

Appendix A

Results of the 2016 Household Interview Survey

Colchester Borough Retail Study 2016

for Cushman & Wakefield

Weighted:

October 2016

	Total		Zone 1: Colchester	Zone 2: Rural North	Zone 3: Rural South	Zone 4: Clacton	Zone 5: Frinton / Harwich	Zone 6: Rural West	Zone 7: Halstead	Zone 8: Braintree	Zone 9: Witham									
Q01 At which food store or shopping centre does your household do most of its main food shopping, and where is that?																				
<i>Excludes SFT and Nulls</i>																				
Aldi at London Road, Lexden, Colchester	2.5%	28	6.3%	20	1.5%	1	2.3%	3	0.0%	0	0.0%	0	5.1%	4	0.8%	0	0.0%	0	0.0%	0
Aldi at Magdalen Street, Colchester	1.7%	19	4.3%	13	0.0%	0	3.7%	4	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Iceland at St Johns Walk, Colchester Town Centre	0.4%	5	0.9%	3	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer at Lion Walk, High Street, Colchester Town Centre	0.5%	5	0.9%	3	0.0%	0	1.5%	2	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's at Priory Walk, Colchester Town Centre	1.6%	18	2.8%	9	2.0%	2	3.7%	4	0.0%	0	0.0%	0	2.7%	2	0.0%	0	1.2%	2	0.0%	0
Waitrose at St Andrews Avenue Retail Park, Colchester	3.0%	33	5.6%	18	4.3%	3	9.4%	10	0.9%	1	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Greenstead Road (District Centre OR Retail Park), Hythe, Colchester; including Tesco	4.4%	49	8.2%	26	3.3%	3	17.8%	19	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Highwoods (District Centre OR Retail Park), Colchester; including Tesco Extra	7.6%	85	19.2%	61	8.2%	6	10.5%	11	0.0%	0	1.5%	2	2.7%	2	0.8%	0	1.5%	2	0.0%	0
Peartree Road (District Centre OR Retail Park), Colchester; including Co-op	0.4%	4	0.4%	1	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Tollgate (District Centre OR Retail Park), Stanway, Colchester; including Sainsbury's and Iceland	12.8%	144	29.0%	92	2.1%	2	11.9%	13	0.0%	0	1.5%	2	38.0%	33	0.0%	0	0.5%	1	3.6%	2
Turner Rise (District Centre OR Retail Park), Colchester; including Asda and Iceland	5.0%	56	13.3%	42	4.3%	3	1.9%	2	1.1%	2	3.2%	3	1.9%	2	2.7%	1	0.6%	1	0.0%	0
Elsewhere in Colchester Town Centre	1.0%	11	3.1%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.8%	0	0.0%	0	0.0%	0
Elsewhere in Colchester, out of Town Centre	2.4%	26	4.6%	15	0.0%	0	7.6%	8	0.0%	0	1.6%	2	2.4%	2	0.0%	0	0.0%	0	0.0%	0
Braintree Town Centre	5.0%	57	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	9.3%	4	35.1%	51	0.0%	0
Superstores outside of Braintree town centre	6.1%	69	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	12.5%	6	41.1%	60	3.3%	2
Elsewhere in Braintree (i.e. local shops, markets)	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	4	0.0%	0
Chelmsford Town Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.9%	1

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October 2016

	Total		Zone 1: Colchester		Zone 2: Rural North		Zone 3: Rural South		Zone 4: Clacton		Zone 5: Frinton / Harwich		Zone 6: Rural West		Zone 7: Halstead		Zone 8: Braintree		Zone 9: Witham	
Superstores outside of Chelmsford town centre	0.9%	10	0.0%	0	0.0%	0	0.0%	0	2.0%	3	2.7%	3	0.0%	0	0.0%	0	0.0%	0	5.9%	4
Clacton-on-Sea Town Centre	6.1%	68	0.3%	1	0.0%	0	3.1%	3	34.4%	57	6.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Superstores outside of Clacton-on-Sea town centre	10.9%	122	0.0%	0	1.9%	1	5.2%	6	57.6%	96	18.1%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Clacton-on-Sea (i.e. local shops, markets)	0.2%	3	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ipswich Town Centre	0.2%	3	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Superstores outside of Ipswich town centre	0.6%	6	0.0%	0	6.6%	5	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Halstead Town Centre	1.3%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	32.3%	15	0.0%	0	0.0%	0
Superstores outside of Halstead town centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0
Sudbury Town Centre	1.9%	21	0.0%	0	11.4%	9	0.0%	0	0.0%	0	0.0%	0	7.6%	7	13.0%	6	0.0%	0	0.0%	0
Superstores outside of Sudbury town centre	1.5%	17	0.0%	0	5.9%	5	0.0%	0	0.0%	0	0.0%	0	4.4%	4	18.9%	9	0.0%	0	0.0%	0
Witham Town Centre	3.7%	41	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	5	0.0%	0	0.5%	1	49.9%	34
Superstores outside of Witham town centre	2.0%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	3.2%	5	25.0%	17
Brightlingsea	0.2%	2	0.0%	0	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coggeshall	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Dovercourt	1.0%	11	0.0%	0	5.3%	4	0.0%	0	0.0%	0	6.4%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Frinton-on-Sea	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.2%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hadleigh	1.3%	15	0.4%	1	15.5%	12	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harwich	4.7%	53	0.0%	0	6.3%	5	0.8%	1	0.0%	0	45.0%	47	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Maldon	0.7%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	2.0%	1	0.5%	1	8.7%	6
Manningtree	1.2%	13	0.0%	0	16.8%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks Tey	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Tiptree	2.0%	22	0.3%	1	0.0%	0	2.3%	2	0.0%	0	0.0%	0	20.4%	17	0.0%	0	0.0%	0	2.1%	1
Walton	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	4	0.0%	0	0.0%	0	0.0%	0	0.8%	1
West Mersea	0.8%	9	0.0%	0	0.0%	0	8.0%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wivenhoe	0.3%	4	0.0%	0	0.0%	0	3.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	2.7%	1	1.2%	2	0.0%	0
Brantham	0.1%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sible Hedingham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0
Little Clacton	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.7%	3	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, The Square, Notley Green	1.3%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.8%	14	0.0%	0
Weighted base:		1120		316		79		109		166		105		86		46		147		68
Sample:		1125		223		91		113		154		109		94		89		154		98

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Q02 When members of your household do main food shopping, do they usually do any non-food shopping in the town / district centre on the same journey?																				
Yes	32.9%	395	32.8%	112	34.6%	30	24.1%	28	35.9%	62	43.2%	50	27.2%	25	30.3%	16	31.6%	48	34.5%	24
No	65.5%	786	65.5%	225	62.1%	54	75.3%	87	64.1%	111	56.2%	65	68.8%	63	64.0%	33	67.9%	104	64.7%	45
(Don't know)	1.5%	18	1.8%	6	3.3%	3	0.6%	1	0.0%	0	0.7%	1	4.0%	4	5.7%	3	0.5%	1	0.8%	1
Weighted base:	1200		343		86		116		173		116		91		52		153		69	
Sample:	1200		240		100		120		160		120		100		100		160		100	

Q02X When members of your household do main food and grocery shopping, how do they usually travel?*Those asked Q02X*

Car (as driver/passenger)	71.0%	589	63.5%	129	69.7%	56	77.0%	68	69.4%	94	76.9%	59	79.1%	51	68.2%	11	76.8%	82	67.2%	39
Car (including park and ride)	13.3%	110	10.1%	21	17.7%	14	12.8%	11	17.5%	24	9.1%	7	13.8%	9	13.6%	2	11.4%	12	17.4%	10
Bus	3.4%	28	7.2%	15	0.9%	1	0.8%	1	1.9%	3	2.0%	2	2.5%	2	4.5%	1	2.7%	3	4.2%	2
Taxi	0.6%	5	1.2%	2	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Train	0.2%	2	0.0%	0	0.9%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bicycle	0.7%	6	1.2%	2	0.0%	0	2.6%	2	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Motorcycle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walk	8.3%	68	12.1%	25	6.7%	5	5.8%	5	6.7%	9	9.8%	8	3.4%	2	13.7%	2	5.6%	6	11.2%	6
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mobility scooter	0.8%	7	0.6%	1	2.4%	2	0.0%	0	2.0%	3	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
(Don't know / varies)	1.8%	15	4.1%	8	1.8%	1	0.9%	1	1.3%	2	0.0%	0	1.2%	1	0.0%	0	1.7%	2	0.0%	0
Weighted base:		829		203		80		88		136		77		65		16		107		58
Sample:		871		144		93		95		132		84		75		41		119		88

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Q03 Where does your household do most of its shopping for small scale ‘top-up’ food and convenience goods items, including newspapers and tobacco products?																						
<i>Excludes SFT and Nulls</i>																						
Aldi at London Road, Lexden, Colchester	1.8%	17	4.3%	12	0.9%	1	2.7%	2	0.0%	0	0.0%	0	1.0%	1	2.4%	1	0.0%	0	0.0%	0		
Aldi at Magdalen Street, Colchester	0.6%	6	1.7%	5	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0		
Iceland at St Johns Walk, Colchester Town Centre	0.4%	4	1.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0		
Marks & Spencer at Lion Walk, High Street, Colchester Town Centre	1.1%	11	3.3%	9	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0		
Sainsbury’s at Priory Walk, Colchester Town Centre	0.8%	8	2.5%	7	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0		
Waitrose at St Andrews Avenue Retail Park, Colchester	1.6%	16	2.6%	7	0.0%	0	7.4%	7	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0		
Greenstead Road (District Centre OR Retail Park), Hythe, Colchester; including Tesco	2.8%	27	7.8%	23	0.9%	1	3.1%	3	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0		
Highwoods (District Centre OR Retail Park), Colchester; including Tesco Extra	4.8%	47	13.6%	39	3.5%	3	4.5%	4	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0		
Peartree Road (District Centre OR Retail Park), Colchester; including Co-op	1.8%	17	3.7%	11	0.0%	0	7.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0		
Tollgate (District Centre OR Retail Park), Stanway, Colchester; including Sainsbury’s and Iceland	5.1%	49	11.6%	34	1.0%	1	4.0%	4	0.0%	0	0.0%	0	14.2%	11	0.9%	0	0.0%	0	1.1%	1		
Turner Rise (District Centre OR Retail Park), Colchester; including Asda and Iceland	2.1%	20	4.7%	14	2.5%	2	2.3%	2	0.0%	0	0.0%	0	1.2%	1	0.0%	0	1.5%	2	0.0%	0		
Elsewhere in Colchester Town Centre	2.1%	20	5.8%	17	0.0%	0	0.8%	1	0.0%	0	1.3%	1	1.0%	1	2.4%	1	0.0%	0	0.0%	0		
Elsewhere in Colchester, out of Town Centre	12.3%	119	33.8%	97	4.6%	3	11.5%	10	0.0%	0	0.9%	1	9.4%	7	0.0%	0	0.0%	0	0.0%	0		
Braintree Town Centre	4.2%	41	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	34.4%	40	1.2%	1		
Superstores outside of Braintree town centre	4.2%	40	0.4%	1	0.0%	0	0.9%	1	0.6%	1	0.0%	0	0.0%	0	3.5%	1	30.1%	35	2.3%	1		
Elsewhere in Braintree (i.e. local shops, markets)	2.1%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.7%	21	0.0%	0		
Chelmsford Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	3.3%	2		

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Superstores outside of Chelmsford town centre	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	4.1%	2
Clacton-on-Sea Town Centre	5.2%	51	0.0%	0	0.0%	0	0.0%	0	34.7%	49	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Superstores outside of Clacton-on-Sea town centre	6.6%	64	0.4%	1	0.0%	0	1.8%	2	41.3%	58	3.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Clacton-on-Sea (i.e. local shops, markets)	2.8%	27	0.0%	0	0.0%	0	0.0%	0	18.3%	26	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ipswich Town Centre	0.1%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Superstores outside of Ipswich town centre	0.3%	3	0.0%	0	1.0%	1	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Halstead Town Centre	2.1%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	53.4%	20	0.0%	0	0.0%	0
Superstores outside of Halstead town centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	0	0.0%	0	0.0%	0
Elsewhere in Halstead (i.e. local shops, markets)	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	10.7%	4	0.0%	0	0.0%	0
Sudbury Town Centre	1.0%	9	0.0%	0	2.6%	2	0.0%	0	0.0%	0	0.0%	0	6.4%	5	6.6%	2	0.0%	0	0.0%	0
Superstores outside of Sudbury town centre	0.5%	5	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	2.0%	2	4.3%	2	0.0%	0	0.0%	0
Elsewhere in Sudbury (i.e. local shops, markets)	0.2%	2	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Witham Town Centre	2.2%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	43.8%	21
Superstores outside of Witham town centre	1.5%	15	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	24.8%	12
Elsewhere in Witham (i.e. local shops, markets)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	2
Brightlingsea	1.3%	12	0.0%	0	0.0%	0	13.6%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coggeshall	1.1%	10	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.2%	8	0.0%	0	0.0%	0	0.0%	0
Dovercourt	1.4%	14	0.0%	0	0.9%	1	1.0%	1	0.0%	0	11.7%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Frinton-on-Sea	2.0%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.4%	19	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Hadleigh	1.4%	14	0.0%	0	17.7%	13	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harwich	5.3%	51	0.0%	0	1.9%	1	0.0%	0	0.0%	0	48.5%	50	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Maldon	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	3
Manningtree	3.4%	33	0.0%	0	40.5%	30	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0
Marks Tey	0.3%	3	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0
Tiptree	2.4%	23	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.7%	1	27.3%	20	0.0%	0	0.0%	0	1.1%	1
Walton	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
West Mersea	1.7%	17	0.0%	0	0.0%	0	18.6%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wivenhoe	1.1%	10	0.0%	0	0.0%	0	11.6%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	2.8%	28	0.8%	2	7.9%	6	3.8%	3	1.8%	2	4.7%	5	0.0%	0	3.4%	1	2.7%	3	8.5%	4
Brantham	0.1%	1	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Earls Colne	1.1%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.8%	10	0.0%	0	0.0%	0	0.0%	0
Kelvedon	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.5%	5	0.0%	0	0.0%	0	0.0%	0
Sible Hedingham	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.7%	3	0.0%	0	0.0%	0
Tesco, The Square, Notley Green	1.2%	12	0.0%	0	4.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.2%	8	0.0%	0
Weighted base:		970		288		74		90		140		102		75		38		117		48

Colchester Borough Retail Study 2016
for Cushman & Wakefield

	Total	Zone 1: Colchester	Zone 2: Rural North	Zone 3: Rural South	Zone 4: Clacton	Zone 5: Frinton / Harwich	Zone 6: Rural West	Zone 7: Halstead	Zone 8: Braintree	Zone 9: Witham
Sample:	961	202	85	95	128	105	82	74	120	70

Colchester Borough Retail Study 2016

for Cushman & Wakefield

Weighted:

October 2016

	Total		Zone 1: Colchester	Zone 2: Rural North	Zone 3: Rural South		Zone 4: Clacton		Zone 5: Frinton / Harwich		Zone 6: Rural West		Zone 7: Halstead		Zone 8: Braintree		Zone 9: Witham			
Q04 Where does your household do most of its shopping for clothing and footwear?																				
<i>Excludes SFT and Nulls</i>																				
Colchester Town Centre; including Lion Walk and Culver Square	46.4%	443	69.3%	197	40.8%	26	65.8%	55	33.5%	46	58.8%	50	62.7%	47	26.1%	10	6.8%	9	5.9%	3
Sainsbury’s at Priory Walk, Colchester Town Centre	0.2%	2	0.4%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Greenstead Road (District Centre OR Retail Park), Hythe, Colchester; including Tesco	1.5%	14	4.7%	13	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Highwoods (District Centre OR Retail Park), Colchester; including Tesco Extra	0.7%	7	2.1%	6	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tollgate (District Centre OR Retail Park), Stanway, Colchester; including Sainsbury’s	5.0%	47	9.4%	27	0.0%	0	9.9%	8	1.4%	2	2.4%	2	5.6%	4	0.0%	0	0.6%	1	5.7%	3
Turner Rise (District Centre OR Retail Park), Colchester; including Asda	0.8%	7	1.3%	4	0.0%	0	0.0%	0	0.7%	1	1.0%	1	1.2%	1	2.3%	1	0.0%	0	0.0%	0
Colchester Retail Park, Sheepen Road, Colchester	0.4%	4	0.4%	1	0.0%	0	2.4%	2	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Other retail warehouses in Colchester	0.2%	2	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Braintree Town Centre	3.3%	31	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	1.0%	1	8.0%	3	20.1%	26	0.9%	1
Freeport Designer Outlet Village, Braintree	6.9%	66	1.6%	5	1.3%	1	2.9%	2	0.6%	1	0.0%	0	3.7%	3	16.8%	7	29.6%	38	16.8%	10
Other Retail Parks, retail warehouses and superstores in Braintree	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	2.7%	3	0.0%	0
Chelmsford Town Centre	9.6%	91	0.8%	2	1.1%	1	1.9%	2	2.9%	4	1.8%	2	14.2%	11	11.0%	4	31.4%	41	44.0%	25
Chelmer Village Retail Park, Chelmsford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1
Riverside Retail Park, Chelmsford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
The Meadows Retail Park, Chelmsford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Other Retail Parks, retail warehouses and superstores in Chelmsford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Clacton-on-Sea Town Centre	8.2%	79	0.4%	1	1.8%	1	3.7%	3	45.7%	62	9.7%	8	1.0%	1	0.0%	0	1.4%	2	0.0%	0
Brook Retail Park, Clacton-on-Sea	0.6%	6	0.0%	0	0.0%	0	1.5%	1	1.9%	3	2.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Clacton Factory Outlet,	0.6%	6	0.0%	0	0.0%	0	0.0%	0	3.0%	4	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Colchester Borough Retail Study 2016

for Cushman & Wakefield

Weighted:

October 2016

	Total	Zone 1: Colchester		Zone 2: Rural North		Zone 3: Rural South		Zone 4: Clacton		Zone 5: Frinton / Harwich		Zone 6: Rural West		Zone 7: Halstead		Zone 8: Braintree		Zone 9: Witham		
Clacton-on-Sea																				
Other Retail Parks, retail warehouses and superstores in Clacton-on-Sea	0.2%	2	0.0%	0	1.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Clacton-on-Sea	0.3%	3	0.0%	0	0.0%	0	1.9%	2	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ipswich Town Centre	4.4%	42	2.7%	8	31.3%	20	1.8%	2	2.7%	4	10.0%	8	0.0%	0	2.3%	1	0.0%	0	0.0%	0
Euro Retail Park, Ipswich	0.1%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other Retail Parks, retail warehouses and superstores in Ipswich	0.1%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Halstead Town Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	3	0.0%	0	0.0%	0
Sudbury Town Centre	2.2%	21	1.4%	4	12.0%	8	0.0%	0	0.0%	0	0.0%	0	4.5%	3	13.6%	5	0.0%	0	0.9%	1
Witham Town Centre	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.5%	6
Frinton-on-Sea	0.9%	9	0.4%	1	0.0%	0	0.0%	0	1.3%	2	6.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hadleigh	0.1%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harwich	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Maldon	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.3%	1	0.0%	0	1.8%	1
Manningtree	0.3%	3	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0
West Mersea	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.9%	8	1.4%	4	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	4.3%	3
Bluewater Shopping Centre, Greenhithe	0.7%	7	0.4%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	3.1%	4	0.9%	1
Bury St Edmunds	0.3%	3	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	2	0.6%	1	0.0%	0
Cambridge	0.4%	4	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	2.8%	1	0.0%	0	0.0%	0
Lakeside Retail Park, West Thurrock	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lakeside Shopping Centre, West Thurrock	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.6%	1	2.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
London	2.2%	21	2.3%	6	3.7%	2	4.4%	4	1.9%	3	0.0%	0	2.2%	2	1.0%	0	1.3%	2	3.9%	2
Weighted base:		954		284		64		83		137		85		74		40		129		58
Sample:		950		199		74		88		126		88		80		79		133		83

Colchester Borough Retail Study 2016 for Cushman & Wakefield

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	Total		Zone 1: Colchester	Zone 2: Rural North	Zone 3: Rural South			Zone 4: Clacton		Zone 5: Frinton / Harwich		Zone 6: Rural West		Zone 7: Halstead		Zone 8: Braintree		Zone 9: Witham		
Q05 Where does your household do most of its shopping for furniture, carpets and other floor coverings?																				
<i>Excludes SFT and Nulls</i>																				
Colchester Town Centre; including Lion Walk and Culver Square	12.6%	90	12.5%	26	23.3%	11	16.7%	11	10.3%	10	24.1%	18	12.6%	7	13.3%	4	2.5%	2	2.3%	1
Greenstead Road (District Centre OR Retail Park), Hythe, Colchester; including Tesco	0.8%	6	2.0%	4	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Highwoods (District Centre OR Retail Park), Colchester; including Tesco Extra	0.5%	4	0.0%	0	0.0%	0	5.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Peartree Road (District Centre OR Retail Park), Colchester	2.8%	20	6.2%	13	0.0%	0	2.5%	2	0.0%	0	0.0%	0	4.5%	2	3.2%	1	1.8%	2	1.1%	1
Tollgate (District Centre OR Retail Park), Stanway, Colchester; including Sainsbury's	34.6%	247	53.4%	111	14.3%	7	45.0%	29	23.7%	23	19.4%	15	55.7%	29	19.4%	5	19.0%	18	22.9%	10
Turner Rise (District Centre OR Retail Park), Colchester; including Asda	0.4%	3	0.6%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	3.2%	1	0.0%	0	0.0%	0
Colchester Retail Park, Sheepen Road, Colchester	0.3%	2	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
St Andrews Avenue Retail Park, Colchester; including Waitrose	0.8%	5	1.4%	3	0.0%	0	1.2%	1	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other retail warehouses in Colchester	2.2%	16	1.6%	3	2.5%	1	0.0%	0	2.9%	3	3.7%	3	1.4%	1	5.3%	1	2.2%	2	3.4%	2
Elsewhere in Colchester, out of Town Centre	6.2%	45	11.7%	24	4.9%	2	10.3%	7	2.5%	2	4.9%	4	2.4%	1	4.1%	1	3.0%	3	0.0%	0
Braintree Town Centre	4.6%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	2	30.8%	30	3.6%	2
Freeport Designer Outlet Village, Braintree	1.8%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	1.2%	0	9.9%	10	4.5%	2
Other Retail Parks, retail warehouses and superstores in Braintree	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	4	1.1%	1
Elsewhere in Braintree	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	3	0.0%	0
Chelmsford Town Centre	2.1%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	6.0%	6	20.3%	9
Chelmer Village Retail Park, Chelmsford	0.9%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2	9.3%	4
Riverside Retail Park, Chelmsford	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.0%	0
Other Retail Parks, retail warehouses and	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1

Colchester Borough Retail Study 2016

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	Total		Zone 1: Colchester	Zone 2: Rural North	Zone 3: Rural South	Zone 4: Clacton	Zone 5: Frinton / Harwich	Zone 6: Rural West	Zone 7: Halstead	Zone 8: Braintree	Zone 9: Witham							
superstores in Chelmsford																		
Elsewhere in Chelmsford	0.4%	3	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	1.3%	1				
Clacton-on-Sea Town Centre	4.4%	31	0.0%	0	0.0%	0	2.0%	1	25.8%	25	5.9%	4	0.0%	0	0.0%	0	0.0%	0
Brook Retail Park, Clacton-on-Sea	1.3%	9	0.0%	0	0.0%	0	1.2%	1	7.6%	8	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Clacton Factory Outlet, Clacton-on-Sea	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.8%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Other Retail Parks, retail warehouses and superstores in Clacton-on-Sea	1.8%	13	0.0%	0	0.0%	0	0.0%	0	13.1%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Clacton-on-Sea	0.8%	6	0.0%	0	0.0%	0	0.0%	0	3.6%	4	3.2%	2	0.0%	0	0.0%	0	0.0%	0
Ipswich Town Centre	2.5%	18	1.9%	4	19.0%	9	1.4%	1	0.9%	1	3.2%	2	1.5%	1	0.0%	0	0.0%	0
Anglia Retail Park, Ipswich	0.3%	2	0.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Euro Retail Park, Ipswich	0.4%	3	0.0%	0	6.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Futura Park, Ipswich	0.4%	3	0.0%	0	0.0%	0	1.2%	1	0.0%	0	2.7%	2	0.0%	0	0.0%	0	0.0%	0
Orwell Retail Park, Ipswich	0.3%	2	0.6%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other Retail Parks, retail warehouses and superstores in Ipswich	0.9%	6	0.0%	0	6.6%	3	0.0%	0	0.9%	1	1.7%	1	1.6%	1	0.0%	0	0.0%	0
Elsewhere in Ipswich	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Halstead Town Centre	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.0%	6	0.0%	0	0.0%	0
Retail Parks, retail warehouses and superstores in Halstead	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0
Elsewhere in Halstead	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1	0.0%	0
Sudbury Town Centre	0.6%	5	0.0%	0	5.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.1%	2	0.0%	0
Elsewhere in Sudbury	0.3%	2	0.0%	0	1.7%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0
Witham Town Centre	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Retail Parks, retail warehouses and superstores in Witham	0.9%	7	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	2.2%	2
Elsewhere in Witham	0.9%	6	0.6%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	1.5%	1	2.0%	1	1.8%	2
Brightlingsea	0.2%	2	0.0%	0	0.0%	0	2.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coggeshall	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Dovercourt	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Frinton-on-Sea	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	2	0.0%	0	0.0%	0	0.0%	0
Hadleigh	0.3%	2	0.0%	0	4.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harwich	2.2%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.5%	16	0.0%	0	0.0%	0	0.0%	0
Maldon	0.4%	3	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	1
Manningtree	0.2%	1	0.0%	0	3.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tiptree	0.6%	4	0.0%	0	0.0%	0	3.2%	2	0.0%	0	0.0%	0	2.9%	2	0.0%	0	0.0%	0
Walton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Other	0.9%	6	0.6%	1	3.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	1.3%	1
Bluewater Shopping Centre, Greenhithe	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0
Bury St Edmunds	0.3%	2	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	1.8%	1	1.3%	0	0.0%	0

Colchester Borough Retail Study 2016 for Cushman & Wakefield

Weighted:

October 2016

	Total		Zone 1: Colchester		Zone 2: Rural North		Zone 3: Rural South		Zone 4: Clacton		Zone 5: Frinton / Harwich		Zone 6: Rural West		Zone 7: Halstead		Zone 8: Braintree		Zone 9: Witham	
Cambridge	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	1	0.0%	0	0.0%	0
Lakeside Retail Park, West Thurrock	2.1%	15	3.7%	8	3.1%	1	1.2%	1	2.4%	2	1.0%	1	0.0%	0	0.0%	0	1.4%	1	1.2%	1
Lakeside Shopping Centre, West Thurrock	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	2	0.0%	0	0.9%	1	0.0%	0
Stanway	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	5.4%	2
London	0.7%	5	0.0%	0	0.0%	0	2.5%	2	0.9%	1	0.0%	0	1.6%	1	1.4%	0	1.1%	1	0.0%	0
Weighted base:		715		207		48		64		99		76		53		28		97		45
Sample:		712		148		53		65		91		78		57		56		99		65

Colchester Borough Retail Study 2016

for Cushman & Wakefield

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October 2016

	Total		Zone 1: Colchester		Zone 2: Rural North		Zone 3: Rural South		Zone 4: Clacton		Zone 5: Frinton / Harwich		Zone 6: Rural West		Zone 7: Halstead		Zone 8: Braintree		Zone 9: Witham		
Q06 Where does your household do most of its shopping for household textiles and soft furnishings, including bedding?																					
<i>Excludes SFT and Nulls</i>																					
Colchester Town Centre; including Lion Walk and Culver Square	18.7%	148	25.4%	59	13.9%	8	34.8%	27	10.0%	12	23.7%	16	19.9%	12	22.1%	6	4.1%	4	7.6%	3	
Sainsbury’s at Priory Walk, Colchester Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
Greenstead Road (District Centre OR Retail Park), Hythe, Colchester; including Tesco	0.6%	5	0.5%	1	1.3%	1	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	
Highwoods (District Centre OR Retail Park), Colchester; including Tesco Extra	1.3%	10	2.4%	6	1.2%	1	1.9%	1	1.2%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	
Peartree Road (District Centre OR Retail Park), Colchester	0.8%	6	0.0%	0	1.2%	1	1.1%	1	0.8%	1	3.4%	2	1.2%	1	3.2%	1	0.0%	0	0.0%	0	
Tollgate (District Centre OR Retail Park), Stanway, Colchester; including Sainsbury’s	20.3%	161	30.4%	70	6.4%	4	24.2%	19	8.0%	10	22.6%	15	40.9%	24	11.3%	3	13.3%	14	3.6%	2	
Turner Rise (District Centre OR Retail Park), Colchester; including Asda	12.9%	102	23.2%	54	10.0%	6	16.6%	13	8.7%	11	8.0%	5	13.9%	8	5.9%	2	2.5%	3	2.5%	1	
Colchester Retail Park, Sheepen Road, Colchester	0.4%	3	1.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	
St Andrews Avenue Retail Park, Colchester; including Waitrose	0.3%	2	0.0%	0	0.0%	0	2.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
Other retail warehouses in Colchester	1.7%	13	2.2%	5	1.2%	1	2.0%	2	1.2%	1	2.4%	2	3.6%	2	0.0%	0	0.8%	1	0.0%	0	
Elsewhere in Colchester, out of Town Centre	3.9%	31	6.8%	16	2.7%	2	3.7%	3	2.8%	3	1.1%	1	3.4%	2	2.0%	1	3.9%	4	0.0%	0	
Braintree Town Centre	4.4%	35	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.9%	3	28.8%	30	6.1%	3	
Freeport Designer Outlet Village, Braintree	3.6%	29	1.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2	5.3%	2	14.8%	15	13.9%	6	
Other Retail Parks, retail warehouses and superstores in Braintree	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	1.7%	2	0.0%	0	
Elsewhere in Braintree	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	
Chelmsford Town Centre	4.8%	38	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	5.6%	2	17.2%	18	41.1%	18	
Chelmer Village Retail Park, Chelmsford	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	5.9%	3	
Riverside Retail Park, Chelmsford	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	1.4%	1	

