan period.

6.3 When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.

6.4 The short term priority is to secure the implementation and occupation of commitments and proposals. If an out-of-centre proposal emerges then the ability to accommodate the proposed use within town centres or emerging town centre developments will need to be carefully considered, along with an assessment of the proposal's impact.

6.5 The quantitative assessment of the potential capacity for new retail floorspace suggests that there is scope for new retail development within the Colchester urban area and the rest of the Borough, over and above commitments. The projections suggest new retail floorspace should be distributed as shown in Table 6.1 overleaf.

6.6 The capacity figures suggest there is limited need for food store development outside Colchester urban area. Recommended phasing of food store development in Colchester urban area is as follows:

- **up to 2016** – implementation of commitments plus one further large food store;
- **2016 to 2021** – implementation of one further large food store;
- **2021 to 2026** – implementation of one further large food store*.

* subject to monitored long term population and expenditure growth.

6.7 The recommended phasing of comparison goods retail development in Colchester urban area is:

- **up to 2016** – implementation of commitments/town centre proposals and the reoccupation of vacant units;

- **2016 to 2021** – implementation of up to 13,000 sq m gross of comparison retail floorspace;
- **2021 to 2026** – implementation of up to a further 19,000 sq m gross comparison retail floorspace*.

* subject to monitored long term population and expenditure growth and reoccupation of vacant space.

Table 6.1 Class A1 Retail Floorspace Projections

Location	Sale Floorspace sq.m net		
	Convenience	Comparison	Total
Up to 2016			
Commitments/town centre proposals	1,450	12,800	14,250
Colchester urban area	2,255	803	3,058
Tiptree	-	21	21
West Mersea	-	18	18
Other Colchester Borough	522	-	522
Total up to 2016	**4,227**	**13,642**	**17,869**
2016 to 2021			
Colchester urban area	2,610	9,079	11,689
Tiptree	-	48	48
West Mersea	-	33	33
Other Colchester Borough	174	-	174
Total 2016 to 2021	**2,784**	**9,160**	**11,944**
2021 to 2026			
Colchester urban area	3,101	13,805	16,906
Tiptree	-	74	74
West Mersea	-	49	49
Other Colchester Borough	209	-	209
Total 2016 to 2021	**3,310**	**13,928**	**17,238**
Total Plan Period 2012 to 2026			
Colchester urban area*	9,416	36,487	45,903
Tiptree	-	143	143
West Mersea	-	100	100
Other Colchester Borough	904	-	904
Grand Total	**10,321**	**36,730**	**47,050**

** including commitments/town centre proposals*

Source: Appendix B, Table 9B and Appendix C, Table 10C

Food Store Development

6.8 The convenience goods projections indicate there is scope for one large food store in Colchester urban area in the short term (up to 2016). It is unlikely that this food store can be accommodated within the Town Centre Core, and the pre-application proposals for a Morrison's food store located within a designated Urban Gateway appear to be the preferred location from a sequential perspective. This opportunity could meet the short term need for food store development identified above.

6.9 In the medium to long term (2016 to 2021) there is a requirement for 1-2 new large food stores, which could be provided in a new district/neighbourhood centre anchored by a large food store, expansion of one of the five urban district centres and/or the provision of a freestanding out-of-centre food store.

6.10 In terms of the spatial distribution of food superstores in Colchester urban area, the priorities appear to be the south of Colchester urban area, in order to serve existing and future residents and to the northwest to serve new residential areas. The proposed neighbourhood centre within the Colchester Northern Growth Area or the Northern Gateway site could serve proposed residential development within the northwest of the urban area.

6.11 If the Council concludes that the Cowdray Centre site is suitable for a large food store and is the sequentially preferred location in the short term, then the large food store in the proposed neighbourhood centre could be delayed until after 2016 and the implementation of the Cowdray Centre development, unless the applicant can demonstrate two new food stores by 2016 would not have a harmful impact.

Comparison Development

6.12 Vacant shop premises and planned investment within Colchester town centre should be sufficient to accommodate comparison expenditure growth and operator demand for small to medium sized premises up to and beyond 2016.

6.13 If longer term growth (2016 to 2026), where development cannot be accommodated within the town centre, the Council should consider the potential to expand urban district centres or the provision of new shopping destinations in the urban area. There is insufficient available expenditure to support all of the current comparison retail proposals between 2016 and 2021. The merits of these proposals will need to be considered carefully as a when detail proposals emerge.

6.14 Retail development should not be permitted outside the Town Centre Core unless it can clearly be demonstrated that the proposed development cannot be accommodated in the Town Centre Core, and the proposals will not harm the vitality and viability of designated centres and planned investment.

6.15 The defined urban and rural district centres should continue to complement the town centre by providing for bulk convenience food shopping and a more limited range of comparison shopping facilities and other services. The priority for urban district centres in the short term should be the broadening on non-retail services, as envisaged in Policy CE2b.

6.16 Below the district centres, designated local centres should serve small localised catchment areas, providing coverage across the Colchester urban areas. District and local should not compete directly with the town centre and should not contain uses which have a town city wide catchment area, if that use can be accommodated within or at the edge of the town centre.

Impact Assessment Thresholds

6.17 The 2,500 sq m gross threshold is considered to be appropriate for proposals in Colchester, however for the smaller rural district centres a lower threshold of 500 sq.m gross should be adopted.

Appendix A Study Area and Existing Facilities

Study Area Zones

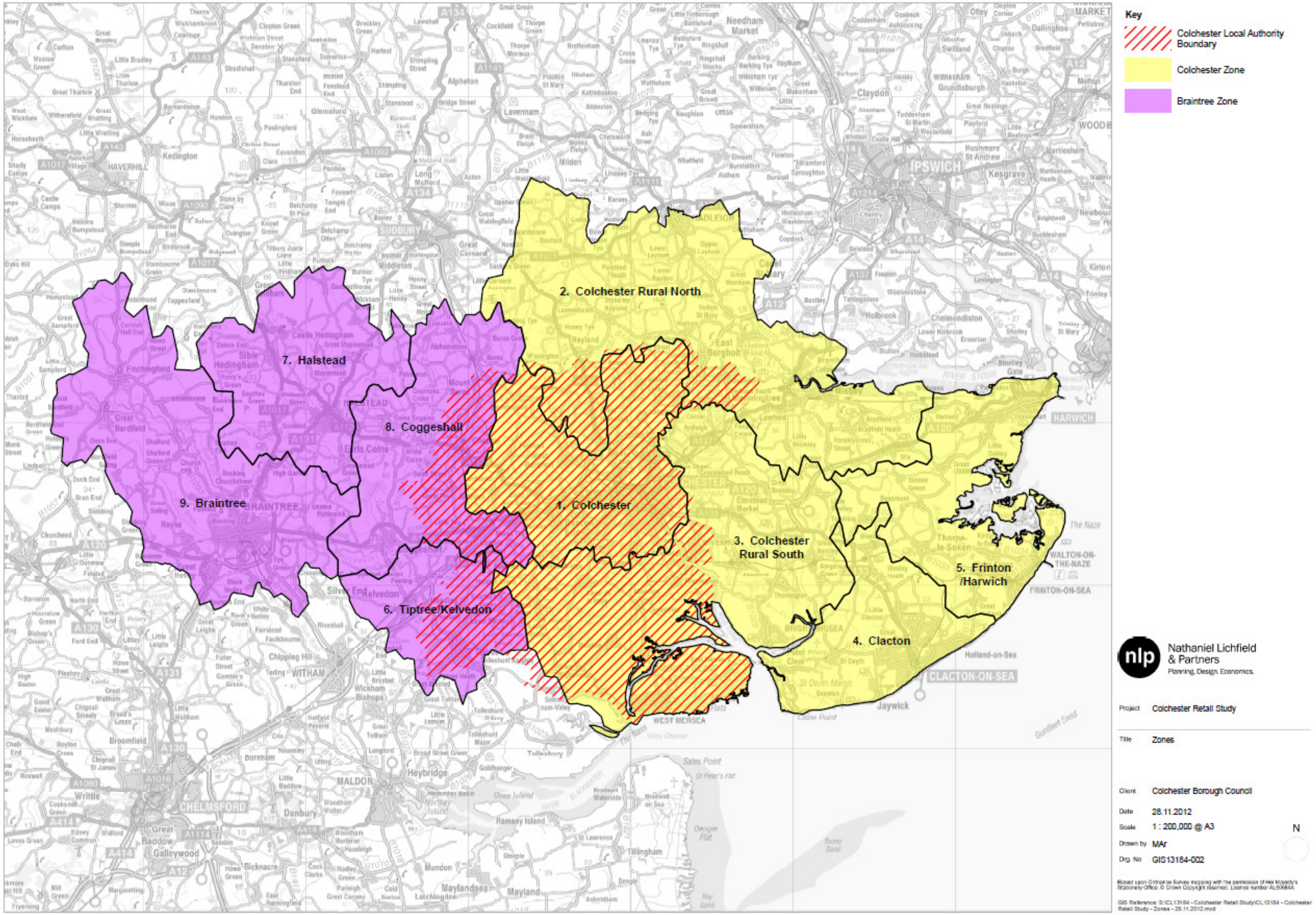
Colchester Zones

Zone	Postcode Sectors	Zone	Postcode Sectors
1 - Colchester	CO1 1 CO1 2 CO2 7 CO2 8 CO2 9 CO3 0 CO3 3 CO3 4 CO3 8 CO3 9 CO4 0 CO4 3 CO4 5 CO4 9 CO6 3	3 - Colchester Rural South	CO2 0 CO5 7 CO5 8 CO7 0 CO7 7 CO7 8 CO7 9
		4 - Clacton	CO15 1 CO15 2 CO15 3 CO15 4 CO15 5 CO15 6 CO16 7 CO16 8 CO16 9
2 - Colchester Rural North	CO6 4 CO6 5 CO7 6 CO10 5 CO11 1 CO11 2 IP7 5	5 - Frinton / Harwich	CO12 3 CO12 4 CO12 5 CO13 0 CO13 9 CO14 8 CO16 0

Braintree Zones

Zone	Postcode Sectors
6 - Tiptree/ Kelvedon	CO5 0 CO5 9
7 - Halstead	CO9 1 CO9 2 CO9 3
8 - Coggeshall	CO6 1 CO6 2 CO8 5
9 - Braintree	CM7 1 CM7 2 CM7 3 CM7 4 CM7 5 CM7 9 CM77 6 CM77 7 CM77 8

Study Area


Key
Colchester Local Authority Boundary
Colchester Zone
Braintree Zone
1. Colchester
2. Colchester Rural North
3. Colchester Rural South
4. Clacton
5. Frinton /Harwich
6. Tiptree/Kelvedon
7. Halstead
8. Coggeshall
9. Braintree
Nathaniel Lichfield & Partners
Planning. Design. Economics.
Project Colchester Retail Study
Title Zones
Client Colchester Borough Council
Date 28.11.2012
Scale 1 : 200,000 @ A3
Drawn by MAr
Drg. No GIS13184-002
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Based upon Ordnance Survey mapping with the permission of Her Majesty's Stationery Office. © Crown Copyright reserved. Licence number AL50684A
GIS Reference: S:\CL13184 - Colchester Retail Study\CL13184 - Colchester Retail Study - Zones - 28.11.2012.mxd

Table 1A: Convenience Floorspace and Benchmark Turnover

Town/Store	Sales Floorspace sq.m net	Convenience Sales %	Convenience Sales sq.m net	Turnover Density £ per sq.m net	Total Turnover £Million
Colchester					
Asda, Colchester	5,216	65%	3,390	£13,632	£46.22
Aldi, Magdalen Street Colchester	1,305	60%	783	£7,731	£6.05
Aldi, London Road Colchester	1,614	95%	1,533	£7,731	£11.85
Co-op, Abbots Road, Colchester	1,239	80%	991	£7,496	£7.43
Co-op, Nayland Road, Mile End, Colchester	127	95%	121	£7,496	£0.90
Co-op, Mersea Road, Colchester	641	85%	545	£7,496	£4.08
Co-op, Old Heath Road, Colchester	240	95%	228	£7,496	£1.71
Co-op, Regent Street, Rowhedge, Colchester	109	95%	104	£7,496	£0.78
Co-op, The Centre, Greenstead Estate, Colchester	552	90%	497	£7,496	£3.72
Co-op, The Square, Shrub End, Colchester	176	95%	167	£7,496	£1.25
Co-op, Old Heath Road, Colchester	239	95%	227	£7,496	£1.70
Co-op, Wimpole Road Colchester	279	80%	223	£7,496	£1.67
Co-op, Harwich Road, Colchester	100	98%	98	£7,496	£0.73
Iceland, St John's Walk, Colchester	432	95%	410	£7,265	£2.98
Marks & Spencer, Colchester	1,059	100%	1,059	£10,932	£11.58
Sainsbury's, Priory Walk, Colchester	1,235	90%	1,112	£12,537	£13.93
Tesco, Greenstead Road, Colchester	5,192	60%	3,115	£11,126	£34.66
Tesco Extra, Colchester	6,241	60%	3,745	£11,126	£41.66
Tesco Express, Crouch Street	315	95%	299	£11,126	£3.33
Tesco Express, Bromley Road	130	95%	124	£11,126	£1.37
Tesco Express, St Christopher Road	192	95%	182	£11,126	£2.03
Waitrose, Colchester	2,209	75%	1,657	£11,818	£19.58
Local Shops	3,200	99%	3,168	£4,500	£14.26
Total	**32,042**		**23,778**		**£233.50**
Stanway					
Co-op, Fiveways Retail Park, Stanway, Colchester	3,901	75%	2,926	£7,496	£21.93
Sainsbury's, Stanway, Colchester	9,027	60%	5,416	£12,537	£67.90
Iceland, Tollgate Centre, Colchester	439	95%	417	£7,265	£3.03
Total	**13,367**		**8,759**		**£92.86**
Tiptree					
Asda, Tiptree	1,115	85%	948	£13,632	£12.92
Tesco, Tiptree	1,697	85%	1,442	£11,818	£17.05
Local Shops	320	99%	317	£4,500	£1.43
Total	**3,132**		**2,707**		**£31.39**
West Mersea					
Co-op, Barfield Road, West Mersea	855	90%	770	£7,496	£5.77
Tesco Express, West Mersea	280	90%	204	£11,126	£2.27
Local Shops	202	99%	200	£4,500	£0.90
Total	**1,337**		**1,173**		**£8.94**
Wivenhoe					
Co-op. The Avenue, Wivenhoe	628	85%	534	£7,496	£4.00
Local Shops	108	99%	107	£4,500	£0.48
Total	**736**		**641**		**£4.48**
GRAND TOTAL	**50,614**		**37,058**		**£371.18**

Sources: Institute of Grocery Distribution, Verdict, VOA and Goad Plans

Table 2A: Comparison Floorspace

Location	Floorspace sq.m gross	Sales Floorspace sq.m net
Colchester comparison shops	84,793	59,355
Colchester comparison floorspace in food stores	n/a	161
Homebase	3,600	2,880
Sea Pets	511	409
Wickes	2,200	1,760
B&Q Extra	7,200	5,760
The Range	2,400	1,920
Homebase, Stanway	3,700	2,960
Other Colchester comp. floorspace in food stores	n/a	12,711
Tollgate Retail Park		
Bennetts	1,100	880
Currys	1,285	1,028
Staples	1,000	800
PC World	1,575	1,260
Conway Furniture	792	634
Dreams	929	743
Carpets 4 Less	648	518
Harveys	600	480
Carpetright	1,015	812
AHF	1,994	1,595
SCS	594	475
Next Home	660	528
Comet	1,858	1,486
Boots Drive thru	135	108
Peartree Road Retail Park		
Tool Station	50	40
Hatfield Furniture	2,230	1,784
Topps Tiles	557	446
Hatfield Outlet	2,647	2,118
World of Beds	420	336
Leather Gallery	350	280
Hunwick	350	280
Paul Simon	849	679
St Helena Hopice	210	168
Turner Retail Park		
Go Outdoors	3,700	2,960
Home Bargains	910	728
Bath Store	450	360
Jolly Pet Food	310	248
Bensons	750	600
Carpetright	750	600
Dunelm Mill	2,923	2,338
Colchester Retail Park		
Matalan	2,583	2,066
Brantano	1,000	800
Maplin	540	432
Blockbuster	540	432
JJB Sport	1,260	1,008
Colne View Retail Park		
DFS	1,800	1,440
Staples	1,725	1,380
Pets at Home	536	429
Halfords	1,000	800
Tiptree comparison shops	2,750	1,650
Tiptree comparison floorspace in foodstores	n/a	425
Wivenhoe comparison shops	80	48
Wivenhoe comparison floorspace in foodstores	n/a	95
West Mersea comparison shops	631	379
West Mersea comparison floorspace in foodstores	n/a	164
GRAND TOTAL	n/a	**124,613**

Appendix B Convenience Assessment

Table 1B: Population Projections

Zone Area	2011	2012	2016	2021	2026
Zone 1 - Colchester	128,066	130,276	138,545	147,769	156,978
Zone 2 - Colchester Rural North	34,115	34,243	34,941	36,073	37,363
Zone 3 - Colchester Rural South	44,088	44,723	47,259	50,378	53,628
Zone 4 - Clacton	65,317	66,142	69,612	74,180	79,068
Zone 5 - Frinton/Harwich	43,959	44,514	46,850	49,924	53,214
Zone 6 - Tiptree/Kelvedon	15,990	16,153	16,734	17,475	18,115
Zone 7 - Halstead	21,054	21,089	21,362	21,726	21,418
Zone 8 - Coggeshall	19,127	19,246	19,662	20,219	20,541
Zone 9 - Braintree	62,715	62,746	62,778	62,638	63,234
Total	**434,431**	**439,132**	**457,744**	**480,381**	**503,559**

Sources: Experian MMG3

Population in Zone 6 to 9 sourced from Braintree Retail Study Update 2012, based on Council's projected ward population estimates and housing completions

ONS 2011 sub-national population projections

Table 2B: Convenience Goods Expenditure Per Capita (2011 Prices)

Expenditure Per Capita	2012	2016	2021	2026
Zone 1: Colchester	£1,734	£1,737	£1,779	£1,841
Zone 2 - Colchester Rural North	£1,996	£2,000	£2,047	£2,120
Zone 3 - Colchester Rural South	£1,920	£1,923	£1,969	£2,038
Zone 4 - Clacton	£1,836	£1,840	£1,883	£1,950
Zone 5 - Frinton/Harwich	£1,880	£1,883	£1,928	£1,996
Zone 6 - Tiptree/Kelvedon	£1,918	£1,921	£1,967	£2,036
Zone 7 - Halstead	£1,896	£1,900	£1,945	£2,013
Zone 8 - Coggeshall	£1,957	£1,960	£2,007	£2,078
Zone 9 - Braintree	£1,874	£1,877	£1,922	£1,989

Sources:
Experian local estimates for 2011 convenience goods expenditure per capita
(Excluding special forms of trading)
Experian Business Strategies - recommended forecast growth rates
(0.1% 2011-2012, -0.1% 2012-2013, 0.0% 2013-2014, 0.6% 2014-2019 and 0.8% per annum onwards)

Table 3B: Total Available Convenience Goods Expenditure (£M - 2011 Prices)

Zone	2012	2016	2021	2026	Growth 2012-2016	Growth 2012-2021	Growth 2012-2026
Zone 1: Colchester	£225.90	£240.65	£262.88	£289.00	6.5%	16.4%	27.9%
Zone 2 - Colchester Rural North	£68.35	£69.88	£73.84	£79.21	2.2%	8.0%	15.9%
Zone 3 - Colchester Rural South	£85.87	£90.88	£99.19	£109.29	5.8%	15.5%	27.3%
Zone 4 - Clacton	£121.44	£128.09	£139.68	£154.18	5.5%	15.0%	27.0%
Zone 5 - Frinton/Harwich	£83.69	£88.22	£96.25	£106.21	5.4%	15.0%	26.9%
Zone 6 - Tiptree/Kelvedon	£30.98	£32.15	£34.37	£36.88	3.8%	10.9%	19.0%
Zone 7 - Halstead	£39.98	£40.59	£42.26	£43.11	1.5%	5.7%	7.8%
Zone 8 - Coggeshall	£37.66	£38.54	£40.58	£42.69	2.3%	7.7%	13.3%
Zone 9 - Braintree	£117.59	£117.83	£120.39	£125.77	0.2%	2.4%	7.0%
Total	**£811.46**	**£846.83**	**£909.45**	**£986.35**	**4.4%**	**12.1%**	**21.6%**

Sources: Table 1A and Table 2A

Table 4B: Convenience Shopping Penetration Rates 2012

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow
Asda, Colchester	15.0%	8.4%	4.7%	1.6%	1.4%	3.9%	0.9%	6.4%	0.3%	5.0%
Sainsbury's, Priory Walk, Colchester	4.6%	0.6%	4.6%	0.0%	0.3%	0.5%	0.9%	0.0%	0.0%	5.0%
Tesco Extra, Colchester	18.7%	17.0%	7.3%	0.2%	3.0%	0.0%	0.0%	0.4%	0.0%	5.0%
Tesco, Greenstead Road, Colchester	9.4%	0.6%	19.8%	0.0%	0.5%	0.9%	0.0%	2.4%	0.0%	5.0%
Waitrose, Colchester	6.3%	2.7%	7.0%	1.1%	0.6%	0.8%	0.0%	0.8%	0.4%	5.0%
Colchester Other	18.2%	2.5%	8.1%	0.6%	0.3%	0.9%	0.6%	2.1%	0.0%	5.0%
Sainsbury's, Stanway	17.0%	3.3%	8.9%	1.5%	1.7%	18.9%	2.6%	26.3%	1.0%	5.0%
Co-op, Fiveways Retail Park, Stanway	4.6%	0.6%	3.6%	1.1%	0.8%	1.0%	0.0%	0.0%	0.0%	5.0%
Colchester Sub-Total	**93.8%**	**35.7%**	**64.0%**	**6.1%**	**8.6%**	**26.9%**	**5.0%**	**38.4%**	**1.7%**	
Asda, Tiptree	0.0%	0.0%	0.0%	0.0%	0.0%	9.5%	0.0%	0.0%	0.0%	5.0%
Tesco, Tiptree	0.2%	0.0%	0.6%	0.0%	0.6%	39.9%	0.0%	2.0%	0.0%	5.0%
Tiptree Other	0.0%	0.0%	0.0%	0.0%	0.0%	3.8%	0.0%	0.0%	0.0%	5.0%
Tiptree Sub-Total	**0.2%**	**0.0%**	**0.6%**	**0.0%**	**0.6%**	**53.2%**	**0.0%**	**2.0%**	**0.0%**	
West Mersea	0.0%	0.0%	5.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Wivenhoe	0.0%	0.0%	10.1%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	5.0%
Other Colchester Borough	4.4%	1.9%	0.8%	0.0%	0.0%	0.0%	0.3%	1.7%	0.0%	5.0%
Other Sub-Total	**4.4%**	**1.9%**	**16.2%**	**0.0%**	**0.5%**	**0.0%**	**0.3%**	**1.7%**	**0.0%**	
Colchester Borough Total	**98.4%**	**37.6%**	**80.8%**	**6.1%**	**9.7%**	**80.1%**	**5.3%**	**42.1%**	**1.7%**	
Elsewhere										
Braintree	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	23.1%	10.9%	67.8%	n/a
Chelmsford	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.4%	1.6%	n/a
Clacton	0.5%	1.5%	7.2%	88.6%	18.2%	0.0%	0.0%	0.0%	0.0%	n/a
Frinton	0.0%	0.0%	0.6%	0.0%	13.2%	0.0%	0.0%	0.0%	0.0%	n/a
Ipswich	0.5%	18.8%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	n/a
Sudbury	0.0%	8.7%	0.0%	0.0%	0.0%	0.0%	18.3%	10.1%	0.0%	n/a
Other Outside Borough	0.4%	33.4%	11.4%	5.3%	58.6%	19.9%	52.4%	36.5%	28.9%	n/a
Market Share Total	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	

Source: NEMS Household Survey, September 2012 and Braintree Retail Study Update 2012

Table 5B: Convenience Expenditure 2012 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Expenditure 2012	**£225.90**	**£68.35**	**£85.87**	**£121.44**	**£83.69**	**£30.98**	**£39.98**	**£37.66**	**£117.59**		**£811.46**
Asda, Colchester	£33.88	£5.74	£4.04	£1.94	£1.17	£1.21	£0.36	£2.41	£0.35	£2.69	£53.80
Sainsbury's, Priory Walk, Colchester	£10.39	£0.41	£3.95	£0.00	£0.25	£0.15	£0.36	£0.00	£0.00	£0.82	£16.33
Tesco Extra, Colchester	£42.24	£11.62	£6.27	£0.24	£2.51	£0.00	£0.00	£0.15	£0.00	£3.32	£66.35
Tesco, Greenstead Road, Colchester	£21.23	£0.41	£17.00	£0.00	£0.42	£0.28	£0.00	£0.90	£0.00	£2.12	£42.37
Waitrose, Colchester	£14.23	£1.85	£6.01	£1.34	£0.50	£0.25	£0.00	£0.30	£0.47	£1.31	£26.26
Colchester Other	£41.11	£1.71	£6.96	£0.73	£0.25	£0.28	£0.24	£0.79	£0.00	£2.74	£54.81
Sainsbury's, Stanway	£38.40	£2.26	£7.64	£1.82	£1.42	£5.86	£1.04	£9.91	£1.18	£3.66	£73.18
Co-op, Fiveways Retail Park, Stanway	£10.39	£0.41	£3.09	£1.34	£0.67	£0.31	£0.00	£0.00	£0.00	£0.85	£17.06
Colchester Sub-Total	**£211.89**	**£24.40**	**£54.96**	**£7.41**	**£7.20**	**£8.33**	**£2.00**	**£14.46**	**£2.00**	**£17.51**	**£350.16**
Asda, Tiptree	£0.00	£0.00	£0.00	£0.00	£0.00	£2.94	£0.00	£0.00	£0.00	£0.15	£3.10
Tesco, Tiptree	£0.45	£0.00	£0.52	£0.00	£0.50	£12.36	£0.00	£0.75	£0.00	£0.77	£15.35
Tiptree Other	£0.00	£0.00	£0.00	£0.00	£0.00	£1.18	£0.00	£0.00	£0.00	£0.06	£1.24
Tiptree Sub-Total	**£0.45**	**£0.00**	**£0.52**	**£0.00**	**£0.50**	**£16.48**	**£0.00**	**£0.75**	**£0.00**	**£0.98**	**£19.69**
West Mersea	£0.00	£0.00	£4.55	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.24	£4.79
Wivenhoe	£0.00	£0.00	£8.67	£0.00	£0.42	£0.00	£0.00	£0.00	£0.00	£0.48	£9.57
Other Colchester Borough	£9.94	£1.30	£0.69	£0.00	£0.00	£0.00	£0.12	£0.64	£0.00	£0.67	£13.35
Other Sub-Total	**£9.94**	**£1.30**	**£13.91**	**£0.00**	**£0.42**	**£0.00**	**£0.12**	**£0.64**	**£0.00**	**£1.39**	**£27.71**
Colchester Borough Total	**£222.28**	**£25.70**	**£69.38**	**£7.41**	**£8.12**	**£24.82**	**£2.12**	**£15.86**	**£2.00**	**£19.88**	**£397.56**
Elsewhere											
Braintree	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£9.24	£4.11	£79.72	n/a	£93.07
Chelmsford	£0.45	£0.00	£0.00	£0.00	£0.00	£0.00	£0.36	£0.15	£1.88	n/a	£2.84
Clacton	£1.13	£1.03	£6.18	£107.59	£15.23	£0.00	£0.00	£0.00	£0.00	n/a	£131.16
Frinton	£0.00	£0.00	£0.52	£0.00	£11.05	£0.00	£0.00	£0.00	£0.00	n/a	£11.56
Ipswich	£1.13	£12.85	£0.00	£0.00	£0.25	£0.00	£0.00	£0.00	£0.00	n/a	£14.23
Sudbury	£0.00	£5.95	£0.00	£0.00	£0.00	£0.00	£7.32	£3.80	£0.00	n/a	£17.07
Other Outside Borough	£0.90	£22.83	£9.79	£6.44	£49.04	£6.17	£20.95	£13.75	£33.98	n/a	£163.84
Total	**£225.90**	**£68.35**	**£85.87**	**£121.44**	**£83.69**	**£30.98**	**£39.98**	**£37.66**	**£117.59**		**£831.33**

Table 6B: Convenience Expenditure 2016 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Expenditure 2016	**£240.65**	**£69.88**	**£90.88**	**£128.09**	**£88.22**	**£32.15**	**£40.59**	**£38.54**	**£117.83**		**£846.83**
Asda, Colchester	£36.10	£5.87	£4.27	£2.05	£1.24	£1.25	£0.37	£2.47	£0.35	£2.84	£56.80
Sainsbury's, Priory Walk, Colchester	£11.07	£0.42	£4.18	£0.00	£0.26	£0.16	£0.37	£0.00	£0.00	£0.87	£17.33
Tesco Extra, Colchester	£45.00	£11.88	£6.63	£0.26	£2.65	£0.00	£0.00	£0.15	£0.00	£3.50	£70.08
Tesco, Greenstead Road, Colchester	£22.62	£0.42	£17.99	£0.00	£0.44	£0.29	£0.00	£0.92	£0.00	£2.25	£44.94
Waitrose, Colchester	£15.16	£1.89	£6.36	£1.41	£0.53	£0.26	£0.00	£0.31	£0.47	£1.39	£27.77
Colchester Other	£43.80	£1.75	£7.36	£0.77	£0.26	£0.29	£0.24	£0.81	£0.00	£2.91	£58.19
Sainsbury's, Stanway	£40.91	£2.31	£8.09	£1.92	£1.50	£6.08	£1.06	£10.14	£1.18	£3.85	£77.02
Co-op, Fiveways Retail Park, Stanway	£11.07	£0.42	£3.27	£1.41	£0.71	£0.32	£0.00	£0.00	£0.00	£0.91	£18.10
Colchester Sub-Total	**£225.73**	**£24.95**	**£58.16**	**£7.81**	**£7.59**	**£8.65**	**£2.03**	**£14.80**	**£2.00**	**£18.51**	**£370.23**
Asda, Tiptree	£0.00	£0.00	£0.00	£0.00	£0.00	£3.05	£0.00	£0.00	£0.00	£0.16	£3.21
Tesco, Tiptree	£0.48	£0.00	£0.55	£0.00	£0.53	£12.83	£0.00	£0.77	£0.00	£0.80	£15.95
Tiptree Other	£0.00	£0.00	£0.00	£0.00	£0.00	£1.22	£0.00	£0.00	£0.00	£0.06	£1.29
Tiptree Sub-Total	**£0.48**	**£0.00**	**£0.55**	**£0.00**	**£0.53**	**£17.10**	**£0.00**	**£0.77**	**£0.00**	**£1.02**	**£20.45**
West Mersea	£0.00	£0.00	£4.82	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.25	£5.07
Wivenhoe	£0.00	£0.00	£9.18	£0.00	£0.44	£0.00	£0.00	£0.00	£0.00	£0.51	£10.13
Other Colchester Borough	£10.59	£1.33	£0.73	£0.00	£0.00	£0.00	£0.12	£0.66	£0.00	£0.71	£14.13
Other Sub-Total	**£10.59**	**£1.33**	**£14.72**	**£0.00**	**£0.44**	**£0.00**	**£0.12**	**£0.66**	**£0.00**	**£1.47**	**£29.32**
Colchester Borough Total	**£236.80**	**£26.28**	**£73.43**	**£7.81**	**£8.56**	**£25.75**	**£2.15**	**£16.22**	**£2.00**	**£21.00**	**£420.01**
Elsewhere											
Braintree	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£9.38	£4.20	£79.89	n/a	£93.47
Chelmsford	£0.48	£0.00	£0.00	£0.00	£0.00	£0.00	£0.37	£0.15	£1.89	n/a	£2.89
Clacton	£1.20	£1.05	£6.54	£113.48	£16.06	£0.00	£0.00	£0.00	£0.00	n/a	£138.34
Frinton	£0.00	£0.00	£0.55	£0.00	£11.64	£0.00	£0.00	£0.00	£0.00	n/a	£12.19
Ipswich	£1.20	£13.14	£0.00	£0.00	£0.26	£0.00	£0.00	£0.00	£0.00	n/a	£14.61
Sudbury	£0.00	£6.08	£0.00	£0.00	£0.00	£0.00	£7.43	£3.89	£0.00	n/a	£17.40
Other Outside Borough	£0.96	£23.34	£10.36	£6.79	£51.70	£6.40	£21.27	£14.07	£34.05	n/a	£168.93
Total	**£240.65**	**£69.88**	**£90.88**	**£128.09**	**£88.22**	**£32.15**	**£40.59**	**£38.54**	**£117.83**		**£867.83**

Table 7B: Convenience Expenditure 2021 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Expenditure 2021	**£262.88**	**£73.84**	**£99.19**	**£139.68**	**£96.25**	**£34.37**	**£42.26**	**£40.58**	**£120.39**		**£909.45**
Asda, Colchester	£39.43	£6.20	£4.66	£2.23	£1.35	£1.34	£0.38	£2.60	£0.36	£3.08	£61.64
Sainsbury's, Priory Walk, Colchester	£12.09	£0.44	£4.56	£0.00	£0.29	£0.17	£0.38	£0.00	£0.00	£0.94	£18.88
Tesco Extra, Colchester	£49.16	£12.55	£7.24	£0.28	£2.89	£0.00	£0.00	£0.16	£0.00	£3.80	£76.09
Tesco, Greenstead Road, Colchester	£24.71	£0.44	£19.64	£0.00	£0.48	£0.31	£0.00	£0.97	£0.00	£2.45	£49.01
Waitrose, Colchester	£16.56	£1.99	£6.94	£1.54	£0.58	£0.27	£0.00	£0.32	£0.48	£1.51	£30.20
Colchester Other	£47.84	£1.85	£8.03	£0.84	£0.29	£0.31	£0.25	£0.85	£0.00	£3.17	£63.44
Sainsbury's, Stanway	£44.69	£2.44	£8.83	£2.10	£1.64	£6.50	£1.10	£10.67	£1.20	£4.17	£83.32
Co-op, Fiveways Retail Park, Stanway	£12.09	£0.44	£3.57	£1.54	£0.77	£0.34	£0.00	£0.00	£0.00	£0.99	£19.74
Colchester Sub-Total	**£246.58**	**£26.36**	**£63.48**	**£8.52**	**£8.28**	**£9.25**	**£2.11**	**£15.58**	**£2.05**	**£20.12**	**£402.33**
Asda, Tiptree	£0.00	£0.00	£0.00	£0.00	£0.00	£3.27	£0.00	£0.00	£0.00	£0.17	£3.44
Tesco, Tiptree	£0.53	£0.00	£0.60	£0.00	£0.58	£13.71	£0.00	£0.81	£0.00	£0.85	£17.08
Tiptree Other	£0.00	£0.00	£0.00	£0.00	£0.00	£1.31	£0.00	£0.00	£0.00	£0.07	£1.37
Tiptree Sub-Total	**£0.53**	**£0.00**	**£0.60**	**£0.00**	**£0.58**	**£18.29**	**£0.00**	**£0.81**	**£0.00**	**£1.09**	**£21.89**
West Mersea	£0.00	£0.00	£5.26	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.28	£5.53
Wivenhoe	£0.00	£0.00	£10.02	£0.00	£0.48	£0.00	£0.00	£0.00	£0.00	£0.55	£11.05
Other Colchester Borough	£11.57	£1.40	£0.79	£0.00	£0.00	£0.00	£0.13	£0.69	£0.00	£0.77	£15.35
Other Sub-Total	**£11.57**	**£1.40**	**£16.07**	**£0.00**	**£0.48**	**£0.00**	**£0.13**	**£0.69**	**£0.00**	**£1.60**	**£31.93**
Colchester Borough Total	**£258.67**	**£27.76**	**£80.15**	**£8.52**	**£9.34**	**£27.53**	**£2.24**	**£17.08**	**£2.05**	**£22.81**	**£456.16**
Elsewhere											
Braintree	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£9.76	£4.42	£81.62	n/a	£95.81
Chelmsford	£0.53	£0.00	£0.00	£0.00	£0.00	£0.00	£0.38	£0.16	£1.93	n/a	£2.99
Clacton	£1.31	£1.11	£7.14	£123.76	£17.52	£0.00	£0.00	£0.00	£0.00	n/a	£150.84
Frinton	£0.00	£0.00	£0.60	£0.00	£12.71	£0.00	£0.00	£0.00	£0.00	n/a	£13.30
Ipswich	£1.31	£13.88	£0.00	£0.00	£0.29	£0.00	£0.00	£0.00	£0.00	n/a	£15.49
Sudbury	£0.00	£6.42	£0.00	£0.00	£0.00	£0.00	£7.73	£4.10	£0.00	n/a	£18.26
Other Outside Borough	£1.05	£24.66	£11.31	£7.40	£56.40	£6.84	£22.14	£14.81	£34.79	n/a	£179.42
Total	**£262.88**	**£73.84**	**£99.19**	**£139.68**	**£96.25**	**£34.37**	**£42.26**	**£40.58**	**£120.39**		**£932.26**