Colchester Borough Retail Study 2016

for Cushman & Wakefield

Weighted:

October 2016

	Total		Zone 1: Colchester	Zone 2: Rural North	Zone 3: Rural South	Zone 4: Clacton	Zone 5: Frinton / Harwich	Zone 6: Rural West	Zone 7: Halstead	Zone 8: Braintree	Zone 9: Witham	
Other Retail Parks, retail warehouses and superstores in Chelmsford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Chelmsford	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	2
Clacton-on-Sea Town Centre	5.8%	46	0.0%	0	0.0%	0	2.0%	2	32.3%	40	6.8%	5
Brook Retail Park, Clacton-on-Sea	2.1%	17	0.0%	0	0.0%	0	0.0%	0	11.8%	14	3.2%	2
Clacton Factory Outlet, Clacton-on-Sea	1.3%	10	0.0%	0	0.0%	0	1.6%	1	5.6%	7	3.0%	2
Other Retail Parks, retail warehouses and superstores in Clacton-on-Sea	1.9%	15	0.0%	0	0.0%	0	0.9%	1	11.8%	14	0.0%	0
Elsewhere in Clacton-on-Sea	0.9%	7	0.0%	0	0.0%	0	1.1%	1	3.7%	5	1.2%	1
Ipswich Town Centre	3.1%	25	1.3%	3	27.7%	16	2.1%	2	0.0%	0	5.4%	4
Anglia Retail Park, Ipswich	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.7%	1	1.2%	1
Euro Retail Park, Ipswich	0.8%	7	0.8%	2	8.4%	5	0.0%	0	0.0%	0	0.0%	0
Suffolk Retail Park, Ipswich	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	3
Futura Park, Ipswich	0.2%	1	0.0%	0	1.2%	1	1.0%	1	0.0%	0	0.0%	0
Other Retail Parks, retail warehouses and superstores in Ipswich	0.5%	4	0.5%	1	5.3%	3	0.0%	0	0.0%	0	0.0%	0
Halstead Town Centre	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Retail Parks, retail warehouses and superstores in Halstead	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sudbury Town Centre	1.3%	10	0.0%	0	6.6%	4	0.0%	0	0.0%	0	0.0%	0
Superstores outside of the town centre	0.2%	2	0.0%	0	3.3%	2	0.0%	0	0.0%	0	0.0%	0
Witham Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dovercourt	0.1%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Frinton-on-Sea	0.4%	4	0.5%	1	0.0%	0	0.0%	0	0.0%	0	3.4%	2
Hadleigh	0.3%	2	0.5%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Harwich	0.8%	6	0.0%	0	2.1%	1	0.0%	0	0.0%	0	7.9%	5
Maldon	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Manningtree	0.2%	2	0.0%	0	1.2%	1	0.0%	0	0.0%	0	1.3%	1
Other	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bluewater Shopping Centre, Greenhithe	0.3%	3	0.0%	0	1.4%	1	0.0%	0	0.0%	0	1.4%	1
Bury St Edmunds	0.1%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Cambridge	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	1
Lakeside Retail Park, West Thurrock	0.5%	4	1.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lakeside Shopping Centre, West Thurrock	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Stanway	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
London	1.1%	9	1.3%	3	1.3%	1	1.1%	1	1.4%	2	0.0%	0

Colchester Borough Retail Study 2016
for Cushman & Wakefield

	Total	Zone 1: Colchester	Zone 2: Rural North	Zone 3: Rural South	Zone 4: Clacton	Zone 5: Frinton / Harwich	Zone 6: Rural West	Zone 7: Halstead	Zone 8: Braintree	Zone 9: Witham
Weighted base:	792	231	58	79	122	67	60	28	103	44
Sample:	786	166	65	82	114	72	64	55	107	61

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Q07 Where does your household do most of its shopping for household appliances, such as fridges, washing machines, kettles or hairdryers?																				
<i>Excludes SFT and Nulls</i>																				
Colchester Town Centre; including Lion Walk and Culver Square	5.6%	43	8.7%	19	5.2%	3	10.7%	7	2.8%	3	3.6%	2	5.0%	3	5.0%	2	1.4%	1	4.1%	2
Sainsbury’s at Priory Walk, Colchester Town Centre	0.2%	1	0.0%	0	1.2%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Greenstead Road (District Centre OR Retail Park), Hythe, Colchester; including Tesco	0.2%	2	0.0%	0	0.0%	0	2.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Highwoods (District Centre OR Retail Park), Colchester; including Tesco Extra	0.8%	6	2.0%	4	2.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Peartree Road (District Centre OR Retail Park), Colchester	0.1%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tollgate (District Centre OR Retail Park), Stanway, Colchester; including Sainsbury’s	41.9%	320	74.5%	162	18.4%	10	58.2%	40	5.8%	7	19.4%	13	77.0%	47	29.9%	10	24.7%	23	16.3%	8
Turner Rise (District Centre OR Retail Park), Colchester; including Asda	0.3%	2	0.5%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0
Colchester Retail Park, Sheepen Road, Colchester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	1	0.0%	0	0.0%	0
Other retail warehouses in Colchester	0.8%	6	1.0%	2	3.9%	2	0.0%	0	0.0%	0	1.1%	1	0.0%	0	1.2%	0	1.0%	1	0.0%	0
Elsewhere in Colchester, out of Town Centre	2.8%	21	6.2%	13	1.3%	1	4.2%	3	0.0%	0	0.0%	0	0.0%	0	4.1%	1	2.3%	2	1.1%	1
Braintree Town Centre	3.2%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	24.9%	23	1.1%	1
Freeport Designer Outlet Village, Braintree	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1	4.7%	4	2.5%	1
Other Retail Parks, retail warehouses and superstores in Braintree	1.4%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	1	10.3%	10	0.0%	0
Elsewhere in Braintree	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2	3.0%	1
Chelmsford Town Centre	1.5%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.7%	7	9.3%	4
Chelmer Village Retail Park, Chelmsford	4.3%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.0%	15	38.0%	18
Riverside Retail Park, Chelmsford	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	1
Other Retail Parks, retail warehouses and superstores in Chelmsford	0.6%	5	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	3	2.2%	1

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	Total		Zone 1: Colchester	Zone 2: Rural North	Zone 3: Rural South	Zone 4: Clacton	Zone 5: Frinton / Harwich	Zone 6: Rural West	Zone 7: Halstead	Zone 8: Braintree	Zone 9: Witham									
Elsewhere in Chelmsford	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	2
Clacton-on-Sea Town Centre	5.7%	43	0.0%	0	0.0%	0	3.0%	2	29.6%	36	8.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brook Retail Park, Clacton-on-Sea	9.5%	72	0.0%	0	2.7%	2	1.1%	1	51.4%	62	12.4%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Clacton Factory Outlet, Clacton-on-Sea	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other Retail Parks, retail warehouses and superstores in Clacton-on-Sea	0.4%	3	0.0%	0	1.3%	1	0.0%	0	1.5%	2	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Clacton-on-Sea	0.8%	6	0.0%	0	0.0%	0	0.0%	0	5.2%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ipswich Town Centre	1.3%	10	0.8%	2	12.5%	7	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Euro Retail Park, Ipswich	0.4%	3	0.0%	0	3.7%	2	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Suffolk Retail Park, Ipswich	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Futura Park, Ipswich	0.7%	5	1.9%	4	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other Retail Parks, retail warehouses and superstores in Ipswich	1.2%	9	0.5%	1	12.7%	7	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Ipswich	0.1%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Halstead Town Centre	1.3%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	30.7%	10	0.0%	0	0.0%	0
Retail Parks, retail warehouses and superstores in Halstead	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	1	0.0%	0	0.0%	0
Elsewhere in Halstead	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0
Sudbury Town Centre	1.5%	11	0.0%	0	13.4%	8	0.0%	0	0.0%	0	0.0%	0	2.5%	2	6.0%	2	0.0%	0	0.0%	0
Shawlands Retail Park, Sudbury	0.5%	4	0.0%	0	4.6%	3	0.0%	0	0.0%	0	0.0%	0	1.4%	1	1.0%	0	0.0%	0	0.0%	0
Superstores outside of the town centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Sudbury	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0
Witham Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	2
Retail Parks, retail warehouses and superstores in Witham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Brightlingsea	0.2%	2	0.0%	0	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dovercourt	0.5%	3	0.0%	0	3.3%	2	0.0%	0	0.0%	0	2.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Frinton-on-Sea	1.1%	8	0.0%	0	0.0%	0	0.0%	0	0.8%	1	9.5%	6	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Hadleigh	0.3%	2	0.0%	0	3.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harwich	3.6%	28	0.8%	2	2.5%	1	0.0%	0	0.0%	0	37.0%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Maldon	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	1.9%	1
Manningtree	0.3%	2	0.0%	0	4.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tiptree	1.2%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.7%	5	0.0%	0	0.0%	0	8.2%	4
West Mersea	1.2%	9	0.0%	0	0.0%	0	13.6%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.5%	4	1.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Cambridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	1	0.0%	0	0.0%	0
Holland-on-Sea	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lakeside Shopping Centre,	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0

Colchester Borough Retail Study 2016

for Cushman & Wakefield

Weighted:

October 2016

	Total	Zone 1: Colchester	Zone 2: Rural North	Zone 3: Rural South	Zone 4: Clacton	Zone 5: Frinton / Harwich	Zone 6: Rural West	Zone 7: Halstead	Zone 8: Braintree	Zone 9: Witham
West Thurrock										
Sible Hedingham	0.1% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	2.2% 1	0.0% 0	0.0% 0
Stanway	0.2% 1	0.6% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
London	0.4% 3	0.5% 1	0.0% 0	1.3% 1	0.7% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
Weighted base:	763	218	57	69	120	66	61	33	94	47
Sample:	780	161	64	71	115	72	67	65	98	67

Colchester Borough Retail Study 2016

for Cushman & Wakefield

Weighted:

October 2016

	Total		Zone 1: Colchester		Zone 2: Rural North		Zone 3: Rural South		Zone 4: Clacton		Zone 5: Frinton / Harwich		Zone 6: Rural West		Zone 7: Halstead		Zone 8: Braintree		Zone 9: Witham	
Q08 Where does your household do most of its shopping for audio-visual equipment, such as radio, TV, HiFi, telephones, photographic goods and computer products?																				
<i>Excludes SFT and Nulls</i>																				
Colchester Town Centre; including Lion Walk and Culver Square	6.7%	50	9.7%	21	10.6%	6	14.9%	11	2.5%	3	3.2%	2	5.5%	3	5.5%	2	0.9%	1	4.1%	2
Greenstead Road (District Centre OR Retail Park), Hythe, Colchester; including Tesco	0.9%	6	0.0%	0	0.0%	0	7.2%	5	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Highwoods (District Centre OR Retail Park), Colchester; including Tesco Extra	1.3%	10	3.1%	7	2.8%	2	1.1%	1	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Tollgate (District Centre OR Retail Park), Stanway, Colchester; including Sainsbury's	44.9%	338	77.2%	171	27.0%	15	57.7%	42	3.4%	4	19.0%	14	78.2%	42	38.9%	11	38.5%	34	13.5%	6
Turner Rise (District Centre OR Retail Park), Colchester; including Asda	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.9%	1	0.0%	0
Colne View Retail Park, Colchester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other retail warehouses in Colchester	0.5%	4	0.5%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	2.6%	2	0.0%	0
Elsewhere in Colchester, out of Town Centre	2.2%	17	4.2%	9	1.3%	1	2.8%	2	0.0%	0	2.8%	2	0.0%	0	1.3%	0	2.4%	2	0.0%	0
Braintree Town Centre	1.7%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	12.7%	11	2.2%	1
Freeport Designer Outlet Village, Braintree	1.2%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.9%	3	5.5%	5	2.6%	1
Other Retail Parks, retail warehouses and superstores in Braintree	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	4	0.0%	0
Elsewhere in Braintree	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	3.0%	1
Chelmsford Town Centre	1.1%	9	0.0%	0	1.3%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	0	3.8%	3	7.4%	3
Chelmer Village Retail Park, Chelmsford	4.4%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.7%	12	44.9%	21
Riverside Retail Park, Chelmsford	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	1
Other Retail Parks, retail warehouses and superstores in Chelmsford	0.7%	6	0.5%	1	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	3	2.6%	1
Elsewhere in Chelmsford	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	4.3%	2
Clacton-on-Sea Town Centre	5.8%	43	0.0%	0	0.0%	0	0.0%	0	33.2%	38	7.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brook Retail Park, Clacton-on-Sea	10.4%	79	0.0%	0	1.5%	1	2.2%	2	55.7%	64	17.0%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other Retail Parks, retail	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Colchester Borough Retail Study 2016 for Cushman & Wakefield

Weighted:

October 2016

	Total		Zone 1: Colchester	Zone 2: Rural North	Zone 3: Rural South		Zone 4: Clacton		Zone 5: Frinton / Harwich		Zone 6: Rural West		Zone 7: Halstead		Zone 8: Braintree		Zone 9: Witham			
warehouses and superstores in Clacton-on-Sea																				
Elsewhere in Clacton-on-Sea	0.7%	5	0.0%	0	0.0%	0	0.0%	0	3.7%	4	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ipswich Town Centre	2.1%	16	1.7%	4	17.0%	9	2.3%	2	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Euro Retail Park, Ipswich	0.3%	3	0.0%	0	4.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Suffolk Retail Park, Ipswich	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other Retail Parks, retail	1.2%	9	0.5%	1	12.1%	7	0.0%	0	0.0%	0	1.0%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0
warehouses and superstores in Ipswich																				
Elsewhere in Ipswich	0.2%	2	0.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Halstead Town Centre	1.2%	9	0.0%	0	0.0%	0	2.8%	2	0.0%	0	0.0%	0	0.0%	0	22.5%	7	0.0%	0	0.0%	0
Elsewhere in Halstead	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0
Sudbury Town Centre	0.9%	7	0.0%	0	6.1%	3	0.0%	0	0.0%	0	0.0%	0	1.4%	1	9.1%	3	0.0%	0	0.0%	0
Shawlands Retail Park, Sudbury	0.5%	4	0.0%	0	5.0%	3	0.0%	0	0.0%	0	0.0%	0	1.6%	1	1.1%	0	0.0%	0	0.0%	0
Superstores outside of the town centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Sudbury	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0
Witham Town Centre	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.9%	1	4.1%	2
Brightlingsea	0.2%	2	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dovercourt	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Frinton-on-Sea	1.1%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.5%	7	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Hadleigh	0.1%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harwich	2.8%	21	0.0%	0	4.8%	3	0.0%	0	0.0%	0	25.0%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Maldon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Manningtree	0.1%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks Tey	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0
Tiptree	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	1	0.0%	0	0.0%	0	7.2%	3
Walton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
West Mersea	0.5%	3	0.0%	0	0.0%	0	4.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.3%	2	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	1.0%	1	0.0%	0
Bluewater Shopping Centre, Greenhithe	0.5%	4	0.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0
Cambridge	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	1	1.8%	2	0.0%	0	0.0%	0
London	0.8%	6	1.0%	2	0.0%	0	1.2%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0	1.8%	2	1.1%	1
Weighted base:		753		221		54		72		114		74		54		29		88		46
Sample:		770		161		61		77		109		82		57		59		95		69

Colchester Borough Retail Study 2016

for Cushman & Wakefield

Weighted:

October 2016

	Total		Zone 1: Colchester		Zone 2: Rural North		Zone 3: Rural South		Zone 4: Clacton		Zone 5: Frinton / Harwich		Zone 6: Rural West		Zone 7: Halstead		Zone 8: Braintree		Zone 9: Witham		
Q09 Where does your household do most of its shopping for hardware, DIY goods, decorating supplies and garden products?																					
<i>Excludes SFT and Nulls</i>																					
Colchester Town Centre; including Lion Walk and Culver Square	4.4%	44	5.8%	16	6.5%	5	12.4%	13	0.7%	1	3.5%	3	6.5%	5	0.0%	0	0.7%	1	0.0%	0	
Greenstead Road (District Centre OR Retail Park), Hythe, Colchester; including Tesco	13.7%	137	24.0%	65	16.3%	12	43.7%	44	0.0%	0	10.5%	10	7.2%	6	0.0%	0	0.0%	0	0.0%	0	
Highwoods (District Centre OR Retail Park), Colchester; including Tesco Extra	1.0%	10	1.5%	4	1.0%	1	3.8%	4	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
Peartree Road (District Centre OR Retail Park), Colchester	0.9%	9	2.2%	6	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	
Tollgate (District Centre OR Retail Park), Stanway, Colchester; including Sainsbury's	16.0%	160	35.6%	96	3.2%	2	15.9%	16	0.7%	1	1.7%	2	48.8%	39	2.7%	1	1.0%	1	2.1%	1	
Turner Rise (District Centre OR Retail Park), Colchester; including Asda	1.1%	11	3.9%	11	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
St Andrews Avenue Retail Park, Colchester; including Waitrose	1.9%	19	6.1%	16	1.1%	1	0.8%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
Other retail warehouses in Colchester	1.3%	13	2.1%	6	6.2%	5	1.6%	2	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	
Elsewhere in Colchester, out of Town Centre	7.8%	78	18.0%	49	5.0%	4	8.8%	9	0.0%	0	8.6%	8	8.9%	7	3.5%	1	0.0%	0	0.0%	0	
Braintree Town Centre	1.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	0	7.5%	10	1.1%	1	
Freeport Designer Outlet Village, Braintree	10.9%	109	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	36.5%	14	58.1%	79	26.7%	14	
Other Retail Parks, retail warehouses and superstores in Braintree	3.9%	39	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	3	10.6%	4	22.8%	31	1.0%	1	
Elsewhere in Braintree	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1	3.3%	4	1.1%	1	
Chelmsford Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	2	
Chelmer Village Retail Park, Chelmsford	1.6%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	3	24.4%	13	
Riverside Retail Park, Chelmsford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	3.0%	2	
Other Retail Parks, retail warehouses and superstores in Chelmsford	1.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.7%	1	20.5%	11	
Elsewhere in Chelmsford	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	3.6%	2	

Colchester Borough Retail Study 2016 for Cushman & Wakefield

Weighted:

October 2016

	Total		Zone 1: Colchester		Zone 2: Rural North		Zone 3: Rural South		Zone 4: Clacton		Zone 5: Frinton / Harwich		Zone 6: Rural West		Zone 7: Halstead		Zone 8: Braintree		Zone 9: Witham	
Clacton-on-Sea Town Centre	1.4%	14	0.0%	0	0.0%	0	0.0%	0	8.0%	12	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brook Retail Park, Clacton-on-Sea	15.3%	153	0.0%	0	3.0%	2	0.7%	1	76.5%	117	36.3%	34	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other Retail Parks, retail warehouses and superstores in Clacton-on-Sea	1.3%	13	0.0%	0	0.0%	0	2.0%	2	5.1%	8	3.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Clacton-on-Sea	1.4%	14	0.0%	0	0.0%	0	0.0%	0	8.0%	12	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ipswich Town Centre	0.6%	6	0.0%	0	7.4%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Euro Retail Park, Ipswich	0.2%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Suffolk Retail Park, Ipswich	0.2%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Orwell Retail Park, Ipswich	0.1%	1	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other Retail Parks, retail warehouses and superstores in Ipswich	0.5%	5	0.0%	0	6.0%	4	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Ipswich	0.1%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Halstead Town Centre	0.2%	2	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	4.0%	2	0.0%	0	0.0%	0
Elsewhere in Halstead	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	2.3%	1	0.0%	0	0.0%	0
Sudbury Town Centre	0.5%	5	0.0%	0	3.5%	3	0.0%	0	0.0%	0	0.0%	0	1.1%	1	4.1%	2	0.0%	0	0.0%	0
Shawlands Retail Park, Sudbury	1.2%	12	0.0%	0	6.4%	5	0.0%	0	0.0%	0	0.0%	0	3.0%	2	12.2%	5	0.0%	0	0.0%	0
Superstores outside of the town centre	0.3%	3	0.0%	0	3.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0
Elsewhere in Sudbury	1.1%	11	0.0%	0	3.0%	2	0.0%	0	0.0%	0	0.9%	1	3.9%	3	11.8%	5	0.0%	0	0.0%	0
Witham Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	2
Retail Parks, retail warehouses and superstores in Witham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Elsewhere in Witham	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.9%	3
Brightlingsea	0.3%	3	0.0%	0	0.0%	0	3.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coggeshall	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Dovercourt	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Frinton-on-Sea	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hadleigh	0.8%	8	0.0%	0	9.5%	7	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harwich	1.6%	16	0.0%	0	1.0%	1	0.0%	0	0.0%	0	16.5%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Maldon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Manningtree	0.7%	7	0.0%	0	10.0%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks Tey	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Tiptree	1.1%	11	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	9.4%	7	0.0%	0	0.0%	0	1.0%	1
Walton	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0
West Mersea	0.4%	4	0.0%	0	0.0%	0	2.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Other	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.8%	1	0.0%	0	3.3%	1	0.0%	0	0.0%	0
Nayland	0.3%	3	0.7%	2	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sible Hedingham	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	2	0.0%	0	0.0%	0
Weighted base:		1001		271		74		102		152		93		80		39		136		53
Sample:		1006		192		86		107		142		96		85		75		141		82

Colchester Borough Retail Study 2016

for Cushman & Wakefield

Weighted:

October 2016

	Total		Zone 1: Colchester		Zone 2: Rural North		Zone 3: Rural South		Zone 4: Clacton		Zone 5: Frinton / Harwich		Zone 6: Rural West		Zone 7: Halstead		Zone 8: Braintree		Zone 9: Witham	
Q10 Where does your household do most of its shopping for chemists and medical goods, cosmetics and other beauty products?																				
<i>Excludes SFT and Nulls</i>																				
Colchester Town Centre; including Lion Walk and Culver Square	13.7%	151	32.6%	103	8.7%	7	30.1%	30	0.0%	0	0.8%	1	7.6%	7	3.1%	1	1.8%	3	0.0%	0
Sainsbury's at Priory Walk, Colchester Town Centre	0.3%	4	0.7%	2	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Greenstead Road (District Centre OR Retail Park), Hythe, Colchester; including Tesco	1.4%	15	3.6%	11	0.0%	0	3.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Highwoods (District Centre OR Retail Park), Colchester; including Tesco Extra	2.6%	28	6.8%	22	0.0%	0	3.8%	4	0.9%	1	0.8%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Peartree Road (District Centre OR Retail Park), Colchester	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tollgate (District Centre OR Retail Park), Stanway, Colchester; including Sainsbury's	9.4%	104	23.3%	74	1.1%	1	4.9%	5	0.0%	0	0.0%	0	27.5%	24	0.7%	0	0.0%	0	0.0%	0
Turner Rise (District Centre OR Retail Park), Colchester; including Asda	2.6%	29	7.1%	22	3.7%	3	0.9%	1	0.0%	0	0.0%	0	2.3%	2	1.9%	1	0.0%	0	0.0%	0
St Andrews Avenue Retail Park, Colchester; including Waitrose	0.2%	2	0.4%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other retail warehouses in Colchester	0.1%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Colchester, out of Town Centre	7.5%	83	21.4%	68	0.0%	0	9.8%	10	0.0%	0	0.9%	1	5.7%	5	0.0%	0	0.0%	0	0.0%	0
Braintree Town Centre	10.0%	110	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	1.7%	1	75.0%	108	0.8%	1
Freeport Designer Outlet Village, Braintree	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2	0.0%	0
Other Retail Parks, retail warehouses and superstores in Braintree	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0
Elsewhere in Braintree	1.1%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.1%	12	0.9%	1
Chelmsford Town Centre	1.3%	14	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	3.9%	6	10.1%	7
Other Retail Parks, retail warehouses and superstores in Chelmsford	0.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Elsewhere in Chelmsford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Clacton-on-Sea Town Centre	11.8%	130	0.0%	0	0.9%	1	1.6%	2	75.2%	124	3.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brook Retail Park,	0.3%	3	0.0%	0	0.0%	0	0.0%	0	2.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Colchester Borough Retail Study 2016

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October 2016

	Total		Zone 1: Colchester	Zone 2: Rural North	Zone 3: Rural South	Zone 4: Clacton	Zone 5: Frinton / Harwich	Zone 6: Rural West	Zone 7: Halstead	Zone 8: Braintree	Zone 9: Witham									
Clacton-on-Sea																				
Other Retail Parks, retail warehouses and superstores in Clacton-on-Sea	0.3%	4	0.0%	0	0.0%	0	0.0%	0	1.6%	3	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Clacton-on-Sea	2.1%	24	0.0%	0	0.0%	0	0.0%	0	13.4%	22	1.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ipswich Town Centre	0.4%	5	0.4%	1	4.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Halstead Town Centre	2.9%	32	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.8%	1	63.4%	30	0.0%	0	0.0%	0
Elsewhere in Halstead	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	4.3%	2	0.0%	0	0.0%	0
Sudbury Town Centre	2.5%	27	0.0%	0	19.3%	16	0.0%	0	0.0%	0	0.0%	0	8.1%	7	9.2%	4	0.0%	0	0.0%	0
Elsewhere in Sudbury	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Witham Town Centre	4.4%	48	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	73.4%	47
Retail Parks, retail warehouses and superstores in Witham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1
Elsewhere in Witham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1
Brightlingsea	1.1%	12	0.0%	0	0.0%	0	12.4%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coggeshall	0.4%	5	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	4.5%	4	0.0%	0	0.0%	0	0.0%	0
Dovercourt	1.2%	13	0.0%	0	2.5%	2	0.0%	0	0.0%	0	11.3%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Frinton-on-Sea	2.0%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.3%	21	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Hadleigh	1.1%	12	0.0%	0	15.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harwich	4.6%	50	0.0%	0	1.9%	2	0.0%	0	0.0%	0	49.5%	49	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Maldon	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	2
Manningtree	2.6%	29	0.0%	0	34.1%	28	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks Tey	0.7%	7	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.1%	6	0.0%	0	0.0%	0	0.0%	0
Tiptree	2.0%	22	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.8%	1	21.5%	19	0.0%	0	0.0%	0	2.2%	1
Walton	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
West Mersea	1.7%	19	0.0%	0	0.0%	0	18.9%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wivenhoe	0.6%	7	0.0%	0	0.0%	0	6.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	2.5%	28	1.9%	6	4.7%	4	2.0%	2	3.9%	6	1.7%	2	3.5%	3	0.0%	0	1.3%	2	4.0%	3
Great Notley	0.7%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.5%	8	0.0%	0
Holland-on-Sea	0.5%	5	0.0%	0	0.0%	0	0.0%	0	3.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kelvedon	0.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.5%	6	0.0%	0	0.0%	0	0.0%	0
Nayland	0.1%	1	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sible Hedingham	0.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.8%	7	0.0%	0	0.0%	0
London	0.3%	4	0.3%	1	0.9%	1	0.7%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Weighted base:		1105		316		82		99		166		99		88		48		144		64
Sample:		1109		222		94		107		152		105		96		90		150		93