Table 8B: Convenience Expenditure 2026 £Million

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Expenditure 2026	**£289.00**	**£79.21**	**£109.29**	**£154.18**	**£106.21**	**£36.88**	**£43.11**	**£42.69**	**£125.77**		**£986.35**
Asda, Colchester	£43.35	£6.65	£5.14	£2.47	£1.49	£1.44	£0.39	£2.73	£0.38	£3.37	£67.40
Sainsbury's, Priory Walk, Colchester	£13.29	£0.48	£5.03	£0.00	£0.32	£0.18	£0.39	£0.00	£0.00	£1.04	£20.72
Tesco Extra, Colchester	£54.04	£13.47	£7.98	£0.31	£3.19	£0.00	£0.00	£0.17	£0.00	£4.17	£83.32
Tesco, Greenstead Road, Colchester	£27.17	£0.48	£21.64	£0.00	£0.53	£0.33	£0.00	£1.02	£0.00	£2.69	£53.86
Waitrose, Colchester	£18.21	£2.14	£7.65	£1.70	£0.64	£0.30	£0.00	£0.34	£0.50	£1.66	£33.13
Colchester Other	£52.60	£1.98	£8.85	£0.93	£0.32	£0.33	£0.26	£0.90	£0.00	£3.48	£69.64
Sainsbury's, Stanway	£49.13	£2.61	£9.73	£2.31	£1.81	£6.97	£1.12	£11.23	£1.26	£4.53	£90.70
Co-op, Fiveways Retail Park, Stanway	£13.29	£0.48	£3.93	£1.70	£0.85	£0.37	£0.00	£0.00	£0.00	£1.09	£21.70
Colchester Sub-Total	**£271.08**	**£28.28**	**£69.95**	**£9.41**	**£9.13**	**£9.92**	**£2.16**	**£16.39**	**£2.14**	**£22.02**	**£440.47**
Asda, Tiptree	£0.00	£0.00	£0.00	£0.00	£0.00	£3.50	£0.00	£0.00	£0.00	£0.18	£3.69
Tesco, Tiptree	£0.58	£0.00	£0.66	£0.00	£0.64	£14.72	£0.00	£0.85	£0.00	£0.92	£18.36
Tiptree Other	£0.00	£0.00	£0.00	£0.00	£0.00	£1.40	£0.00	£0.00	£0.00	£0.07	£1.48
Tiptree Sub-Total	**£0.58**	**£0.00**	**£0.66**	**£0.00**	**£0.64**	**£19.62**	**£0.00**	**£0.85**	**£0.00**	**£1.18**	**£23.52**
West Mersea	£0.00	£0.00	£5.79	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.30	£6.10
Wivenhoe	£0.00	£0.00	£11.04	£0.00	£0.53	£0.00	£0.00	£0.00	£0.00	£0.61	£12.18
Other Colchester Borough	£12.72	£1.50	£0.87	£0.00	£0.00	£0.00	£0.13	£0.73	£0.00	£0.84	£16.79
Other Sub-Total	**£12.72**	**£1.50**	**£17.71**	**£0.00**	**£0.53**	**£0.00**	**£0.13**	**£0.73**	**£0.00**	**£1.75**	**£35.07**
Colchester Borough Total	**£284.37**	**£29.78**	**£88.31**	**£9.41**	**£10.30**	**£29.54**	**£2.29**	**£17.97**	**£2.14**	**£24.95**	**£499.06**
Elsewhere											
Braintree	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£9.96	£4.65	£85.27	n/a	£99.89
Chelmsford	£0.58	£0.00	£0.00	£0.00	£0.00	£0.00	£0.39	£0.17	£2.01	n/a	£3.15
Clacton	£1.44	£1.19	£7.87	£136.61	£19.33	£0.00	£0.00	£0.00	£0.00	n/a	£166.44
Frinton	£0.00	£0.00	£0.66	£0.00	£14.02	£0.00	£0.00	£0.00	£0.00	n/a	£14.68
Ipswich	£1.44	£14.89	£0.00	£0.00	£0.32	£0.00	£0.00	£0.00	£0.00	n/a	£16.66
Sudbury	£0.00	£6.89	£0.00	£0.00	£0.00	£0.00	£7.89	£4.31	£0.00	n/a	£19.09
Other Outside Borough	£1.16	£26.46	£12.46	£8.17	£62.24	£7.34	£22.59	£15.58	£36.35	n/a	£192.34
Total	**£289.00**	**£79.21**	**£109.29**	**£154.18**	**£106.21**	**£36.88**	**£43.11**	**£42.69**	**£125.77**		**£1,011.30**

Table 9B: Summary of Convenience Capacity 2012 to 2026 (£Million)

Town	2012	2016	2021	2026
Available Expenditure in Borough				
Colchester and Stanway	£350.16	£370.23	£402.33	£440.47
Tiptree	£19.69	£20.45	£21.89	£23.52
West Mersea	£4.79	£5.07	£5.53	£6.10
Wivenhoe	£9.57	£10.13	£11.05	£12.18
Other Colchester Borough	£13.35	£14.13	£15.35	£16.79
Total	**£397.56**	**£420.01**	**£456.16**	**£499.06**
Benchmark Turnover of Existing Facilities				
Colchester and Stanway*	£326.36	£342.49	£342.49	£342.49
Tiptree	£31.39	£31.39	£31.39	£31.39
West Mersea	£8.94	£8.94	£8.94	£8.94
Wivenhoe	£4.48	£4.48	£4.48	£4.48
Other Colchester Borough	£13.35	£13.35	£13.35	£13.35
Total	**£384.53**	**£400.66**	**£400.66**	**£400.66**
Surplus Expenditure				
Colchester and Stanway	£23.79	£27.74	£59.84	£97.98
Tiptree	-£11.70	-£10.94	-£9.50	-£7.87
West Mersea	-£4.15	-£3.87	-£3.40	-£2.84
Wivenhoe	£5.09	£5.64	£6.57	£7.70
Other Colchester Borough	n/a	£0.77	£1.99	£3.44
Total	**£13.03**	**£19.35**	**£55.50**	**£98.40**
Turnover Density for New Floorspace £ psm (average for five main operators)	£12,300	£12,300	£12,300	£12,300
Floorspace (sq.m (net))				
Colchester and Stanway	1,934	2,255	4,865	7,966
Tiptree	-951	-890	-772	-640
West Mersea	-337	-314	-277	-231
Wivenhoe	414	459	534	626
Other Colchester Borough	n/a	63	162	279
Total	**1,059**	**1,573**	**4,512**	**8,000**
Floorspace (sq.m (gross))				
Colchester and Stanway	2,763	3,222	6,950	11,380
Tiptree	-1,359	-1,271	-1,103	-914
West Mersea	-482	-449	-395	-330
Wivenhoe	591	655	763	894
Other Colchester Borough	n/a	90	232	399
Total	**1,513**	**2,247**	**6,446**	**11,429**

Commitments
Tesco, Blackheath 250 sq m net convenience goods sales
Turnover = 250 at £11,126 per sq m net = £2.78m

Tesco, Garrison Local Centre 1,200 sq m net convenience goods sales
Turnover = 1,200 at £11,126 per sq m net = £13.35m

* Tesco commitments at Blackheath and the Garrison added at 2016

Sources: Tables 1A and 5B to 8B

Table 10B: Summary of Convenience Capacity 2012 to 2026 (£Million)

Town	2012	2016	2021	2026
Available Expenditure in Borough				
Colchester and Stanway	£350.16	£370.23	£402.33	£440.47
Tiptree	£19.69	£20.45	£21.89	£23.52
West Mersea	£4.79	£5.07	£5.53	£6.10
Wivenhoe	£9.57	£10.13	£11.05	£12.18
Other Colchester Borough	£13.35	£14.13	£15.35	£16.79
Total	**£397.56**	**£420.01**	**£456.16**	**£499.06**
Benchmark Turnover of Existing Facilities				
Colchester and Stanway	£326.36	£326.36	£326.36	£326.36
Tiptree	£31.39	£31.39	£31.39	£31.39
West Mersea	£8.94	£8.94	£8.94	£8.94
Wivenhoe	£4.48	£4.48	£4.48	£4.48
Other Colchester Borough	£13.35	£13.35	£13.35	£13.35
Total	**£384.53**	**£384.53**	**£384.53**	**£384.53**
Commitments/Proposals				
Tesco Express, Blackheath	£2.78	£2.78	£2.78	£2.78
Tesco, Garrison Local Centre	£13.35	£13.35	£13.35	£13.35
Morrison's, Cowdray Centre	£29.56	£29.56	£29.56	£29.56
North Colchester UE food store	£29.72	£29.72	£29.72	£29.72
Northern Gateway food store	£28.29	£28.29	£28.29	£28.29
Gosbecks Road food store	£15.37	£15.37	£15.37	£15.37
Total	**£119.07**	**£119.07**	**£119.07**	**£119.07**
Surplus Expenditure				
Colchester and Stanway	-£95.28	-£75.20	-£43.10	-£4.96
Tiptree	-£11.70	-£10.94	-£9.50	-£7.87
West Mersea	-£4.15	-£3.87	-£3.40	-£2.84
Wivenhoe	£5.09	£5.64	£6.57	£7.70
Other Colchester Borough	n/a	£0.77	£1.99	£3.44
Total	**-£106.04**	**-£83.59**	**-£47.44**	**-£4.54**
Turnover Density for New Floorspace £ psm (average for five main operators)	£12,300	£12,300	£12,300	£12,300
Floorspace (sq.m (net))				
Colchester and Stanway	-7,746	-6,114	-3,504	-403
Tiptree	-951	-890	-772	-640
West Mersea	-337	-314	-277	-231
Wivenhoe	414	459	534	626
Other Colchester Borough	n/a	63	162	279
Total	**-8,621**	**-6,796**	**-3,857**	**-369**
Floorspace (sq.m (gross))				
Colchester and Stanway	-11,066	-8,734	-5,006	-576
Tiptree	-1,359	-1,271	-1,103	-914
West Mersea	-482	-449	-395	-330
Wivenhoe	591	655	763	894
Other Colchester Borough	n/a	90	232	399
Total	**-12,316**	**-9,709**	**-5,510**	**-527**

Commitments/Proposals

Tesco, Blackheath 250 sq m net convenience goods sales
Turnover = 250 at £11,126 per sq m net = £2.78m

Tesco, Garrison Local Centre 1,200 sq m net convenience goods sales
Turnover = 1,200 at £11,126 per sq m net = £13.35m

Morrison's food store, Cowdray Centre 2,378 sq m net convenience goods sales
Turnover = 2,378 at £12,431 per sq m net = £29.56m

North Colchester UE food store 2,415 sq m net convenience goods sales
Turnover = 2,416 at £12,300 per sq m net = £29.72m

Northern Gateway food store 2,300 sq m net conveniene good sales
Turnover = 2,500 at £12,300 per sq m net = £28.29m

Gosbecks Road neighbourhood food store 1,250 sq m net conveniene good sales
Turnover = 1,250 at £12,300 per sq m net = £15.37m

Sources: Tables 1A and 5B to 8B

Appendix C Comparison Assessment

Table 1C: Comparison Goods Expenditure Per Capita (2011 Prices)

Expenditure Per Capita	2012	2016	2021	2026
Zone 1: Colchester	£2,591	£2,765	£3,083	£3,549
Zone 2 - Colchester Rural North	£3,019	£3,222	£3,593	£4,135
Zone 3 - Colchester Rural South	£2,897	£3,091	£3,447	£3,968
Zone 4 - Clacton	£2,318	£2,473	£2,758	£3,174
Zone 5 - Frinton/Harwich	£2,546	£2,717	£3,030	£3,487
Zone 6 - Tiptree/Kelvedon	£3,030	£3,234	£3,606	£4,150
Zone 7 - Halstead	£2,813	£3,002	£3,347	£3,853
Zone 8 - Coggeshall	£3,082	£3,288	£3,667	£4,221
Zone 9 - Braintree	£2,907	£3,102	£3,459	£3,982

Sources:
Experian local estimates for 2011 comparison goods expenditure per capita
(Excluding special forms of trading)
Experian Business Strategies - recommended forecast growth rates
(1.4% 2011-2012, 1.8% 2012-2013, 2.4% 2013-2014 and 2.9% per annum onwards)

Table 2C: Total Available Comparison Goods Expenditure (£M - 2011 Prices)

Zone	2012	2016	2021	2026	Growth 2012-2016	Growth 2012-2021	Growth 2012-2026
Zone 1: Colchester	£337.54	£383.08	£455.57	£557.11	13.5%	35.0%	65.0%
Zone 2 - Colchester Rural North	£103.38	£112.58	£129.61	£154.50	8.9%	25.4%	49.4%
Zone 3 - Colchester Rural South	£129.56	£146.08	£173.65	£212.79	12.7%	34.0%	64.2%
Zone 4 - Clacton	£153.32	£172.15	£204.59	£250.96	12.3%	33.4%	63.7%
Zone 5 - Frinton/Harwich	£113.33	£127.29	£151.27	£185.56	12.3%	33.5%	63.7%
Zone 6 - Tiptree/Kelvedon	£48.94	£54.12	£63.01	£75.18	10.6%	28.8%	53.6%
Zone 7 - Halstead	£59.32	£64.13	£72.72	£82.52	8.1%	22.6%	39.1%
Zone 8 - Coggeshall	£59.32	£64.65	£74.14	£86.71	9.0%	25.0%	46.2%
Zone 9 - Braintree	£182.40	£194.74	£216.66	£251.80	6.8%	18.8%	38.0%
Total	**£1,187.12**	**£1,318.81**	**£1,541.23**	**£1,857.13**	**11.1%**	**29.8%**	**56.4%**

Sources: Table 1B and Table 1C

Table 3C: Comparison Shopping Penetration Rates 2012

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow
Colchester	65.2%	42.6%	63.1%	27.7%	50.8%	51.2%	26.2%	40.6%	5.7%	5.0%
Other Colchester	22.4%	11.1%	18.3%	4.6%	10.0%	13.4%	6.7%	15.5%	1.4%	5.0%
Tiptree	0.1%	0.0%	0.0%	0.0%	0.0%	5.4%	0.2%	0.2%	0.2%	5.0%
West Mersea	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Borough Total	**87.7%**	**53.7%**	**82.7%**	**32.3%**	**60.8%**	**70.0%**	**33.1%**	**56.3%**	**7.3%**	
Braintree	1.1%	0.4%	2.0%	0.8%	0.3%	12.8%	31.6%	17.5%	63.1%	n/a
Chelmsford	1.1%	0.1%	0.9%	0.3%	1.1%	7.7%	2.9%	1.0%	18.7%	n/a
Clacton	0.5%	2.3%	3.7%	59.9%	12.2%	0.0%	0.0%	0.0%	0.0%	n/a
Frinton	0.0%	0.0%	1.3%	0.5%	6.9%	0.0%	0.0%	0.0%	0.0%	n/a
Ipswich	4.3%	27.7%	3.8%	3.8%	4.6%	0.2%	0.3%	0.0%	0.1%	n/a
Sudbury	0.2%	2.4%	0.0%	0.0%	0.0%	1.5%	9.2%	8.3%	0.1%	n/a
Other Outside Borough	5.1%	13.4%	5.6%	2.4%	14.1%	7.8%	22.9%	16.9%	10.7%	n/a
Market Share Total	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	

Source: NEMS Household Survey, September 2012 and Braintree District Council Retail Study Update 2012

Table 4C: Comparison Expenditure 2012 £Million

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Expenditure 2012	**£337.54**	**£103.38**	**£129.56**	**£153.32**	**£113.33**	**£48.94**	**£59.32**	**£59.32**	**£182.40**		**£1,187.12**
Colchester	£220.08	£44.04	£81.75	£42.47	£57.57	£25.06	£15.54	£24.08	£10.40	£27.42	£548.42
Other Colchester	£75.61	£11.47	£23.71	£7.05	£11.33	£6.56	£3.97	£9.19	£2.55	£7.97	£159.43
Tiptree	£0.34	£0.00	£0.00	£0.00	£0.00	£2.64	£0.12	£0.12	£0.36	£0.19	£3.77
West Mersea	£0.00	£0.00	£1.68	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.09	£1.77
Borough Total	**£296.03**	**£55.51**	**£107.15**	**£49.52**	**£68.91**	**£34.26**	**£19.64**	**£33.39**	**£13.32**	**£35.67**	**£713.39**
Braintree	£3.71	£0.41	£2.59	£1.23	£0.34	£6.26	£18.75	£10.38	£115.10	n/a	£158.77
Chelmsford	£3.71	£0.10	£1.17	£0.46	£1.25	£3.77	£1.72	£0.59	£34.11	n/a	£46.88
Clacton	£1.69	£2.38	£4.79	£91.84	£13.83	£0.00	£0.00	£0.00	£0.00	n/a	£114.52
Frinton	£0.00	£0.00	£1.68	£0.77	£7.82	£0.00	£0.00	£0.00	£0.00	n/a	£10.27
Ipswich	£14.51	£28.64	£4.92	£5.83	£5.21	£0.10	£0.18	£0.00	£0.18	n/a	£59.57
Sudbury	£0.68	£2.48	£0.00	£0.00	£0.00	£0.73	£5.46	£4.92	£0.18	n/a	£14.45
Other Outside Borough	£17.21	£13.85	£7.26	£3.68	£15.98	£3.82	£13.58	£10.02	£19.52	n/a	£104.93
Total	**£337.54**	**£103.38**	**£129.56**	**£153.32**	**£113.33**	**£48.94**	**£59.32**	**£59.32**	**£182.40**		**£1,175.91**

Table 5C: Increased Future Comparison Shopping Penetration Rates 2016 to 2026

Centre/Facilities	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow
Colchester	95.0%	60.0%	85.0%	35.0%	65.0%	70.0%	35.0%	60.0%	7.1%	5.0%
Tiptree	0.1%	0.0%	0.0%	0.0%	0.0%	5.4%	0.2%	0.2%	0.2%	5.0%
West Mersea	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Borough Total	**95.1%**	**60.0%**	**86.3%**	**35.0%**	**65.0%**	**75.4%**	**35.2%**	**60.2%**	**7.3%**	
Other Outside Borough	4.9%	40.0%	13.7%	65.0%	35.0%	24.6%	64.8%	39.8%	92.7%	n/a
Market Share Total	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	

Source: NEMS Household Survey, September 2012 and Braintree District Council Retail Study Update 2012

Table 6C: Comparison Expenditure 2016 £Million - Constant Market Shares

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Expenditure 2016	**£383.08**	**£112.58**	**£146.08**	**£172.15**	**£127.29**	**£54.12**	**£64.13**	**£64.65**	**£194.74**		**£1,318.81**
Colchester	£249.77	£47.96	£92.18	£47.69	£64.66	£27.71	£16.80	£26.25	£11.10	£30.74	£614.85
Other Colchester	£85.81	£12.50	£26.73	£7.92	£12.73	£7.25	£4.30	£10.02	£2.73	£8.95	£178.93
Tiptree	£0.38	£0.00	£0.00	£0.00	£0.00	£2.92	£0.13	£0.13	£0.39	£0.21	£4.16
West Mersea	£0.00	£0.00	£1.90	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.10	£2.00
Borough Total	**£335.96**	**£60.46**	**£120.81**	**£55.60**	**£77.39**	**£37.88**	**£21.23**	**£36.40**	**£14.22**	**£40.00**	**£799.94**
Braintree	£4.21	£0.45	£2.92	£1.38	£0.38	£6.93	£20.27	£11.31	£122.88	n/a	£170.73
Chelmsford	£4.21	£0.11	£1.31	£0.52	£1.40	£4.17	£1.86	£0.65	£36.42	n/a	£50.65
Clacton	£1.92	£2.59	£5.40	£103.12	£15.53	£0.00	£0.00	£0.00	£0.00	n/a	£128.56
Frinton	£0.00	£0.00	£1.90	£0.86	£8.78	£0.00	£0.00	£0.00	£0.00	n/a	£11.54
Ipswich	£16.47	£31.18	£5.55	£6.54	£5.86	£0.11	£0.19	£0.00	£0.19	n/a	£66.10
Sudbury	£0.77	£2.70	£0.00	£0.00	£0.00	£0.81	£5.90	£5.37	£0.19	n/a	£15.74
Other Outside Borough	£19.54	£15.09	£8.18	£4.13	£17.95	£4.22	£14.69	£10.93	£20.84	n/a	£115.55
Total	**£383.08**	**£112.58**	**£146.08**	**£172.15**	**£127.29**	**£54.12**	**£64.13**	**£64.65**	**£194.74**		**£1,308.16**

Table 7C: Comparison Expenditure 2021 £Million - Constant Market Shares

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Expenditure 2021	**£455.57**	**£129.61**	**£173.65**	**£204.59**	**£151.27**	**£63.01**	**£72.72**	**£74.14**	**£216.66**		**£1,541.23**
Colchester	£297.03	£55.21	£109.58	£56.67	£76.85	£32.26	£19.05	£30.10	£12.35	£36.27	£725.37
Other Colchester	£102.05	£14.39	£31.78	£9.41	£15.13	£8.44	£4.87	£11.49	£3.03	£10.56	£211.15
Tiptree	£0.46	£0.00	£0.00	£0.00	£0.00	£3.40	£0.15	£0.15	£0.43	£0.24	£4.83
West Mersea	£0.00	£0.00	£2.26	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.12	£2.38
Borough Total	**£399.54**	**£69.60**	**£143.61**	**£66.08**	**£91.97**	**£44.11**	**£24.07**	**£41.74**	**£15.82**	**£47.19**	**£943.73**
Braintree	£5.01	£0.52	£3.47	£1.64	£0.45	£8.07	£22.98	£12.97	£136.72	n/a	£191.83
Chelmsford	£5.01	£0.13	£1.56	£0.61	£1.66	£4.85	£2.11	£0.74	£40.52	n/a	£57.20
Clacton	£2.28	£2.98	£6.43	£122.55	£18.45	£0.00	£0.00	£0.00	£0.00	n/a	£152.69
Frinton	£0.00	£0.00	£2.26	£1.02	£10.44	£0.00	£0.00	£0.00	£0.00	n/a	£13.72
Ipswich	£19.59	£35.90	£6.60	£7.77	£6.96	£0.13	£0.22	£0.00	£0.22	n/a	£77.38
Sudbury	£0.91	£3.11	£0.00	£0.00	£0.00	£0.95	£6.69	£6.15	£0.22	n/a	£18.03
Other Outside Borough	£23.23	£17.37	£9.72	£4.91	£21.33	£4.92	£16.65	£12.53	£23.18	n/a	£133.85
Total	**£455.57**	**£129.61**	**£173.65**	**£204.59**	**£151.27**	**£63.01**	**£72.72**	**£74.14**	**£216.66**		**£1,531.22**

Table 8C: Comparison Expenditure 2026 £Million - Constant Market Shares

Centre	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Inflow	Total
Expenditure 2026	**£557.11**	**£154.50**	**£212.79**	**£250.96**	**£185.56**	**£75.18**	**£82.52**	**£86.71**	**£251.80**		**£1,857.13**
Colchester	£363.24	£65.82	£134.27	£69.52	£94.26	£38.49	£21.62	£35.20	£14.35	£44.04	£880.81
Other Colchester	£124.79	£17.15	£38.94	£11.54	£18.56	£10.07	£5.53	£13.44	£3.53	£12.82	£256.37
Tiptree	£0.56	£0.00	£0.00	£0.00	£0.00	£4.06	£0.17	£0.17	£0.50	£0.29	£5.75
West Mersea	£0.00	£0.00	£2.77	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.15	£2.91
Borough Total	**£488.59**	**£82.96**	**£175.98**	**£81.06**	**£112.82**	**£52.63**	**£27.32**	**£48.82**	**£18.38**	**£57.29**	**£1,145.84**
Braintree	£6.13	£0.62	£4.26	£2.01	£0.56	£9.62	£26.08	£15.17	£158.89	n/a	£223.33
Chelmsford	£6.13	£0.15	£1.92	£0.75	£2.04	£5.79	£2.39	£0.87	£47.09	n/a	£67.13
Clacton	£2.79	£3.55	£7.87	£150.33	£22.64	£0.00	£0.00	£0.00	£0.00	n/a	£187.18
Frinton	£0.00	£0.00	£2.77	£1.25	£12.80	£0.00	£0.00	£0.00	£0.00	n/a	£16.82
Ipswich	£23.96	£42.80	£8.09	£9.54	£8.54	£0.15	£0.25	£0.00	£0.25	n/a	£93.56
Sudbury	£1.11	£3.71	£0.00	£0.00	£0.00	£1.13	£7.59	£7.20	£0.25	n/a	£20.99
Other Outside Borough	£28.41	£20.70	£11.92	£6.02	£26.16	£5.86	£18.90	£14.65	£26.94	n/a	£159.58
Total	**£557.11**	**£154.50**	**£212.79**	**£250.96**	**£185.56**	**£75.18**	**£82.52**	**£86.71**	**£251.80**		**£1,847.29**

Table 9C: Comparison Floorspace Capacity - Constant Market Shares (no proposals)

	2012	2016	2021	2026
Available Expenditure in Borough				
Colchester (incl retail warehouses)	£707.85	£793.78	£936.52	£1,137.18
Tiptree	£3.77	£4.16	£4.83	£5.75
West Mersea	£1.77	£2.00	£2.38	£2.91
Total	**£713.39**	**£799.94**	**£943.73**	**£1,145.84**
Turnover of Existing Facilities				
Colchester (incl retail warehouses)	£707.85	£760.21	£831.13	£908.68
Tiptree	£3.77	£4.05	£4.43	£4.84
West Mersea	£1.77	£1.90	£2.08	£2.28
Total	**£713.39**	**£766.16**	**£837.64**	**£915.80**
Surplus/Deficit Expenditure				
Colchester (incl retail warehouses)	n/a	£33.57	£105.39	£228.51
Tiptree	n/a	£0.11	£0.40	£0.91
West Mersea	n/a	£0.09	£0.29	£0.64
Total	**n/a**	**£33.78**	**£106.08**	**£230.05**
Turnover Density for New Floorspace (£ per sq.m)				
Colchester	£7,000	£7,488	£8,147	£8,863
Other centres	£5,000	£5,349	£5,819	£6,331
Sales Floorspace (sq.m net)				
Colchester (incl retail warehouses)	n/a	4,483	12,936	25,781
Tiptree	n/a	21	69	143
West Mersea	n/a	18	51	100
Total	**n/a**	**4,522**	**13,055**	**26,025**
Floorspace (sq.m gross)				
Colchester (incl retail warehouses)	n/a	5,978	17,248	34,375
Tiptree	n/a	28	91	191
West Mersea	n/a	24	67	134
Total	**n/a**	**6,029**	**17,407**	**34,700**

Sources: Tables 4C and 6C to 8C

Table 10C: Comparison Floorspace Capacity - Increased Market Share (with Town Centre Proposals)

	2012	2016	2021	2026
Available Expenditure in Borough				
Colchester (incl retail warehouses)	£761.80	£854.29	£1,007.92	£1,223.88
Tiptree	£3.77	£4.16	£4.83	£5.75
West Mersea	£1.77	£2.00	£2.38	£2.91
Total	**£767.35**	**£860.45**	**£1,015.12**	**£1,232.54**
Turnover of Existing Facilities				
Colchester (incl retail warehouses)	£707.85	£760.21	£831.13	£908.68
Tiptree	£3.77	£4.05	£4.43	£4.84
West Mersea	£1.77	£1.90	£2.08	£2.28
Total	**£713.39**	**£766.16**	**£837.64**	**£915.80**
Turnover of Town Centre Proposals				
William & Griffin Department Store Proposals	£17.50	£18.79	£20.55	£22.47
The Crescent Vineyard Gate	£63.00	£67.66	£73.97	£80.87
Garrison Local Centre	£1.50	£1.61	£1.76	£1.93
Total	**£82.00**	**£88.07**	**£96.28**	**£105.26**
Surplus/Deficit Expenditure				
Colchester (incl retail warehouses)	-£28.05	£6.02	£80.51	£209.94
Tiptree	£0.00	£0.11	£0.40	£0.91
West Mersea	£0.00	£0.09	£0.29	£0.64
Total	**-£28.05**	**£6.22**	**£81.20**	**£211.48**
Turnover Density for New Floorspace (£ per sq.m)				
Colchester	£7,000	£7,488	£8,147	£8,863
Other centres	£5,000	£5,349	£5,819	£6,331
Sales Floorspace (sq.m net)				
Colchester (incl retail warehouses)	n/a	803	9,882	23,687
Tiptree	n/a	21	69	143
West Mersea	n/a	18	51	100
Total	**n/a**	**842**	**10,001**	**23,930**
Floorspace (sq.m gross)				
Colchester (incl retail warehouses)	n/a	1,071	13,176	31,582
Tiptree	n/a	28	91	191
West Mersea	n/a	24	67	134
Total	**n/a**	**1,122**	**13,335**	**31,907**

Commitments/Town Centre Proposals

William & Griffin Department Store - additional 3,500 sq m net at £5,000 per sq m

Vineyard Gate - 12,000 sq m gross (9,000 sq m net at £7,000 per sq m)

Garrison Local Centre - 300 sq m net comparsion sales at £5,000 per sq m

Table 11C: Comparison Floorspace Capacity - Increased Market Share (with All Proposals)

	2012	2016	2021	2026
Available Expenditure in Borough				
Colchester (incl retail warehouses)	£761.80	£854.29	£1,007.92	£1,223.88
Tiptree	£3.77	£4.16	£4.83	£5.75
West Mersea	£1.77	£2.00	£2.38	£2.91
Total	**£767.35**	**£860.45**	**£1,015.12**	**£1,232.54**
Turnover of Existing Facilities				
Colchester (incl retail warehouses)	£707.85	£760.21	£831.13	£908.68
Tiptree	£3.77	£4.05	£4.43	£4.84
West Mersea	£1.77	£1.90	£2.08	£2.28
Total	**£713.39**	**£766.16**	**£837.64**	**£915.80**
Turnover of Comparison Retail Proposals				
William & Griffin Department Store Proposals*	£17.50	£18.79	£20.55	£22.47
The Crescent Vineyard Gate	£63.00	£67.66	£73.97	£80.87
Garrison Local Centre	£1.50	£1.61	£1.76	£1.93
Stane Park, Stanway	£48.00	£51.55	£56.36	£61.62
Tollgate, Stanway	£60.00	£64.44	£70.45	£77.02
North Colchester Urban Extension food superstore	£9.31	£10.00	£10.93	£11.95
Northern Gateway food superstore	£9.00	£9.67	£10.57	£11.55
Northern Gateway bulky goods retail warehousing	£11.25	£12.08	£13.21	£14.44
Morrison's store, Cowdray Centre	£6.05	£6.50	£7.10	£7.77
Total	**£225.61**	**£242.30**	**£264.90**	**£289.62**
Surplus/Deficit Expenditure				
Colchester (incl retail warehouses)	-£171.66	-£148.22	-£88.12	£25.58
Tiptree	£0.00	£0.11	£0.40	£0.91
West Mersea	£0.00	£0.09	£0.29	£0.64
Total	**-£171.66**	**-£148.01**	**-£87.42**	**£27.13**
Turnover Density for New Floorspace (£ per sq.m)				
Colchester	£7,000	£7,488	£8,147	£8,863
Other centres	£5,000	£5,349	£5,819	£6,331
Sales Floorspace (sq.m net)				
Colchester (incl retail warehouses)	n/a	-19,793	-10,816	2,887
Tiptree	n/a	21	69	143
West Mersea	n/a	18	51	100
Total	**n/a**	**-19,755**	**-10,697**	**3,130**
Floorspace (sq.m gross)				
Colchester (incl retail warehouses)	n/a	-26,391	-14,422	3,849
Tiptree	n/a	28	91	191
West Mersea	n/a	24	67	134
Total	**n/a**	**-26,340**	**-14,263**	**4,173**

Commitments/Proposals
William & Griffin Department Store - additional 3,500 sq m net at £5,000 per sq m
Vineyard Gate - 12,000 sq m gross (9,000 sq m net at £7,000 per sq m)
Garrison Local Centre - 300 sq m net comparsion sales at £5,000 per sq m
Stane Park, Stanway - 12,000 sq m gross (9,600 sq m net at £5,000 per sq m)
Tollgate, Stanway - 15,000 sq m gross (12,000 sq m net at £5,000 per sq m)
North Colchester UE food superstore (1,035 sq m net comparison sales at £9,000 per sq m)
Northern Gateway food superstore (1,000 sq m net at £9,000 per sq m)
Northern Gateway bulky non-food retail warehousng (4,500 sq m net at £2,500 per sq m).
Morrison's food store, Cowdray Centre (595 sq m net comparison at £10,164 per sq m)

* William & Griffin additional turnover over and above existing

Appendix D Household Survey Results

Q01 In which store or shop do you buy most of your household's main food and grocery shopping?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Aldi, Magdalen Street, Colchester	1.1%	9	1.6%	5	0.0%	0	3.6%	4	0.0%	0	0.0%	0
Aldi, London Road, Lexden, Colchester	1.0%	8	1.9%	6	1.0%	1	0.9%	1	0.0%	0	0.0%	0
Asda, Colchester	8.1%	65	15.8%	49	8.0%	8	4.5%	5	1.2%	2	0.9%	1
Asda, Ipswich	0.4%	3	0.3%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Co-op (East of England), Samsons Road, Brightlingsea	0.4%	3	0.0%	0	0.0%	0	2.7%	3	0.0%	0	0.0%	0
Co-op (East of England), Bull Hill Road, Clacton-on-Sea	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0
Co-op (East of England), Coopers Lane, Clacton-on-Sea	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Co-op (East of England), Abbots Road, Colchester	0.4%	3	1.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op (East of England), Chapel Road, West Bergholt, Colchester	0.4%	3	0.6%	2	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Co-op (East of England), Fiveways Retail Park, Peartree Road, Stanway, Colchester	2.3%	18	3.5%	11	1.0%	1	3.6%	4	0.6%	1	0.9%	1
Co-op (East of England), Mersea Road, Colchester	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Co-op (East of England), The Avenue, Wivenhoe, Colchester	0.9%	7	0.0%	0	0.0%	0	5.5%	6	0.0%	0	0.9%	1
Co-op (East of England), The Centre, Greenstead Estate, Colchester	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op (East of England), Wimpole Road, Colchester	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op (East of England), Dedham	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Co-op (East of England), The Triangle, Frinton-on-Sea	1.3%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.1%	10
Co-op (East of England), Acacia Court, Blenheim Close, Brantham, Manningtree	0.4%	3	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0
Co-op (East of England), Riverside Avenue East, Station Road, Lawford, Manningtree	0.4%	3	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.9%	1
Co-op (East of England), West Mersea	0.4%	3	0.0%	0	0.0%	0	2.7%	3	0.0%	0	0.0%	0
Iceland, St John's Walk, Colchester	0.4%	3	1.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Tollgate Centre, Colchester	0.5%	4	1.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Clacton-On-Sea	1.1%	9	0.0%	0	0.0%	0	0.0%	0	4.7%	8	0.9%	1
Marks and Spencer, Clacton-on-sea	1.0%	8	0.0%	0	0.0%	0	0.0%	0	4.1%	7	0.9%	1
Morrisons, Clacton-on-sea	12.9%	103	0.6%	2	1.0%	1	4.5%	5	47.1%	80	13.6%	15
Morrisons, Harwich	7.0%	56	0.0%	0	8.0%	8	0.9%	1	0.0%	0	42.7%	47
Sainsbury's, Ipswich	0.9%	7	0.0%	0	7.0%	7	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Priory Walk, Colchester	2.6%	21	4.8%	15	0.0%	0	5.5%	6	0.0%	0	0.0%	0
Sainsbury's, Stanway, Colchester	11.0%	88	21.6%	67	3.0%	3	12.7%	14	1.8%	3	0.9%	1
Tesco Extra, Highwoods Square, Colchester	13.8%	110	22.3%	69	24.0%	24	10.0%	11	0.0%	0	5.5%	6
Tesco Extra, Ipswich	1.5%	12	0.0%	0	12.0%	12	0.0%	0	0.0%	0	0.0%	0
Tesco, Greenstead Road, Colchester	8.9%	71	13.2%	41	1.0%	1	25.5%	28	0.0%	0	0.9%	1
Tesco, Tiptree	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, High Street, Clacton-on-Sea	0.4%	3	0.0%	0	0.0%	0	0.9%	1	0.6%	1	0.9%	1
Waitrose, Colchester	3.4%	27	5.8%	18	3.0%	3	4.5%	5	0.6%	1	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Waitrose, Sudbury	0.4%	3	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0
Local Shops, Brightlingsea	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Internet / delivery	4.1%	33	3.2%	10	9.0%	9	5.5%	6	3.5%	6	1.8%	2
Tesco, Brook Retail Park, Clacton-on-Sea	6.9%	55	0.0%	0	0.0%	0	1.8%	2	26.5%	45	7.3%	8
Asda, Main Road, Harwich	1.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.2%	9
Budgens, The Street, East Bergholt	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Co-op (East of England), Frinton Road, Holland-On-Sea	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Co-op (East of England), High Street, Hadleigh	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Iceland, High Street, Harwich	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2
Iceland, Water Glade Retail Park, Clacton-on-Sea	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Lidl, Parkeston Road, Dovercourt, Harwich	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Local Shops, Great Holland	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Local Shops, Hadleigh	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Local Shops, Stratford Saint Mary	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Morrisons, Sproughton Road, Ipswich	0.3%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Street, Clacton-on-Sea	1.1%	9	0.0%	0	0.0%	0	0.0%	0	5.3%	9	0.0%	0
Tesco Express, Frinton Road, Holland-on-Sea	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Tesco Express, High Street, Walton-on-the-Naze	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Tesco, Woodhall Business Park, Sudbury	0.8%	6	0.0%	0	6.0%	6	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	0.3%	2	0.3%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Base:		800		310		100		110		170		110