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Q11 Where does your household do most of its shopping for books; jewellery and watches; china, glassware and kitchen utensils; recreational and luxury goods?																				
<i>Excludes SFT and Nulls</i>																				
Colchester Town Centre; including Lion Walk and Culver Square	41.6%	244	75.6%	130	43.5%	18	53.0%	26	14.3%	12	38.5%	19	56.1%	30	31.5%	8	2.2%	2	1.8%	1
Sainsbury’s at Priory Walk, Colchester Town Centre	0.1%	1	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Greenstead Road (District Centre OR Retail Park), Hythe, Colchester; including Tesco	0.5%	3	1.4%	2	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Highwoods (District Centre OR Retail Park), Colchester; including Tesco Extra	0.8%	4	2.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tollgate (District Centre OR Retail Park), Stanway, Colchester; including Sainsbury’s	4.6%	27	10.0%	17	0.0%	0	7.4%	4	1.1%	1	0.0%	0	9.4%	5	0.0%	0	0.0%	0	0.0%	0
Turner Rise (District Centre OR Retail Park), Colchester; including Asda	0.5%	3	1.1%	2	0.0%	0	2.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Colchester, out of Town Centre	0.7%	4	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	1	2.3%	1	0.0%	0	0.0%	0
Braintree Town Centre	8.7%	51	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	5.2%	3	12.4%	3	52.1%	43	3.2%	1
Freeport Designer Outlet Village, Braintree	2.5%	15	0.0%	0	0.0%	0	1.7%	1	0.0%	0	1.5%	1	9.2%	5	4.3%	1	8.8%	7	0.0%	0
Other Retail Parks, retail warehouses and superstores in Braintree	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1	2.2%	2	0.0%	0
Elsewhere in Braintree	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Chelmsford Town Centre	7.6%	45	0.0%	0	0.0%	0	5.0%	2	1.8%	1	0.0%	0	2.9%	2	3.8%	1	28.8%	24	44.6%	14
Clacton-on-Sea Town Centre	9.9%	58	0.0%	0	0.0%	0	3.1%	2	64.8%	54	6.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brook Retail Park, Clacton-on-Sea	0.3%	2	0.0%	0	0.0%	0	0.0%	0	2.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Clacton Factory Outlet, Clacton-on-Sea	0.4%	2	0.0%	0	0.0%	0	0.0%	0	2.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other Retail Parks, retail warehouses and superstores in Clacton-on-Sea	0.9%	5	0.0%	0	0.0%	0	0.0%	0	3.9%	3	4.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Clacton-on-Sea	0.9%	5	0.0%	0	0.0%	0	0.0%	0	5.7%	5	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ipswich Town Centre	2.1%	12	0.6%	1	17.9%	7	0.0%	0	1.1%	1	5.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Halstead Town Centre	1.2%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	23.0%	6	0.0%	0	0.0%	0
Sudbury Town Centre	2.4%	14	0.0%	0	19.1%	8	0.0%	0	0.0%	0	1.8%	1	4.7%	2	12.7%	3	0.0%	0	0.0%	0
Witham Town Centre	2.1%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	37.4%	12

Colchester Borough Retail Study 2016

for Cushman & Wakefield

Weighted:

October 2016

	Total		Zone 1: Colchester	Zone 2: Rural North	Zone 3: Rural South	Zone 4: Clacton	Zone 5: Frinton / Harwich	Zone 6: Rural West	Zone 7: Halstead	Zone 8: Braintree	Zone 9: Witham	
Brightlingsea	0.4%	2	0.0%	0	0.0%	0	5.0%	2	0.0%	0	0.0%	0
Dovercourt	0.7%	4	0.0%	0	1.7%	1	0.0%	0	0.0%	0	7.5%	4
Frinton-on-Sea	0.8%	5	0.0%	0	0.0%	0	0.0%	0	9.8%	5	0.0%	0
Hadleigh	0.4%	2	0.0%	0	5.4%	2	0.0%	0	0.0%	0	0.0%	0
Harwich	1.4%	8	0.0%	0	0.0%	0	0.0%	0	16.6%	8	0.0%	0
Maldon	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	4.3%
Manningtree	0.3%	2	0.0%	0	3.7%	2	0.0%	0	0.0%	0	0.0%	0
Tiptree	0.6%	4	0.0%	0	0.0%	0	0.0%	0	4.2%	2	0.0%	4.3%
Walton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0
West Mersea	0.6%	4	0.0%	0	0.0%	0	7.2%	4	0.0%	0	0.0%	0
Wivenhoe	0.6%	4	1.7%	3	0.0%	0	1.6%	1	0.0%	0	0.0%	0
Other	0.6%	4	0.0%	0	0.0%	0	0.0%	0	4.7%	2	0.0%	5.3%
Bluewater Shopping Centre, Greenhithe	0.1%	1	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	1
Cambridge	0.2%	1	0.0%	0	1.7%	1	0.0%	0	0.0%	0	2.3%	1
Lakeside Retail Park, West Thurrock	0.3%	2	0.0%	0	0.0%	0	4.1%	2	0.0%	0	0.0%	0
Lakeside Shopping Centre, West Thurrock	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Nayland	0.3%	2	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stanway	0.2%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
London	3.2%	19	3.9%	7	2.0%	1	7.8%	4	2.1%	2	0.0%	3
Weighted base:	586		172		41		49		83		49	
Sample:	567		119		46		49		72		51	

Q11X When members of your household do non-food shopping, how do they usually travel?

Those asked Q11X

Car (as driver/passenger)	67.8%	580	48.2%	102	77.6%	64	73.1%	65	67.9%	96	83.1%	66	78.0%	50	78.3%	16	74.0%	79	70.2%	41
Car (including park and ride)	10.8%	93	8.5%	18	12.8%	10	10.1%	9	15.0%	21	5.6%	4	12.2%	8	10.6%	2	10.3%	11	14.6%	9
Bus	10.4%	89	24.5%	52	5.1%	4	6.8%	6	4.3%	6	2.8%	2	8.6%	5	7.1%	1	7.2%	8	6.9%	4
Taxi	0.4%	3	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.9%	1
Train	0.6%	5	0.0%	0	1.8%	2	0.0%	0	0.0%	0	1.9%	2	1.2%	1	0.0%	0	0.0%	0	1.8%	1
Bicycle	0.3%	2	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Motorcycle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walk	6.9%	59	13.0%	28	2.6%	2	3.4%	3	11.0%	16	4.9%	4	0.0%	0	0.0%	0	4.4%	5	3.3%	2
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mobility scooter	0.3%	2	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0	0.7%	1	0.0%	0
(Don't know / varies)	2.5%	21	5.2%	11	0.0%	0	4.9%	4	0.6%	1	1.6%	1	0.0%	0	2.1%	0	1.7%	2	2.4%	1
Weighted base:	855		212		82		89		142		80		64		20		107		58	
Sample:	897		150		95		96		138		88		73		49		120		88	

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Q12 What do you like most about Colchester town centre for shopping and services?																				
Good non-food shops	16.9%	203	11.5%	39	14.8%	13	13.8%	16	26.4%	46	24.6%	29	13.7%	13	28.1%	15	17.1%	26	10.1%	7
Easy to get to from home	5.3%	64	10.0%	34	3.3%	3	8.5%	10	2.5%	4	3.8%	4	7.4%	7	2.5%	1	0.0%	0	0.0%	0
Attractive environment	4.9%	58	3.9%	13	2.7%	2	4.3%	5	4.6%	8	4.5%	5	8.8%	8	6.9%	4	3.7%	6	10.5%	7
Good cafes, restaurants or public houses	3.2%	38	4.2%	14	2.2%	2	0.7%	1	4.3%	7	0.0%	0	6.9%	6	0.0%	0	4.0%	6	2.0%	1
Compact shopping environment	3.0%	36	2.4%	8	6.0%	5	0.6%	1	1.9%	3	8.9%	10	4.0%	4	0.0%	0	1.9%	3	2.0%	1
Good range of shops in general	2.8%	34	3.4%	12	3.1%	3	0.7%	1	5.0%	9	2.5%	3	2.7%	3	0.0%	0	2.2%	3	1.5%	1
Easy to get round	2.2%	26	3.8%	13	0.0%	0	4.1%	5	0.0%	0	4.6%	5	0.9%	1	3.8%	2	0.0%	0	0.7%	1
Specific retailer	1.6%	19	1.5%	5	5.2%	4	1.4%	2	0.5%	1	0.7%	1	3.1%	3	1.8%	1	1.3%	2	0.0%	0
Easy to park the car	1.5%	18	0.9%	3	2.2%	2	2.2%	3	0.6%	1	3.5%	4	0.8%	1	4.2%	2	1.1%	2	0.7%	1
Traffic free pedestrian area	1.2%	14	1.9%	7	1.7%	1	0.7%	1	0.5%	1	1.1%	1	1.8%	2	0.7%	0	0.5%	1	0.8%	1
Good food shops	1.0%	11	1.2%	4	0.0%	0	0.0%	0	0.6%	1	3.5%	4	0.0%	0	0.7%	0	1.1%	2	0.0%	0
General convenience	0.8%	10	0.0%	0	0.0%	0	0.7%	1	1.9%	3	1.3%	2	0.9%	1	0.0%	0	2.3%	4	0.0%	0
Good public transport	0.8%	10	1.2%	4	1.7%	2	0.6%	1	0.5%	1	0.7%	1	1.6%	1	0.6%	0	0.0%	0	0.0%	0
Independent retailers	0.8%	9	0.4%	1	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	1.8%	1	1.9%	3	3.4%	2
Preference / habit / familiarity	0.6%	7	0.3%	1	3.0%	3	0.0%	0	0.0%	0	0.7%	1	2.5%	2	0.0%	0	0.0%	0	0.0%	0
Cultural activities	0.5%	6	0.3%	1	0.0%	0	3.2%	4	0.6%	1	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Nice atmosphere	0.5%	6	1.1%	4	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Good market	0.4%	5	0.6%	2	0.0%	0	0.7%	1	1.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Big retailers	0.4%	4	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	1.9%	3	0.0%	0
Reasonably priced car parking	0.3%	3	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Easy to get to from work	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.7%	0	0.0%	0	0.0%	0
Street entertainment / event / lots going on	0.1%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Good range of financial or personal services	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good safety / security	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	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	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Clean streets	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Well maintained streets	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Nothing / very little)	30.1%	362	41.8%	144	25.3%	22	44.9%	52	22.7%	39	25.9%	30	29.4%	27	17.2%	9	14.1%	22	25.1%	17
(Don't visit Colchester)	16.6%	199	6.3%	22	24.3%	21	5.0%	6	21.4%	37	13.7%	16	6.9%	6	11.6%	6	40.3%	62	34.8%	24
(Don't know)	4.5%	54	3.3%	11	2.8%	2	5.5%	6	3.2%	6	0.0%	0	6.7%	6	17.0%	9	5.0%	8	8.3%	6
Weighted base:		1200		343		86		116		173		116		91		52		153		69
Sample:		1200		240		100		120		160		120		100		100		160		100

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Q13 What do you dislike most about Colchester town centre for shopping and services?																				
Car parking too expensive	12.9%	155	14.2%	49	12.1%	10	21.0%	24	5.5%	9	16.0%	19	21.8%	20	9.7%	5	7.4%	11	9.7%	7
Difficult to park near shops	10.2%	123	6.1%	21	10.3%	9	10.6%	12	13.1%	23	10.7%	12	13.7%	13	16.3%	8	10.8%	17	11.4%	8
Poor range of non-food shops	8.1%	97	17.7%	61	4.6%	4	12.1%	14	2.9%	5	2.7%	3	8.0%	7	0.7%	0	0.0%	0	2.5%	2
Traffic congestion makes it difficult to get to by car	5.5%	66	7.1%	24	2.7%	2	5.1%	6	8.0%	14	10.4%	12	2.5%	2	1.1%	1	2.8%	4	0.0%	0
Unattractive environment / not a very nice place	3.4%	41	5.7%	20	1.7%	2	2.7%	3	1.6%	3	1.4%	2	5.2%	5	3.5%	2	2.3%	4	2.8%	2
Too spread out	2.8%	33	1.9%	7	0.8%	1	1.7%	2	4.0%	7	1.3%	2	4.4%	4	2.5%	1	2.8%	4	8.8%	6
Streets are dirty	2.6%	31	3.5%	12	1.9%	2	8.4%	10	0.0%	0	1.1%	1	6.2%	6	0.0%	0	0.0%	0	0.7%	1
Too busy / crowded	2.4%	28	2.8%	10	4.6%	4	0.6%	1	3.7%	6	5.8%	7	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Too many vacant units	2.3%	28	4.2%	14	4.4%	4	2.1%	2	2.1%	4	1.1%	1	1.6%	1	1.1%	1	0.0%	0	0.0%	0
Don't feel safe	1.8%	22	2.1%	7	3.1%	3	1.7%	2	3.3%	6	0.0%	0	2.6%	2	0.7%	0	1.2%	2	0.0%	0
Poor public transport provision	1.0%	12	0.9%	3	0.8%	1	2.0%	2	0.5%	1	1.3%	2	0.0%	0	1.8%	1	1.7%	3	0.0%	0
Streets are badly maintained	0.7%	8	2.1%	7	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Too far away	0.7%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0	3.8%	6	0.0%	0
Not undercover	0.6%	7	1.1%	4	0.0%	0	0.0%	0	0.0%	0	2.9%	3	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Not enough quality retailers	0.6%	7	1.8%	6	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dislike nightlife	0.5%	6	1.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2	0.0%	0	0.0%	0	0.0%	0
Poor access for the disabled	0.5%	6	1.2%	4	0.8%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Not having a particular shop or service	0.5%	6	1.1%	4	0.0%	0	0.7%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Has no character	0.4%	5	0.9%	3	1.4%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Too many charity / discount shops	0.4%	5	0.5%	2	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.6%	1	0.0%	0
Poor range of cafes, restaurants or public houses	0.4%	5	0.3%	1	0.8%	1	0.7%	1	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Danger from vehicles in some streets / not fully pedestrianised	0.4%	5	0.4%	1	1.0%	1	0.6%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Not enough seats / litter bins / public telephones / public toilets	0.4%	4	0.3%	1	0.0%	0	0.6%	1	0.5%	1	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0
Too many religious groups / charity collectors / DVD sellers	0.3%	3	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor range of food shops	0.2%	3	0.3%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Poor market	0.2%	2	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Too hilly	0.1%	2	0.0%	0	0.8%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poor range of services	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Prefer to shop at retail parks	0.1%	1	0.0%	0	0.8%	1	0.0%	0	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	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Nothing or very little)	22.1%	265	12.7%	44	17.1%	15	21.0%	24	35.1%	61	27.3%	32	21.4%	20	29.7%	15	25.3%	39	24.0%	17

Colchester Borough Retail Study 2016 for Cushman & Wakefield

Weighted:

October 2016

	Total		Zone 1: Colchester		Zone 2: Rural North		Zone 3: Rural South		Zone 4: Clacton		Zone 5: Frinton / Harwich		Zone 6: Rural West		Zone 7: Halstead		Zone 8: Braintree		Zone 9: Witham	
(Don't visit Colchester)	14.2%	171	3.6%	12	22.3%	19	5.6%	7	17.7%	31	9.5%	11	6.1%	6	11.6%	6	37.3%	57	32.6%	23
(Don't know)	3.8%	46	4.8%	17	4.0%	3	1.3%	1	1.0%	2	2.7%	3	1.7%	2	18.4%	10	2.4%	4	6.7%	5
Weighted base:		1200		343		86		116		173		116		91		52		153		69
Sample:		1200		240		100		120		160		120		100		100		160		100

Colchester Borough Retail Study 2016

for Cushman & Wakefield

Weighted:

October 2016

	Total		Zone 1: Colchester		Zone 2: Rural North		Zone 3: Rural South		Zone 4: Clacton		Zone 5: Frinton / Harwich		Zone 6: Rural West		Zone 7: Halstead		Zone 8: Braintree		Zone 9: Witham	
Q14 Where did you last go for the purpose of eating out?																				
Colchester Town Centre	20.0%	240	39.8%	137	13.4%	12	31.5%	37	12.5%	22	6.5%	8	18.7%	17	4.4%	2	3.2%	5	2.9%	2
Greenstead Road (District Centre OR Retail Park), Hythe, Colchester	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Highwoods (District Centre OR Retail Park), Colchester	0.4%	5	1.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tollgate (District Centre OR Retail Park), Stanway, Colchester	2.9%	35	5.6%	19	2.7%	2	1.4%	2	0.0%	0	0.7%	1	8.4%	8	0.0%	0	2.0%	3	0.0%	0
Turner Rise (District Centre OR Retail Park), Colchester	0.3%	3	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0
Abberton and Langenhoe	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birch	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Boxted	0.4%	4	0.0%	0	4.2%	4	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chappel and Wakes Colne	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0
Copford and Copford Green	0.3%	4	1.0%	3	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dedham	1.3%	16	2.5%	9	2.5%	2	3.6%	4	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Easthorpe	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Eight Ash Green	0.2%	2	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Fordham	0.2%	2	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fingringhoe	0.1%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Great Horkesley	0.3%	3	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Great Tey	0.6%	7	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	1.6%	2	0.8%	1
Laver Breton	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Laver de la Haye	0.4%	5	0.3%	1	0.0%	0	3.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks Tey	0.6%	7	1.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	3	0.0%	0	0.0%	0	0.0%	0
Messing	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mount Bures	0.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Peldon	0.2%	2	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rowhedge	0.1%	2	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Salcott	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tiptree	1.1%	13	1.2%	4	0.0%	0	1.4%	2	0.0%	0	0.0%	0	6.4%	6	0.0%	0	0.5%	1	1.5%	1
West Bergholt	0.7%	8	2.1%	7	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
West Mersea	0.8%	9	0.0%	0	0.0%	0	7.6%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Wivenhoe	0.3%	4	0.0%	0	0.0%	0	2.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Wormingford	0.2%	2	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Colchester	3.8%	46	11.0%	38	0.0%	0	0.7%	1	0.6%	1	2.9%	3	3.4%	3	0.0%	0	0.0%	0	0.0%	0
Braintree Town Centre	2.3%	28	0.0%	0	1.4%	1	0.0%	0	1.4%	2	0.0%	0	0.0%	0	1.4%	1	14.6%	22	1.6%	1
Elsewhere in Braintree	6.8%	82	1.7%	6	0.0%	0	0.7%	1	0.5%	1	1.1%	1	3.1%	3	18.2%	9	35.9%	55	8.3%	6
Chelmsford Town Centre	2.2%	26	1.0%	3	0.0%	0	0.0%	0	0.5%	1	0.7%	1	0.9%	1	1.8%	1	6.7%	10	13.2%	9
Elsewhere in Chelmsford	1.1%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	6	0.6%	0	2.2%	3	5.8%	4
Clacton-on-Sea Town Centre	5.1%	61	0.0%	0	0.8%	1	3.5%	4	29.8%	51	4.1%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Clacton-on-Sea	3.5%	42	0.3%	1	0.0%	0	0.0%	0	18.9%	33	6.5%	8	0.0%	0	0.0%	0	0.6%	1	0.0%	0

Weighted:

Colchester Borough Retail Study 2016 for Cushman & Wakefield

October 2016

	Total		Zone 1: Colchester	Zone 2: Rural North	Zone 3: Rural South	Zone 4: Clacton	Zone 5: Frinton / Harwich	Zone 6: Rural West	Zone 7: Halstead	Zone 8: Braintree	Zone 9: Witham									
Ipswich Town Centre	1.3%	15	0.9%	3	5.8%	5	0.8%	1	1.9%	3	2.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Ipswich	1.5%	19	2.7%	9	7.1%	6	0.7%	1	0.5%	1	0.7%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Halstead Town Centre	0.8%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.4%	7	1.8%	3	0.0%	0
Elsewhere in Halstead	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	6.8%	4	0.0%	0	0.0%	0
Sudbury Town Centre	1.2%	14	0.3%	1	4.6%	4	0.0%	0	0.0%	0	1.4%	2	3.6%	3	3.1%	2	1.6%	3	0.0%	0
Elsewhere in Sudbury	0.6%	7	0.0%	0	3.1%	3	0.0%	0	0.0%	0	0.0%	0	2.6%	2	1.8%	1	0.5%	1	0.0%	0
Witham Town Centre	1.8%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.7%	0	0.5%	1	26.4%	18
Elsewhere in Witham	0.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	3
Brightlingsea	0.5%	6	0.0%	0	0.0%	0	5.4%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coggeshall	0.3%	3	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0
Dovercourt	0.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Frinton-on-Sea	1.1%	13	0.0%	0	0.8%	1	0.0%	0	0.5%	1	9.5%	11	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Hadleigh	0.5%	6	0.0%	0	5.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0
Harwich	2.5%	30	0.0%	0	1.8%	2	1.1%	1	0.0%	0	23.8%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Maldon	1.0%	12	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	2	1.8%	1	0.7%	1	8.0%	6
Manningtree	1.3%	16	0.3%	1	14.6%	13	1.4%	2	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walton	0.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	5.1%	62	3.3%	11	8.7%	8	5.1%	6	5.8%	10	6.1%	7	0.8%	1	7.8%	4	8.2%	13	3.6%	3
Black Notley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Bures	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Castle Hedingham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0
Colne Engaine	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	1.8%	1	0.0%	0	0.0%	0
Copford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Earls Colne	0.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.5%	1	0.0%	0
East Bergholt	0.2%	2	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Great Bentley	0.2%	2	0.0%	0	0.0%	0	0.7%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Great Bromley	0.1%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Great Holland	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Great Leighs	0.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0
Great Notley	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0
Hatfield Peverel	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	2
Holland-on-Sea	0.6%	7	0.0%	0	0.0%	0	0.0%	0	4.1%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kelvedon	0.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0
Little Dunmow	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.9%	1	0.0%	0
Other (Colchester)	0.7%	8	1.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	1.8%	1	0.0%	0	0.0%	0
Panfield	0.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	3	0.0%	0
Rayne	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Ridgewell	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1	0.0%	0	0.0%	0
Stanway	0.4%	5	0.3%	1	0.0%	0	0.6%	1	0.6%	1	0.0%	0	0.8%	1	3.5%	2	0.0%	0	0.0%	0
Stoke-by-Nayland	0.7%	8	1.5%	5	1.7%	1	0.7%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Thorpe-le-Soken	0.2%	3	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weeley	0.2%	3	0.0%	0	0.0%	0	0.0%	0	1.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nayland	0.4%	5	0.5%	2	3.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
London	1.5%	18	1.4%	5	0.0%	0	2.4%	3	1.9%	3	2.5%	3	2.3%	2	0.7%	0	0.5%	1	1.5%	1
Cambridge	0.2%	2	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0
(Don't know / can't remember)	5.4%	65	4.3%	15	3.3%	3	5.7%	7	4.8%	8	11.6%	14	9.2%	8	7.2%	4	2.2%	3	5.5%	4

Colchester Borough Retail Study 2016
for Cushman & Wakefield

	Total		Zone 1: Colchester		Zone 2: Rural North		Zone 3: Rural South		Zone 4: Clacton		Zone 5: Frinton / Harwich		Zone 6: Rural West		Zone 7: Halstead		Zone 8: Braintree		Zone 9: Witham	
(Don't do this)	9.3%	112	8.8%	30	9.2%	8	11.1%	13	11.3%	20	5.7%	7	6.2%	6	11.5%	6	8.9%	14	13.4%	9
Weighted base:		1200		343		86		116		173		116		91		52		153		69
Sample:		1200		240		100		120		160		120		100		100		160		100

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	Total		Zone 1: Colchester		Zone 2: Rural North		Zone 3: Rural South		Zone 4: Clacton		Zone 5: Frinton / Harwich		Zone 6: Rural West		Zone 7: Halstead		Zone 8: Braintree		Zone 9: Witham	
Q15 Where did you last go for the purpose of drinking out?																				
Colchester Town Centre	10.9%	131	28.8%	99	3.1%	3	9.6%	11	6.8%	12	0.8%	1	3.9%	4	0.0%	0	1.6%	2	0.0%	0
Highwoods (District Centre OR Retail Park), Colchester	0.2%	2	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tollgate (District Centre OR Retail Park), Stanway, Colchester	0.7%	8	0.3%	1	2.2%	2	1.4%	2	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0
Aldham	0.2%	2	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birch	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Boxted	0.3%	3	0.0%	0	3.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chappel and Wakes Colne	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0
Copford and Copford Green	0.3%	4	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	3	0.0%	0	0.0%	0	0.0%	0
Dedham	0.7%	9	1.2%	4	2.5%	2	2.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
East Mersea	0.2%	2	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Fingringhoe	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Great Horkesley	0.3%	4	0.9%	3	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Great Tey	0.4%	5	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.5%	1	0.0%	0
Langham	0.1%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Layer de la Haye	0.5%	6	0.4%	1	0.0%	0	4.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks Tey	0.4%	5	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	3	0.0%	0	0.5%	1	0.0%	0
Messing	0.2%	3	0.3%	1	0.8%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Peldon	0.2%	2	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tiptree	0.8%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.5%	10	0.0%	0	0.0%	0	0.7%	1
West Bergholt	0.9%	11	2.9%	10	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
West Mersea	0.9%	11	0.5%	2	0.0%	0	7.7%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wivenhoe	0.7%	8	0.3%	1	0.0%	0	5.8%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Colchester	1.8%	21	5.5%	19	0.8%	1	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Braintree Town Centre	1.6%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	11.9%	18	0.0%	0
Elsewhere in Braintree	1.6%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.2%	17	2.3%	2
Chelmsford Town Centre	2.2%	27	0.0%	0	0.0%	0	0.0%	0	2.7%	5	0.0%	0	2.2%	2	0.0%	0	7.7%	12	11.8%	8
Elsewhere in Chelmsford	0.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	1.7%	3	0.8%	1
Clacton-on-Sea Town Centre	3.6%	43	0.0%	0	0.0%	0	1.4%	2	22.5%	39	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Clacton-on-Sea	2.9%	35	0.0%	0	0.0%	0	0.0%	0	18.9%	33	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ipswich Town Centre	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Ipswich	0.2%	2	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Halstead Town Centre	0.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.3%	5	0.0%	0	0.0%	0
Elsewhere in Halstead	0.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	10.3%	5	0.0%	0	0.0%	0
Sudbury Town Centre	0.6%	7	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0	2.6%	2	1.4%	1	1.1%	2	0.0%	0
Elsewhere in Sudbury	0.5%	6	0.0%	0	3.1%	3	0.0%	0	0.0%	0	0.0%	0	1.8%	2	2.5%	1	0.0%	0	0.0%	0
Witham Town Centre	1.1%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	17.3%	12
Elsewhere in Witham	0.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.8%	6
Brightlingsea	1.0%	11	0.0%	0	0.0%	0	9.9%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coggeshall	0.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	4.2%	4	0.0%	0	0.0%	0	0.0%	0
Dovercourt	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Frinton-on-Sea	1.0%	11	0.0%	0	0.0%	0	0.6%	1	0.5%	1	7.7%	9	0.0%	0	0.0%	0	0.6%	1	0.0%	0

Colchester Borough Retail Study 2016 for Cushman & Wakefield

Weighted:

October 2016

	Total		Zone 1: Colchester	Zone 2: Rural North	Zone 3: Rural South	Zone 4: Clacton	Zone 5: Frinton / Harwich	Zone 6: Rural West	Zone 7: Halstead	Zone 8: Braintree	Zone 9: Witham	
Hadleigh	0.3%	4	0.0%	0	4.4%	4	0.0%	0	0.0%	0	0.0%	0
Harwich	2.0%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Maldon	0.3%	4	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	2
Manningtree	1.5%	19	0.0%	0	20.6%	18	0.7%	1	0.0%	0	0.0%	0
Walton	0.7%	8	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Other	3.0%	36	1.0%	4	7.6%	7	2.1%	2	3.5%	6	2.2%	3
Black Notley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Bures	0.2%	3	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Castle Hedingham	0.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Colne Engaine	0.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2
Copford	0.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2
Earls Colne	0.4%	5	0.9%	3	0.0%	0	0.0%	0	0.0%	0	2.2%	2
East Bergholt	0.2%	2	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0
Great Bentley	0.1%	2	0.0%	0	0.0%	0	1.5%	2	0.0%	0	0.0%	0
Great Bromley	0.2%	2	0.4%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Great Holland	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Great Leighs	0.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Great Notley	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hatfield Peverel	0.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Holland-on-Sea	0.5%	6	0.0%	0	0.0%	0	0.0%	0	3.2%	6	0.0%	0
Kelvedon	0.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	4
Little Dunmow	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other (Colchester)	0.3%	4	0.0%	0	0.0%	0	1.1%	1	0.0%	0	1.7%	2
Panfield	0.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rayne	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2
Ridgewell	0.2%	3	0.5%	2	0.0%	0	0.0%	0	0.0%	0	1.8%	1
Stoke-by-Nayland	0.5%	6	1.1%	4	2.2%	2	0.0%	0	0.0%	0	0.0%	0
Weeley	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0
Nayland	0.3%	4	0.0%	0	4.3%	4	0.0%	0	0.0%	0	0.0%	0
London	0.8%	10	0.3%	1	0.0%	0	2.4%	3	0.5%	1	1.1%	1
Cambridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	3.9%	47	4.3%	15	3.8%	3	5.6%	7	2.7%	5	8.3%	10
(Don't do this)	42.7%	513	46.5%	160	31.1%	27	38.5%	45	36.5%	63	44.0%	51
Weighted base:		1200		343		86		116		173		116
Sample:		1200		240		100		120		160		120