Q02 Which food retailer do you normally use for your main food goods when shopping on-line?
Those who said 'Internet / delivery' at Q01

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Asda	21.2%	7	30.0%	3	22.2%	2	16.7%	1	0.0%	0	50.0%	1
Iceland	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks and Spencer	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's	3.0%	1	0.0%	0	0.0%	0	16.7%	1	0.0%	0	0.0%	0
Tesco	69.7%	23	70.0%	7	55.6%	5	66.7%	4	100.0%	6	50.0%	1
Waitrose / Ocado	6.1%	2	0.0%	0	22.2%	2	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Base:		33		10		9		6		6		2

Q03 What is the MAIN reason you choose (STORE MENTIONED AT Q01) for your main food and grocery shopping?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Café / restaurant	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Convenient to home	48.8%	390	53.5%	166	43.0%	43	50.9%	56	37.1%	63	56.4%	62
Convenient to work	2.1%	17	2.3%	7	4.0%	4	2.7%	3	1.2%	2	0.9%	1
Delivery service	1.8%	14	1.6%	5	4.0%	4	0.9%	1	2.4%	4	0.0%	0
Easy to get to	2.5%	20	1.9%	6	4.0%	4	4.5%	5	1.2%	2	2.7%	3
Ethical supplier	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good / cheap parking	2.4%	19	1.6%	5	0.0%	0	1.8%	2	5.9%	10	1.8%	2
Good bus service	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good internal layout	0.6%	5	0.6%	2	0.0%	0	0.0%	0	1.2%	2	0.9%	1
Good opening hours	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Good place to meet friends / family	0.3%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.9%	1
Good service / friendly staff	1.4%	11	1.3%	4	2.0%	2	0.0%	0	2.4%	4	0.9%	1
Habit / always used it	4.8%	38	4.5%	14	8.0%	8	3.6%	4	4.7%	8	3.6%	4
Has petrol station	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Larger store	0.5%	4	0.3%	1	0.0%	0	0.9%	1	0.6%	1	0.9%	1
Lower prices	9.8%	78	11.0%	34	8.0%	8	9.1%	10	11.8%	20	5.5%	6
Offers internet shopping / home delivery	1.0%	8	0.3%	1	4.0%	4	0.9%	1	0.6%	1	0.9%	1
Only one in the area / no other choice	0.6%	5	0.0%	0	1.0%	1	0.0%	0	1.2%	2	1.8%	2
Other shops / services nearby / convenient	1.0%	8	0.6%	2	2.0%	2	1.8%	2	0.6%	1	0.9%	1
Preference for retailer	4.9%	39	3.2%	10	6.0%	6	5.5%	6	7.1%	12	4.5%	5
Quality of goods	5.4%	43	5.5%	17	1.0%	1	6.4%	7	5.9%	10	7.3%	8
Range of goods available	3.6%	29	4.2%	13	4.0%	4	0.0%	0	4.1%	7	4.5%	5
Rewards scheme	1.4%	11	0.6%	2	1.0%	1	3.6%	4	2.4%	4	0.0%	0
Sells clothing	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Staff discount	1.3%	10	0.6%	2	1.0%	1	0.9%	1	2.4%	4	1.8%	2
To support local traders	0.4%	3	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.9%	1
Value for money	2.5%	20	2.3%	7	2.0%	2	0.9%	1	4.7%	8	1.8%	2
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
No particular reason	0.6%	5	0.6%	2	0.0%	0	1.8%	2	0.0%	0	0.9%	1
Get a lift	0.5%	4	0.6%	2	0.0%	0	0.0%	0	1.2%	2	0.0%	0
Not too busy / Quiet store	0.8%	6	0.3%	1	3.0%	3	1.8%	2	0.0%	0	0.0%	0
(Don't know / varies)	0.8%	6	1.3%	4	1.0%	1	0.0%	0	0.6%	1	0.0%	0
Base:		800		310		100		110		170		110

Q04 How do you normally travel to (STORE MENTIONED AT Q01)?

Not those who said 'Internet / delivery' at Q01

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Car / van (as driver)	77.2%	592	71.3%	214	90.1%	82	83.7%	87	75.0%	123	79.6%	86
Car / van (as passenger)	9.1%	70	10.0%	30	5.5%	5	7.7%	8	10.4%	17	9.3%	10
Bus, minibus or coach	2.6%	20	3.3%	10	1.1%	1	1.9%	2	3.0%	5	1.9%	2
Motorcycle, scooter or moped	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Walk	9.1%	70	13.0%	39	1.1%	1	5.8%	6	9.8%	16	7.4%	8
Taxi	0.8%	6	0.7%	2	0.0%	0	1.0%	1	1.2%	2	0.9%	1
Train	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bicycle	0.3%	2	0.3%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Mobility scooter	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	0.8%	6	1.3%	4	2.2%	2	0.0%	0	0.0%	0	0.0%	0
Base:		767		300		91		104		164		108

Q05 When you go shopping for main food goods, do you link this trip with another activity? [MR]
Not those who said 'Internet / delivery' at Q01

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Yes – travelling to / from school/college/university	1.4%	11	2.0%	6	0.0%	0	1.0%	1	1.8%	3	0.9%	1
Yes – travelling to / from work	4.0%	31	3.7%	11	6.6%	6	5.8%	6	2.4%	4	3.7%	4
Yes – non-food shopping	10.4%	80	7.0%	21	14.3%	13	11.5%	12	14.0%	23	10.2%	11
Yes – buying fuel	4.7%	36	4.3%	13	3.3%	3	4.8%	5	5.5%	9	5.6%	6
Yes – other food shopping	5.5%	42	3.3%	10	5.5%	5	3.8%	4	7.9%	13	9.3%	10
Yes – leisure activity	4.6%	35	4.7%	14	6.6%	6	6.7%	7	2.4%	4	3.7%	4
Yes – visiting financial service such as bank, building society, post office	1.7%	13	1.3%	4	1.1%	1	1.0%	1	2.4%	4	2.8%	3
Yes – visiting health service such as doctor, dentist, hospital	0.8%	6	1.0%	3	0.0%	0	1.0%	1	0.6%	1	0.9%	1
Yes – visiting other service such as laundrette, hairdresser, recycling	1.2%	9	0.7%	2	1.1%	1	1.9%	2	1.8%	3	0.9%	1
Yes – visiting café / pub / restaurant	3.9%	30	1.7%	5	7.7%	7	5.8%	6	5.5%	9	2.8%	3
Yes – visiting family / friends	3.8%	29	4.3%	13	8.8%	8	3.8%	4	1.8%	3	0.9%	1
Yes – Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
No – Only do a main food shop	64.1%	492	69.7%	209	52.7%	48	55.8%	58	62.2%	102	69.4%	75
(Don’t know)	1.4%	11	1.3%	4	2.2%	2	2.9%	3	1.2%	2	0.0%	0
Base:		767		300		91		104		164		108

Q06 Now thinking about your last main food and grocery shopping trip to (STORE MENTIONED AT Q01) Where did that trip start?
Not those who said 'Internet / delivery' at Q01

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Home	90.6%	695	91.0%	273	83.5%	76	95.2%	99	90.9%	149	90.7%	98
Work	6.0%	46	5.0%	15	11.0%	10	4.8%	5	6.1%	10	5.6%	6
Friend / Relatives house	0.5%	4	0.3%	1	1.1%	1	0.0%	0	0.0%	0	1.9%	2
Leisure facility - inc Church	0.9%	7	1.7%	5	1.1%	1	0.0%	0	0.6%	1	0.0%	0
Another store / service - inc Bank / Post office	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
University / College / School	1.3%	10	1.3%	4	1.1%	1	0.0%	0	1.8%	3	1.9%	2
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know / can't remember)	0.5%	4	0.3%	1	2.2%	2	0.0%	0	0.6%	1	0.0%	0
Base:		767		300		91		104		164		108

Q07 And where did that trip end?
Not those who said 'Internet / delivery' at Q01

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Home	97.1%	745	96.7%	290	96.7%	88	99.0%	103	97.6%	160	96.3%	104
Work	0.7%	5	0.7%	2	2.2%	2	0.0%	0	0.6%	1	0.0%	0
Friend / Relatives house	1.2%	9	2.0%	6	0.0%	0	1.0%	1	0.6%	1	0.9%	1
Leisure facility - inc Church	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Another store / service - inc Bank / Post office	0.7%	5	0.3%	1	0.0%	0	0.0%	0	1.2%	2	1.9%	2
University / College / School	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know / can't remember)	0.3%	2	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.9%	1
Base:		767		300		91		104		164		108

Q08 Is there any other store or shop where you do your main food and grocery shopping?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Aldi, Magdalen Street, Colchester	1.1%	9	2.3%	7	0.0%	0	0.9%	1	0.6%	1	0.0%	0
Aldi, London Road, Lexden, Colchester	1.9%	15	4.2%	13	0.0%	0	1.8%	2	0.0%	0	0.0%	0
Asda, Colchester	8.4%	67	15.8%	49	7.0%	7	3.6%	4	2.4%	4	2.7%	3
Asda, Ipswich	0.3%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Co-op (East of England), Samsons Road, Brightlingsea	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Co-op (East of England), Bull Hill Road, Clacton-on-Sea	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0
Co-op (East of England), Abbots Road, Colchester	0.8%	6	1.9%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op (East of England), Fiveways Retail Park, Peartree Road, Stanway, Colchester	1.3%	10	2.3%	7	0.0%	0	0.9%	1	1.2%	2	0.0%	0
Co-op (East of England), Harwich Road, Colchester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Co-op (East of England), Mersea Road, Colchester	0.4%	3	0.6%	2	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Co-op (East of England), The Avenue, Wivenhoe, Colchester	0.5%	4	0.0%	0	0.0%	0	3.6%	4	0.0%	0	0.0%	0
Co-op (East of England), The Commons, Prettygate, Colchester	0.5%	4	1.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op (East of England), Wimpole Road, Colchester	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Shrub End Road, Shrub End, Colchester	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op (East of England), Connaught Avenue, Frinton-On-Sea	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Co-op (East of England), The Triangle, Frinton-on-Sea	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	5
Co-op (East of England), Acacia Court, Blenheim Close, Brantham, Manningtree	0.3%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Co-op (East of England), Riverside Avenue East, Station Road, Lawford, Manningtree	1.3%	10	0.0%	0	10.0%	10	0.0%	0	0.0%	0	0.0%	0
Co-op (East of England), West Mersea	0.3%	2	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0
Iceland, Frinton-on-Sea	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2
Iceland, St John's Walk, Colchester	0.4%	3	0.6%	2	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Iceland, Tollgate Centre, Colchester	0.4%	3	1.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Clacton-On-Sea	0.8%	6	0.0%	0	0.0%	0	0.0%	0	2.4%	4	1.8%	2
Marks and Spencer, Clacton-on-sea	0.6%	5	0.0%	0	0.0%	0	0.9%	1	2.4%	4	0.0%	0
Marks and Spencer, Colchester	1.8%	14	3.5%	11	1.0%	1	0.9%	1	0.6%	1	0.0%	0
Morrisons, Clacton-on-sea	6.1%	49	0.3%	1	2.0%	2	5.5%	6	19.4%	33	6.4%	7
Morrisons, Harwich	1.9%	15	0.3%	1	4.0%	4	0.0%	0	0.0%	0	9.1%	10
Morrisons, Maldon	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Witham	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Ipswich	1.0%	8	0.3%	1	7.0%	7	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Priory Walk, Colchester	1.5%	12	2.6%	8	2.0%	2	0.9%	1	0.0%	0	0.9%	1
Sainsbury's, Stanway, Colchester	5.0%	40	9.0%	28	3.0%	3	2.7%	3	1.8%	3	2.7%	3
Tesco Extra, Highwoods Square, Colchester	5.0%	40	8.1%	25	9.0%	9	4.5%	5	0.6%	1	0.0%	0
Tesco Extra, Ipswich	0.5%	4	0.3%	1	2.0%	2	0.0%	0	0.0%	0	0.9%	1
Tesco, Greenstead Road, Colchester	2.5%	20	3.2%	10	0.0%	0	9.1%	10	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Tesco, Tiptree	0.4%	3	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.9%	1
Tesco Express, Bromley Road, Colchester	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, High Street, Clacton-on-Sea	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Tesco Express, Manningtree	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Express, West Mersea	0.3%	2	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0
Waitrose, Colchester	4.8%	38	5.8%	18	3.0%	3	10.9%	12	1.8%	3	1.8%	2
Waitrose, Sudbury	0.6%	5	0.0%	0	5.0%	5	0.0%	0	0.0%	0	0.0%	0
Local Shops, Brightlingsea	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Local Shops, Clacton-on-Sea	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Local Shops, Colchester Town Centre	0.5%	4	1.0%	3	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Local Shops, Harwich	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2
Local Shops, Manningtree	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Local Shops, Stoke-by Nayland	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Local Shops, Wivenhoe	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Internet / delivery	0.5%	4	0.3%	1	2.0%	2	0.0%	0	0.0%	0	0.9%	1
Tesco, Brook Retail Park, Clacton-on-Sea	4.5%	36	0.0%	0	0.0%	0	0.9%	1	18.2%	31	3.6%	4
Asda, Main Road, Harwich	2.0%	16	0.0%	0	0.0%	0	0.9%	1	0.0%	0	13.6%	15
Blackwells Farm Produce & Farm Shop, Colne Road, Coggeshall	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op (East of England), Frinton Road, Holland-On-Sea	0.5%	4	0.0%	0	0.0%	0	0.0%	0	2.4%	4	0.0%	0
Co-op (East of England), High Street, Dovercourt, Harwich	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Co-op (East of England), High Street, Hadleigh	0.3%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Co-op (East of England), High Street, Walton-On-Naze	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Iceland, High Street, Harwich	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Iceland, Water Glade Retail Park, Clacton-on-Sea	0.8%	6	0.0%	0	0.0%	0	1.8%	2	2.4%	4	0.0%	0
Lidl, Handford Road, Ipswich	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Lidl, Parkeston Road, Dovercourt, Harwich	0.6%	5	0.0%	0	1.0%	1	0.0%	0	0.0%	0	3.6%	4
Local Shops, Holland-on-Sea	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Makro, The Havens, Warren Heath, Ipswich	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Sproughton Road, Ipswich	0.4%	3	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Street, Clacton-on-Sea	1.9%	15	0.0%	0	0.0%	0	0.0%	0	8.2%	14	0.9%	1
Tesco Express, High Street, Walton-on-the-Naze	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Tesco, Woodhall Business Park, Sudbury	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	2.1%	17	1.6%	5	3.0%	3	3.6%	4	1.2%	2	2.7%	3
(Don't use any other store)	31.5%	252	31.6%	98	24.0%	24	34.5%	38	31.8%	54	34.5%	38
Base:		800		310		100		110		170		110

Q09 How often do you usually undertake your main food / grocery shopping trip?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Daily	1.4%	11	2.6%	8	0.0%	0	0.9%	1	0.6%	1	0.9%	1
Two or more times a week	11.0%	88	11.6%	36	11.0%	11	5.5%	6	12.9%	22	11.8%	13
At least once a week	66.8%	534	67.1%	208	60.0%	60	65.5%	72	70.0%	119	68.2%	75
At least once a fortnight	13.0%	104	12.6%	39	18.0%	18	18.2%	20	8.2%	14	11.8%	13
At least once a month	6.0%	48	4.2%	13	10.0%	10	5.5%	6	7.1%	12	6.4%	7
At least every two months	0.3%	2	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less often	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Have only visited once	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know / varies / no particular pattern)	1.6%	13	1.3%	4	1.0%	1	4.5%	5	1.2%	2	0.9%	1
Base:		800		310		100		110		170		110

Q10 Do you make small-scale/'top up' shopping trips for basic food goods, such as bread and milk, in between your main food shopping trip?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Yes	78.1%	625	76.5%	237	79.0%	79	80.0%	88	72.9%	124	88.2%	97
No	21.9%	175	23.5%	73	21.0%	21	20.0%	22	27.1%	46	11.8%	13
Base:		800		310		100		110		170		110

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	

Q11 In which store or shop do you buy most of this small scale/ 'top-up' shopping?
Those who said do top-up shopping at Q10

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Aldi, Magdalen Street, Colchester	0.6%	4	1.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, London Road, Lexden, Colchester	1.9%	12	4.2%	10	0.0%	0	2.3%	2	0.0%	0	0.0%	0
Asda, Colchester	3.2%	20	4.6%	11	6.3%	5	3.4%	3	0.8%	1	0.0%	0
Asda, Ipswich	0.2%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Co-op (East of England), Samsons Road, Brightlingsea	0.6%	4	0.0%	0	0.0%	0	4.5%	4	0.0%	0	0.0%	0
Co-op (East of England), Station Road, Brightlingsea	0.3%	2	0.0%	0	0.0%	0	2.3%	2	0.0%	0	0.0%	0
Co-op (East of England), Bull Hill Road, Clacton-on-Sea	0.5%	3	0.0%	0	0.0%	0	0.0%	0	2.4%	3	0.0%	0
Co-op (East of England), Coopers Lane, Clacton-on-Sea	0.8%	5	0.0%	0	0.0%	0	0.0%	0	4.0%	5	0.0%	0
Co-op (East of England), Abbots Road, Colchester	1.3%	8	3.0%	7	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Co-op (East of England), Chapel Road, West Bergholt, Colchester	1.3%	8	3.4%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op (East of England), Fiveways Retail Park, Peartree Road, Stanway, Colchester	3.8%	24	7.2%	17	0.0%	0	4.5%	4	1.6%	2	1.0%	1
Co-op (East of England), Mersea Road, Colchester	1.4%	9	3.0%	7	0.0%	0	2.3%	2	0.0%	0	0.0%	0
Co-op (East of England), Nayland Road, Mile End, Colchester	0.3%	2	0.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op (East of England), Old Heath Road, Colchester	0.3%	2	0.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op (East of England), Old Road, Clacton-on-Sea	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Co-op (East of England), The Avenue, Wivenhoe, Colchester	2.6%	16	0.0%	0	0.0%	0	18.2%	16	0.0%	0	0.0%	0
Co-op (East of England), The Centre, Greenstead Estate, Colchester	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op (East of England), The Commons, Prettygate, Colchester	1.3%	8	3.4%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op (East of England), The Square, Iceni Way, Shrub End, Colchester	0.6%	4	1.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op (East of England), Wimpole Road, Colchester	0.8%	5	2.1%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Regent Street, Rowhedge, Colchester	0.2%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Co-op, Shrub End Road, Shrub End, Colchester	0.6%	4	1.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op (East of England), Dedham	0.5%	3	0.0%	0	3.8%	3	0.0%	0	0.0%	0	0.0%	0
Co-op (East of England), Connaught Avenue, Frinton-On-Sea	0.6%	4	0.0%	0	0.0%	0	1.1%	1	0.0%	0	3.1%	3
Co-op (East of England), The Triangle, Frinton-on-Sea	1.8%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.3%	11
Co-op (East of England), Acacia Court, Blenheim Close, Brantham, Manningtree	0.8%	5	0.0%	0	6.3%	5	0.0%	0	0.0%	0	0.0%	0
Co-op (East of England), Riverside Avenue East, Station Road, Lawford, Manningtree	1.4%	9	0.0%	0	10.1%	8	0.0%	0	0.0%	0	1.0%	1
Co-op (East of England),	0.6%	4	0.0%	0	0.0%	0	4.5%	4	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
West Mersea												
Iceland, Frinton-on-Sea	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2
Iceland, St John's Walk, Colchester	0.5%	3	0.8%	2	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Iceland, Tollgate Centre, Colchester	0.6%	4	1.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Clacton-On-Sea	1.0%	6	0.0%	0	0.0%	0	0.0%	0	4.8%	6	0.0%	0
Marks and Spencer, Clacton-on-sea	1.0%	6	0.0%	0	0.0%	0	0.0%	0	4.8%	6	0.0%	0
Marks and Spencer, Colchester	1.9%	12	5.1%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Clacton-on-sea	6.2%	39	0.0%	0	0.0%	0	0.0%	0	30.6%	38	1.0%	1
Morrisons, Harwich	3.5%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0	22.7%	22
Sainsbury's, Priory Walk, Colchester	2.2%	14	4.2%	10	0.0%	0	4.5%	4	0.0%	0	0.0%	0
Sainsbury's, Springfield, Chelmsford	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Stanway, Colchester	3.7%	23	7.6%	18	2.5%	2	2.3%	2	0.0%	0	1.0%	1
Tesco Extra, Highwoods Square, Colchester	5.1%	32	13.5%	32	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Greenstead Road, Colchester	2.4%	15	3.4%	8	0.0%	0	8.0%	7	0.0%	0	0.0%	0
Tesco, Tiptree	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Tesco Express, Brightlingsea	0.8%	5	0.0%	0	0.0%	0	5.7%	5	0.0%	0	0.0%	0
Tesco Express, Bromley Road, Colchester	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Crouch Street, Colchester	0.6%	4	0.8%	2	1.3%	1	0.0%	0	0.8%	1	0.0%	0
Tesco Express, High Street, Clacton-on-Sea	0.8%	5	0.0%	0	1.3%	1	0.0%	0	2.4%	3	1.0%	1
Tesco Express, Manningtree	0.6%	4	0.0%	0	5.1%	4	0.0%	0	0.0%	0	0.0%	0
Tesco Express, St Christopher Road, Colchester	1.6%	10	4.2%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, West Mersea	0.8%	5	0.0%	0	0.0%	0	5.7%	5	0.0%	0	0.0%	0
Waitrose, Colchester	2.4%	15	4.6%	11	0.0%	0	3.4%	3	0.8%	1	0.0%	0
Waitrose, Sudbury	0.2%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Local Shops, Brightlingsea	1.0%	6	0.0%	0	0.0%	0	6.8%	6	0.0%	0	0.0%	0
Local Shops, Clacton-on-Sea	1.9%	12	0.0%	0	0.0%	0	0.0%	0	8.9%	11	1.0%	1
Local Shops, Colchester Town Centre	3.8%	24	7.2%	17	5.1%	4	3.4%	3	0.0%	0	0.0%	0
Local Shops, Dedham	0.2%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Local Shops, Frinton-on-Sea	0.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.2%	5
Local Shops, Harwich	0.5%	3	0.0%	0	1.3%	1	0.0%	0	0.0%	0	2.1%	2
Local Shops, Manningtree	1.9%	12	0.0%	0	15.2%	12	0.0%	0	0.0%	0	0.0%	0
Local Shops, Stanway	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Shops, Stoke-by Nayland	0.8%	5	0.0%	0	6.3%	5	0.0%	0	0.0%	0	0.0%	0
Local Shops, Wivenhoe	0.2%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Internet / delivery	0.5%	3	0.0%	0	0.0%	0	1.1%	1	0.0%	0	2.1%	2
Tesco, Brook Retail Park, Clacton-on-Sea	1.9%	12	0.0%	0	0.0%	0	0.0%	0	9.7%	12	0.0%	0
Asda, Main Road, Harwich	2.2%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.4%	14
Budgens, The Street, East Bergholt	0.5%	3	0.0%	0	3.8%	3	0.0%	0	0.0%	0	0.0%	0
Co-op (Chemsford Star), Duke Street, Chelmsford	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op (East of England), Frinton Road, Holland-On-Sea	1.3%	8	0.0%	0	0.0%	0	0.0%	0	6.5%	8	0.0%	0
Co-op (East of England), Fronks Road, Upper Dovercourt	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	3
Co-op (East of England), High Street, Dovercourt, Harwich	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2
Co-op (East of England), High Street, Hadleigh	1.3%	8	0.0%	0	10.1%	8	0.0%	0	0.0%	0	0.0%	0
Co-op (East of England), High Street, Walton-On-Naze	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2
Co-op, East Street, Sudbury	0.2%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Iceland, High Street,	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Harwich												
Iceland, Water Glade Retail Park, Clacton-on-Sea	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Lidl, Parkeston Road, Dovercourt, Harwich	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2
Local Shops, Alresford	0.2%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Local Shops, Boxford	0.2%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Local Shops, Dovercourt	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Local Shops, East Bergholt	0.2%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Local Shops, Great Bentley	0.3%	2	0.0%	0	0.0%	0	2.3%	2	0.0%	0	0.0%	0
Local Shops, Hadleigh	0.6%	4	0.0%	0	5.1%	4	0.0%	0	0.0%	0	0.0%	0
Local Shops, Ipswich Road, Colchester	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Shops, Jaywick	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Local Shops, Kelvedon	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Shops, Layer de la Haye	0.2%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Local Shops, Lexden	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Shops, London Road, Colchester	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Shops, Saint Osyth	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0
Local Shops, Stratford Saint Mary	0.2%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Local Shops, Sudbury	0.2%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Local Shops, Thorpe-le-Soken	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2
Local Shops, Walton-on-the-Naze	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Local Shops, Wrabness	0.2%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Makro, The Havens, Warren Heath, Ipswich	0.2%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
One Stop, Ramsey Road, Harwich	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2
Premier Convenience Store, Drury Road, Colchester	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Premier Convenience Store, The Cross, Wivenhoe	0.3%	2	0.0%	0	0.0%	0	2.3%	2	0.0%	0	0.0%	0
Sainsbury's, High Street, Clacton-on-Sea	1.6%	10	0.0%	0	0.0%	0	0.0%	0	8.1%	10	0.0%	0
Spar, Connaught Avenue, Frinton-on-Sea	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Tesco Express, Frinton Road, Holland-on-Sea	1.0%	6	0.0%	0	0.0%	0	0.0%	0	4.8%	6	0.0%	0
Tesco Express, High Street, Thorpe Le Soken	1.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	6
Tesco Express, High Street, Walton-on-the-Naze	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Tesco Express, London House, Plough Road, Great Bentley	0.6%	4	0.0%	0	0.0%	0	3.4%	3	0.8%	1	0.0%	0
Tesco Metro, Bishopsgate, London	0.2%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Tesco, Woodhall Business Park, Sudbury	0.3%	2	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	3.5%	22	5.1%	12	1.3%	1	0.0%	0	4.0%	5	4.1%	4
Base:		625		237		79		88		124		97

Q12 In which town or centre do you buy most of your household's non-food shopping?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Chelmsford City Centre	0.5%	4	1.0%	3	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Clacton-on-Sea Town Centre	13.4%	107	0.3%	1	1.0%	1	5.5%	6	50.6%	86	11.8%	13
Colchester Town Centre	61.9%	495	79.7%	247	46.0%	46	75.5%	83	35.3%	60	53.6%	59
Harwich Town Centre	1.8%	14	0.0%	0	3.0%	3	0.0%	0	0.0%	0	10.0%	11
Ipswich Town Centre	6.0%	48	2.3%	7	28.0%	28	3.6%	4	2.9%	5	3.6%	4
London	0.5%	4	0.6%	2	1.0%	1	0.9%	1	0.0%	0	0.0%	0
Maldon Town Centre	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Manningtree Town Centre	0.3%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Anglia Retail Park, Ipswich	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Bluewater Shopping Centre, Greenhithe	0.4%	3	0.6%	2	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Colchester Retail Park, Sheepen Rd, Colchester	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Freeport Outlet Shopping Village	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Lakeside Shopping Centre, Thurrock	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Suffolk Retail Park, Ipswich	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Tollgate Retail Park, Stanway, Colchester	2.4%	19	4.8%	15	1.0%	1	0.9%	1	1.2%	2	0.0%	0
Turner Rise Retail Park, Colchester	0.4%	3	0.6%	2	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Homebase, St Andrew's Ave, Colchester	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Colchester	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Stanway, Colchester	0.5%	4	1.0%	3	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Colchester	0.5%	4	1.0%	3	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Tesco, Greenstead Road, Colchester	0.6%	5	0.6%	2	0.0%	0	2.7%	3	0.0%	0	0.0%	0
Tesco, Sudbury	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Internet / delivery	2.8%	22	2.6%	8	8.0%	8	0.9%	1	2.4%	4	0.9%	1
Brightlingsea Town Centre	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Brook Retail Park, Clacton-on-Sea	0.4%	3	0.0%	0	0.0%	0	0.0%	0	1.8%	3	0.0%	0
Bury St Edmonds Town Centre	0.3%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Clacton Factory Outlet, Stephenson Road West, Clacton-on-Sea	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0
Dovercourt Town Centre	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	4
Frinton-on-Sea Town Centre	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.5%	6
Great Holland Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Hadleigh Town Centre	0.3%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Harwich Gateway Retail Park, Freshfields Road, Harwich	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Holland-on-Sea Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0
Morrisons, Clacton-on-Sea	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Morrisons, Harwich	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2
Newcastle City Centre	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Norwich City Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Parkeston Local Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Reading Town Centre	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sudbury Town Centre	0.3%	2	0.3%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Walton-on-the-Naze Town Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	3
Waterglade Retail Park, Clacton-on-Sea	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
(Don't know / varies)	2.5%	20	2.9%	9	0.0%	0	5.5%	6	1.8%	3	1.8%	2
Base:		800		310		100		110		170		110

Q13 What are your main reasons for visiting (LOCATION MENTIONED AT Q12)? [MR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Accessibility by public transport	1.3%	10	2.3%	7	0.0%	0	0.0%	0	1.2%	2	0.9%	1
Car parking prices	1.1%	9	0.3%	1	6.0%	6	0.9%	1	0.6%	1	0.0%	0
Car parking provision	3.9%	31	2.3%	7	8.0%	8	1.8%	2	6.5%	11	2.7%	3
Choice of non food goods available	6.1%	49	7.7%	24	2.0%	2	5.5%	6	7.6%	13	3.6%	4
Choice of shops nearby selling food goods	2.9%	23	2.9%	9	5.0%	5	0.9%	1	2.4%	4	3.6%	4
Choice of shops selling non food goods	15.6%	125	12.3%	38	14.0%	14	13.6%	15	18.8%	32	23.6%	26
Cleanliness	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Close to family / friends	1.5%	12	1.0%	3	3.0%	3	0.0%	0	1.8%	3	2.7%	3
Convenient / easy to get to	22.4%	179	23.9%	74	26.0%	26	31.8%	35	10.0%	17	24.5%	27
Delivery service	0.9%	7	1.0%	3	2.0%	2	0.0%	0	0.6%	1	0.9%	1
For a day out	1.4%	11	1.9%	6	2.0%	2	0.0%	0	1.2%	2	0.9%	1
Free parking	1.4%	11	1.3%	4	2.0%	2	0.9%	1	1.8%	3	0.9%	1
Good bus service	0.9%	7	0.6%	2	2.0%	2	2.7%	3	0.0%	0	0.0%	0
Habit / always use it / preference for retailer	4.4%	35	2.3%	7	9.0%	9	5.5%	6	2.9%	5	7.3%	8
Has a good market	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Lower prices	2.3%	18	1.6%	5	5.0%	5	0.0%	0	2.9%	5	2.7%	3
Near to home	36.1%	289	38.1%	118	31.0%	31	35.5%	39	41.8%	71	27.3%	30
Near to work	2.5%	20	2.3%	7	4.0%	4	2.7%	3	2.4%	4	1.8%	2
Provision of leisure facilities nearby	1.0%	8	1.6%	5	3.0%	3	0.0%	0	0.0%	0	0.0%	0
Provision of services nearby, such as banks and other financial services	2.9%	23	4.8%	15	1.0%	1	0.0%	0	3.5%	6	0.9%	1
Public information, signposts and public facilities	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Quality of non food goods available	2.5%	20	1.3%	4	3.0%	3	0.0%	0	2.4%	4	8.2%	9
Quality of shops selling non food goods	3.1%	25	1.0%	3	3.0%	3	0.0%	0	5.9%	10	8.2%	9
Rewards scheme	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shopping environment	4.6%	37	2.3%	7	4.0%	4	3.6%	4	7.6%	13	8.2%	9
Staff discount / work there	0.3%	2	0.0%	0	0.0%	0	0.9%	1	0.6%	1	0.0%	0
To support local traders	1.1%	9	0.6%	2	1.0%	1	0.0%	0	1.2%	2	3.6%	4
Value for money	0.4%	3	0.3%	1	1.0%	1	0.0%	0	0.6%	1	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good disabled access	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Internet shopping is more convenient	1.1%	9	1.3%	4	3.0%	3	0.0%	0	1.2%	2	0.0%	0
Park & Ride	0.6%	5	1.0%	3	0.0%	0	0.0%	0	1.2%	2	0.0%	0
(Don’t know)	1.4%	11	1.3%	4	1.0%	1	4.5%	5	0.6%	1	0.0%	0
(No reason in particular)	4.0%	32	4.2%	13	4.0%	4	3.6%	4	4.7%	8	2.7%	3
Base:		800		310		100		110		170		110

Q14 How do you normally travel to (LOCATION MENTIONED AT Q12)?
Not those who said 'Internet / delivery' at Q12

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Car / van (as driver)	58.5%	468	41.0%	127	77.0%	77	70.0%	77	62.4%	106	73.6%	81
Car / van (as passenger)	6.0%	48	5.2%	16	3.0%	3	4.5%	5	9.4%	16	7.3%	8
Bus, minibus or coach	14.9%	119	22.6%	70	8.0%	8	18.2%	20	10.0%	17	3.6%	4
Motorcycle, scooter or moped	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.6%	1	1.8%	2
Walk	11.8%	94	22.3%	69	0.0%	0	0.0%	0	10.0%	17	7.3%	8
Taxi	0.9%	7	1.3%	4	0.0%	0	0.0%	0	0.6%	1	1.8%	2
Train	1.4%	11	1.3%	4	1.0%	1	0.9%	1	0.6%	1	3.6%	4
Bicycle	1.3%	10	1.0%	3	0.0%	0	2.7%	3	2.4%	4	0.0%	0
Mobility scooter	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Goods delivered	1.4%	11	1.6%	5	3.0%	3	0.0%	0	1.2%	2	0.9%	1
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	3.5%	28	3.9%	12	8.0%	8	3.6%	4	2.4%	4	0.0%	0
Base:		800		310		100		110		170		110

Q15 When you go shopping for non-food goods, do you link this trip with another activity? [MR]
Not those who said 'Internet / delivery' at Q12