Colchester Borough Retail Study 2016

for Cushman & Wakefield

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	Total	Zone 1: Colchester		Zone 2: Rural North		Zone 3: Rural South		Zone 4: Clacton		Zone 5: Frinton / Harwich		Zone 6: Rural West		Zone 7: Halstead		Zone 8: Braintree		Zone 9: Witham		
Q16 Where did you last visit the cinema?																				
Odeon, Head Street, Colchester	23.8%	285	54.0%	185	20.5%	18	33.9%	39	6.1%	10	18.6%	22	10.1%	9	0.0%	0	0.0%	0	2.0%	1
Cineworld, Freeport Designer Outlet Village, Braintree	22.3%	267	10.3%	35	2.2%	2	5.3%	6	0.9%	1	0.7%	1	62.5%	57	50.0%	26	67.7%	104	50.8%	35
Cineworld, Cardinal Park, Ipswich	6.7%	81	4.7%	16	38.4%	33	3.1%	4	4.6%	8	17.1%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Century Cinema (Flicks), Pier Avenue, Clacton-on-Sea	8.0%	96	0.3%	1	2.3%	2	8.6%	10	39.8%	69	11.1%	13	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Electric Palace Cinema, Kings Quay Street, Harwich	1.3%	16	0.0%	0	0.9%	1	0.7%	1	0.0%	0	12.0%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.9%	10	0.7%	2	3.1%	3	0.0%	0	0.5%	1	1.3%	2	1.4%	1	1.8%	1	0.5%	1	0.0%	0
Cineworld, Ehringshausen Way, Haverhill	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	2	0.0%	0	0.0%	0
Mercury Theatre, Balcerne Gate, Colchester	0.1%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Odeon, Kings Head Walk, Chelmsford	0.4%	5	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	4.5%	3
London	0.2%	2	0.0%	0	0.8%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Ipswich	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	2.8%	34	2.0%	7	0.8%	1	5.2%	6	3.7%	6	3.7%	4	2.7%	3	4.6%	2	2.2%	3	1.5%	1
(Don't do this)	33.3%	399	27.3%	94	30.9%	27	42.4%	49	44.4%	77	34.7%	40	23.3%	21	39.4%	20	27.9%	43	41.1%	28
Weighted base:		1200		343		86		116		173		116		91		52		153		69
Sample:		1200		240		100		120		160		120		100		100		160		100

Colchester Borough Retail Study 2016

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Q17 Where did you last visit the bowling alley?																				
Tenpin Bowling Centre, Colne View Retail Park, Colchester	14.9%	178	31.8%	109	16.9%	15	15.8%	18	3.7%	6	16.5%	19	11.6%	11	0.0%	0	0.0%	0	0.0%	0
Tenpin Bowling Centre, Walton Pier	2.7%	33	0.4%	1	1.0%	1	0.6%	1	7.2%	12	14.2%	16	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Namco Funscape, Freeport Designer Outlet Village, Braintree	10.4%	125	3.3%	11	0.0%	0	0.0%	0	0.0%	0	0.7%	1	29.7%	27	21.8%	11	40.7%	62	17.0%	12
Other	0.8%	10	0.9%	3	0.8%	1	1.7%	2	0.6%	1	0.7%	1	0.9%	1	3.1%	2	0.0%	0	0.0%	0
Clacton Pavilion, Marine Parade West, Clacton-on-Sea	6.3%	75	1.4%	5	0.9%	1	5.1%	6	32.1%	55	7.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Madison Lanes, Madison Heights, Park Drive, Maldon	0.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0	0.0%	0	2.2%	2
Strikes Bowling Centre, Byford Road, Sudbury	1.1%	13	0.9%	3	9.1%	8	0.0%	0	0.0%	0	0.0%	0	0.9%	1	2.2%	1	0.0%	0	0.0%	0
Ipswich	0.5%	6	0.0%	0	6.9%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Chelmsford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2	0.0%	0
(Don't know / can't remember)	2.0%	24	1.3%	5	5.3%	5	2.7%	3	1.5%	3	3.8%	4	1.8%	2	1.6%	1	0.5%	1	1.5%	1
(Don't do this)	60.9%	730	60.1%	206	59.0%	51	73.9%	86	54.9%	95	57.1%	66	52.6%	48	70.4%	37	56.8%	87	79.2%	55
Weighted base:	1200		343		86		116		173		116		91		52		153		69	
Sample:	1200		240		100		120		160		120		100		100		160		100	

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Q18 Where did you last visit the gymnasium / health club?																				
Anytime Fitness, Haven Road, Colchester	0.2%	3	0.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bannatyne Health Club, Grange Way, Colchester	1.1%	13	2.5%	8	0.0%	0	4.1%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bannatyne Health Club, Springwood Drive, Braintree	0.9%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.7%	10	0.0%	0
Braintree Sports & Health Club, Panfield Lane, Braintree	0.7%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	8	0.0%	0
Crossfit Blackwater, Crittall Road, Witham	0.2%	2	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1
Halstead Leisure Centre, Colne Road, Halstead	1.0%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	3	17.2%	9	0.0%	0	0.0%	0
Leisure World, Cowdray Avenue, Colchester	3.0%	36	7.4%	25	3.0%	3	3.5%	4	0.9%	1	0.0%	0	1.4%	1	0.0%	0	0.6%	1	0.0%	0
Leisure World, Brinkley Lane, Colchester	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leisure World, Maypole Road, Colchester	0.2%	2	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Livia Gym, Moorside, Colchester	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spirit Health Club, Holiday Inn, Abbots Lane, Colchester	0.3%	4	0.3%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
The Gym Group, Queen Street, Colchester	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Topnotch Health Club, Wyncolls Road, Colchester	0.6%	7	1.4%	5	2.2%	2	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Witham Leisure Centre, Spinks Lane, Witham	1.5%	18	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	1.7%	2	0.0%	0	1.2%	2	19.4%	13
Other	1.5%	18	0.3%	1	5.3%	5	4.2%	5	1.0%	2	1.8%	2	1.7%	2	0.0%	0	1.1%	2	0.8%	1
Busy Body's Fitness, Station Road, Manningtree	0.7%	8	0.0%	0	9.3%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Clarice House, Kingsford Park, Layer Road, Colchester	0.4%	4	0.6%	2	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
David Lloyd Health Club, United Way, Mile End, Colchester	0.3%	3	0.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fit4Less, Stanway Retail Park, Colchester	0.7%	8	1.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0
GYM4U, Peartree Road, Colchester	0.3%	3	0.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Colchester Borough Retail Study 2016 for Cushman & Wakefield

Weighted:

October 2016

	Total	Zone 1: Colchester		Zone 2: Rural North		Zone 3: Rural South		Zone 4: Clacton		Zone 5: Frinton / Harwich		Zone 6: Rural West		Zone 7: Halstead		Zone 8: Braintree		Zone 9: Witham		
Gymphobics, The Mulberry Centre, Albany Gardens, Haven Road, Colchester	0.3%	4	0.4%	1	0.9%	1	1.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lifthouse Spa & Hotel, Frinton Road, Thorpe-le-Soken	0.3%	4	0.0%	0	0.0%	0	0.0%	0	0.9%	1	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Prested Hall Health Club, Feering, Colchester	0.7%	8	0.5%	2	0.0%	0	0.6%	1	0.0%	0	0.0%	0	5.3%	5	0.0%	0	0.0%	0	0.9%	1
Sports Direct Fitness, North Station, Clarendon Way, Colchester	1.3%	16	4.6%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stoke by Nayland Hotel, Golf & Spa, Keepers Lane, Leavenheath	0.4%	4	0.0%	0	4.1%	4	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
The Essex Golf & Country Club, Earls Colne, Colchester	0.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	4	0.0%	0	0.0%	0	0.0%	0
Braintree	1.3%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.2%	16	0.0%	0
Tiptree	0.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0
Great Bentley	0.2%	3	0.0%	0	0.0%	0	1.8%	2	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Witham	0.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0	1.6%	1
Maldon	0.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	4	0.0%	0	0.0%	0	0.7%	1
London	0.3%	4	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	3	0.0%	0
Chelmsford	0.2%	3	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	2.0%	1
Clacton-on-Sea	2.4%	29	0.0%	0	0.0%	0	0.7%	1	14.9%	26	2.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ipswich	0.3%	3	0.0%	0	2.6%	2	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harwich	1.0%	12	0.0%	0	0.8%	1	0.0%	0	0.0%	0	9.9%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Earls Colne	0.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	1.8%	1	0.6%	1	0.0%	0
Sudbury	0.3%	4	0.0%	0	3.6%	3	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.6%	0	0.0%	0	0.0%	0
Other (Colchester)	1.2%	14	2.3%	8	2.2%	2	0.8%	1	0.0%	0	0.0%	0	3.6%	3	0.0%	0	0.0%	0	0.0%	0
Walton-on-the-Naze	0.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	2.7%	32	3.7%	13	0.8%	1	3.7%	4	3.0%	5	3.1%	4	2.6%	2	0.0%	0	0.5%	1	3.6%	2
(Don't do this)	71.8%	861	71.2%	245	61.8%	53	71.6%	83	79.0%	136	77.8%	90	61.3%	56	80.3%	42	70.5%	108	69.1%	48
Weighted base:		1200		343		86		116		173		116		91		52		153		69
Sample:		1200		240		100		120		160		120		100		100		160		100
GEN Gender of respondent:																				
Male	33.0%	396	33.4%	115	30.7%	26	29.4%	34	30.3%	52	37.2%	43	31.4%	29	30.8%	16	36.3%	56	36.8%	25
Female	67.0%	804	66.6%	229	69.3%	60	70.6%	82	69.7%	120	62.8%	73	68.6%	63	69.2%	36	63.7%	98	63.2%	44
Weighted base:		1200		343		86		116		173		116		91		52		153		69
Sample:		1200		240		100		120		160		120		100		100		160		100

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	Total		Zone 1: Colchester		Zone 2: Rural North		Zone 3: Rural South		Zone 4: Clacton		Zone 5: Frinton / Harwich		Zone 6: Rural West		Zone 7: Halstead		Zone 8: Braintree		Zone 9: Witham	
AGE Could I ask how old you are please?																				
18 to 24	6.0%	72	3.4%	12	6.6%	6	5.2%	6	4.1%	7	5.3%	6	2.2%	2	33.3%	17	4.2%	6	14.1%	10
25 to 34	11.6%	140	12.9%	44	6.6%	6	17.4%	20	12.3%	21	14.2%	16	11.1%	10	3.5%	2	5.6%	9	16.1%	11
35 to 44	17.3%	207	24.7%	85	16.4%	14	12.0%	14	14.5%	25	14.4%	17	15.2%	14	19.7%	10	14.1%	22	10.1%	7
45 to 54	17.5%	210	15.3%	53	22.9%	20	16.8%	20	21.7%	37	21.9%	25	20.5%	19	10.2%	5	15.2%	23	10.9%	8
55 to 64	17.8%	214	17.2%	59	16.8%	15	20.0%	23	15.1%	26	17.4%	20	20.7%	19	21.6%	11	20.4%	31	13.7%	9
65 +	27.3%	328	24.3%	84	26.6%	23	26.9%	31	31.6%	55	26.0%	30	29.2%	27	8.4%	4	33.1%	51	34.1%	24
(Refused)	2.4%	29	2.1%	7	4.2%	4	1.7%	2	0.7%	1	0.8%	1	1.1%	1	3.3%	2	7.4%	11	1.0%	1
Weighted base:	1200		343		86		116		173		116		91		52		153		69	
Sample:	1200		240		100		120		160		120		100		100		160		100	

ADU Including yourself, how many people are there in your household who are aged 16 and over?

One	21.1%	254	24.6%	84	16.1%	14	12.6%	15	26.9%	46	18.5%	21	10.8%	10	38.7%	20	19.5%	30	18.7%	13
Two	50.8%	609	53.6%	184	55.2%	48	55.4%	64	45.0%	78	49.6%	58	48.0%	44	40.3%	21	46.5%	71	60.9%	42
Three	15.4%	185	14.9%	51	11.3%	10	23.3%	27	15.3%	26	13.9%	16	18.4%	17	6.1%	3	17.8%	27	11.1%	8
Four	6.7%	80	4.5%	16	8.6%	7	4.6%	5	5.5%	9	6.4%	7	14.3%	13	9.3%	5	9.1%	14	4.7%	3
Five	1.6%	19	0.4%	1	3.2%	3	0.0%	0	3.5%	6	0.7%	1	5.7%	5	0.7%	0	1.1%	2	0.8%	1
Six or more	0.2%	3	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1
(Refused)	4.1%	50	1.9%	7	5.6%	5	4.1%	5	3.1%	5	10.9%	13	2.8%	3	4.8%	2	6.0%	9	1.8%	1
Weighted base:	1200		343		86		116		173		116		91		52		153		69	
Sample:	1200		240		100		120		160		120		100		100		160		100	

CHI How many people are there in your household who are aged 15 and under?

None	73.2%	879	68.6%	235	66.5%	57	72.2%	84	78.3%	135	64.3%	75	78.7%	72	85.8%	45	74.1%	113	90.3%	62
One	8.9%	107	11.1%	38	11.3%	10	8.7%	10	7.6%	13	8.0%	9	8.9%	8	2.8%	1	10.4%	16	2.0%	1
Two	9.5%	114	13.4%	46	8.1%	7	12.9%	15	7.2%	12	10.0%	12	7.3%	7	3.3%	2	6.2%	10	5.8%	4
Three	3.3%	40	4.4%	15	8.5%	7	1.3%	2	1.9%	3	3.6%	4	2.2%	2	2.8%	1	3.2%	5	0.0%	0
Four	0.4%	5	0.0%	0	0.0%	0	0.0%	0	1.9%	3	1.1%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Five	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	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	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Refused)	4.4%	53	2.5%	8	5.6%	5	4.8%	6	3.1%	5	12.0%	14	2.8%	3	4.2%	2	6.0%	9	1.8%	1
Weighted base:	1200		343		86		116		173		116		91		52		153		69	
Sample:	1200		240		100		120		160		120		100		100		160		100	

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	Total	Zone 1: Colchester	Zone 2: Rural North	Zone 3: Rural South	Zone 4: Clacton	Zone 5: Frinton / Harwich	Zone 6: Rural West	Zone 7: Halstead	Zone 8: Braintree	Zone 9: Witham										
EMP How many people (men and women) aged 16-64 are there in your household who are: [PR]																				
In part time employment (up to 29 hours per week)?																				
None	69.7%	836	71.9%	247	68.4%	59	65.3%	76	67.5%	117	67.7%	79	61.8%	56	79.9%	41	71.8%	110	74.2%	51
One	22.4%	269	21.5%	74	25.2%	22	23.6%	27	27.3%	47	18.2%	21	29.5%	27	14.2%	7	19.4%	30	19.9%	14
Two	3.1%	37	3.7%	13	0.0%	0	6.9%	8	1.6%	3	3.2%	4	3.6%	3	3.6%	2	2.9%	4	0.8%	1
Three	0.4%	5	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	3.1%	3	0.0%	0	0.9%	1	0.0%	0
Four	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Five	0.0%	0	0.0%	0	0.0%	0	0.0%	0	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	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	0.4%	5	0.0%	0	1.0%	1	2.5%	3	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Refused)	4.0%	48	2.9%	10	5.4%	5	1.7%	2	3.1%	5	10.2%	12	2.0%	2	2.3%	1	5.0%	8	5.1%	4
Weighted base:	1200		343		86		116		173		116		91		52		153		69	
Sample:	1200		240		100		120		160		120		100		100		160		100	
In full time employment - 30 or more hours per week?																				
None	43.9%	527	44.0%	151	30.8%	27	42.1%	49	49.7%	86	34.7%	40	35.3%	32	62.4%	32	44.2%	68	61.2%	42
One	28.3%	339	29.7%	102	34.4%	30	29.8%	35	25.3%	44	36.1%	42	25.8%	24	21.1%	11	27.3%	42	15.8%	11
Two	17.2%	206	19.6%	67	19.2%	17	20.8%	24	13.8%	24	10.9%	13	26.3%	24	8.2%	4	15.8%	24	13.2%	9
Three	4.4%	52	2.1%	7	6.1%	5	3.2%	4	5.4%	9	5.7%	7	8.9%	8	2.1%	1	5.7%	9	3.2%	2
Four	2.0%	24	1.6%	5	3.0%	3	0.0%	0	2.8%	5	1.8%	2	1.7%	2	3.9%	2	2.0%	3	2.8%	2
Five	0.0%	0	0.0%	0	0.0%	0	0.0%	0	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	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	0.4%	5	0.0%	0	1.0%	1	2.5%	3	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Refused)	3.9%	47	2.9%	10	5.4%	5	1.7%	2	3.1%	5	10.2%	12	2.0%	2	2.3%	1	5.0%	8	3.8%	3
Weighted base:	1200		343		86		116		173		116		91		52		153		69	
Sample:	1200		240		100		120		160		120		100		100		160		100	
Unemployed but available or seeking employment?																				
None	89.0%	1068	89.3%	306	83.9%	73	83.1%	96	91.6%	158	87.8%	102	91.3%	83	95.9%	50	90.0%	138	89.4%	62
One	5.2%	62	6.9%	24	9.6%	8	7.7%	9	3.5%	6	1.4%	2	6.7%	6	1.8%	1	2.0%	3	5.5%	4
Two	1.3%	16	0.9%	3	0.0%	0	5.1%	6	1.9%	3	0.0%	0	0.0%	0	0.0%	0	2.1%	3	0.0%	0
Three	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Four	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Five	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Six or more	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
(Don't know)	0.4%	5	0.0%	0	1.0%	1	2.5%	3	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Refused)	4.0%	48	2.9%	10	5.4%	5	1.7%	2	3.1%	5	10.2%	12	2.0%	2	2.3%	1	5.0%	8	5.1%	4
Weighted base:	1200		343		86		116		173		116		91		52		153		69	
Sample:	1200		240		100		120		160		120		100		100		160		100	

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	Total		Zone 1: Colchester		Zone 2: Rural North		Zone 3: Rural South		Zone 4: Clacton		Zone 5: Frinton / Harwich		Zone 6: Rural West		Zone 7: Halstead		Zone 8: Braintree		Zone 9: Witham	
CAR How many cars do you have in your household which can be used for shopping trips? (Include light vans, pickups and 4-wheel drive vehicles)																				
None	9.9%	118	12.0%	41	7.1%	6	3.8%	4	13.1%	23	7.7%	9	5.0%	5	19.6%	10	8.5%	13	10.5%	7
One	37.4%	449	43.2%	148	26.4%	23	33.1%	38	45.1%	78	35.0%	41	21.8%	20	38.2%	20	33.6%	51	43.6%	30
Two	32.8%	393	34.0%	117	42.6%	37	34.8%	40	24.1%	42	33.5%	39	34.4%	31	25.5%	13	35.2%	54	29.5%	20
Three or more	15.5%	185	7.6%	26	18.4%	16	24.3%	28	15.1%	26	11.8%	14	35.2%	32	14.9%	8	17.2%	26	13.3%	9
(Refused)	4.5%	54	3.2%	11	5.5%	5	4.0%	5	2.6%	4	12.0%	14	3.6%	3	1.7%	1	5.5%	8	3.1%	2
Weighted base:		1200		343		86		116		173		116		91		52		153		69
Sample:		1200		240		100		120		160		120		100		100		160		100

QUOTA Zone:

Zone 1: Colchester	28.6%	343	100.0%	343	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 2: Rural North	7.2%	86	0.0%	0	100.0%	86	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 3: Rural South	9.7%	116	0.0%	0	0.0%	0	100.0%	116	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 4: Clacton	14.4%	173	0.0%	0	0.0%	0	0.0%	0	100.0%	173	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 5: Frinton / Harwich	9.7%	116	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	116	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 6: Rural West	7.6%	91	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	91	0.0%	0	0.0%	0	0.0%	0
Zone 7: Halstead	4.3%	52	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	52	0.0%	0	0.0%	0
Zone 8: Braintree	12.8%	153	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	153	0.0%	0
Zone 9: Witham	5.8%	69	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	69
Weighted base:		1200		343		86		116		173		116		91		52		153		69
Sample:		1200		240		100		120		160		120		100		100		160		100

Colchester Borough Retail Study 2016

for Cushman & Wakefield

Weighted:

October 2016

		Total	Zone 1: Colchester		Zone 2: Rural North		Zone 3: Rural South		Zone 4: Clacton		Zone 5: Frinton / Harwich		Zone 6: Rural West		Zone 7: Halstead		Zone 8: Braintree		Zone 9: Witham		
PC	Postcode sector:																				
	CM3 2	0.7%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.7%	8
	CM7 1	1.1%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.8%	14	0.0%	0
	CM7 2	0.7%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.2%	8	0.0%	0
	CM7 3	2.2%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.1%	26	0.0%	0
	CM7 5	2.1%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.7%	26	0.0%	0
	CM7 9	2.1%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.5%	25	0.0%	0
	CM77 6	1.1%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.5%	13	0.0%	0
	CM77 7	2.2%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.0%	26	0.0%	0
	CM77 8	1.3%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.1%	15	0.0%	0
	CM8 1	1.5%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	26.8%	19
	CM8 2	1.9%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	32.7%	23
	CM8 3	1.7%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	28.8%	20
	CO1 1	0.4%	5	1.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO1 2	1.3%	15	4.5%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO10 5	1.4%	16	0.0%	0	19.0%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO11 1	1.7%	20	0.0%	0	22.9%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO11 2	1.9%	23	0.0%	0	26.8%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO12 3	1.5%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.5%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO12 4	2.9%	35	0.0%	0	0.0%	0	0.0%	0	0.0%	0	30.5%	35	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO12 5	1.4%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.8%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO13 0	1.6%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.6%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO13 9	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO14 8	1.0%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.4%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO15 1	1.0%	12	0.0%	0	0.0%	0	0.0%	0	7.1%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO15 2	1.2%	15	0.0%	0	0.0%	0	0.0%	0	8.7%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO15 3	2.6%	31	0.0%	0	0.0%	0	0.0%	0	18.2%	31	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO15 4	2.2%	26	0.0%	0	0.0%	0	0.0%	0	15.0%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO15 5	1.0%	12	0.0%	0	0.0%	0	0.0%	0	7.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO15 6	1.2%	15	0.0%	0	0.0%	0	0.0%	0	8.6%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO16 0	0.9%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.5%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO16 7	1.3%	15	0.0%	0	0.0%	0	0.0%	0	8.8%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO16 8	2.5%	30	0.0%	0	0.0%	0	0.0%	0	17.5%	30	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO16 9	1.3%	15	0.0%	0	0.0%	0	0.0%	0	8.9%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO2 0	1.3%	16	0.0%	0	0.0%	0	13.5%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO2 7	2.3%	27	8.0%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO2 8	1.7%	21	6.1%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO2 9	0.9%	11	3.1%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO3 0	2.0%	24	7.0%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO3 3	2.5%	30	8.7%	30	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO3 4	1.4%	16	4.7%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO3 8	0.5%	6	1.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO3 9	1.3%	15	4.5%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO4 0	1.7%	21	6.1%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO4 3	2.2%	26	7.7%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
	CO4 5	4.4%	53	15.5%	53	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Colchester Borough Retail Study 2016

for Cushman & Wakefield

Weighted:

October 2016

	Total	Zone 1: Colchester	Zone 2: Rural North	Zone 3: Rural South	Zone 4: Clacton	Zone 5: Frinton / Harwich	Zone 6: Rural West	Zone 7: Halstead	Zone 8: Braintree	Zone 9: Witham
CO4 9	2.3% 27	7.9% 27	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
CO5 0	1.8% 22	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	24.2% 22	0.0% 0	0.0% 0	0.0% 0
CO5 7	0.9% 11	0.0% 0	0.0% 0	9.5% 11	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
CO5 8	2.2% 26	0.0% 0	0.0% 0	22.5% 26	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
CO5 9	1.2% 14	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	15.3% 14	0.0% 0	0.0% 0	0.0% 0
CO6 1	2.4% 28	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	30.9% 28	0.0% 0	0.0% 0	0.0% 0
CO6 2	1.5% 17	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	19.0% 17	0.0% 0	0.0% 0	0.0% 0
CO6 3	3.7% 45	13.0% 45	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
CO6 4	1.2% 15	0.0% 0	17.0% 15	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
CO6 5	0.2% 2	0.0% 0	2.2% 2	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
CO7 0	1.9% 23	0.0% 0	0.0% 0	19.8% 23	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
CO7 6	0.4% 4	0.0% 0	5.1% 4	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
CO7 7	1.0% 12	0.0% 0	0.0% 0	10.7% 12	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
CO7 8	0.8% 9	0.0% 0	0.0% 0	7.9% 9	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
CO7 9	1.6% 19	0.0% 0	0.0% 0	16.2% 19	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
CO8 5	0.8% 10	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	10.5% 10	0.0% 0	0.0% 0	0.0% 0
CO9 1	2.0% 24	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	46.7% 24	0.0% 0	0.0% 0
CO9 2	1.2% 14	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	26.8% 14	0.0% 0	0.0% 0
CO9 3	1.1% 14	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	26.5% 14	0.0% 0	0.0% 0
IP7 5	0.5% 6	0.0% 0	6.9% 6	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
Weighted base:	1200	343	86	116	173	116	91	52	153	69
Sample:	1200	240	100	120	160	120	100	100	160	100

Appendix B

District Centre Healthcheck Assessments

RETAIL COMPOSITION

The centre is focused along the B1023 (Church Road) and comprises a range of retail, service and community facilities. It is anchored by two food/non-food superstores, Tesco and Asda, which account for almost 90% of the centre's convenience goods floorspace. Both superstores offer in-store clothing ranges (Florence & Fred and George respectively) and a selection of other comparison goods.

Further multiple retailers include Iceland and Boots. The centre also supports a library, a number of banks (e.g. Barclays, Lloyds) and several independents selling 'bulkier' goods such as hardware, electricals, carpets and flooring.

The table below sets out a detailed breakdown of the composition of uses in Tiptree. This highlights the centre's local convenience-based role, with a high proportion of floorspace dedicated to Convenience Retail and various Services. These uses are supplemented by 19 Comparison Retail units.

Use Categories	Units (count)	Units (%)	Floorspace (sq. m)	Floorspace (%)
Comparison Retail	19	27.1	2,481	19.2
Convenience Retail	6	8.6	6,169	47.7
Retail Services	17	24.3	1,329	10.3
Leisure Services	13	18.6	1,022	7.9
Financial & Business Services	13	18.6	1,839	14.2
Vacant	2	2.8	93	0.7
TOTAL	70	100	12,933	100

Source: Experian Goad (May 2015).

VACANCY RATES

As shown in the table above, which is based on the latest Experian Goad survey, in May 2015 there were only two vacant units in Tiptree; or 2.9% as a proportion of the total number of units.

COMMERCIAL RENTS & YIELDS

No published information available for this centre.

CUSTOMERS' VIEWS & BEHAVIOURS

Based on the results of the 2016 household interview survey, the centre's convenience goods shopping offer (dominated by Tesco and Asda) principally serves the western parts of Colchester Borough. Some 20.4% of consumers in Zone 6 [Rural West] do most of their main food shopping in Tiptree, with limited expenditure inflows from the wider catchment area. It has a strong, localised 'top up' food shopping function.

The centre further secures notable market shares of expenditure on certain comparison goods sub-categories from Zone 6 and also Zone 9 [Witham]. For example, around a quarter (24.5%) of consumers in Zone 6 do most of their shopping for *chemists and medical goods, cosmetics and other beauty products* in Tiptree. High proportions of consumers in Zones 6 and 9 do most of their shopping for *household appliances* in the centre (8.7% and 8.2% respectively).

ACCESSIBILITY & PEDESTRIAN FLOWS

Tiptree is located approximately 10 miles to the southwest of Colchester town centre. It is a linear centre with bus stops serving the main pedestrian thoroughfares. There is no rail station.

At the time of our site inspection, the highest pedestrian flows were observed around the Tesco superstore; and the customer car park (which would appear to function as Tiptree's main car park) at approximately 75-85% capacity. There is some on-street car parking within the centre and further capacity at the Asda superstore.

ENVIRONMENTAL QUALITY

The centre comprises a mix of land uses and buildings along the linear Church Road, while the two superstores (Tesco and Asda) are somewhat detached from this core shopping area. Ground floor shop frontages are generally well-maintained.

Predominantly residential areas surround the centre, providing a substantial walk-in catchment.

PERCEPTION OF SAFETY

We identified no adverse issues with regard to safety or security during our site inspection.

WEST MERSEA

HEALTHCHECK ASSESSMENT



RETAIL COMPOSITION

The centre includes a modest range of retail, service and community facilities. There are approximately 30 ground floor shop units, interspersed with residential uses, along the B1025 (High Street/ Barfield Road/ Kingsland Road).