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Yes – travelling to / from school/college/university	0.6%	5	0.0%	0	1.0%	1	1.8%	2	0.0%	0	1.8%	2
Yes – travelling to / from work	3.9%	31	4.2%	13	5.0%	5	7.3%	8	2.4%	4	0.9%	1
Yes – food shopping	4.6%	37	4.5%	14	11.0%	11	6.4%	7	2.4%	4	0.9%	1
Yes – buying fuel	0.6%	5	0.3%	1	0.0%	0	0.9%	1	0.6%	1	1.8%	2
Yes – other non-food shopping	4.6%	37	5.2%	16	5.0%	5	3.6%	4	3.5%	6	5.5%	6
Yes – leisure activity	10.1%	81	12.3%	38	9.0%	9	7.3%	8	10.6%	18	7.3%	8
Yes – visiting financial service such as bank, building society, post office	5.0%	40	6.5%	20	1.0%	1	3.6%	4	6.5%	11	3.6%	4
Yes – visiting health service such as doctor, dentist, hospital	1.6%	13	1.3%	4	0.0%	0	0.9%	1	3.5%	6	1.8%	2
Yes – visiting other service such as laundrette, hairdresser, recycling	3.0%	24	3.5%	11	3.0%	3	1.8%	2	2.9%	5	2.7%	3
Yes – visiting café / pub / restaurant	11.5%	92	12.3%	38	13.0%	13	10.9%	12	8.8%	15	12.7%	14
Yes – visiting family / friends	9.1%	73	6.8%	21	14.0%	14	8.2%	9	10.0%	17	10.9%	12
Yes – Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes – visiting library	1.0%	8	2.6%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0
No – Only shop for non-food goods	54.0%	432	49.7%	154	44.0%	44	57.3%	63	58.8%	100	64.5%	71
(Don't know)	3.1%	25	4.2%	13	5.0%	5	3.6%	4	1.2%	2	0.9%	1
Base:		800		310		100		110		170		110

Q16 Where do you do most of your household's shopping for clothes, footwear and other fashion goods?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Braintree Town Centre	0.3%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Chelmsford City Centre	0.6%	5	1.3%	4	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Clacton-on-Sea Town Centre	7.9%	63	0.3%	1	2.0%	2	3.6%	4	26.5%	45	10.0%	11
Colchester Town Centre	58.9%	471	71.6%	222	45.0%	45	68.2%	75	36.5%	62	60.9%	67
Harwich Town Centre	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	5
Ipswich Town Centre	7.0%	56	2.6%	8	28.0%	28	2.7%	3	6.5%	11	5.5%	6
London	1.4%	11	0.6%	2	3.0%	3	1.8%	2	2.4%	4	0.0%	0
Maldon Town Centre	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Bluewater Shopping Centre, Greenhithe	0.8%	6	1.3%	4	0.0%	0	0.9%	1	0.0%	0	0.9%	1
Colchester Retail Park, Sheepen Rd, Colchester	0.5%	4	1.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Freeport Outlet Shopping Village	0.5%	4	0.6%	2	0.0%	0	0.0%	0	1.2%	2	0.0%	0
Lakeside Shopping Centre, Thurrock	1.1%	9	1.6%	5	2.0%	2	0.9%	1	0.6%	1	0.0%	0
Tollgate Retail Park, Stanway, Colchester	0.4%	3	0.3%	1	0.0%	0	0.9%	1	0.6%	1	0.0%	0
Turner Rise Retail Park, Colchester	0.3%	2	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Westfield Centre, Stratford (London)	0.5%	4	0.6%	2	1.0%	1	0.9%	1	0.0%	0	0.0%	0
Asda, Colchester	0.6%	5	1.0%	3	0.0%	0	0.9%	1	0.0%	0	0.9%	1
Sainsbury's, Stanway, Colchester	0.5%	4	1.0%	3	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Colchester	0.5%	4	1.0%	3	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Tesco, Greenstead Road, Colchester	0.8%	6	1.0%	3	0.0%	0	2.7%	3	0.0%	0	0.0%	0
Internet / delivery	8.6%	69	7.1%	22	7.0%	7	10.9%	12	11.8%	20	7.3%	8
Abroad	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Brook Retail Park, Clacton-on-Sea	0.5%	4	0.0%	0	0.0%	0	0.0%	0	2.4%	4	0.0%	0
Bury St Edmonds Town Centre	0.3%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Carlisle Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Clacton Factory Outlet, Stephenson Road West, Clacton-on-Sea	1.8%	14	0.0%	0	0.0%	0	0.0%	0	5.9%	10	3.6%	4
Frinton-on-Sea Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Glasgow City Centre	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Harlow Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Harwich Gateway Retail Park, Freshfields Road, Harwich	0.3%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.9%	1
Norwich City Centre	0.5%	4	1.0%	3	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Reading Town Centre	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sudbury Town Centre	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	2.4%	19	3.2%	10	2.0%	2	1.8%	2	2.4%	4	0.9%	1
(Don't do this type of shopping)	1.8%	14	1.6%	5	2.0%	2	1.8%	2	1.8%	3	1.8%	2
Base:		800		310		100		110		170		110

Q17 Where else do you shop for clothes, footwear and other fashion goods?

Not those who said '(Don't do this type of shopping)' at Q16

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Braintree Town Centre	1.9%	15	3.3%	10	0.0%	0	1.9%	2	0.6%	1	1.9%	2
Chelmsford City Centre	2.4%	19	2.6%	8	1.0%	1	4.6%	5	1.2%	2	2.8%	3
Clacton-on-Sea Town Centre	5.0%	39	1.3%	4	4.1%	4	3.7%	4	13.2%	22	4.6%	5
Colchester Town Centre	13.9%	109	7.5%	23	19.4%	19	13.0%	14	21.0%	35	16.7%	18
Harwich Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	2
Ipswich Town Centre	14.0%	110	12.8%	39	15.3%	15	13.0%	14	12.0%	20	20.4%	22
London	2.9%	23	3.6%	11	5.1%	5	2.8%	3	2.4%	4	0.0%	0
Tiptree District Centre	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
West Mersea Town Centre	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Bluewater Shopping Centre, Greenhithe	1.3%	10	1.6%	5	3.1%	3	1.9%	2	0.0%	0	0.0%	0
Braintree Retail Park, Braintree	1.4%	11	1.3%	4	0.0%	0	4.6%	5	0.6%	1	0.9%	1
Colchester Retail Park, Sheepen Rd, Colchester	0.3%	2	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Freeport Outlet Shopping Village	0.8%	6	1.0%	3	0.0%	0	2.8%	3	0.0%	0	0.0%	0
Lakeside Shopping Centre, Thurrock	2.4%	19	4.3%	13	1.0%	1	1.9%	2	1.2%	2	0.9%	1
Turner Rise Retail Park, Colchester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Westfield Centre, Stratford (London)	0.3%	2	0.3%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Colchester	0.8%	6	1.3%	4	1.0%	1	0.0%	0	0.0%	0	0.9%	1
Sainsbury's, Stanway, Colchester	0.5%	4	1.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Colchester	0.3%	2	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Tesco, Greenstead Road, Colchester	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivery	7.1%	56	10.5%	32	5.1%	5	5.6%	6	4.2%	7	5.6%	6
Blackpool Town Centre	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brighton City Centre	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bury St Edmonds Town Centre	0.3%	2	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cambridge Town Centre	0.4%	3	0.3%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Clacton Factory Outlet, Stephenson Road West, Clacton-on-Sea	1.3%	10	0.3%	1	0.0%	0	0.9%	1	4.2%	7	0.9%	1
Dovercourt Town Centre	0.3%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.9%	1
Frinton-on-Sea Town Centre	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.6%	6
Hadleigh Town Centre	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Harlow Town Centre	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Harwich Gateway Retail Park, Freshfields Road, Harwich	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Lincoln City Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Norwich City Centre	1.3%	10	1.0%	3	4.1%	4	0.0%	0	1.2%	2	0.9%	1
Parkeston Local Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Sudbury Town Centre	0.4%	3	0.3%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Walton-on-the-Naze Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
(Don't know / varies)	8.0%	63	10.2%	31	7.1%	7	12.0%	13	6.6%	11	0.9%	1
(Nowhere else)	30.5%	240	32.1%	98	26.5%	26	29.6%	32	30.5%	51	30.6%	33
Base:		786		305		98		108		167		108

Q18 Where do you do most of your household's shopping for furniture, floor coverings and household textiles?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Clacton-on-Sea Town Centre	5.3%	42	0.3%	1	0.0%	0	0.0%	0	22.9%	39	1.8%	2
Colchester Town Centre	29.4%	235	31.3%	97	27.0%	27	29.1%	32	26.5%	45	30.9%	34
Harwich Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Hatfield Peverel Local Centre	0.5%	4	0.6%	2	1.0%	1	0.0%	0	0.0%	0	0.9%	1
Ipswich Town Centre	3.0%	24	1.6%	5	16.0%	16	0.9%	1	0.0%	0	1.8%	2
London	0.8%	6	1.0%	3	0.0%	0	1.8%	2	0.6%	1	0.0%	0
Manningtree Town Centre	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
West Mersea Town Centre	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Anglia Retail Park, Ipswich	0.6%	5	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.9%	1
Bluewater Shopping Centre, Greenhithe	0.6%	5	1.0%	3	1.0%	1	0.9%	1	0.0%	0	0.0%	0
Colchester Retail Park, Sheepen Rd, Colchester	0.8%	6	0.6%	2	0.0%	0	1.8%	2	0.6%	1	0.9%	1
Lakeside Shopping Centre, Thurrock	1.4%	11	2.3%	7	0.0%	0	1.8%	2	0.6%	1	0.9%	1
Suffolk Retail Park, Ipswich	0.3%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.9%	1
Tollgate Retail Park, Stanway, Colchester	15.3%	122	20.0%	62	10.0%	10	15.5%	17	8.2%	14	17.3%	19
Turner Rise Retail Park, Colchester	1.6%	13	3.5%	11	1.0%	1	0.9%	1	0.0%	0	0.0%	0
B&Q, Colchester	1.1%	9	2.3%	7	0.0%	0	1.8%	2	0.0%	0	0.0%	0
Homebase, Clacton-on-sea	0.4%	3	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.9%	1
Homebase, Stanway, Colchester	0.3%	2	0.3%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Asda, Colchester	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Colchester	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Greenstead Road, Colchester	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivery	7.4%	59	6.8%	21	10.0%	10	11.8%	13	4.1%	7	7.3%	8
Alresford Village Centre	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Brantham Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Brightlingsea Town Centre	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Brook Retail Park, Clacton-on-Sea	0.5%	4	0.0%	0	0.0%	0	0.9%	1	0.6%	1	1.8%	2
Bury St Edmonds Town Centre	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Clacton Factory Outlet, Stephenson Road West, Clacton-on-Sea	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Colne View Retail Park, Colchester	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cowdray Centre, Mason Road, Colchester	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Dovercourt Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Fiveways Retail Park, Peartree Road, Stanway, Colchester	0.8%	6	1.3%	4	0.0%	0	1.8%	2	0.0%	0	0.0%	0
Frinton-on-Sea Town Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	3
Harlow Retail Park, Harlow	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Harwich Gateway Retail Park, Freshfields Road, Harwich	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Holland-on-Sea Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Long Melford Village Centre	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Norwich City Centre	0.3%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.9%	1
Parkeston Local Centre	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Sudbury Town Centre	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waterglade Retail Park, Clacton-on-Sea	0.5%	4	0.0%	0	0.0%	0	0.9%	1	1.8%	3	0.0%	0
(Don't know / varies)	9.4%	75	9.7%	30	11.0%	11	13.6%	15	9.4%	16	2.7%	3
(Don't do this type of shopping)	17.3%	138	15.5%	48	14.0%	14	12.7%	14	21.2%	36	23.6%	26
Base:		800		310		100		110		170		110

Column %ges.

Q19 Where do you do most of your household's shopping for DIY and decorating goods?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Chelmsford City Centre	0.3%	2	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Clacton-on-Sea Town Centre	6.8%	54	0.0%	0	1.0%	1	0.0%	0	25.9%	44	8.2%	9
Colchester Town Centre	15.3%	122	21.0%	65	20.0%	20	19.1%	21	1.2%	2	12.7%	14
Harwich Town Centre	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	4
Ipswich Town Centre	1.8%	14	0.0%	0	14.0%	14	0.0%	0	0.0%	0	0.0%	0
London	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Manningtree Town Centre	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Anglia Retail Park, Ipswich	0.8%	6	0.0%	0	6.0%	6	0.0%	0	0.0%	0	0.0%	0
Colchester Retail Park, Sheepen Rd, Colchester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Shawlands Retail Park, Sudbury	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Suffolk Retail Park, Ipswich	0.3%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.9%	1
Tollgate Retail Park, Stanway, Colchester	3.5%	28	5.5%	17	2.0%	2	2.7%	3	1.8%	3	2.7%	3
Turner Rise Retail Park, Colchester	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Braintree	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Chelmsford	0.3%	2	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0
B&Q, Colchester	28.3%	226	36.1%	112	18.0%	18	54.5%	60	4.7%	8	25.5%	28
B&Q, Sudbury	0.3%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Homebase, Clacton-on-sea	3.6%	29	0.3%	1	1.0%	1	0.0%	0	13.5%	23	3.6%	4
Homebase, St Andrew's Ave, Colchester	3.4%	27	4.8%	15	4.0%	4	4.5%	5	0.0%	0	2.7%	3
Homebase, Stanway, Colchester	6.4%	51	13.9%	43	3.0%	3	2.7%	3	0.0%	0	1.8%	2
Homebase, Sudbury	0.3%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Wickes, Colchester	1.9%	15	3.9%	12	2.0%	2	0.9%	1	0.0%	0	0.0%	0
Internet / delivery	0.8%	6	0.0%	0	2.0%	2	1.8%	2	1.2%	2	0.0%	0
Brook Retail Park, Clacton-on-Sea	10.9%	87	0.0%	0	0.0%	0	2.7%	3	39.4%	67	15.5%	17
Chilton Industrial Estate, Sudbury	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Dovercourt Town Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	3
Frinton-on-Sea Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2
Hadleigh Town Centre	0.3%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Harwich Gateway Retail Park, Freshfields Road, Harwich	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	3
Kent Blaxill & Co. Ltd., Layer Road, Colchester	0.3%	2	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Little Clacton Village	0.3%	2	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.9%	1
Sudbury Town Centre	0.3%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
The Sandlings Euro Retail Park, Ipswich	0.9%	7	0.0%	0	7.0%	7	0.0%	0	0.0%	0	0.0%	0
Walton-on-the-Naze Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Whitehall Industrial Estate, Colchester	0.3%	2	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.4%	11	1.6%	5	2.0%	2	0.9%	1	1.2%	2	0.9%	1
(Don't do this type of shopping)	9.6%	77	10.0%	31	6.0%	6	7.3%	8	11.2%	19	11.8%	13
Base:		800		310		100		110		170		110

Q20 Where do you do most of your household's shopping for domestic appliances such as washing machines, fridges, cookers and kettles?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Chelmsford City Centre	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Clacton-on-Sea Town Centre	9.8%	78	0.3%	1	2.0%	2	1.8%	2	37.6%	64	8.2%	9
Colchester Town Centre	19.3%	154	27.4%	85	16.0%	16	23.6%	26	6.5%	11	14.5%	16
Harwich Town Centre	2.6%	21	0.0%	0	1.0%	1	0.0%	0	0.0%	0	18.2%	20
Ipswich Town Centre	2.3%	18	0.0%	0	17.0%	17	0.0%	0	0.6%	1	0.0%	0
London	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
West Mersea Town Centre	0.5%	4	0.3%	1	0.0%	0	2.7%	3	0.0%	0	0.0%	0
Anglia Retail Park, Ipswich	0.4%	3	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0
Bluewater Shopping Centre, Greenhithe	0.5%	4	1.0%	3	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Shawlands Retail Park, Sudbury	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Suffolk Retail Park, Ipswich	0.3%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.9%	1
Tollgate Retail Park, Stanway, Colchester	24.0%	192	36.5%	113	19.0%	19	31.8%	35	5.3%	9	14.5%	16
Turner Rise Retail Park, Colchester	0.6%	5	1.3%	4	0.0%	0	0.0%	0	0.6%	1	0.0%	0
B&Q, Colchester	0.3%	2	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.9%	1
Homebase, Clacton-on-sea	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Asda, Colchester	0.3%	2	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Stanway, Colchester	0.3%	2	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Colchester	0.6%	5	1.3%	4	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Tesco, Greenstead Road, Colchester	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivery	14.5%	116	12.6%	39	15.0%	15	21.8%	24	14.1%	24	12.7%	14
Brightlingsea Town Centre	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Brook Retail Park, Clacton-on-Sea	4.5%	36	0.0%	0	1.0%	1	0.0%	0	18.2%	31	3.6%	4
Dovercourt Town Centre	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	3
Fiveways Retail Park, Peartree Road, Stanway, Colchester	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Frinton-on-Sea Town Centre	1.6%	13	0.0%	0	0.0%	0	0.0%	0	2.4%	4	8.2%	9
Hadleigh Town Centre	0.3%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Harwich Gateway Retail Park, Freshfields Road, Harwich	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2
Holland-on-Sea Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0
Morrisons, Clacton-on-Sea	0.3%	2	0.3%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Norwich City Centre	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Parkeston Local Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Ransomes Europark, Ipswich	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Shortlands Retail Park, Sudbury	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Stellison Ltd, Harwich Road, Colchester	0.3%	2	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sudbury Town Centre	0.3%	2	0.3%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
The Interchange Retail Park, Ipswich	0.5%	4	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0
The Sandlings Euro Retail Park, Ipswich	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Waterglade Retail Park, Clacton-on-Sea	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0
(Don’t know / varies)	5.9%	47	6.8%	21	4.0%	4	7.3%	8	4.7%	8	5.5%	6
(Don't do this type of shopping)	7.9%	63	9.4%	29	9.0%	9	7.3%	8	5.3%	9	7.3%	8
Base:		800		310		100		110		170		110

Q21 Where do you do most of your household's shopping for TV, Hi Fi, radio, photographic and computer equipment?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Chelmsford City Centre	0.4%	3	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Clacton-on-Sea Town Centre	8.8%	70	0.6%	2	2.0%	2	1.8%	2	32.9%	56	7.3%	8
Colchester Town Centre	20.0%	160	27.7%	86	16.0%	16	27.3%	30	5.9%	10	16.4%	18
Harwich Town Centre	1.5%	12	0.0%	0	1.0%	1	0.0%	0	0.0%	0	10.0%	11
Ipswich Town Centre	2.4%	19	1.0%	3	15.0%	15	0.0%	0	0.0%	0	0.9%	1
London	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
West Mersea Town Centre	0.3%	2	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0
Witham Town Centre	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Anglia Retail Park, Ipswich	0.3%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Bluewater Shopping Centre, Greenhithe	0.6%	5	0.6%	2	0.0%	0	0.9%	1	0.0%	0	1.8%	2
Colchester Retail Park, Sheepen Rd, Colchester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Lakeside Shopping Centre, Thurrock	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shawlands Retail Park, Sudbury	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Suffolk Retail Park, Ipswich	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Tollgate Retail Park, Stanway, Colchester	24.5%	196	35.5%	110	20.0%	20	31.8%	35	7.1%	12	17.3%	19
Turner Rise Retail Park, Colchester	0.3%	2	0.3%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Homebase, Clacton-on-sea	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Asda, Colchester	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Stanway, Colchester	0.4%	3	1.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Colchester	1.0%	8	1.9%	6	0.0%	0	0.9%	1	0.6%	1	0.0%	0
Tesco, Greenstead Road, Colchester	0.3%	2	0.3%	1	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Internet / delivery	16.3%	130	14.5%	45	20.0%	20	19.1%	21	15.3%	26	16.4%	18
Brentwood Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Brightlingsea Town Centre	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Brook Retail Park, Clacton-on-Sea	3.8%	30	0.0%	0	0.0%	0	0.0%	0	15.9%	27	2.7%	3
Cambridge Town Centre	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Clacton Factory Outlet, Stephenson Road West, Clacton-on-Sea	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Dovercourt Town Centre	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	4
Felixstowe Town Centre	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Frinton-on-Sea Town Centre	1.9%	15	0.0%	0	0.0%	0	0.9%	1	2.4%	4	9.1%	10
Hadleigh Town Centre	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Harwich Gateway Retail Park, Freshfields Road, Harwich	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	4
Holland-on-Sea Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0
Morrisons, Clacton-on-Sea	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Ramsey Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Ransomes Europark, Ipswich	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Stellison Ltd, Harwich Road, Colchester	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sudbury Town Centre	0.3%	2	0.3%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
The Interchange Retail Park, Ipswich	0.4%	3	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0
The Sandlings Euro Retail Park, Ipswich	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Upper Dovercourt District Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Waterglade Retail Park, Clacton-on-Sea	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0
(Don’t know / varies)	4.8%	38	5.8%	18	2.0%	2	3.6%	4	6.5%	11	2.7%	3
(Don't do this type of shopping)	8.3%	66	8.7%	27	11.0%	11	9.1%	10	8.2%	14	3.6%	4
Base:		800		310		100		110		170		110

Q22 Where do you do most of your household's shopping for personal / luxury goods including books, jewellery, china, glass and cosmetics?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Chelmsford City Centre	0.3%	2	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Clacton-on-Sea Town Centre	8.1%	65	0.0%	0	1.0%	1	1.8%	2	33.5%	57	4.5%	5
Colchester Town Centre	40.4%	323	52.9%	164	31.0%	31	51.8%	57	15.3%	26	40.9%	45
Harwich Town Centre	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	4
Ipswich Town Centre	2.9%	23	1.9%	6	13.0%	13	1.8%	2	1.2%	2	0.0%	0
London	0.5%	4	0.3%	1	3.0%	3	0.0%	0	0.0%	0	0.0%	0
Manningtree Town Centre	0.4%	3	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0
West Mersea Town Centre	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Bluewater Shopping Centre, Greenhithe	0.3%	2	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Braintree Retail Park, Braintree	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Freeport Outlet Shopping Village	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Lakeside Shopping Centre, Thurrock	0.3%	2	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Tollgate Retail Park, Stanway, Colchester	1.0%	8	2.3%	7	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Westfield Centre, Stratford (London)	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Asda, Colchester	0.5%	4	1.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Stanway, Colchester	0.3%	2	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Colchester	1.0%	8	1.9%	6	0.0%	0	0.9%	1	0.0%	0	0.9%	1
Tesco, Greenstead Road, Colchester	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Internet / delivery	22.1%	177	21.0%	65	29.0%	29	25.5%	28	20.0%	34	19.1%	21
Brightlingsea Town Centre	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Brook Retail Park, Clacton-on-Sea	0.4%	3	0.0%	0	0.0%	0	0.0%	0	1.8%	3	0.0%	0
Bury St Edmonds Town Centre	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Carlisle Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Dedham Village Centre	0.3%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Dovercourt Town Centre	0.4%	3	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.9%	1
Frinton-on-Sea Town Centre	1.0%	8	0.0%	0	0.0%	0	1.8%	2	0.0%	0	5.5%	6
Hadleigh Town Centre	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Harwich Gateway Retail Park, Freshfields Road, Harwich	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Norwich City Centre	0.3%	2	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.9%	1
Sudbury Town Centre	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
(Don’t know / varies)	4.3%	34	3.5%	11	5.0%	5	2.7%	3	5.3%	9	5.5%	6
(Don't do this type of shopping)	13.8%	110	12.9%	40	8.0%	8	8.2%	9	21.8%	37	14.5%	16
Base:		800		310		100		110		170		110

Q23 Do the people who live in your house, including you, make use of electronic home shopping (i.e. Internet or TV Shopping)?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Yes, Internet	62.9%	503	61.6%	191	65.0%	65	75.5%	83	54.1%	92	65.5%	72
Yes, TV Shopping	1.1%	9	1.6%	5	0.0%	0	1.8%	2	1.2%	2	0.0%	0
Yes, both	4.3%	34	2.9%	9	10.0%	10	1.8%	2	4.1%	7	5.5%	6
No	31.8%	254	33.9%	105	25.0%	25	20.9%	23	40.6%	69	29.1%	32
Base:		800		310		100		110		170		110

Q24 Which goods or services does your household currently purchase via electronic home shopping, or might you purchase in the future? [MR]

Those who make use of electronic home shopping at Q23

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Banking	19.0%	104	26.3%	54	16.0%	12	3.4%	3	26.7%	27	10.3%	8
Books	53.3%	291	49.8%	102	62.7%	47	49.4%	43	54.5%	55	56.4%	44
Clothes	36.8%	201	34.6%	71	26.7%	20	42.5%	37	37.6%	38	44.9%	35
Collectables / ornaments	1.3%	7	1.0%	2	1.3%	1	0.0%	0	2.0%	2	2.6%	2
Computer games	4.9%	27	4.4%	9	1.3%	1	2.3%	2	6.9%	7	10.3%	8
Concert tickets	3.5%	19	1.5%	3	0.0%	0	4.6%	4	3.0%	3	11.5%	9
DIY goods	2.4%	13	2.0%	4	2.7%	2	0.0%	0	4.0%	4	3.8%	3
DVDs / CDs / music	31.5%	172	27.8%	57	28.0%	21	39.1%	34	29.7%	30	38.5%	30
Food	9.0%	49	6.8%	14	13.3%	10	10.3%	9	8.9%	9	9.0%	7
Footwear	9.7%	53	6.3%	13	4.0%	3	17.2%	15	6.9%	7	19.2%	15
Furniture / Carpets	6.8%	37	4.9%	10	5.3%	4	17.2%	15	4.0%	4	5.1%	4
Garden items	3.8%	21	2.0%	4	2.7%	2	9.2%	8	4.0%	4	3.8%	3
Gifts	11.2%	61	10.2%	21	10.7%	8	10.3%	9	13.9%	14	11.5%	9
Health / beauty and chemists	6.2%	34	5.4%	11	4.0%	3	10.3%	9	5.0%	5	7.7%	6
Hobby / Craft items	6.4%	35	6.3%	13	5.3%	4	2.3%	2	9.9%	10	7.7%	6
Holiday and / or Travel Tickets	11.4%	62	11.2%	23	2.7%	2	10.3%	9	13.9%	14	17.9%	14
Insurance	8.1%	44	7.3%	15	1.3%	1	10.3%	9	11.9%	12	9.0%	7
Jewellery	7.5%	41	7.8%	16	6.7%	5	5.7%	5	8.9%	9	7.7%	6
Major electrical items	23.4%	128	18.0%	37	24.0%	18	31.0%	27	27.7%	28	23.1%	18
Musical instruments	0.4%	2	0.0%	0	0.0%	0	1.1%	1	0.0%	0	1.3%	1
Pet products	2.6%	14	2.0%	4	0.0%	0	3.4%	3	3.0%	3	5.1%	4
Printer cartridges	2.9%	16	1.5%	3	0.0%	0	2.3%	2	5.9%	6	6.4%	5
Small electrical items	24.2%	132	18.5%	38	24.0%	18	29.9%	26	25.7%	26	30.8%	24
Small household goods	9.9%	54	6.8%	14	6.7%	5	12.6%	11	14.9%	15	11.5%	9
Sports goods	2.4%	13	1.5%	3	1.3%	1	3.4%	3	2.0%	2	5.1%	4
Toys	4.9%	27	5.4%	11	2.7%	2	3.4%	3	7.9%	8	3.8%	3
Vehicle parts	2.0%	11	1.5%	3	2.7%	2	2.3%	2	3.0%	3	1.3%	1
Vehicles	0.4%	2	0.5%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Computer products	1.1%	6	2.0%	4	0.0%	0	0.0%	0	1.0%	1	1.3%	1
Photographic equipment	0.5%	3	1.0%	2	0.0%	0	1.1%	1	0.0%	0	0.0%	0
(Don't know)	3.1%	17	2.9%	6	1.3%	1	5.7%	5	3.0%	3	2.6%	2
Base:		546		205		75		87		101		78

Q25 Which cinema do you or your family visit the most?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Colchester Odeon, Colchester	37.5%	300	51.3%	159	20.0%	20	50.0%	55	18.8%	32	30.9%	34
Cineworld, Ipswich	9.6%	77	3.2%	10	44.0%	44	3.6%	4	2.4%	4	13.6%	15
Cineworld, Braintree	3.9%	31	5.2%	16	2.0%	2	9.1%	10	1.2%	2	0.9%	1
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Electric Palace, King's Quay Street, Harwich	0.9%	7	0.6%	2	0.0%	0	0.0%	0	0.0%	0	4.5%	5
Flicks, Pier Avenue, Clacton-on-Sea	3.3%	26	0.0%	0	0.0%	0	0.9%	1	12.9%	22	2.7%	3
Gala Clubs, Pier Avenue, Clacton-on-Sea	0.8%	6	0.0%	0	0.0%	0	0.9%	1	2.4%	4	0.9%	1
IMAX, South Bank, London	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Riverside, Quayside, Woodbridge	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
(Don't know / can't remember)	0.4%	3	0.0%	0	1.0%	1	0.9%	1	0.0%	0	0.9%	1
(Don’t go to the cinema)	43.5%	348	39.4%	122	33.0%	33	33.6%	37	62.4%	106	45.5%	50
Base:		800		310		100		110		170		110

GEN Gender of respondent

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Male	32.6%	261	32.9%	102	30.0%	30	32.7%	36	31.8%	54	35.5%	39
Female	67.4%	539	67.1%	208	70.0%	70	67.3%	74	68.2%	116	64.5%	71
Base:		800		310		100		110		170		110

AGE For the purposes of the survey, could I ask how old are you please?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
18-24 years	1.8%	14	1.9%	6	3.0%	3	1.8%	2	0.6%	1	1.8%	2
25-34 years	1.6%	13	1.9%	6	2.0%	2	0.9%	1	1.8%	3	0.9%	1
35-44 years	14.3%	114	15.8%	49	14.0%	14	20.0%	22	11.2%	19	9.1%	10
45-54 years	24.8%	198	24.2%	75	30.0%	30	31.8%	35	17.6%	30	25.5%	28
55-64 years	23.1%	185	22.9%	71	21.0%	21	21.8%	24	22.4%	38	28.2%	31
65 plus	32.5%	260	31.0%	96	28.0%	28	22.7%	25	44.1%	75	32.7%	36
(Refused)	2.0%	16	2.3%	7	2.0%	2	0.9%	1	2.4%	4	1.8%	2
Base:		800		310		100		110		170		110

ETH For the purposes of the survey, could I ask what ethnicity you consider yourself to be?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
White	97.8%	782	96.5%	299	99.0%	99	97.3%	107	99.4%	169	98.2%	108
Indian	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pakistani	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bangladeshi	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other Asian	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Black Caribbean	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Black African	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other Black	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chinese	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other ethnic group	0.4%	3	0.6%	2	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Mixed Race	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Refused)	1.6%	13	2.3%	7	1.0%	1	2.7%	3	0.0%	0	1.8%	2
Base:		800		310		100		110		170		110

ADU How many adults, including yourself, live in your household (16 years and above)?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
One	20.1%	161	22.9%	71	11.0%	11	20.0%	22	20.0%	34	20.9%	23
Two	53.0%	424	51.0%	158	54.0%	54	49.1%	54	61.8%	105	48.2%	53
Three	17.4%	139	15.5%	48	24.0%	24	17.3%	19	12.9%	22	23.6%	26
Four	6.0%	48	7.1%	22	8.0%	8	8.2%	9	3.5%	6	2.7%	3
Five	1.0%	8	1.0%	3	1.0%	1	1.8%	2	0.6%	1	0.9%	1
Six or more	0.6%	5	0.3%	1	1.0%	1	1.8%	2	0.6%	1	0.0%	0
(Refused)	1.9%	15	2.3%	7	1.0%	1	1.8%	2	0.6%	1	3.6%	4
Base:		800		310		100		110		170		110

CHI How many children live in your household, aged 15 years and under?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
None	74.9%	599	72.3%	224	75.0%	75	72.7%	80	78.2%	133	79.1%	87
One	11.4%	91	13.2%	41	12.0%	12	10.9%	12	10.6%	18	7.3%	8
Two	9.0%	72	9.4%	29	6.0%	6	11.8%	13	9.4%	16	7.3%	8
Three	2.5%	20	2.9%	9	6.0%	6	1.8%	2	1.2%	2	0.9%	1
Four	0.4%	3	0.3%	1	0.0%	0	0.9%	1	0.0%	0	0.9%	1
Five	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Six or more	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Refused)	1.9%	15	1.9%	6	1.0%	1	1.8%	2	0.6%	1	4.5%	5
Base:		800		310		100		110		170		110

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

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
None	9.6%	77	11.9%	37	1.0%	1	8.2%	9	12.4%	21	8.2%	9
One	47.6%	381	50.0%	155	30.0%	30	47.3%	52	50.6%	86	52.7%	58
Two	29.8%	238	26.8%	83	46.0%	46	27.3%	30	29.4%	50	26.4%	29
Three or more	11.0%	88	9.4%	29	22.0%	22	14.5%	16	7.1%	12	8.2%	9
(Refused)	2.0%	16	1.9%	6	1.0%	1	2.7%	3	0.6%	1	4.5%	5
Base:		800		310		100		110		170		110

QUOTA Zone

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Zone 1	38.8%	310	100.0%	310	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 2	12.5%	100	0.0%	0	100.0%	100	0.0%	0	0.0%	0	0.0%	0
Zone 3	13.8%	110	0.0%	0	0.0%	0	100.0%	110	0.0%	0	0.0%	0
Zone 4	21.3%	170	0.0%	0	0.0%	0	0.0%	0	100.0%	170	0.0%	0
Zone 5	13.8%	110	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	110
Base:		800		310		100		110		170		110

PC Postcode Sector

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
CO1 1	0.9%	7	2.3%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CO1 2	2.9%	23	7.4%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CO105	0.8%	6	0.0%	0	6.0%	6	0.0%	0	0.0%	0	0.0%	0
CO111	2.3%	18	0.0%	0	18.0%	18	0.0%	0	0.0%	0	0.0%	0
CO112	2.8%	22	0.0%	0	22.0%	22	0.0%	0	0.0%	0	0.0%	0
CO123	2.3%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.4%	18
CO124	3.9%	31	0.0%	0	0.0%	0	0.0%	0	0.0%	0	28.2%	31
CO125	1.8%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.7%	14
CO130	1.9%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.6%	15
CO139	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.3%	8
CO148	1.9%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.6%	15
CO151	1.8%	14	0.0%	0	0.0%	0	0.0%	0	8.2%	14	0.0%	0
CO152	1.4%	11	0.0%	0	0.0%	0	0.0%	0	6.5%	11	0.0%	0
CO153	1.9%	15	0.0%	0	0.0%	0	0.0%	0	8.8%	15	0.0%	0
CO154	2.1%	17	0.0%	0	0.0%	0	0.0%	0	10.0%	17	0.0%	0
CO155	3.9%	31	0.0%	0	0.0%	0	0.0%	0	18.2%	31	0.0%	0
CO156	2.8%	22	0.0%	0	0.0%	0	0.0%	0	12.9%	22	0.0%	0
CO160	1.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.2%	9
CO167	1.5%	12	0.0%	0	0.0%	0	0.0%	0	7.1%	12	0.0%	0
CO168	3.3%	26	0.0%	0	0.0%	0	0.0%	0	15.3%	26	0.0%	0
CO169	2.8%	22	0.0%	0	0.0%	0	0.0%	0	12.9%	22	0.0%	0
CO2 0	1.1%	9	0.0%	0	0.0%	0	8.2%	9	0.0%	0	0.0%	0
CO2 7	3.3%	26	8.4%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CO2 8	4.0%	32	10.3%	32	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CO2 9	1.3%	10	3.2%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CO3 0	2.8%	22	7.1%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CO3 3	2.5%	20	6.5%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CO3 4	2.8%	22	7.1%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CO3 8	0.4%	3	1.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CO3 9	2.0%	16	5.2%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CO4 0	3.1%	25	8.1%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CO4 3	4.4%	35	11.3%	35	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CO4 5	3.1%	25	8.1%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CO4 9	2.9%	23	7.4%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CO5 7	1.0%	8	0.0%	0	0.0%	0	7.3%	8	0.0%	0	0.0%	0
CO5 8	1.4%	11	0.0%	0	0.0%	0	10.0%	11	0.0%	0	0.0%	0
CO6 3	2.6%	21	6.8%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CO6 4	3.0%	24	0.0%	0	24.0%	24	0.0%	0	0.0%	0	0.0%	0
CO6 5	0.3%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
CO7 0	3.5%	28	0.0%	0	0.0%	0	25.5%	28	0.0%	0	0.0%	0
CO7 6	2.0%	16	0.0%	0	16.0%	16	0.0%	0	0.0%	0	0.0%	0
CO7 7	1.4%	11	0.0%	0	0.0%	0	10.0%	11	0.0%	0	0.0%	0
CO7 8	1.9%	15	0.0%	0	0.0%	0	13.6%	15	0.0%	0	0.0%	0
CO7 9	3.5%	28	0.0%	0	0.0%	0	25.5%	28	0.0%	0	0.0%	0
IP7 5	1.5%	12	0.0%	0	12.0%	12	0.0%	0	0.0%	0	0.0%	0
Base:		800		310		100		110		170		110

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