There is a balanced mix of multiple and independent retailers; the latter helping to provide a relatively distinct retail and service offer. National multiple retailers include Boots, Tesco Express, and the Co-Op and Spar convenience stores.

Other uses comprise service and community facilities such as a Post Office, a library and a leisure/ community centre.

VACANCY RATES

No vacancies at the time of our site inspection.

COMMERCIAL RENTS & YIELDS

No published information available for this centre.

CUSTOMERS' VIEWS & BEHAVIOURS

Based on the results of the 2016 household interview survey, the centre's convenience goods shopping offer principally serves the immediate catchment. To that end 8% of consumers in Zone 3 [Rural South] do most of their main food shopping in West Mersea, with little or no expenditure inflows from the wider catchment area. It has a strong, localised 'top up' food shopping function.

The centre further secures notable market shares of expenditure on a limited number of comparison goods sub-categories from Zone 3. For example, 13.6% of consumers in Zone 3 do most of their shopping for *household appliances* in West Mersea. In addition, perhaps reflecting the localised nature of shopping patterns for *chemists and medical goods, cosmetics and other beauty products*, some 18.9% of consumers in Zone 3 do most of their shopping for such goods in the centre.

West Mersea is also understood to have a tourist/ holidaymaker function, which is likely to help support the centre's retail and other facilities.

ACCESSIBILITY & PEDESTRIAN FLOWS

West Mersea is located approximately 10 miles to the south of Colchester town centre. There is no rail station but the centre is well served by bus stops along the B1025.

At the time of our site inspection, the highest pedestrian flows were observed around the Co-Op convenience store and its customer car park (which was at approximately 90% capacity). Additional, albeit limited, off-street car parking is available throughout the centre.

ENVIRONMENTAL QUALITY

The retail offer is somewhat dispersed throughout the centre amongst (predominantly) residential uses. Notwithstanding this, the centre has a pleasant character – assisted by the diversity of independent retail businesses – and the shop frontages are generally well kept.

Predominantly residential areas surround the centre, providing a substantial walk-in catchment.

PERCEPTION OF SAFETY

We identified no adverse issues with regard to safety or security during our site inspection.

WIVENHOE

HEALTHCHECK ASSESSMENT



RETAIL COMPOSITION

The centre has a limited range of retail, service and community facilities dispersed along Wivenhoe's linear High Street. There are approximately 10 ground floor shop units.

There are two convenience stores, Co-Op and One Stop, which serve the day-to-day needs of the local community. The centre also includes Boots, a Post Office, a library and a hair/ beauty salon.

VACANCY RATES

No vacancies at the time of our site inspection.

COMMERCIAL RENTS & YIELDS

No published information available for this centre.

CUSTOMERS' VIEWS & BEHAVIOURS

Based on the results of the 2016 household interview survey, the centre's convenience goods shopping offer principally serves the immediate catchment. Reflecting the limited range of provision only 3.3% of consumers in Zone 3 [Rural South] do most of their main food shopping in Wivenhoe. It has a greater localised 'top up' food shopping function.

Unsurprisingly, the centre secures little or no market shares of comparison goods expenditure from Colchester's catchment area. The main exception is *chemists and medical goods, cosmetics and other beauty products*, with 6.9% of consumers in Zone 3 doing most of their shopping for such goods in Wivenhoe.

ACCESSIBILITY & PEDESTRIAN FLOWS

Wivenhoe is located approximately four miles to the southeast of Colchester town centre, to/from which vehicular access is provided via the A133 (Clingoe Hill) and the B1028 (Colchester Road). Car parking provision is limited and principally available in the form of on-street car parking.

The centre is served by Wivenhoe rail station and a number of bus stops along High Street and Station Road. At the time of our site inspection, there was relatively little pedestrian activity.

ENVIRONMENTAL QUALITY

The retail offer is somewhat dispersed throughout the centre amongst (predominantly) residential uses. Notwithstanding this, the centre has an attractive 'rural' character extending north from the River Colne while shop frontages are relatively well-maintained.

Predominantly residential areas surround the centre, particularly to the north.

PERCEPTION OF SAFETY

We identified no adverse issues with regard to safety or security during our site inspection.

TOLLGATE

HEALTHCHECK ASSESSMENT



RETAIL COMPOSITION

The centre has a significant retail offer including Colchester's largest retail park (The Tollgate Centre), Tollgate West Retail Park, a standalone Homebase warehouse, and a Sainsbury's superstore. The superstore includes an in-store pharmacy and café, and sells predominantly convenience goods (around 70% of total ground floor) with the remainder – plus mezzanine floor – dedicated to comparison goods.

The Tollgate Centre accommodates a range of multiple retailers such as Next, Next Home, Argos, Boots, Sports Direct, Smyths Toys, Carpetright, Dreams, SCS and Iceland. The adjacent Tollgate West Retail Park includes Currys & PC World, Staples and B&M Bargains. A number of food and drink uses are located within or adjacent to the centre; Chiquito, Frankie & Benny's, Harvester, Costa Coffee (two) and McDonalds. There is also a doctor's surgery.

The table below sets out a detailed breakdown of the composition of uses at Tollgate.

Use Categories	Units (count)	Units (%)	Floorspace (sq. m)	Floorspace (%)
Comparison Retail	24	75	30,285	70.4
Convenience Retail	2	6.25	10,740	25
Retail Services	1	3.1	190	0.4
Leisure Services	4	12.5	1,460	3.4
Financial & Business Services	1	3.1	330	0.8
Vacant	0	0	0	0
TOTAL	32	100	43,005	100

Source: Experian Goad (November 2015), with 'Comparison Retail Floorspace' updated by Cushman & Wakefield to account for mezzanine floors (excluding Sainsbury's comparison goods floorspace).

This analysis shows that Tollgate functions principally as a comparison goods shopping destination. However, it also has a substantial proportion of floorspace (28.9%) dedicated to Convenience Retail. Given the clear dominance of Comparison Retail the centre lacks a balanced mix of uses and local services in particular.

The new leisure-based scheme at Stane Park, once open, will provide six food and drink uses (KFC, Starbucks, Coast to Coast, Nando's, Bella Italia and McMullen) thereby further enhancing the centre's role as a leisure destination.

VACANCY RATES

No vacancies at the time of our site inspection.

COMMERCIAL RENTS & YIELDS

PMA report that Sports Direct took a lease of £25 per square foot (psf) in summer 2015, following the downsizing of Anglia Home Furnishings. Other rents at Tollgate include Next (£23 psf) and Carpets 4 Less (£22.50 psf).

CUSTOMERS' VIEWS & BEHAVIOURS

Based on the results of the 2016 household interview survey, Tollgate is the most popular main food shopping destination for consumers in Colchester's catchment area. High proportions of consumers

from Colchester Borough in particular do most of their main food shopping at the centre (most likely the Sainsbury's superstore) including 38% from Zone 6 [Rural West], 29% from Zone 1 [Colchester] and 11.9% from Zone 3 [Rural South].

Unsurprisingly, given the type and scale of the centre's comparison goods shopping offer, Tollgate directly competes with Colchester Town Centre and serves a Borough-wide catchment area. It is clearly also a principal shopping destination for consumers outside of Colchester Borough, securing substantial market shares of expenditure on certain comparison goods sub-categories from, inter alia, Zone 4 [Clacton], Zone 5 [Frinton / Harwich], Zone 7 [Halstead], Zone 8 [Braintree] and Zone 9 [Witham].

To this end, Tollgate's comparison goods shopping offer is particularly strong in terms of *furniture, carpets and other floor coverings; household textiles and soft furnishings; household appliances; audio-visual equipment; and hardware, DIY goods, decorating supplies and garden products.*

Tollgate further secures substantial market shares of expenditure on the other comparison goods sub-categories – namely *clothing and footwear; chemists and medical goods, cosmetics and other beauty products; and all other comparison goods* – from Zones 1, 3 and 6 in particular.

ACCESSIBILITY & PEDESTRIAN FLOWS

Tollgate is situated approximately three miles to the west of Colchester town centre, off London Road (A1124) and adjacent to Junction 26 of the A12. The centre is therefore highly accessible by car and has extensive surface level car parking. At the time of our site inspection, the Sainsbury's superstore was very busy and the car park at approximately 90% capacity. The car parks dedicated to The Tollgate Centre and Tollgate West Retail Park were also busy (approximately 90% and 80% respectively in terms of capacity).

There are two bus stops along London Road and Tollgate West respectively, providing services to/from the town centre and surrounding communities. Tollgate is not served by a rail station.

ENVIRONMENTAL QUALITY

The centre is characterised by a large superstore (Sainsbury's) and purpose-built retail parks and terraces, with significant areas dedicated to surface level car parking. It appears well-maintained although substantial traffic flows – particularly along London Road and the Stanway Western Bypass – affect the pedestrian experience and act as a barrier between the centre's various components.

PERCEPTION OF SAFETY

We identified no adverse issues with regard to safety or security during our site inspection.

TURNER RISE

HEALTHCHECK ASSESSMENT



RETAIL COMPOSITION

The centre comprises a retail park and an Asda superstore. The superstore includes an in-store optician, pharmacy and café. It sells predominantly convenience goods (around 90% of total ground floor) with the remainder – plus mezzanine floor – dedicated to comparison goods.

The retail park accommodates a range of multiple retailers and is predominantly 'value' focused with the likes of Poundland, Home Bargains, Dunelm and Iceland. The centre also includes some food and drink uses such as Pizza Hut, Costa Coffee and Subway.

The table below sets out a detailed breakdown of the composition of uses at Turner Rise.

Use Categories	Units (count)	Units (%)	Floorspace (sq. m)	Floorspace (%)
Comparison Retail	7	63.6	11,060	56.2
Convenience Retail	2	18.2	8,280	42.1
Retail Services	1	9.1	30	0.2
Leisure Services	1	9.1	320	1.6
Financial & Business Services	0	0	0	0
Vacant	0	0	0	0
TOTAL	11	100	19,690	100

Source: Experian Goad (December 2014).

This analysis shows that Turner Rise is dominated by Comparison Retail while the Convenience Retail component is also significant in floorspace terms (42.1%), largely due to the Asda superstore. For a district centre it lacks the services required to meet the day-to-day needs of the local community.

Clarendon Way Retail Park (including Wickes) and Colne View Retail Park (including Aldi, The Range and Pets At Home) are located nearby.

VACANCY RATES

No vacancies at the time of our site inspection.

COMMERCIAL RENTS & YIELDS

PMA report that rents at Turner Rise vary between £10-10.50 per square foot (psf) (e.g. Dunelm and Go Outdoors) and £25 psf (e.g. Costa Coffee and Subway). In March 2015, a letting to Poundland achieved £18.50 psf.

CUSTOMERS' VIEWS & BEHAVIOURS

Based on the results of the 2016 household interview survey, the centre's convenience goods shopping offer (anchored by an Asda superstore) principally serves the central and northern parts of Colchester Borough. Some 13.3% of consumers in Zone 1 [Colchester] do most of their main food shopping at Turner Rise, followed by 4.3% in Zone 2 [Rural North].

Reflecting the centre's comparison goods shopping offer, it secures substantial market shares of expenditure on *household textiles and soft furnishings* – and is the Borough's third most popular shopping destination in this respect (behind Colchester Town Centre and Tollgate). High proportions of consumers from Colchester Borough (i.e. Zones 1, 2 and 3) and also from the wider catchment area (including Zones 4, 5, 6 and 7) do most of their shopping for such goods at Turner Rise.

The centre secures relatively limited market shares of expenditure on other comparison goods sub-categories, with the exception of *chemists and medical goods, cosmetics and other beauty products*. For example, 7.1% of consumers in Zone 1 [Colchester] do most of their shopping for such goods at Turner Rise and this is likely to be attributable to the Asda superstore.

ACCESSIBILITY & PEDESTRIAN FLOWS

Turner Rise is situated less than one mile to the north Colchester town centre, to the immediate north of the railway lines serving nearby Colchester rail station. Bus stops within Asda's car park and along the A134 provide services to/from the town centre and surrounding communities.

The Asda superstore occupies a prominent location off the A134, although wayfindings to the customer car park could be improved. At the time of our site inspection, the superstore was busy and the car park at approximately 80-90% capacity.

ENVIRONMENTAL QUALITY

The centre is characterised by a large superstore (Asda), a purpose-built retail park and extensive surface level car parking. It appears well-maintained although substantial traffic flows affect the pedestrian experience.

PERCEPTION OF SAFETY

We identified no adverse issues with regard to safety or security during our site inspection.

PEARTREE ROAD

HEALTHCHECK ASSESSMENT



RETAIL COMPOSITION

The centre has a substantial cluster of warehouses occupied by local and multiple retailers (or trade outlets). The main retail function is focused on Fiveways Retail Park, which comprises a Co-Op foodstore (including a small Boots chemist) and Poundstretcher. The wider retail area is predominantly bulky-orientated with Halfords, Topps Tiles, Screwfix and a number of retailers selling furniture, beds and bedding.

The centre also includes some leisure uses including Jungle Adventure (children's soft play), Iceni (gymnastics club), Fitness4Less and Anytime Fitness.

VACANCY RATES

We identified one vacant unit during our site inspection (at Angora Business Park). Recent in-movers at Fiveways Retail Park are Fitness4Less and Dominos, while Lewis's now accommodate a previously vacant unit at Peartree Road Retail Park.

COMMERCIAL RENTS & YIELDS

Reflecting the secondary nature of Peartree Road as a retail location, PMA report that Peartree Road Retail Park has historically achieved rents in the region of £10-13 per square foot.

CUSTOMERS' VIEWS & BEHAVIOURS

Based on the results of the 2016 household interview survey, a relatively limited proportion of consumers in Colchester's catchment area do most of their main food and/or comparison goods shopping at Peartree Road. However, the extent and type of provision would suggest that consumers are prepared to travel and do 'some' of their shopping for certain comparison goods at the centre, perhaps for occasional bulky goods.

ACCESSIBILITY & PEDESTRIAN FLOWS

Peartree Road is situated approximately three miles to the southwest of Colchester town centre, and less than one mile to the southeast of Tollgate. Bus services running along Peartree Road and Winstree Road provide access to/from the town centre and surrounding communities. The centre is not served by a rail station.

At the time of our site inspection, Fiveways Retail Park was the busiest retail area (particularly the Co-Op foodstore).

ENVIRONMENTAL QUALITY

The centre is characterised by a group of retail parks and terraces. These are prominently located off Peartree Road and have dedicated surface level car parking.

PERCEPTION OF SAFETY

We identified no adverse issues with regard to safety or security during our site inspection.

RETAIL COMPOSITION

The centre comprises a Tesco Extra superstore with in-store concessions including Harris & Hoole Café, Florence & Fred (clothing range), Max (print shop), an optician and a pharmacy. The superstore sells predominantly convenience goods (around 65% of total ground floor) with the remainder dedicated to comparison goods.

Other uses within the centre include a limited range of services and community facilities including a Post Office, doctor's surgery, a community centre and a coffee shop.

VACANCY RATES

No vacancies at the time of our site inspection.

COMMERCIAL RENTS & YIELDS

No published information available for this centre.

CUSTOMERS' VIEWS & BEHAVIOURS

Based on the results of the 2016 household interview survey, Tesco Extra is the Borough's second most popular main food shopping destination (behind the Sainsbury's superstore at Tollgate). High proportions of consumers do most of their main food shopping at Tesco Extra including some 19.2% from Zone 1 [Colchester], 10.5% from Zone 3 [Rural South] and 8.2% from Zone 2 [Rural North].

The centre secures relatively limited market shares of comparison goods expenditure from Colchester's catchment area.

ACCESSIBILITY & PEDESTRIAN FLOWS

Highwoods is situated approximately two miles to the northeast of Colchester town centre. The centre is located off Highwoods Approach, which has easy access to/from the A12 and A120 via Ipswich Road to the east. The superstore has a large surface level car park.

The centre is served by a number of bus stops situated along Highwoods Approach, Highwoods Square and Eastwood Drive, providing services to/from the town centre and surrounding communities. It is not served by a rail station.

At time of our site inspection, the Tesco Extra superstore was busy and the car park at approximately 75-85% capacity.

ENVIRONMENTAL QUALITY

The centre is characterised by a large superstore (Tesco Extra) and an extensive surface level car park, set within a substantial residential area.

PERCEPTION OF SAFETY

We identified no adverse issues with regard to safety or security during our site inspection.

GREENSTEAD ROAD

HEALTHCHECK ASSESSMENT



RETAIL COMPOSITION

The centre comprises a Tesco superstore with in-store concessions including Costa Coffee, Florence & Fred (clothing range), Max (print shop) and Timpson. The superstore sells predominantly convenience goods (around 65% of total ground floor) with the remainder dedicated to comparison goods.

VACANCY RATES

No vacancies at the time of our site inspection.

COMMERCIAL RENTS & YIELDS

No published information available for this centre.

CUSTOMERS' VIEWS & BEHAVIOURS

Based on the results of the 2016 household interview survey, the Tesco superstore principally serves the southern/ eastern and central parts of Colchester Borough. Some 17.8% of consumers in Zone 3 [Rural South] do most of their main food shopping at Greenstead Road, followed by 8.2% in Zone 1 [Colchester].

ACCESSIBILITY & PEDESTRIAN FLOWS

Greenstead Road is situated less than one mile to the east of Colchester town centre, close to the A133 (Clingoe Hill) and the A134 (Eastern Approach). The superstore has a large surface level car park. A series of mini-roundabouts at the centre's entrance/egress make the vehicular approach somewhat difficult.

The centre is served by Hythe rail station (to the northwest) and bus services to/from the town centre and surrounding communities (with bus stops along Greenstead Road and Hythe Station Road).

At the time of our site inspection, the Tesco superstore was busy and the car park at approximately 80-90% capacity.

ENVIRONMENTAL QUALITY

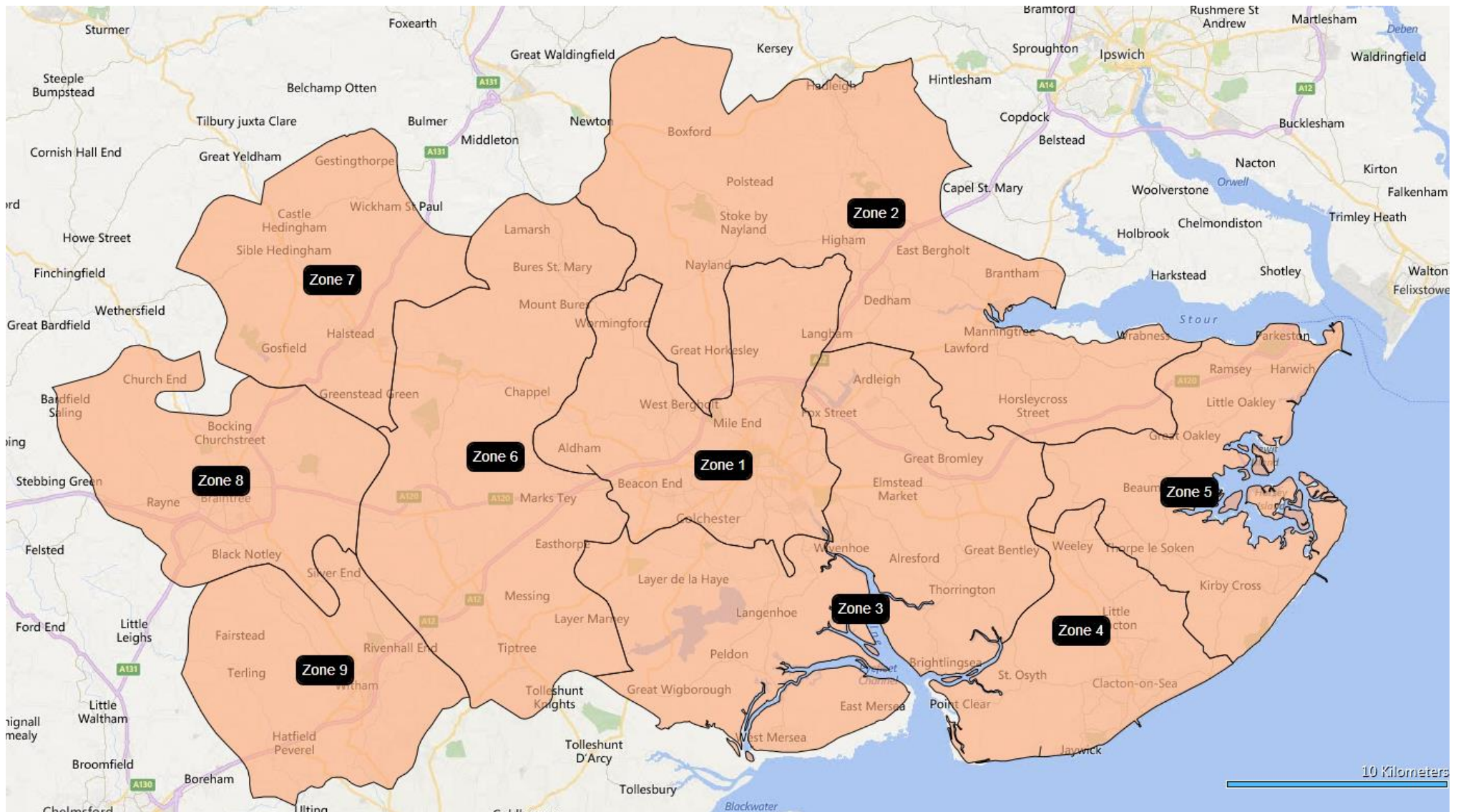
The centre is dominated by the Tesco superstore and surface level car park, surrounded by brick walls and railings (notably to the east along Greenstead Road). High traffic flows and general congestion create a relatively poor pedestrian experience.

PERCEPTION OF SAFETY

We identified no adverse issues with regard to safety or security during our site inspection.

Appendix C

Plan of Catchment Area



Appendix D

NEMS Market Research's Technical Report on the Household Interview Survey



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**Colchester Borough Retail Study 2016
for
Cushman & Wakefield**

October 2016

Job Ref: 050916

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Introduction

1.1 Research Background & Objectives

To conduct a survey amongst residents in the Colchester area to assess shopping habits for main food and grocery, top-up, non-food shopping and leisure activities.

1.2 Research Methodology

A total of 1,200 telephone interviews were conducted between Tuesday 27th September 2016 and Wednesday 12th October 2016. Interviews were conducted using NEMS in-house CATI (Computer Assisted Telephone Interviewing) Unit. Respondents were contacted during the day and in the evening. All respondents were the main shopper in the household, determined using a preliminary filter question.

1.3 Sampling

1.3.1 Survey Area

The survey area was segmented into 9 zones, defined using postcode sectors. The zone details were:

Zone	Postcode Sectors	Number of Interviews
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	240
2- Rural North	CO6 4, CO6 5, CO7 6, CO10 5, CO11 1, CO11 2, IP7 5	100
3- Rural South	CO2 0, CO5 7, CO5 8, CO7 0, CO7 7, CO7 8, CO7 9	120
4- Clacton	CO15 1, CO15 2, CO15 3, CO15 4, CO15 5, CO15 6, CO16 7, CO16 8, CO16 9	160
5- Frinton/Harwich	CO12 3, CO12 4, CO12 5, CO13 0, CO13 9, CO14 8, CO16 0	120
6- Rural West	CO5 0, CO5 9, CO6 1, CO6 2, CO8 5	100
7- Halstead	CO9 1, CO9 2, CO9 3	100
8- Braintree	CM7 1, CM7 3, CM7 5, CM7 9, CM77 6, CM77 7, CM77 8	160
9- Witham	CM3 2, CM8 1, CM8 2, CM8 3	100
Total		1,200

1.3.2 Telephone Numbers

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

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

1.3.3 Sample Profile

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

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

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

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

updated and is therefore probably the most accurate and up to date information of its kind.

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

1.3.4 Time of Interviewing

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

1.3.5 Monitoring of Calls

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

1.4 Weightings

To correct the small differences between the sample profile and population profile, the data was weighted. The population is of the main shopper in the household. Weightings have been applied to age bands based on an estimated age profile of main shoppers (see section 1.3.3 for details). The weighted totals differ occasionally from the adjusted population due to rounding error. Details of the age weightings are given in the table below:

Age	Main Shopper Profile (%)	Interviews Achieved	Age Weightings
18-34	19.74%	110	2.0989
35-44	17.03%	152	1.3107
45-54	17.47%	252	0.8110
55-64	18.49%	242	0.8937
65+	27.27%	414	0.7708
(Refused)	n/a	30	1.0000
Total		1,200	

Further weightings were then applied to adjust zone samples to be representative by population. Details of those weightings are given in the table below:

Zone	Population *	Interviews Achieved	Interviews Achieved (Weighted by Age)	Zone Weightings
1	139,000	240	244	1.4074
2	35,000	100	96	0.9025
3	47,000	120	120	0.9631
4	70,000	160	154	1.1257
5	47,000	120	118	0.9795
6	37,000	100	95	0.9627
7	21,000	100	120	0.4329
8	62,000	160	149	1.0267
9	28,000	100	104	0.6642
Total	486,000	1,200		

* Source: Census 2011

1.5 Statistical Accuracy

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

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

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

For example, if 50% of a sample of 1,200 answers “Yes” to a question, we can be 95% sure that between 47.2% and 52.8% of the population holds the same opinion (i.e. +/- 2.8%). The following is a guide showing confidence intervals attached to various sample sizes from the study:

%ge Response	95% confidence interval
10%	±1.7%
20%	±2.3%
30%	±2.6%
40%	±2.8%
50%	±2.8%

1.6 Data Tables

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

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

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

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

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

Appendix E

RECAP Model Tables

RECAP

The retail capacity forecasting model

Project:	Colchester Retail and Town Centre Study 2016	Number:	162JFR00
Client:	Colchester Borough Council	Status:	FINAL DRAFT
Date of Latest Revision:	07.11.2016	File:	Colchester RECAP Model 2016

Retail Locations Modelled:	Colchester Town Centre
	Tollgate
	Turner Rise
	Peartree Road
	Highwoods
	Greenstead Road
	Tiptree
	Non-central stores in Borough

Scenarios Modelled:	1	Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.
	2	Committed retail development from 2018, and further new retail development from 2023 in Colchester Town Centre, altering the balance of market shares with Tollgate, such that potential growth in comparison goods expenditure at Tollgate is transferred to Colchester Town Centre.

Notes:	Price basis is 2014 prices. Rounded figures are displayed in all tables.
--------	--

Catchment Area Population and Expenditure

Table: 1
CATCHMENT AREA POPULATION FORECASTS

Zone	Postcode Sectors	Base Year	Forecasting Years			
		2016	2018	2023	2028	2033
1	Details of the Postcode Sectors comprising each Zone set out at Appendix accompanying the main report.	137,156	140,511	148,208	156,144	164,085
2		34,422	34,598	35,064	35,509	35,957
3		44,270	44,677	45,659	46,660	47,654
4		66,195	67,274	70,540	73,578	76,620
5		44,671	45,168	46,574	47,919	49,254
6		35,114	35,531	36,448	37,397	38,349
7		21,854	22,279	23,331	24,362	25,405
8		62,904	64,088	67,467	70,615	73,806
9		39,414	39,955	41,103	42,300	43,506
TOTAL		486,000	494,081	514,394	534,484	554,636

Sources:

Pitney Bowes - GeolInsight Report for Colchester Catchment Area, September 2016.

Notes:

Pitney Bowes population forecasts are only up to 2026. Forecasts for 2028 and 2033 extrapolated by trend projection.

Table: 2
CATCHMENT AREA PER CAPITA EXPENDITURE

Price Basis:		2014 Prices									
Catchment Zone	CONVENIENCE GOODS					COMPARISON GOODS					
	Per Capita Expenditure Including Special Form of Trading					Per Capita Expenditure Including Special Form of Trading					
	Base Year	Forecasting Years				Base Year	Forecasting Years				
	2016	2018	2023	2028	2033	2016	2018	2023	2028	2033	
1	1,945	1,941	1,970	1,998	2,016	3,695	3,943	4,587	5,246	5,897	
2	2,060	2,095	2,216	2,334	2,446	3,872	4,218	5,118	6,037	6,943	
3	2,163	2,191	2,297	2,400	2,495	4,039	4,382	5,270	6,175	7,069	
4	2,137	2,147	2,197	2,246	2,289	3,643	3,919	4,607	5,308	6,008	
5	2,165	2,188	2,275	2,359	2,437	3,822	4,138	4,938	5,754	6,564	
6	2,140	2,162	2,258	2,352	2,437	4,023	4,353	5,216	6,099	6,969	
7	2,183	2,189	2,241	2,292	2,333	3,973	4,265	5,015	5,781	6,540	
8	2,147	2,151	2,194	2,237	2,271	3,918	4,204	4,924	5,661	6,395	
9	2,201	2,221	2,312	2,401	2,481	4,012	4,335	5,182	6,047	6,900	
Catchment Area Average	2,091	2,102	2,164	2,224	2,276	3,834	4,125	4,874	5,638	6,395	
Expenditure on Special Forms of Trading (%)*	5.5	6.0	6.5	7.0	7.5	16.0	17.0	19.0	20.0	21.0	
Catchment Zone	Per Capita Expenditure EXCLUDING* Special Form of Trading					Per Capita Expenditure EXCLUDING* Special Form of Trading					
	Base Year	Forecasting Years				Base Year	Forecasting Years				
	2016	2018	2023	2028	2033	2016	2018	2023	2028	2033	
1	1,838	1,825	1,842	1,858	1,865	3,104	3,272	3,715	4,197	4,659	
2	1,947	1,969	2,072	2,171	2,262	3,253	3,501	4,146	4,830	5,485	
3	2,044	2,060	2,147	2,232	2,308	3,393	3,637	4,269	4,940	5,585	
4	2,019	2,018	2,054	2,089	2,117	3,060	3,253	3,731	4,246	4,747	
5	2,046	2,057	2,127	2,193	2,254	3,210	3,434	4,000	4,603	5,186	
6	2,023	2,033	2,111	2,187	2,254	3,379	3,613	4,225	4,879	5,506	
7	2,063	2,057	2,095	2,131	2,158	3,337	3,540	4,062	4,625	5,167	
8	2,029	2,022	2,052	2,080	2,101	3,291	3,489	3,988	4,529	5,052	
9	2,080	2,088	2,162	2,233	2,295	3,370	3,598	4,197	4,838	5,451	
Catchment Area Average	1,976	1,976	2,023	2,068	2,105	3,220	3,424	3,948	4,510	5,052	

Source:

Pitney Bowes 'GeolInsight Report' for the Catchment Area, September 2016; with interpolation for 2018 and 2023, and trend-based extrapolation

Catchment Zone	TOTAL RETAIL EXPENDITURE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2016 (£000)	2018 (£000)	2023 (£000)	2028 (£000)	2033 (£000)	2016 (£000)	2018 (£000)	2023 (£000)	2028 (£000)	2033 (£000)
1	252,120	256,403	272,989	290,066	305,988	425,674	459,821	550,656	655,292	764,462
2	67,005	68,132	72,642	77,091	81,351	111,967	121,112	145,370	171,495	197,232
3	90,476	92,017	98,048	104,136	109,993	150,213	162,481	194,897	230,492	266,132
4	133,672	135,759	144,921	153,670	162,215	202,543	218,819	263,218	312,426	363,678
5	91,383	92,910	99,053	105,109	111,014	143,402	155,115	186,292	220,567	255,425
6	71,019	72,225	76,937	81,786	86,430	118,667	128,364	153,994	182,469	211,134
7	45,085	45,837	48,886	51,920	54,834	72,932	78,862	94,771	112,672	131,263
8	127,623	129,602	138,422	146,889	155,065	207,026	223,599	269,075	319,829	372,851
9	81,983	83,418	88,849	94,461	99,838	132,819	143,763	172,521	204,639	237,147
TOTALS	960,365	976,303	1,040,747	1,105,127	1,166,728	1,565,244	1,691,937	2,030,794	2,409,881	2,799,325

Table: 4

COMPARISON GOODS PER CAPITA EXPENDITURE BY GOODS TYPE

Source: Pitney Bowes 'Geolinsight Report' for the catchment area, September 2016.
SFT deductions estimated by C&W based on forecasts by Oxford Economics & Verdict Research Limited and regard for the results of the Household Interview Survey 2016.

Catchment Zone	Clothing & footwear (£000)	Furniture/floorcrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden prdcts (£000)	Chemists, medcl & beauty goods (£000)	All other comprns gds (£000)
1	104,463	36,725	11,764	9,105	47,426	21,247	71,949	122,934
2	27,477	9,660	3,094	2,395	12,475	5,589	18,925	32,336
3	36,863	12,960	4,151	3,213	16,736	7,498	25,389	43,381
4	49,705	17,474	5,598	4,332	22,566	10,110	34,234	58,494
5	35,192	12,372	3,963	3,067	15,977	7,158	24,238	41,415
6	29,122	10,238	3,280	2,538	13,221	5,923	20,057	34,271
7	17,898	6,292	2,016	1,560	8,126	3,640	12,327	21,063
8	50,805	17,861	5,721	4,428	23,066	10,333	34,992	59,789
9	32,595	11,459	3,671	2,841	14,798	6,629	22,450	38,358
TOTALS	384,121	135,042	43,258	33,479	174,392	78,126	264,562	452,041

3

Scenario	1
Colchester Town Centre	

Table: **6**
CONVENIENCE GOODS MARKET SHARES IN

2016

2016 Allocations to			
Colchester Town Centre			
Indicated by household interview survey			
Zones	Main Food Q1	Top-up convenience Q3	WEIGHTED AVERAGE
	Expenditure weighting		
	70	30	100
	(%)	(%)	(%)
1	7.7	13.0	9.3
2	2.0	1.2	1.8
3	7.0	2.6	5.7
4	0.0	0.0	0.0
5	0.0	1.3	0.4
6	4.5	1.0	3.5
7	0.8	2.4	1.3
8	1.2	0.0	0.8
9	0.0	0.0	0.0

Sources: Household Interview Survey 2016.
Expenditure weighting by C&W.

Table: **7**
COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN

2016

2016 Allocations to									
Colchester Town Centre									
Indicated by Household Interview Survey									
	Clothing & footwear Q4	Furniture/ floorcvsrgs etc Q5	Household Textiles Q6	Household Appliances Q7	Audio-visual equipment Q8	Hardware, DIY, garden products Q9	Chemists, medcl & beauty goods Q10	All other comparison gds Q11	WEIGHTED AVERAGE
Zones	Expenditure weighting								
	790	278	89	69	359	161	544	930	3,220
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	69.7	12.5	25.4	8.7	9.7	5.8	33.3	75.6	47.9
2	41.9	23.3	13.9	6.4	10.6	6.5	8.7	45.2	28.8
3	65.8	16.7	34.8	11.8	14.9	12.4	31.0	53.0	41.6
4	33.5	10.3	10.0	2.8	2.5	0.7	0.0	14.3	13.9
5	58.8	24.1	24.8	3.6	3.2	3.5	0.8	38.5	29.1
6	62.7	12.6	19.9	5.0	5.5	6.5	8.4	56.1	35.7
7	26.1	13.3	22.1	5.0	5.5	0.0	3.1	31.5	18.5
8	6.8	2.5	4.1	1.4	0.9	0.7	1.8	2.2	3.1
9	5.9	2.3	7.6	4.1	4.1	0.0	0.0	1.8	2.9

Sources: Household Interview Survey 2016.
RECAP Table 4 for expenditure weights.

8

Scenario:	1	Location:	Colchester Town Centre
Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.			

Market shares correction factors:	Convenience Goods:	120 % of survey indicated figures
	Comparison Goods:	90 % of survey indicated figures

Sources:	<p>RECAP Model.</p> <p>C&W for market share corrections.</p>
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RECAP Model.
C&W for market share corrections.

9

2016

Sources:	RECAP Model
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10

Sources:	RECAP Model:
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Table:

11

**SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN**

2016

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Sainsbury's (Priory Walk)	1,235	95	1,173	10,900	12,788
Marks & Spencer (High Street)			1,058	9,821	10,386
Iceland (St John's Walk)	480	98	470	7,219	3,396
Other convenience goods shops and stores	3,317	85	2,819	5,000	14,095
ALL STORES	5,032		5,520	7,367	40,665

Sources: IGD, Experian Goad, C&W, Mintel Retail Rankings.

Table:

12

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

2016

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
ALL STORES	-		-		-
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
Vacant ('Prime') Town Centre Comparison Goods Floorspace	2,841	85	2,415	6,000	14,489
Primark (former BHS store, Lion Walk)*	5,500	85	4,675	6,132	28,667
ALL STORES AND SCHEMES	8,341		7,090	6,087	43,156

Sources: Experian Goad, C&W, Mintel Retail Rankings.
*CoStar (15 February 2016).

Table: 13

FORECAST RETAIL CAPACITY

Scenario:	1					Location:	Colchester Town Centre				
Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.											
Growth in sales per sq m from shop floorspace existing in						Comparison Goods:	2.50 % pa		2016 to 2033		
	CONVENIENCE GOODS					COMPARISON GOODS					
	2016	2018	2023	2028	2033	2016	2018	2023	2028	2033	
Residents' Spending £000	40,425	41,110	43,784	46,517	49,090	391,912	423,610	507,982	602,887	700,334	
Plus visitors' spending (%)	-	-	-	-	-	1.0	1.0	1.0	1.0	1.0	
Total spending (£000)	40,425	41,110	43,784	46,517	49,090	395,832	427,846	513,061	608,916	707,338	
Existing shop floorspace (sq m net)	5,520	5,520	5,520	5,520	5,520	62,052	62,052	62,052	62,052	62,052	
Sales per sq m net (£)	7,323	7,367	7,367	7,367	7,367	6,379	6,702	7,583	8,579	9,706	
Sales from extg flrspace (£000)	40,425	40,665	40,665	40,665	40,665	395,832	415,871	470,519	532,350	602,305	
Available spending to support new shops (£000)	0	445	3,119	5,852	8,425	0	11,976	42,542	76,567	105,033	
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	45,341	51,299	58,040	65,667	
Net available spending for new shops (£000)	0	445	3,119	5,852	8,425	0	-33,365	-8,757	18,526	39,366	
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	6,000	6,304	7,132	8,069	9,130	
Capacity for new shop flrspace (sq m net)	0	37	260	488	702	0	-5,293	-1,228	2,296	4,312	
Market Share of Catchment Area Expenditure	4.2%	4.2%	4.2%	4.2%	4.2%	25.0%	25.0%	25.0%	25.0%	25.0%	

Sources: RECAP Model. Experian Goad for Comparison Goods Floorspace (Ground Floor only) with C&W allowance for Upper/ Mezzanine Floors.

Notes: Includes allowance for vacant Class A1 floorspace in Colchester Town Centre.

Scenario	1
Tollgate	

Table: **14**
CONVENIENCE GOODS MARKET SHARES IN **2016**

2016 Allocations to			
Tollgate			
Indicated by household interview survey			
Zones	Main Food Q1	Top-up convenience Q3	WEIGHTED AVERAGE
	Expenditure weighting		
	70 (%)	30 (%)	100 (%)
1	29.0	11.6	23.8
2	2.1	1.0	1.8
3	11.9	4.0	9.5
4	0.0	0.0	0.0
5	1.5	0.0	1.1
6	38.0	14.2	30.9
7	0.0	0.9	0.3
8	0.5	0.0	0.4
9	3.6	1.1	2.9

Sources: Household Interview Survey 2016.
Expenditure weighting by C&W.

Table: **15**
COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN **2016**

2016 Allocations to									
Tollgate									
Indicated by Household Interview Survey									
	Clothing & footwear Q4	Furniture/ floorcvsr etc Q5	Household Textiles Q6	Household Appliances Q7	Audio-visual equipment Q8	Hardware, DIY, garden products Q9	Chemists, medcl & beauty goods Q10	All other comparison gds Q11	WEIGHTED AVERAGE
Zones	Expenditure weighting								
	790 (%)	278 (%)	89 (%)	69 (%)	359 (%)	161 (%)	544 (%)	930 (%)	3,220 (%)
1	9.4	53.4	30.4	75.1	77.2	35.6	23.3	10.7	26.8
2	0.0	14.3	6.4	18.4	27.0	3.2	1.1	0.0	5.2
3	9.9	45.0	24.2	58.2	57.7	15.9	4.9	7.4	18.4
4	1.4	23.7	8.0	5.8	3.4	0.7	0.0	1.1	3.5
5	2.4	19.4	22.6	19.4	19.0	1.7	0.0	0.0	5.5
6	5.6	57.1	40.9	77.0	78.2	48.8	27.5	9.4	27.6
7	0.0	19.4	11.3	29.9	38.9	2.7	0.7	0.0	7.2
8	0.6	19.0	13.3	24.7	38.5	1.0	0.0	0.0	7.0
9	5.7	28.3	6.8	16.3	13.5	2.1	0.0	0.0	6.0

Sources: Household Interview Survey 2016. RECAP Table 4 for expenditure weights.

Table:

16

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

[illegible]

Sources: RECAP Model.
C&W for market share corrections.

COMPARISON GOODS SALES BY GOODS TYPE IN 2016

Sources:	RECAP Model
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FORECAST RETAIL SALES

Sources:	RECAP Model
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Table:

19

**SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN**

2016

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Sainsbury's (Western Approach)	10,650	58	6,177	10,900	67,329
Iceland (The Tollgate Centre)	744	98	729	7,219	5,264
ALL STORES	11,394		6,906	10,511	72,593

Sources: Experian Goad, Trevor Wood Database, C&W, Mintel Retail Rankings.

Table:

20

SALES CAPACITY OF EXISTING COMPARISON GOODS FLOORSPACE

Net to gross ratio:	90 % (unless otherwise indicated)			Date of sales densities:		2014
Store	Gross Firspce (sq m)	Net Firspce (sq m)	Sales Density 2014 (£per sqm net)	Sales 2014 (£000)		
Comparison Goods Floorspace in stores & warehouses:						
Currys & PC World [5]	1,900	1,710	7,000	11,970		
The Carphone Warehouse [1]	280	252	n/a	2,000		
Next	1,906	1,715	4,404	7,555		
Next Home [5]	1,850	1,665	3,600	5,994		
Staples	1,440	1,296	1,266	1,641		
B&M Bargains	1,160	1,044	3,452	3,604		
Smyths Toys	1,394	1,255	n/a	6,145		
Hughes Electrical [5]	990	891	10,800	9,623		
Dreams	1,050	945	n/a	1,391		
AHF (Anglia Home Furnishings) [5]	2,261	2,035	2,160	4,395		
Sports Direct	1,755	1,580	5,497	8,683		
Wren Living [5]	910	819	3,360	2,752		
Harveys	860	774	2,177	1,685		
Bensons For Beds [2]	600	540	2,177	1,176		
Carpetright	1,270	1,143	1,266	1,447		
Magnet	1,130	1,017	n/a	786		
SCS	1,711	1,540	2,394	3,687		
Carpets 4 Less [5]	647	582	1,080	629		
Boots [3]	540	486	10,963	5,328		
Argos	1,103	n/a	n/a	6,606		
Homebase [4]	5,528	4,726	1,309	6,187		
Comparison Goods Floorspace in main foodstores:						
Sainsbury's (Western Approach) [5]	n/a	4,473	8,300	37,126		
TOTALS Trading at the date of the Household Interview Survey of Shopping Patterns		30,488	4,277	130,408		

Sources: Mintel UK Retail Rankings (April 2016), with VAT added for compatibility with expenditure. Trevor Wood Database, VOA and Experian Goad for Comparison Goods Floorspace with C&W allowance for Upper/ Mezzanine Floors.

Notes:

- (1) Currys & PC World concession.
 (2) Harveys upper floor.
 (3) 2014 sales density.
 (4) 3,888 sq m net sales but 5% excluded for trade / non-retail sales; includes concessions (Sharps & Habitat).
 (5) Estimated sales density.
 Where no sales density is indicated (n/a), sales are based on average sales per outlet.

Table:

21

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

2016

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
ALL STORES	-		-		-
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
Vacant Retail Warehouse (former Seapets unit, Tollgate Road)	670	90	603	4,000	2,412
ALL STORES AND SCHEMES	670		603		2,412

Sources: Experian Goad, C&W.

Table: **22**
FORECAST RETAIL CAPACITY

Scenario:	1					Location: Tollgate					
Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.											
Growth in sales per sq m from shop floorspace existing in						Comparison Goods:		2.50 % pa		2016 to 2028	
	CONVENIENCE GOODS					COMPARISON GOODS					
	2016	2018	2023	2028	2033	2016	2018	2023	2028	2033	
Residents' Spending £000	76,119	77,413	82,440	87,601	92,465	166,686	180,155	216,012	256,512	298,197	
Plus visitors' spending (%)	-	-	-	-	-	0.5	0.5	0.5	0.5	0.5	
Total spending (£000)	76,119	77,413	82,440	87,601	92,465	167,520	181,056	217,092	257,794	299,688	
Existing shop floorspace (sq m net)	6,906	6,906	6,906	6,906	6,906	30,488	30,488	30,488	30,488	30,488	
Sales per sq m net (£)	11,022	10,511	10,511	10,511	10,511	5,495	4,721	5,342	6,044	6,838	
Sales from extg flrspace (£000)	76,119	72,593	72,593	72,593	72,593	167,520	143,946	162,861	184,263	208,476	
Available spending to support new shops (£000)	0	4,820	9,847	15,008	19,872	0	37,110	54,230	73,532	91,212	
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	2,534	2,867	3,244	3,670	
Net available spending for new shops (£000)	0	4,820	9,847	15,008	19,872	0	34,576	51,363	70,288	87,542	
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	6,000	6,304	7,132	8,069	9,130	
Capacity for new shop flrspace (sq m net)	0	402	821	1,251	1,656	0	5,485	7,202	8,710	9,589	
Market Share of Catchment Area Expenditure	7.9%	7.9%	7.9%	7.9%	7.9%	10.6%	10.6%	10.6%	10.6%	10.7%	

Sources: RECAP Model.

Notes:

Scenario	1
Turner Rise	

Table: **23**
CONVENIENCE GOODS MARKET SHARES IN **2016**

2016				Allocations to	
Turner Rise					
Indicated by household interview survey					
Zones	Main Food	Top-up convenience	WEIGHTED AVERAGE		
	Q1	Q3			
	Expenditure weighting				
	70 (%)	30 (%)	100 (%)		
1	13.3	4.7	10.7		
2	4.3	2.5	3.8		
3	1.9	2.3	2.0		
4	1.1	0.0	0.8		
5	3.2	0.0	2.2		
6	1.9	1.2	1.7		
7	2.7	0.0	1.9		
8	0.6	1.5	0.9		
9	0.0	0.0	0.0		

Sources: Household Interview Survey 2016.
Expenditure weighting by C&W.

Table: **24**
COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN **2016**

2016 Allocations to									
Turner Rise									
Indicated by Household Interview Survey									
Clothing & footwear Q4	Furniture/ floorcvsr etc Q5	Household Textiles Q6	Household Appliances Q7	Audio-visual equipment Q8	Hardware, DIY, garden products Q9	Chemists, medcl & beauty goods Q10	All other comparison gds Q11	WEIGHTED AVERAGE	
Expenditure weighting									
790 (%)	278 (%)	89 (%)	69 (%)	359 (%)	161 (%)	544 (%)	930 (%)	3,220 (%)	
1	1.3	0.6	23.2	0.5	0.0	3.9	7.1	1.1	2.7
2	0.0	0.0	10.0	0.0	0.0	1.1	3.7	0.0	1.0
3	0.0	0.0	16.6	0.0	0.0	0.0	0.9	2.6	1.4
4	0.7	0.9	8.7	0.7	0.0	0.0	0.0	0.0	0.5
5	1.0	0.0	8.0	0.0	0.0	0.0	0.0	0.0	0.5
6	1.2	0.0	13.9	0.0	0.0	0.0	2.3	0.0	1.1
7	2.3	3.2	5.9	1.2	1.3	0.0	1.9	0.0	1.5
8	0.0	0.0	2.5	0.0	0.9	0.0	0.0	0.0	0.2
9	0.0	0.0	2.5	0.0	0.0	0.0	0.0	0.0	0.1

Sources: Household Interview Survey 2016. RECAP Table 4 for expenditure weights.

Table: 25
MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario:		1		Location:		Turner Rise				
Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.										
Market shares correction factors:				Convenience Goods:		200% of survey indicated figures				
				Comparison Goods:		250% of survey indicated figures				
Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2016 (%)	2018 (%)	2023 (%)	2028 (%)	2033 (%)	2016 (%)	2018 (%)	2023 (%)	2028 (%)	2033 (%)
1	21	21	21	21	21	7	7	7	7	7
2	8	8	8	8	8	2	2	2	2	2
3	4	4	4	4	4	3	3	3	3	3
4	2	2	2	2	2	1	1	1	1	1
5	4	4	4	4	4	1	1	1	1	1
6	3	3	3	3	3	3	3	3	3	3
7	4	4	4	4	4	4	4	4	4	4
8	2	2	2	2	2	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0

Sources: RECAP Model.
C&W for market share corrections.

COMPARISON GOODS SALES BY GOODS TYPE IN 2016

Sources:	RECAP Model
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FORECAST RETAIL SALES

Sources:	RECAP Model
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Table: 28

**SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN**

2016

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Asda (Petrolea Close)	6,096	75	4,572	14,600	66,751
Iceland (Petrolea Close)	744	98	729	7,219	5,264
ALL STORES	6,840		5,301	13,585	72,015

Sources: Experian Goad, Trevor Wood Database, C&W, Mintel Retail Rankings.

Table: 29

SALES CAPACITY OF EXISTING COMPARISON GOODS FLOORSPACE

Net to gross ratio: 90 % (unless otherwise indicated)		Date of sales densities: 2014		
Store	Gross Firspce (sq m)	Net Firspce (sq m)	Sales Density 2014 (£per sqm net)	Sales 2014 (£000)
Comparison Goods Floorspace in stores & warehouses:				
Go Outdoors [1]	4,217	3,795	2,500	9,488
Home Bargains [1]	1,650	1,485	5,400	8,019
Bathstore	690	621	n/a	781
Dunelm	3,060	2,754	2,647	7,290
Bensons For Beds	1,030	927	2,117	1,962
WeDo Home [1]	830	747	2,500	1,868
Jollies Petfood Superstore	490	441	2,292	1,011
Comparison Goods Floorspace in main foodstores:				
Asda (Petrolea Close) [1]	n/a	1,524	10,100	15,392
TOTALS Trading at the date of the Household Interview Survey of Shopping Patterns		12,294	3,726	45,811

Sources: Mintel UK Retail Rankings (April 2016), with VAT added for compatibility with expenditure.
VOA and Experian Goad for Comparison Goods Floorspace.Notes: (1) Estimated sales density.
Where no sales density is indicated (n/a), sales are based on average sales per outlet.

Table: 30

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

2016

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
ALL STORES	-		-		-
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
ALL STORES AND SCHEMES	-		-		-

Sources:

Table: **31**
FORECAST RETAIL CAPACITY

Scenario:	1		Location:		Turner Rise						
Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.											
Growth in sales per sq m from shop floorspace existing in						Comparison Goods:		2.50 % pa		2016 to 2028	
	CONVENIENCE GOODS					COMPARISON GOODS					
	2016	2018	2023	2028	2033	2016	2018	2023	2028	2033	
Residents' Spending £000	74,740	76,000	80,953	85,993	90,738	46,480	50,229	60,206	71,526	83,217	
Plus visitors' spending (%)	-	-	-	-	-	-	-	-	-	-	
Total spending (£000)	74,740	76,000	80,953	85,993	90,738	46,480	50,229	60,206	71,526	83,217	
Existing shop floorspace (sq m net)	5,301	5,301	5,301	5,301	5,301	12,294	12,294	12,294	12,294	12,294	
Sales per sq m net (£)	14,099	13,585	13,585	13,585	13,585	3,781	4,113	4,654	5,265	5,957	
Sales from extg flrspace (£000)	74,740	72,015	72,015	72,015	72,015	46,480	50,567	57,212	64,730	73,236	
Available spending to support new shops (£000)	0	3,985	8,939	13,978	18,723	0	-338	2,994	6,796	9,980	
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	0	0	0	0	
Net available spending for new shops (£000)	0	3,985	8,939	13,978	18,723	0	-338	2,994	6,796	9,980	
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	4,000	4,203	4,755	5,380	6,086	
Capacity for new shop flrspace (sq m net)	0	332	745	1,165	1,560	0	-80	630	1,263	1,640	
Market Share of Catchment Area Expenditure	7.8%	7.8%	7.8%	7.8%	7.8%	3.0%	3.0%	3.0%	3.0%	3.0%	

Sources: RECAP Model.

Notes:

Scenario	1
Peartree Road	

Table: **32**
CONVENIENCE GOODS MARKET SHARES IN **2016**

2016 Allocations to			
Peartree Road			
Indicated by household interview survey			
Zones	Main Food Q1	Top-up convenience Q3	WEIGHTED AVERAGE
	Expenditure weighting		
	70 (%)	30 (%)	100 (%)
1	0.4	3.7	1.4
2	0.0	0.0	0.0
3	2.1	7.0	3.6
4	0.0	0.0	0.0
5	0.0	0.0	0.0
6	0.0	0.0	0.0
7	0.0	0.0	0.0
8	0.6	0.0	0.4
9	0.0	0.0	0.0

Sources: Household Interview Survey 2016.
Expenditure weighting by C&W.

Table: **33**
COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN **2016**

2016 Allocations to									
Peartree Road									
Indicated by Household Interview Survey									
Zones	Clothing & footwear Q4	Furniture/ floorcrgs etc Q5	Household Textiles Q6	Household Appliances Q7	Audio-visual equipment Q8	Hardware, DIY, garden products Q9	Chemists, medcl & beauty goods Q10	All other comparison gds Q11	WEIGHTED AVERAGE
	Expenditure weighting								
	790 (%)	278 (%)	89 (%)	69 (%)	359 (%)	161 (%)	544 (%)	930 (%)	3,220 (%)
1	0.0	6.2	0.0	0.0	0.0	2.2	0.3	0.0	0.7
2	0.0	0.0	1.2	1.2	0.0	0.0	0.0	0.0	0.1
3	0.0	2.5	1.1	0.0	0.0	0.7	0.0	0.0	0.3
4	0.0	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0
5	0.0	0.0	3.4	0.0	0.0	0.0	0.0	0.0	0.1
6	0.0	4.5	1.2	0.0	0.0	0.0	0.0	0.0	0.4
7	0.0	3.2	3.2	0.0	0.0	0.0	0.0	0.0	0.4
8	0.0	1.8	0.0	0.0	0.0	1.6	0.0	0.0	0.2
9	0.0	1.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1

Sources: Household Interview Survey 2016. RECAP Table 4 for expenditure weights.

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Sources: RECAP Model.
C&W for market share corrections.

COMPARISON GOODS SALES BY GOODS TYPE IN 2016

Sources:	RECAP Model
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FORECAST RETAIL SALES

Sources:	RECAP Model
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Table: 37

**SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN**

2016

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Co-Op (Fiveways Retail Park)	1,470	85	1,250	8,400	10,496
ALL STORES	1,470		1,250	8,400	10,496

Sources: Experian Goad, C&W, Mintel Retail Rankings.

Table: 38

SALES CAPACITY OF EXISTING COMPARISON GOODS FLOORSPACE

Net to gross ratio:	Date of sales densities:			
90 % (unless otherwise indicated)	2014			
Store	Gross Flrspace (sq m)	Net Flrspace (sq m)	Sales Density 2014 (£per sqm net)	Sales 2014 (£000)
Comparison Goods Floorspace in stores & warehouses:				
Poundstretcher	1,110	999	2,189	2,187
Barnado's [1]	390	351	n/a	120
Mattressman [2]	360	324	2,040	661
Hatfields of Colchester	2,370	2,133	1,855	3,957
Hatfields Budget Clearance [2]	2,110	1,899	1,440	2,735
Topps Tiles	600	540	1,211	654
It's Bed Time	630	567	2,040	1,157
Conway Furniture [2]	1,260	1,134	1,800	2,041
Lewis's [2]	1,280	1,152	2,280	2,627
Other comparison goods stores (The Stanway Centre and Angora Business Park)	4,020	3,618	3,000	10,854
Comparison Goods Floorspace in main foodstores:				
Co-Op (Fiveways Retail Park)	n/a	221	8,000	1,764
TOTALS Trading at the date of the Household Interview Survey of Shopping Patterns		12,938	2,223	28,755

Sources: Mintel UK Retail Rankings (April 2016), with VAT added for compatibility with expenditure.
Experian Goad for Comparison Goods Floorspace.

Notes:

(1) Estimated total sales.
(2) Estimates sales density.
Where no sales density is indicated (n/a), sales are based on average sales per outlet.

Table: 39

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

2016

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
ALL STORES	-		-		-
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
ALL STORES AND SCHEMES	-		-		-

Sources:

Table: **40**
FORECAST RETAIL CAPACITY

Scenario:	1					Location: Peartree Road				
Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.										
Growth in sales per sq m from shop floorspace existing in						2016	Comparison Goods: 2.50 % pa	2016 to 2028		
	CONVENIENCE GOODS					COMPARISON GOODS				
	2016	2018	2023	2028	2033	2016	2018	2023	2028	2033
Residents' Spending £000	10,842	11,025	11,746	12,477	13,170	28,696	31,012	37,178	44,175	51,403
Plus visitors' spending (%)	-	-	-	-	-	-	-	-	-	-
Total spending (£000)	10,842	11,025	11,746	12,477	13,170	28,696	31,012	37,178	44,175	51,403
Existing shop floorspace (sq m net)	1,250	1,250	1,250	1,250	1,250	12,938	12,938	12,938	12,938	12,938
Sales per sq m net (£)	8,677	8,400	8,400	8,400	8,400	2,218	2,453	2,776	3,141	3,553
Sales from extg flrspace (£000)	10,842	10,496	10,496	10,496	10,496	28,696	31,741	35,912	40,631	45,970
Available spending to support new shops (£000)	0	529	1,251	1,981	2,674	0	-729	1,267	3,544	5,433
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	0	0	0	0
Net available spending for new shops (£000)	0	529	1,251	1,981	2,674	0	-729	1,267	3,544	5,433
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	4,000	4,203	4,755	5,380	6,086
Capacity for new shop flrspace (sq m net)	0	44	104	165	223	0	-173	266	659	893
Market Share of Catchment Area Expenditure	1.1%	1.1%	1.1%	1.1%	1.1%	1.8%	1.8%	1.8%	1.8%	1.8%

Sources: RECAP Model.

Notes:

Scenario	1
Highwoods	

Table: **41**
CONVENIENCE GOODS MARKET SHARES IN **2016**

2016 Allocations to			
Highwoods			
Indicated by household interview survey			
Zones	Main Food Q1	Top-up convenience Q3	WEIGHTED AVERAGE
	Expenditure weighting		
	70 (%)	30 (%)	100 (%)
1	19.2	13.6	17.5
2	8.2	3.5	6.8
3	10.5	4.5	8.7
4	0.0	0.0	0.0
5	1.5	0.8	1.3
6	2.7	0.0	1.9
7	0.8	0.0	0.6
8	1.5	0.0	1.1
9	0.0	0.0	0.0

Sources: Household Interview Survey 2016.
Expenditure weighting by C&W.

Table: **42**
COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN **2016**

2016 Allocations to									
Highwoods									
Indicated by Household Interview Survey									
Zones	Clothing & footwear Q4	Furniture/ floorcrgs etc Q5	Household Textiles Q6	Household Appliances Q7	Audio-visual equipment Q8	Hardware, DIY, garden products Q9	Chemists, medcl & beauty goods Q10	All other comparison gds Q11	WEIGHTED AVERAGE
	Expenditure weighting								
	790 (%)	278 (%)	89 (%)	69 (%)	359 (%)	161 (%)	544 (%)	930 (%)	3,220 (%)
1	2.1	0.0	2.4	2.0	3.1	1.5	6.8	2.6	2.9
2	0.0	0.0	1.2	2.6	2.8	1.0	0.0	0.0	0.5
3	0.9	5.6	1.9	0.0	1.1	3.8	3.8	0.0	1.7
4	0.0	0.0	1.2	0.0	0.0	0.0	0.9	0.0	0.2
5	0.0	0.0	0.0	0.0	0.0	1.7	0.8	0.0	0.2
6	0.0	0.0	1.2	0.0	1.5	0.0	0.0	0.0	0.2
7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
8	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.0	0.1
9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Sources: Household Interview Survey 2016. RECAP Table 4 for expenditure weights.

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario:	1	Location:	Highwoods							
Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.										
Market shares correction factors:		Convenience Goods:				80 % of survey indicated figures				
		Comparison Goods:				125 % of survey indicated figures				
Catchment Zone										
	CONVENIENCE GOODS					COMPARISON GOODS				
	2016 (%)	2018 (%)	2023 (%)	2028 (%)	2033 (%)	2016 (%)	2018 (%)	2023 (%)	2028 (%)	2033 (%)
1	14	14	14	14	14	4	4	4	4	4
2	5	5	5	5	5	1	1	1	1	1
3	7	7	7	7	7	2	2	2	2	2
4	0	0	0	0	0	0	0	0	0	0
5	1	1	1	1	1	0	0	0	0	0
6	2	2	2	2	2	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0
8	1	1	1	1	1	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0

Sources: RECAP Model.
C&W for market share corrections.

Table:

44

COMPARISON GOODS SALES BY GOODS TYPE IN**2016**

Catchment Zones	2016 Sales in Highwoods							
	By Comparison Goods Type.							
	Clothing & footwear (£000)	Furniture/ floorcrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	2,742	0	353	228	1,838	398	6,116	3,995
2	0	0	46	78	437	70	0	0
3	415	907	99	0	230	356	1,206	0
4	0	0	84	0	0	0	385	0
5	0	0	0	0	0	152	242	0
6	0	0	49	0	248	0	0	0
7	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	262	0
9	0	0	0	0	0	0	0	0
TOTALS	3,157	907	631	305	2,752	976	8,212	3,995
MARKET SHARES	0.8%	0.7%	1.5%	0.9%	1.6%	1.2%	3.1%	0.9%

Sources:

RECAP Model.

Table:

45

FORECAST RETAIL SALES

FORECAST RETAIL SALES										
Scenario:	1	Location: Highwoods								
Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.										
Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2016 (£000)	2018 (£000)	2023 (£000)	2028 (£000)	2033 (£000)	2016 (£000)	2018 (£000)	2023 (£000)	2028 (£000)	2033 (£000)
1	35,297	35,896	38,218	40,609	42,838	17,027	18,393	22,026	26,212	30,578
2	3,350	3,407	3,632	3,855	4,068	1,120	1,211	1,454	1,715	1,972
3	6,333	6,441	6,863	7,290	7,700	3,004	3,250	3,898	4,610	5,323
4	0	0	0	0	0	0	0	0	0	0
5	914	929	991	1,051	1,110	0	0	0	0	0
6	1,420	1,445	1,539	1,636	1,729	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0
8	1,276	1,296	1,384	1,469	1,551	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0
TOTALS	48,591	49,414	52,627	55,909	58,995	21,151	22,854	27,378	32,536	37,873

Sources:

RECAP Model.

Table: 46

**SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN**

2016

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Tesco Extra (Highwoods Square)	6,241	65	4,057	10,700	43,406
ALL STORES	6,241		4,057	10,700	43,406

Sources: IGD, C&W, Mintel Retail Rankings.

Table: 47

SALES CAPACITY OF EXISTING COMPARISON GOODS FLOORSPACE

Net to gross ratio:	Date of sales densities: 2014			
90 % (unless otherwise indicated)				
Store	Gross Firspce (sq m)	Net Firspce (sq m)	Sales Density 2014 (£per sqm net)	Sales 2014 (£000)
Comparison Goods Floorspace in main foodstore:				
Tesco Extra (Highwoods Square) [1]	n/a	2,184	9,000	19,659
TOTALS Trading at the date of the Household Interview Survey of Shopping Patterns		2,184	9,000	19,659

Sources: IGD and C&W for Comparison Goods Floorspace.

Notes: (1) Estimated sales density.

Table: 48

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

2016

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
ALL STORES	-		-		-
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
ALL STORES AND SCHEMES	-		-		-

Sources:

Table: 49

FORECAST RETAIL CAPACITY

Scenario:	1					Location:	Highwoods				
Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.											
Growth in sales per sq m from shop floorspace existing in						2016	Comparison Goods:	2.50	% pa	2016 to 2028	
	CONVENIENCE GOODS						COMPARISON GOODS				
	2016	2018	2023	2028	2033	2016	2018	2023	2028	2033	
Residents' Spending £000	48,591	49,414	52,627	55,909	58,995	21,151	22,854	27,378	32,536	37,873	
Plus visitors' spending (%)	-	-	-	-	-	-	-	-	-	-	
Total spending (£000)	48,591	49,414	52,627	55,909	58,995	21,151	22,854	27,378	32,536	37,873	
Existing shop floorspace (sq m net)	4,057	4,057	4,057	4,057	4,057	2,184	2,184	2,184	2,184	2,184	
Sales per sq m net (£)	11,978	10,700	10,700	10,700	10,700	9,683	9,934	11,240	12,717	14,388	
Sales from extg flrspace (£000)	48,591	43,406	43,406	43,406	43,406	21,151	21,700	24,552	27,778	31,428	
Available spending to support new shops (£000)	0	6,008	9,221	12,503	15,589	0	1,154	2,826	4,759	6,445	
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	0	0	0	0	
Net available spending for new shops (£000)	0	6,008	9,221	12,503	15,589	0	1,154	2,826	4,759	6,445	
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	9,000	9,456	10,698	12,104	13,695	
Capacity for new shop flrspace (sq m net)	0	501	768	1,042	1,299	0	122	264	393	471	
Market Share of Catchment Area Expenditure	5.1%	5.1%	5.1%	5.1%	5.1%	1.4%	1.4%	1.3%	1.4%	1.4%	

Sources: RECAP Model.

Notes:

Scenario	1
Greenstead Road	

Table: **50**
CONVENIENCE GOODS MARKET SHARES IN **2016**

2016 Allocations to			
Greenstead Road			
Indicated by household interview survey			
Zones	Main Food Q1	Top-up convenience Q3	WEIGHTED AVERAGE
	Expenditure weighting		
	70 (%)	30 (%)	100 (%)
1	8.2	7.8	8.1
2	3.3	0.9	2.6
3	17.8	3.1	13.4
4	0.6	0.7	0.6
5	0.0	0.0	0.0
6	0.0	0.0	0.0
7	0.0	0.0	0.0
8	0.0	0.0	0.0
9	0.0	0.0	0.0

Sources: Household Interview Survey 2016.
Expenditure weighting by C&W.

Table: **51**
COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN **2016**

2016 Allocations to									
Greenstead Road									
Indicated by Household Interview Survey									
Zones	Clothing & footwear Q4	Furniture/ floorcvsr etc Q5	Household Textiles Q6	Household Appliances Q7	Audio-visual equipment Q8	Hardware, DIY, garden products Q9	Chemists, medcl & beauty goods Q10	All other comparison gds Q11	WEIGHTED AVERAGE
	Expenditure weighting								
	790 (%)	278 (%)	89 (%)	69 (%)	359 (%)	161 (%)	544 (%)	930 (%)	3,220 (%)
1	4.7	2.0	0.5	0.0	0.0	0.0	3.6	1.4	2.4
2	0.0	0.0	1.3	0.0	0.0	0.0	0.0	0.0	0.0
3	0.9	2.5	2.1	2.3	7.2	0.0	3.9	1.6	2.5
4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
5	0.0	0.0	0.0	0.0	1.7	0.0	0.0	0.0	0.2
6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
9	0.0	0.0	2.0	0.0	0.0	0.0	0.0	0.0	0.1

Sources: Household Interview Survey 2016. RECAP Table 4 for expenditure weights.

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario:		1		Location:		Greenstead Road					
Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.											
Market shares correction factors:						Convenience Goods:		100% of survey indicated figures			
						Comparison Goods:		125% of survey indicated figures			
Catchment Zone		PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
		CONVENIENCE GOODS					COMPARISON GOODS				
		2016 (%)	2018 (%)	2023 (%)	2028 (%)	2033 (%)	2016 (%)	2018 (%)	2023 (%)	2028 (%)	2033 (%)
1		8	8	8	8	8	3	3	3	3	3
2		3	3	3	3	3	0	0	0	0	0
3		13	13	13	13	13	3	3	3	3	3
4		1	1	1	1	1	0	0	0	0	0
5		0	0	0	0	0	0	0	0	0	0
6		0	0	0	0	0	0	0	0	0	0
7		0	0	0	0	0	0	0	0	0	0
8		0	0	0	0	0	0	0	0	0	0
9		0	0	0	0	0	0	0	0	0	0

Sources: RECAP Model.
C&W for market share corrections.

COMPARISON GOODS SALES BY GOODS TYPE IN 2016

Sources:	RECAP Model
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FORECAST RETAIL SALES

Sources:	RECAP Model
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Table: 55

**SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN**

2016

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Tesco (Greenstead Road)	5,129	65	3,334	10,700	35,672
ALL STORES	5,129		3,334	10,700	35,672

Sources: IGD, C&W, Colchester Retail Update 2013, Mintel Retail Rankings.

Table: 56

SALES CAPACITY OF EXISTING COMPARISON GOODS FLOORSPACE

Net to gross ratio:	Date of sales densities: 2014			
90 % (unless otherwise indicated)				
Store	Gross Flrspace (sq m)	Net Flrspace (sq m)	Sales Density 2014 (£ per sqm net)	Sales 2014 (£000)
Comparison Goods Floorspace in main foodstore:				
Tesco (Greenstead Road) [1]	n/a	1,795	9,000	16,156
TOTALS Trading at the date of the Household Interview Survey of Shopping Patterns		1,795	9,000	16,156

Sources: IGD and C&W for Comparison Goods Floorspace.

Notes: (1) Estimated sales density.

Table: 57

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

2016

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
ALL STORES	-		-		-
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
ALL STORES AND SCHEMES	-		-		-

Sources:

Table: **58**

FORECAST RETAIL CAPACITY

Scenario:	1					Location: Greenstead Road				
Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.										
Growth in sales per sq m from shop floorspace existing in						Comparison Goods: 2.50 % pa		2016 to 2028		
	CONVENIENCE GOODS					COMPARISON GOODS				
	2016	2018	2023	2028	2033	2016	2018	2023	2028	2033
Residents' Spending £000	35,278	35,876	38,214	40,592	42,841	17,277	18,669	22,367	26,574	30,918
Plus visitors' spending (%)	-	-	-	-	-	-	-	-	-	-
Total spending (£000)	35,278	35,876	38,214	40,592	42,841	17,277	18,669	22,367	26,574	30,918
Existing shop floorspace (sq m net)	3,334	3,334	3,334	3,334	3,334	1,795	1,795	1,795	1,795	1,795
Sales per sq m net (£)	10,582	10,700	10,700	10,700	10,700	9,624	9,934	11,240	12,717	14,388
Sales from extg flrspace (£000)	35,278	35,672	35,672	35,672	35,672	17,277	17,834	20,177	22,828	25,828
Available spending to support new shops (£000)	0	204	2,542	4,920	7,169	0	835	2,190	3,745	5,089
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	0	0	0	0
Net available spending for new shops (£000)	0	204	2,542	4,920	7,169	0	835	2,190	3,745	5,089
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	9,000	9,456	10,698	12,104	13,695
Capacity for new shop flrspace (sq m net)	0	17	212	410	597	0	88	205	309	372
Market Share of Catchment Area Expenditure	3.7%	3.7%	3.7%	3.7%	3.7%	1.1%	1.1%	1.1%	1.1%	1.1%

Sources: RECAP Model.

Notes:

Scenario	1
Tiptree	

Table:

59

CONVENIENCE GOODS MARKET SHARES IN

2016

2016 Allocations to			
Tiptree			
Indicated by household interview survey			
Zones	Main Food	Top-up convenience	WEIGHTED AVERAGE
	Q1	Q3	
	Expenditure weighting		
	70	30	100
	(%)	(%)	(%)
1	0.3	0.0	0.2
2	0.0	0.0	0.0
3	2.3	1.8	2.2
4	0.0	0.0	0.0
5	0.0	0.7	0.2
6	20.4	27.3	22.5
7	0.0	0.0	0.0
8	0.0	0.0	0.0
9	2.1	1.1	1.8

Sources: Household Interview Survey 2016.
Expenditure weighting by C&W.

Table:

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COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN

2016

2016 Allocations to									
Tiptree									
Indicated by Household Interview Survey									
	Clothing & footwear	Furniture/ floorcrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemists, medcl & beauty goods	All other comparison gds	WEIGHTED AVERAGE
	Q4	Q5	Q6	Q7	Q8	Q9	Q10	Q11	
Zones	Expenditure weighting								
	790	278	89	69	359	161	544	930	3,220
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3	0.0	3.2	0.0	0.0	0.0	3.0	0.7	0.0	0.5
4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
5	0.0	0.0	0.0	0.0	0.0	0.0	0.8	0.0	0.1
6	0.0	2.9	0.0	8.7	2.8	9.4	21.5	4.2	6.1
7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
9	0.0	1.1	0.0	8.2	7.2	1.0	2.2	4.3	2.7

Sources: Household Interview Survey 2016.
RECAP Table 4 for expenditure weights.

Table: 61
MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario:		1		Location:		Tiptree				
Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.										
Market shares correction factors:				Convenience Goods:		150% of survey indicated figures				
				Comparison Goods:		125% of survey indicated figures				
Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2016 (%)	2018 (%)	2023 (%)	2028 (%)	2033 (%)	2016 (%)	2018 (%)	2023 (%)	2028 (%)	2033 (%)
1	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0
3	3	3	3	3	3	1	1	1	1	1
4	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0
6	34	34	34	34	34	8	8	8	8	8
7	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0
9	3	3	3	3	3	3	3	3	3	3

Sources: RECAP Model.
C&W for market share corrections.

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2016

Sources:	RECAP Model:
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63

Sources: RECAP Model.

Table: 64

**SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN**

2016

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Tesco (Church Road)	1,697	80	1,358	10,700	14,526
Asda (Church Road)	1,115	90	1,004	14,600	14,651
Iceland (The Centre)	416	98	408	7,219	2,943
Other convenience goods shops and stores	252	85	214	5,000	1,071
ALL STORES	3,480		2,983	11,127	33,191

Sources: Experian Goad, C&W, Mintel Retail Rankings.

Table: 65

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

2016

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
ALL STORES	-		-		-
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
ALL STORES AND SCHEMES	-		-		-

Sources:

Table: 66

FORECAST RETAIL CAPACITY

Scenario:	1					Location: Tiptree				
Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.										
Growth in sales per sq m from shop floorspace existing in 2016						Comparison Goods: 2.50 % pa		2016 to 2028		
	CONVENIENCE GOODS					COMPARISON GOODS				
	2016	2018	2023	2028	2033	2016	2018	2023	2028	2033
Residents' Spending £000	29,320	29,820	31,766	33,765	35,681	14,980	16,207	19,444	23,042	26,666
Plus visitors' spending (%)	-	-	-	-	-	-	-	-	-	-
Total spending (£000)	29,320	29,820	31,766	33,765	35,681	14,980	16,207	19,444	23,042	26,666
Existing shop floorspace (sq m net)	2,983	2,983	2,983	2,983	2,983	2,686	2,686	2,686	2,686	2,686
Sales per sq m net (£)	9,829	11,127	11,127	11,127	11,127	5,578	5,860	6,630	7,501	8,487
Sales from extg flrspce (£000)	29,320	33,191	33,191	33,191	33,191	14,980	15,738	17,807	20,147	22,794
Available spending to support new shops (£000)	0	-3,372	-1,426	574	2,490	0	468	1,637	2,895	3,873
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	0	0	0	0
Net available spending for new shops (£000)	0	-3,372	-1,426	574	2,490	0	468	1,637	2,895	3,873
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	4,000	4,203	4,755	5,380	6,086
Capacity for new shop flrspce (sq m net)	0	-281	-119	48	207	0	111	344	538	636
Market Share of Catchment Area Expenditure	3.1%	3.1%	3.1%	3.1%	3.1%	1.0%	1.0%	1.0%	1.0%	1.0%

Sources: RECAP Model. Experian Goad for Comparison Goods Floorspace.

Notes:

Scenario	1
Non-central stores in Borough	

Table: **67**
CONVENIENCE GOODS MARKET SHARES IN **2016**

2016				Allocations to	
Non-central stores in Borough					
Indicated by household interview survey					
Zones	Main Food	Top-up convenience	WEIGHTED AVERAGE		
	Q1	Q3			
	Expenditure weighting				
	70 (%)	30 (%)	100 (%)		
1	14.5	38.1	21.6		
2	4.3	5.8	4.8		
3	20.7	18.9	20.2		
4	0.9	0.6	0.8		
5	1.6	0.9	1.4		
6	4.8	9.4	6.2		
7	0.0	0.0	0.0		
8	0.0	0.8	0.2		
9	0.0	0.0	0.0		

Sources: Household Interview Survey 2016.
Expenditure weighting by C&W.

Table: **68**
COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN **2016**

2016 Allocations to									
Non-central stores in Borough									
Indicated by Household Interview Survey									
	Clothing & footwear Q4	Furniture/ floorcrgs etc Q5	Household Textiles Q6	Household Appliances Q7	Audio-visual equipment Q8	Hardware, DIY, garden products Q9	Chemists, medal & beauty goods Q10	All other comparison gds Q11	WEIGHTED AVERAGE
Zones	Expenditure weighting								
	790 (%)	278 (%)	89 (%)	69 (%)	359 (%)	161 (%)	544 (%)	930 (%)	3,220 (%)
1	0.8	15.3	10.1	7.2	4.7	50.2	22.2	1.3	9.1
2	0.0	7.4	3.9	5.2	1.3	28.6	1.0	0.0	2.6
3	2.4	11.5	8.6	4.2	2.8	54.9	9.8	0.0	6.6
4	0.0	7.2	4.0	0.0	0.0	0.6	0.0	0.0	0.8
5	0.9	8.6	3.5	1.1	4.8	19.1	0.9	0.0	2.7
6	1.2	5.2	8.4	0.0	0.0	17.0	5.7	2.8	3.6
7	0.0	9.4	2.0	8.1	1.3	3.5	0.0	2.3	2.0
8	0.0	5.2	4.7	3.3	5.0	0.0	0.0	0.0	1.2
9	0.0	3.4	0.0	1.1	0.0	0.0	0.0	0.0	0.3

Sources: Household Interview Survey 2016. RECAP Table 4 for expenditure weights.

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Sources: RECAP Model.
C&W for market share corrections.

COMPARISON GOODS SALES BY GOODS TYPE IN 2016

Sources:	RECAP Model
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FORECAST RETAIL SALES

Sources:	RECAP Model
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Table:

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**SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN**

2016

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Waitrose (St Andrews Avenue Retail Park)	2,672	80	2,138	11,100	23,727
Aldi (Colne View Retail Park)	1,552	75	1,164	11,000	12,804
Aldi (London Road, Lexden)	1,305	75	979	11,000	10,766
Aldi (Magdalen Street)	1,614	75	1,211	11,000	13,316
Other (estimated) convenience goods shops and stores	500	85	425	5,000	2,125
ALL STORES	7,643		5,916	10,605	62,738

Sources: Experian Goad, C&W, Colchester Retail Update 2013, Mintel Retail Rankings.

Table:

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SALES CAPACITY OF EXISTING COMPARISON GOODS FLOORSACE

Net to gross ratio:	Date of sales densities:			
90 % (unless otherwise indicated)	2014			
Store	Gross Flrspace (sq m)	Net Flrspace (sq m)	Sales Density 2014 (£per sqm net)	Sales 2014 (£000)
Comparison Goods Floorspace in stores & warehouses:				
DFS (Colne View Retail Park)	1,940	1,746	5,309	9,270
Halfords (Colne View Retail Park) [1]	1,140	616	3,430	2,112
Pets At Home (Colne View Retail Park)	800	720	2,671	1,923
The Range (Cowdray Avenue)	2,630	2,367	n/a	7,138
Wickes (Clarendon Way Retail Park) [2]	2,590	1,632	n/a	3,049
Homebase (St Andrews Avenue Retail Park) [3]	3,320	2,839	1,309	3,716
Matalan (Colchester Retail Park, Sheepen Road)	2,940	2,646	2,136	5,652
Brantano (Colchester Retail Park, Sheepen Road)	980	882	1,452	1,281
Maplin (Colchester Retail Park, Sheepen Road)	390	351	n/a	1,350
Poundland (Colchester Retail Park, Sheepen Road)	470	423	4,849	2,051
Intersport (Colchester Retail Park, Sheepen Road)	1,120	1,008	n/a	719
B&Q Extra (Lightship Way) [4]	9,508	6,418	1,758	11,283
Aldi (Colne View Retail Park) comparison goods		388	10,200	3,958
Aldi (London Road, Lexden) comparison goods		326	10,200	3,328
Aldi (Magdalen Street) comparison goods		404	10,200	4,116
		-		
		-		
		-		
TOTALS Trading at the date of the Household Interview Survey of Shopping Patterns		22,765	2,677	60,943
TOTALS excluding B&Q (which will be replaced by Sainsbury's)		16,347	3,038	49,661

Sources: Mintel UK Retail Rankings (April 2016), with VAT added for compatibility with expenditure.
Experian Goad and Trevor Wood Database for Comparison Goods Floorspace.

Notes:

- (1) 1,026 sq m net sales but 40% excluded as non-retail (i.e. motor parts and accessories) sales.
 (2) 2,331 sq m net sales but 30% excluded for trade / non-retail sales.
 (3) 2,988 sq m net sales but 5% excluded for trade / non-retail sales; includes concessions (Sharps & Laura Ashley Home).
 (4) 8,557 sq m net sales but 25% excluded for trade / non-retail sales.
 Where no sales density is indicated (n/a), sales are based on average sales per outlet.

Table:

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SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS

2016

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
Lidl (Gosbecks Road) - Application Ref. 145510	1,896	80	1,517	6,800	10,314
Sainsbury's (B&Q Extra, Lightship Way) - Application Ref. 143715	6,831	54	3,689	10,900	40,207
ALL STORES	8,727		5,206		50,522
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
Sainsbury's (B&Q Extra, Lightship Way) - Application Ref. 143715 [1]	n/a	n/a	3,142	8,300	26,081
ALL STORES AND SCHEMES	-		3,142		26,081

Sources: Colchester Borough Council, C&W, Mintel Retail Rankings.

Notes:

- (1) Estimated sales density.

Table: **75**
FORECAST RETAIL CAPACITY

Scenario:	1					Location:	Non-central stores in Borough				
Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.											
Growth in sales per sq m from shop floorspace existing in						Comparison Goods:	2.50	% pa	2016 to 2028		
	CONVENIENCE GOODS					COMPARISON GOODS					
	2016	2018	2023	2028	2033	2016	2018	2023	2028	2033	
Residents' Spending £000	73,380	74,625	79,478	84,436	89,109	66,788	72,180	86,530	102,747	119,446	
Plus visitors' spending (%)	-	-	-	-	-	-	-	-	-	-	
Total spending (£000)	73,380	74,625	79,478	84,436	89,109	66,788	72,180	86,530	102,747	119,446	
Existing shop floorspace (sq m net)	5,916	5,916	5,916	5,916	5,916	22,765	16,347	16,347	16,347	16,347	
Sales per sq m net (£)	12,404	10,605	10,605	10,605	10,605	2,934	3,353	3,794	4,293	4,857	
Sales from extg flrspace (£000)	73,380	62,738	62,738	62,738	62,738	66,788	54,816	62,019	70,169	79,390	
Available spending to support new shops (£000)	0	11,887	16,740	21,698	26,370	0	17,364	24,511	32,578	40,057	
Less sales capacity of committed new floorspace (£000)	0	50,522	50,522	50,522	50,522	0	27,401	31,002	35,076	39,685	
Net available spending for new shops (£000)	0	-38,635	-33,781	-28,824	-24,151	0	-10,037	-6,491	-2,497	372	
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	3,500	3,677	4,160	4,707	5,326	
Capacity for new shop flrspace (sq m net)	0	-3,220	-2,815	-2,402	-2,013	0	-2,729	-1,560	-531	70	
Market Share of Catchment Area Expenditure	7.6%	7.6%	7.6%	7.6%	7.6%	4.3%	4.3%	4.3%	4.3%	4.3%	

Sources: RECAP Model. Experian Goad and Trevor Wood Database for Comparison Goods Floorspace.

Notes:

Scenario	2
Colchester Town Centre	

Table: **76**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA										
Scenario:	2	Location:	Colchester Town Centre							
Committed retail development from 2018, and further new retail development from 2023 in Colchester Town Centre, altering the balance of market shares with Tollgate, such that potential growth in comparison goods expenditure at Tollgate is transferred to Colchester Town Centre.										
Market shares correction factors:			Convenience Goods:			120% of survey indicated figures				
			Comparison Goods:			90% of survey indicated figures				
Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2016 (%)	2018 (%)	2023 (%)	2028 (%)	2033 (%)	2016 (%)	2018 (%)	2023 (%)	2028 (%)	2033 (%)
1	11	11	11	11	11	43	47	52	52	52
2	2	2	2	2	2	26	28	30	30	30
3	7	7	7	7	7	37	40	44	44	44
4	0	0	0	0	0	13	13	14	14	14
5	0	0	0	0	0	26	28	31	31	31
6	4	4	4	4	4	32	35	38	38	38
7	2	2	2	2	2	17	19	21	21	21
8	1	1	1	1	1	3	3	3	3	3
9	0	0	0	0	0	3	3	3	3	3

Sources: RECAP Model.
C&W for market share adjustments.

Table: **77**

FORECAST RETAIL SALES

FORECAST RETAIL SALES										
Scenario:	2		Location: Colchester Town Centre							
Committed retail development from 2018, and further new retail development from 2023 in Colchester Town Centre, altering the balance of market shares with Tollgate, such that potential growth in comparison goods expenditure at Tollgate is transferred to Colchester Town Centre.										
Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2016 (£000)	2018 (£000)	2023 (£000)	2028 (£000)	2033 (£000)	2016 (£000)	2018 (£000)	2023 (£000)	2028 (£000)	2033 (£000)
1	27,733	28,204	30,029	31,907	33,659	183,040	216,116	286,341	340,752	397,520
2	1,340	1,363	1,453	1,542	1,627	29,111	33,911	43,611	51,448	59,170
3	6,333	6,441	6,863	7,290	7,700	55,579	64,992	85,755	101,417	117,098
4	0	0	0	0	0	26,331	28,446	36,850	43,740	50,915
5	0	0	0	0	0	37,285	43,432	57,751	68,376	79,182
6	2,841	2,889	3,077	3,271	3,457	37,974	44,927	58,518	69,338	80,231
7	902	917	978	1,038	1,097	12,398	14,984	19,902	23,661	27,565
8	1,276	1,296	1,384	1,469	1,551	6,211	6,708	8,072	9,595	11,186
9	0	0	0	0	0	3,985	4,313	5,176	6,139	7,114
TOTALS	40,425	41,110	43,784	46,517	49,090	391,912	457,830	601,975	714,466	829,981

Sources: RECAP Model.

Table: 78

FORECAST RETAIL CAPACITY

Scenario:	2		Location:		Colchester Town Centre							
Committed retail development from 2018, and further new retail development from 2023 in Colchester Town Centre, altering the balance of market shares with Tollgate, such that potential growth in comparison goods expenditure at Tollgate is transferred to Colchester Town Centre.												
Growth in sales per sq m from shop floorspace existing in					2016		Comparison Goods:		2.50 % pa		2016 to 2028	
	CONVENIENCE GOODS					COMPARISON GOODS						
	2016	2018	2023	2028	2033	2016	2018	2023	2028	2033		
Residents' Spending £000	40,425	41,110	43,784	46,517	49,090	391,912	457,830	601,975	714,466	829,981		
Plus visitors' spending (%)	-	-	-	-	-	1.0	1.0	1.0	1.0	1.0		
Total spending (£000)	40,425	41,110	43,784	46,517	49,090	395,832	462,409	607,995	721,610	838,281		
Existing shop floorspace (sq m net)	5,520	5,520	5,520	5,520	5,520	62,052	62,052	62,052	62,052	62,052		
Sales per sq m net (£)	7,323	7,367	7,367	7,367	7,367	6,379	6,702	7,583	8,579	9,706		
Sales from extg flrspace (£000)	40,425	40,665	40,665	40,665	40,665	395,832	415,871	470,519	532,350	602,305		
Available spending to support new shops (£000)	0	445	3,119	5,852	8,425	0	46,538	137,476	189,261	235,976		
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	45,341	51,299	58,040	65,667		
Net available spending for new shops (£000)	0	445	3,119	5,852	8,425	0	1,197	86,177	131,220	170,309		
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	6,000	6,304	7,132	8,069	9,130		
Capacity for new shop flrspace (sq m net)	0	37	260	488	702	0	190	12,083	16,262	18,654		
Market Share of Catchment Area Expenditure	4.2%	4.2%	4.2%	4.2%	4.2%	25.0%	27.1%	29.6%	29.6%	29.6%		

Sources: RECAP Model.

Notes: Includes allowance for vacant Class A1 floorspace in Colchester Town Centre.

Scenario	2
Tollgate	

Table: **79**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA										
Scenario:	2	Location:	Tollgate							
Committed retail development from 2018, and further new retail development from 2023 in Colchester Town Centre, altering the balance of market shares with Tollgate, such that potential growth in comparison goods expenditure at Tollgate is transferred to Colchester Town Centre.										
Market shares correction factors:			Convenience Goods:			80% of survey indicated figures				
			Comparison Goods:			75% of survey indicated figures				
Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2016 (%)	2018 (%)	2023 (%)	2028 (%)	2033 (%)	2016 (%)	2018 (%)	2023 (%)	2028 (%)	2033 (%)
1	19	19	19	19	19	20	17	14	14	14
2	1	1	1	1	1	4	4	3	3	3
3	8	8	8	8	8	14	12	9	9	9
4	0	0	0	0	0	3	3	3	3	3
5	1	1	1	1	1	4	4	3	3	3
6	25	25	25	25	25	21	19	17	17	17
7	0	0	0	0	0	5	4	3	3	3
8	0	0	0	0	0	5	5	5	5	5
9	2	2	2	2	2	4	4	4	4	4

Sources: RECAP Model.
C&W for market share adjustments.

Table: **80**

FORECAST RETAIL SALES

FORECAST RETAIL SALES										
Scenario:	2		Location:		Tollgate					
Committed retail development from 2018, and further new retail development from 2023 in Colchester Town Centre, altering the balance of market shares with Tollgate, such that potential growth in comparison goods expenditure at Tollgate is transferred to Colchester Town Centre.										
Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2016 (£000)	2018 (£000)	2023 (£000)	2028 (£000)	2033 (£000)	2016 (£000)	2018 (£000)	2023 (£000)	2028 (£000)	2033 (£000)
1	47,903	48,717	51,868	55,113	58,138	85,135	78,170	77,092	91,741	107,025
2	670	681	726	771	814	4,479	4,844	4,361	5,145	5,917
3	7,238	7,361	7,844	8,331	8,799	21,030	19,498	17,541	20,744	23,952
4	0	0	0	0	0	6,076	6,565	7,897	9,373	10,910
5	914	929	991	1,051	1,110	5,736	6,205	5,589	6,617	7,663
6	17,755	18,056	19,234	20,447	21,607	24,920	24,389	26,179	31,020	35,893
7	0	0	0	0	0	3,647	3,154	2,843	3,380	3,938
8	0	0	0	0	0	10,351	11,180	13,454	15,991	18,643
9	1,640	1,668	1,777	1,889	1,997	5,313	5,751	6,901	8,186	9,486
TOTALS	76,119	77,413	82,440	87,601	92,465	166,686	159,755	161,856	192,197	223,426

Sources: RECAP Model.

Table: **81**
FORECAST RETAIL CAPACITY

Scenario:	2		Location:		Tollgate					
Committed retail development from 2018, and further new retail development from 2023 in Colchester Town Centre, altering the balance of market shares with Tollgate, such that potential growth in comparison goods expenditure at Tollgate is transferred to Colchester Town Centre.										
Growth in sales per sq m from shop floorspace existing in										
2016			Comparison Goods:		2.50 % pa					
2016 to 2028										
	CONVENIENCE GOODS					COMPARISON GOODS				
	2016	2018	2023	2028	2033	2016	2018	2023	2028	2033
Residents' Spending £000	76,119	77,413	82,440	87,601	92,465	166,686	159,755	161,856	192,197	223,426
Plus visitors' spending (%)	-	-	-	-	-	0.5	0.5	0.5	0.5	0.5
Total spending (£000)	76,119	77,413	82,440	87,601	92,465	167,520	160,554	162,665	193,158	224,543
Existing shop floorspace (sq m net)	6,906	6,906	6,906	6,906	6,906	30,488	30,488	30,488	30,488	30,488
Sales per sq m net (£)	11,022	10,511	10,511	10,511	10,511	5,495	4,721	5,342	6,044	6,838
Sales from extg flrspace (£000)	76,119	72,593	72,593	72,593	72,593	167,520	143,946	162,861	184,263	208,476
Available spending to support new shops (£000)	0	4,820	9,847	15,008	19,872	0	16,608	-196	8,895	16,067
Less sales capacity of committed new floorspace (£000)	0	0	0	0	0	0	2,534	2,867	3,244	3,670
Net available spending for new shops (£000)	0	4,820	9,847	15,008	19,872	0	14,074	-3,063	5,651	12,397
Sales per sq m net in new shops (£)	12,000	12,000	12,000	12,000	12,000	6,000	6,304	7,132	8,069	9,130
Capacity for new shop flrspace (sq m net)	0	402	821	1,251	1,656	0	2,233	-430	700	1,358
Market Share of Catchment Area Expenditure	7.9%	7.9%	7.9%	7.9%	7.9%	10.6%	9.4%	8.0%	8.0%	8.0%

Sources: RECAP Model.

Notes:

Combined Market Shares for Colchester Borough

Table: 82

TOTAL MARKET SHARES BY COMPARISON GOODS TYPE IN

2016

SHOPPING LOCATION	COMPARISON GOODS TYPE							
	Clothing & footwear	Furniture/ floorcrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY & garden goods	Chemists, medical & beauty goods	All other comparison goods
Colchester Town Centre	40.8%	11.1%	16.7%	5.2%	5.9%	3.8%	12.4%	36.4%
Tollgate	3.7%	26.1%	15.1%	31.3%	33.5%	11.9%	6.8%	3.4%
Turner Rise	1.8%	1.1%	30.9%	0.7%	0.4%	2.8%	6.4%	1.4%
Peartree Road	0.0%	15.1%	4.7%	0.5%	0.0%	4.8%	0.4%	0.0%
Highwoods	0.8%	0.7%	1.5%	0.9%	1.6%	1.2%	3.1%	0.9%
Greenstead Road	1.7%	1.0%	0.8%	0.3%	1.1%	0.0%	1.7%	0.7%
Tiptree	0.0%	0.8%	0.0%	1.7%	1.0%	1.4%	2.4%	0.9%
Non-central stores in Borough	0.6%	9.3%	6.0%	3.7%	2.8%	24.2%	7.6%	0.7%
TOTALS COLCHESTER BOROUGH	49.5%	65.2%	75.5%	44.3%	46.3%	50.2%	40.7%	44.2%

Sources:

RECAP Model

Notes:

The totals may not equal to the sum of the individual figures, owing to rounding.

Table:

83

Scenario:

1

TOTAL MARKET SHARES BY CATCHMENT ZONE FOR:

COLCHESTER BOROUGH*

Catchment Zones	CONVENIENCE GOODS					COMPARISON GOODS				
	2016 (%)	2018 (%)	2023 (%)	2028 (%)	2033 (%)	2016 (%)	2018 (%)	2023 (%)	2028 (%)	2033 (%)
1	94	94	94	94	94	90	90	90	90	90
2	23	23	23	23	23	36	36	36	36	36
3	65	65	65	65	65	69	69	69	69	69
4	4	4	4	4	4	18	18	18	18	18
5	7	7	7	7	7	35	35	35	35	35
6	74	74	74	74	74	70	70	70	70	70
7	6	6	6	6	6	30	30	30	30	30
8	5	5	5	5	5	10	10	10	10	10
9	5	5	5	5	5	11	11	11	11	11
OVERALL	40.5%	40.5%	40.5%	40.5%	40.5%	48.2%	48.2%	48.1%	48.1%	48.2%

Sources:

RECAP Model

Notes:

*Colchester Town Centre, Tollgate, Turner Rise, Peartree Road, Highwoods, Greenstead Road, Tiptree, and Non-central stores in Borough.

Table:

84

Scenario:

2

TOTAL MARKET SHARES BY CATCHMENT ZONE FOR:

COLCHESTER BOROUGH*

Catchment Zones	CONVENIENCE GOODS					COMPARISON GOODS				
	2016 (%)	2018 (%)	2023 (%)	2028 (%)	2033 (%)	2016 (%)	2018 (%)	2023 (%)	2028 (%)	2033 (%)
1	94	94	94	94	94	90	91	93	93	93
2	23	23	23	23	23	36	38	39	39	39
3	65	65	65	65	65	69	70	71	71	71
4	4	4	4	4	4	18	18	19	19	19
5	7	7	7	7	7	35	37	39	39	39
6	74	74	74	74	74	70	71	72	72	72
7	6	6	6	6	6	30	31	32	32	32
8	5	5	5	5	5	10	10	10	10	10
9	5	5	5	5	5	11	11	11	11	11
OVERALL	40.5%	40.5%	40.5%	40.5%	40.5%	48.2%	49.0%	50.1%	50.1%	50.1%

Sources:

RECAP Model

Notes:

*Colchester Town Centre, Tollgate, Turner Rise, Peartree Road, Highwoods, Greenstead Road, Tiptree, and Non-central stores in Borough.

Appendix F

Office Market Review

OVERVIEW

Colchester is a comparatively small centre (in the regional context) with office provision largely concentrated in the Town Centre and the Northern Gateway business parks – it has an estimated office stock of 2.2 million sq ft (PMA 2015). The scale of office provision is partially attributed to its geographical location, situated close to larger more established commercial centres such as Chelmsford and Ipswich which absorb much of the demand from corporate occupiers.

Colchester has good sectoral representation from professional and business services, health care and general creative industries, and the printing and publishing sub-sector in particular. It is still under-represented in the banking and finance and TMT sectors. By far the largest employer is 'public sector services', which account for 34.5% of total employment, reflecting that both the Ministry of Defence (Colchester Garrison) and the University of Essex are major employers within the area (Promis 2016). The total number of employees in Colchester is forecast to rise by 0.2% pa over the 2011-2017 period (Promis 2016).

RENTS

There is relatively strong demand from occupiers for units on the Northern Gateway business parks, achieving rents of £172 per square metre (psm), with recent development activity at Axial Way suggesting confidence in the occupier market.

Within East Colchester, the market is less established with relatively small take up levels on large site allocations. Future demand is heavily predicated on business need for links with the University of Essex. Promis (2016) indicates that as of Q2 2016, rents achieved in Colchester were circa £145 psm. This does not completely match with what was indicated during discussions with local agents, however this disparity is considered likely to be due to the market for smaller units not being reflected within Promis' data.

The most sought after office space is for small high quality floorplates ranging from 93-435 sq m (1,000-5,000 sq ft), with the demand profile being made up of mainly start-up companies and SME's, with occupiers in both the public and private sectors. The most popular locations are situated out of the Town Centre in the Northern Gateway business parks that have proximity to the A12 and connectivity through the recent creation of J26 servicing the business community. As such, office rents at Colchester Business Park and Apex 12 are commanding the highest rents (in the Colchester area) of £161-172 psm and experience low vacancy levels with several notable businesses such as Linklaters and Natwest having established a presence here. Local agents report that no significant deals have been undertaken recently, with the largest recent letting being to Birkett Long solicitors (terms are confidential).

There is a very limited amount of Grade A supply within the market, local agents noting that there has been no new Town Centre development for 5-6 years. Secondary Town Centre office stock has also been much reduced in recent years as a significant number of office buildings have been converted to residential use. As such there is a general shortage of new high specification offices available to rent in Colchester and a reduced quantum of second hand stock. As a result, good quality office refurbishments in Colchester are performing well in the market place, with agents stating that rents for modern and brand new office accommodation can achieve up to £215 psm (£20psf) for small spaces; although this rent is higher than the £172 quoted in relation to the Northern Business Parks we consider that they are not directly comparable and for offices of any significant scale rates are unlikely to exceed £172 psf.

Overall, stable 'in town' office rents are forecast (Fenn Wright). In the medium to long-term, demand is considered likely to increase, in particular from larger occupiers as they are priced out of other competing centres (Fenn Wright). This anticipated increase in demand is considered likely to have the potential to lead to a corresponding rise in rental values.

Recent rental transactions in Colchester (CoStar)

Address	Date	Size (sq m)	Rent (pa)	Rent psm
6 George Street, Colchester, CO1 1TP	09/09/2016	264	£24,000	£91
Suite 10 - Langham Ln, Colchester, CO4 5ZS	30/09/2015	29	£6,000	£207
Suite Angel Court - 135-137, Colchester, CO1 1SP	05/01/2015	487	£82,500	£169

INCENTIVES

Based on discussions with local agents, C&W consider that a 6 month rent free period would be applicable for a reasonably specific office suite, assuming a standard lease term of 10 years. It could be expected that such a unit could be on the market from 6-12 months prior to achieving these terms.

CAPITAL VALUES AND YIELDS

Prime capital values in Colchester are currently estimated to stand at £2,240 psm in both Colchester Town Centre and out of town (Promis 2016). Anecdotally, based on discussions with local agents, there is a preference from a number of local occupiers in the Town Centre to purchase offices freehold as opposed to leasehold.

Yields are reported to be at 6.5% as of Q2 2016 (Promis 2016). This is closely aligned to Fenn Wright's view of 7% and is supported by C&W's own research as set out in Table 4:

Recent capital values and yields achieved in Colchester (Costar)

Address	Date	Price psm	Yield
Brunel Way	10/11/2015	£2,170	7.7%
67-70 North Hill	01/01/2015	£1,526	6.8%
135-137 High Street	23/12/2015	£2,765	5.8%

DEMAND

- In 2015 take-up within Colchester was estimated to be 650 sq m, a 62% fall compared with 2014 (Promis).
- Local commercial property agency Whybrow note that for the year to April 2016, out of town demand from the average occupier for B1 space is for circa 479 sq m. This figure is supported by similar data within other sources such as the Employment Land Needs Assessment (ELNA) 2015 report.
- Whybrow's calculate demand for employment floorspace to be circa 2.53 ha pa (37.5ha over the plan period). This is considered to be only partially met within the Borough, with the additional demand either being met by inferior locations or outside the Borough due to units not matching requirements in Strategic Employment Zones (SEZs).
- Finally, with regard to future demand, Whybrow's note that the Colchester Employment Land Study CELS forecast a requirement of 106,000 sq m floorspace for B1 use over the plan period from 2017-2033. It is noted that this is the equivalent to 29.8 hectares take-up of employment land within the Borough. Within the ELNA 2015 report, it is considered that this requirement will be for better quality, modern space for small and start-up businesses. This represents a key challenge for the Council to shift from older, outdated office space, particularly within Colchester Town Centre where some of the stock tends to be dated.

SUPPLY

- The ELNA 2015 report notes that commercial office stock has been increasing in scale in recent years, with space concentrated within Colchester Town Centre and the Northern Gateway business parks.
- The Council's Annual Monitoring Report 2015 reports that there has been a net loss of 10,938 sq m of commercial floorspace across the Borough in the monitoring period. Much of this was office floorspace, as a direct result of the 2013 amendments to permitted development rights allowing the change of use from offices to residential.
- The estimated availability in Colchester, based on data from EGi (inclusive of space due for completion within the next 6 months) has risen to a total of 22,390 sq m over the 6 months to Q2-2016. This equates to a vacancy rate of 11% for Colchester (Promis).

DEVELOPMENT PIPELINE

- Colchester has a relatively small development pipeline for office space; there is currently circa 92,900 sq m of office space in Colchester's development pipeline, which equates to 46% of stock. Completions during 2015 totalled just 1,022 sq m (Promis).
- As such, although current development activity is minimal, the fact that there are some schemes in progress and the recent past suggests that in certain employment clusters, occupier demand could be strong enough to warrant undertaking development risk.
- However, the ELNA 2015 report considers that there is currently 'insufficient demand to warrant speculative development'.
- In terms of employment land availability to meet future needs, there is currently 77ha of undeveloped allocations, of which 60.7ha are accommodated across 3 Strategic Enterprise Zones of North Colchester, Stanway and the Knowledge Gateway. This suggests that the employment pipeline is overwhelmingly being channelled into edge/ out of town locations and not Colchester Town Centre, as supported by Promis data. The biggest allocation is concentrated in North Colchester, which evidence shows is a popular location for businesses.

SITE SPECIFIC COMMENTARY

- Congestion and infrastructure provision is a major obstacle to occupier take up in the Town Centre. In relation to this site:
 - This site is positioned on the north of the Town Centre and has good access to the A134/ A133 although it is over 2 miles to the nearest A12 junction.
 - If significant development is to be undertaken within the site area, the capacity of both the access roads and key roundabouts would likely need to be increased.
 - Colchester railway station (north) is circa 10 minutes' walk away.
 - There is a push factor for businesses occupying out of town space due to the quality of Town Centre stock, which is typically of lower grade and not fit for purpose for modern occupier requirements. Local businesses particularly, require office space with ample car parking, limited congestion and excellent broadband, pulls that can be difficult for Town Centre sites such as this to provide.
- Existing site uses:
 - With regard to existing office provision within the site, the best quality units appear to be clustered around the Middleborough Roundabout. These include The Octagon,

Hiscox, Rowan House and Colwyn House. Although not Grade A stock (with Colwyn House appearing to be the most dated) all of these offices appear to be occupied and of reasonable size, with heights ranging from two to four storeys. All except The Octagon benefit from car parking. Other office provision within the area includes The Riverside Office Centre, which is based to the far north-east of the site and comprises of four somewhat dated office buildings (with car parking). It is considered that this site in particular may benefit from redevelopment given its isolated location and relatively poor condition. There also appears to be some very poor and underutilised office and parking space opposite The Octagon on North Station Road, and a standard quality car show-room to the far north-west of the site.

- There is also some residential provision within the site, comprising in the main of terraced and semi-detached housing of standard quality.
- There appears to be limited amenity within the development area in terms of retail provision, with units appearing to be peripheral and/or of poor quality. That said, it is noted that the northern aspect of the development draws adjacent to Colchester Retail Park, which benefits from significant parking provision. As a whole, the site appears to have broadly inactive frontages, and as such there is little to encourage footfall both into and out of the Town Centre. This is a key consideration, as occupiers are increasingly demonstrating a preference for developments which, if not benefiting from a Town Centre location, provide the amenities of a mixed use, campus style offer such as green space and retail/ leisure units.
- Issues to overcome:
 - The site in question is located immediately outside a Conservation Area- as such, although not directly impacted, regard must be had to the requirements pertaining from these designations.
 - It is noted that the area of development falls within Flood Zones 2 and 3. Although some of this area benefits from flood defences, not all is protected.
 - The site also contains various Grade II listed buildings. These would have to be taken into account if they are likely to be affected by development.
 - It is considered that in order to enable the development of office space, pedestrian access would need to be improved, along with improvements to the public realm and provision of amenities in order to promote active frontages and encourage footfall. Emphasis should be placed on improving urban legibility and cultivating a sense of place.
- The total site covers circa 7.7ha (as calculated by C&W on Promap). This is equal to circa 836,000 sq ft (or 77,667 sq m). If it is assumed site coverage will not exceed 40% (in order to allow for access, parking and amenity), it is envisaged this could hold a total commercial footprint of circa 334,000 sq ft (31,030 sq m). If it is assumed that the average storey height will not exceed 4 floors (based on the scale of existing buildings), the physical capacity of the site for office space could be circa 1,340,000 sq ft (124,000 sq m) GIA. With an efficiency ratio of 85%, this equates to a NIA of 1,137,000 sq ft (106,000 sq m). Although approximate, this gives some indication of the physical capacity of the site, on the basis of land area alone; in reality, any office provision is going to be part of a wider mix of uses on this site for it to be brought forward and much of the site will not be redeveloped in the plan period.
- As per C&W's analysis of the Colchester office market earlier in this report, development of new offices is typically not considered to be viable within Colchester Town Centre. In order for office space to be delivered, provision of other more viable element may be required in order to cross-subsidise office provision and to create an attractive environment.
- Due to the need to cross-subsidise the office element, improve the amenity provision and provide active frontages, it is considered that a deliverable proposition for the site will include other uses. Whilst there is no exact science as to the quantum of B1 development which would be deliverable, we would not expect it to exceed a third of the potential floorspace identified

(i.e. 380,000 sq ft or 35,000 sq m) given the need for cross subsidy, the retention of many of the existing buildings on the site and wider market conditions. In the context of the current office market within Colchester (the 2015 Colchester Employment Land Study forecasting a B1 requirement of circa 7,067 sq m pa over 15 years), this is a circa 1/3 of the total office requirement in this period.

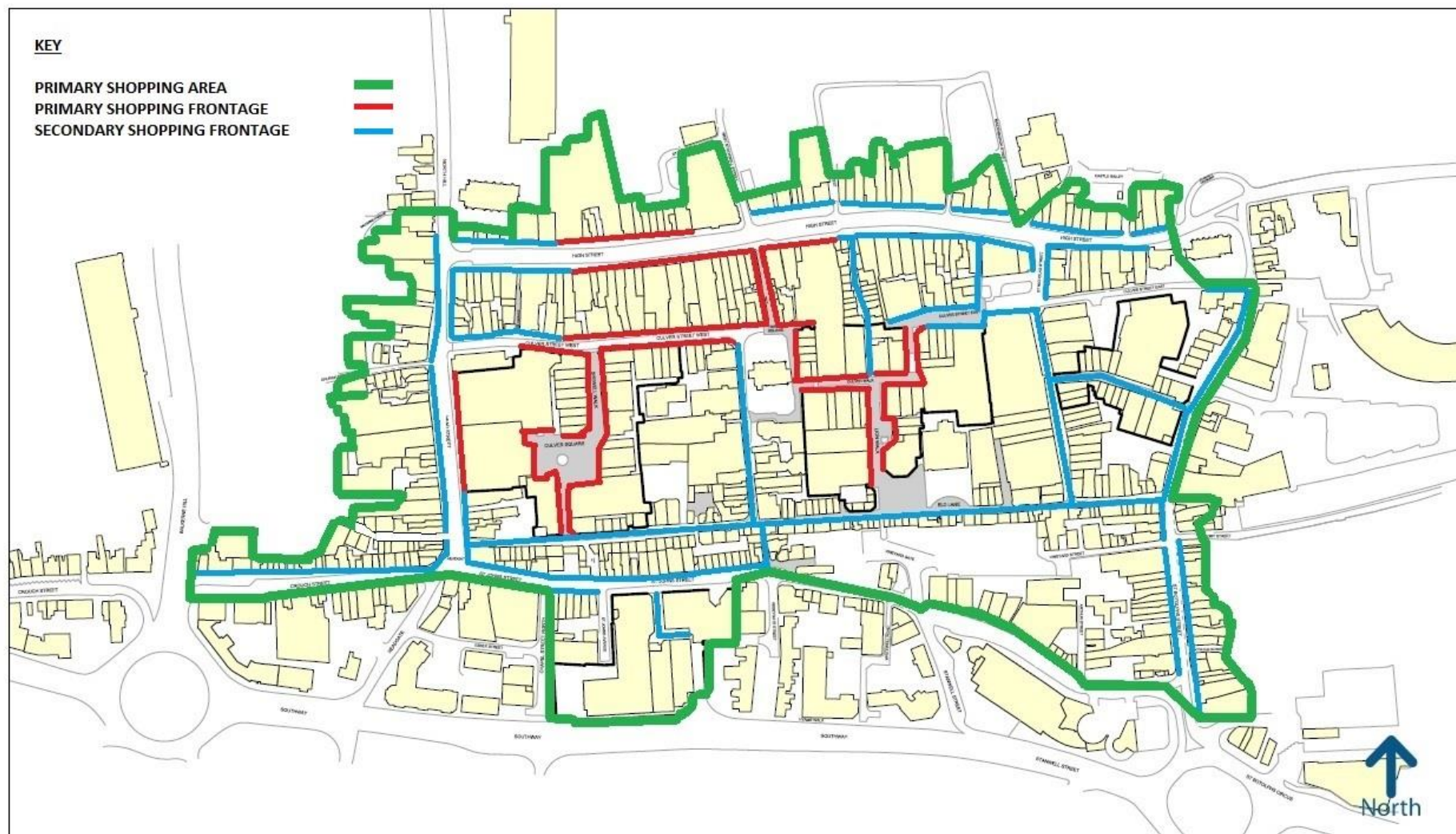
With regard to development potential, there is considered to be a gap in the market for modern Grade A office buildings, particularly those with smaller floorplates. This is expected to further increase within the next few years as occupiers are pushed out of higher value centres. As such, there could be an opportunity for developments to meet latent demand by fulfilling this requirement. However, the rental levels achievable in the Town Centre are unlikely to justify speculative office development without significant public sector support and an upgrade in infrastructure provision which individual developments will struggle to support.

- Deliverability:
 - A key factor which could impact on the site's deliverability is our understanding that the site is made up of disparate ownerships; the site has disjointed land uses which includes residential elements (likely to be in held in a large number of individual freeholds) and there is no cohesive use/ form of development to indicate as small number of landowners.
 - The likely disparate ownership of the site represent a challenge to delivery due to the need to align different and varied interests, difficulty in getting vacant possession, and a more limited ability to meet occupiers requirements (e.g. there may be a need to ensure there is freehold space made available for office occupiers) as this would be difficult to distribute between landowners.
 - As previously noted within the report, the current office rental values within Colchester are low. As such, land that already has a reasonably high Existing Use Value (EUV) represents a barrier to viability.
 - C&W note that there are no obvious areas within the site which are currently clear and ready for development (i.e. most of the existing land has an economic value) - this could provide an additional challenge in terms of providing comprehensive new development and achieving a step-change in values.
 - With regard to a potential first phases of development:

The large Sheepen Road car park (circa 7,500 sq m) is well situated adjacent to the Middleborough Roundabout (with the associated strong access to the A134) and the existing office cluster. Clearly, the car park will have an EUV which may be difficult to exceed in order to justify development but there are no obvious physical impediments to development.

Appendix G

Recommended Colchester Town Centre PSA Boundaries



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Experian Goad Plan Created: 02/11/2016
Created By: DTZ Debenham Tie Leung Limited

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