Local Plan Committee Meeting

Grand Jury Room, Town Hall, High Street, Colchester, CO1 1PJ
Tuesday, 07 February 2017 at 18:00

The Local Plan Committee deals with the Council's responsibilities relating to the Local Plan

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COLCHESTER BOROUGH COUNCIL
Local Plan Committee
Tuesday, 07 February 2017 at 18:00

Member:

Councillor Martin Goss	Chairman
Councillor Nick Barlow	Deputy Chairman
Councillor Nigel Chapman	
Councillor Nick Cope	
Councillor Andrew Ellis	
Councillor Adam Fox	
Councillor John Jowers	
Councillor Sue Lissimore	
Councillor Gerard Oxford	
Councillor Martyn Warnes	

Substitutes:
All members of the Council who are not Cabinet members or members of this Panel.

AGENDA - Part A

(open to the public including the press)

Members of the public may wish to note that Agenda items 1 to 5 are normally brief.

1 **Welcome and Announcements**

a) The Chairman to welcome members of the public and Councillors and to remind all speakers of the requirement for microphones to be used at all times.

(b) At the Chairman's discretion, to announce information on:

- action in the event of an emergency;
- mobile phones switched to silent;
- the audio-recording of meetings;
- location of toilets;
- introduction of members of the meeting.

2 **Substitutions**

Members may arrange for a substitute councillor to attend a meeting on their behalf, subject to prior notice being given. The attendance of substitute councillors must be recorded.

3 **Urgent Items**

To announce any items not on the agenda which the Chairman has agreed to consider because they are urgent, to give reasons for the urgency and to indicate where in the order of business the item will be considered.

4 **Declarations of Interest**

The Chairman to invite Councillors to declare individually any interests they may have in the items on the agenda. Councillors should consult Meetings General Procedure Rule 7 for full guidance on the registration and declaration of interests. However Councillors may wish to note the following:-

- Where a Councillor has a disclosable pecuniary interest, other pecuniary interest or a non-pecuniary interest in any business of the authority and he/she is present at a meeting of the authority at which the business is considered, the Councillor must disclose to that meeting the existence and nature of that interest, whether or not such interest is registered on his/her register of Interests or if he/she has made a pending notification.

- If a Councillor has a disclosable pecuniary interest in a matter being considered at a meeting, he/she must not participate in any discussion or vote on the matter at the meeting. The Councillor must withdraw from the room where the meeting is being held unless he/she has received a dispensation from the Monitoring Officer.

- Where a Councillor has another pecuniary interest in a matter being considered at a meeting and where the interest is one which a member of the public with knowledge of the relevant facts would reasonably regard as so significant that it is likely to prejudice the Councillor's judgement of the public interest, the Councillor must disclose the existence and nature of the interest and withdraw from the room where the meeting is being held unless he/she has received a dispensation from the Monitoring Officer.

- Failure to comply with the arrangements regarding disclosable pecuniary interests without reasonable excuse is a criminal offence, with a penalty of up to £5,000 and disqualification from office for up to 5 years.

5 **Have Your Say!**

a) The Chairman to invite members of the public to indicate if they wish to speak or present a petition at this meeting – either on an item on the agenda or on a general matter relating to the terms of reference of the Committee/Panel not on this agenda. You should indicate your wish to speak at this point if your name has not been noted by Council staff.

(b) The Chairman to invite contributions from members of the public who wish to Have Your Say! on a general matter relating to the terms of reference of the Committee/Panel not on this agenda.

Part B

(not open to the public including the press)

Local Plan Committee

Monday, 07 November 2016

Attendees: Councillor Nick Barlow, Councillor Nigel Chapman, Councillor Nick Cope, Councillor Andrew Ellis, Councillor Adam Fox, Councillor Martin Goss, Councillor John Jowers, Councillor Sue Lissimore, Councillor Gerard Oxford, Councillor Martyn Warnes

Substitutes:

86 Minutes of 5 July 2016

The minutes of the meeting held on 5 July 2016 were confirmed as a correct record, subject to amendments to the declarations of interest recorded in relation to minute no 78 to more accurately reflect Councillor Arnold's position as the Honorary Treasurer of Colchester Symphony Orchestra and Councillor Warnes' spouse's relatives' land ownership south of Berechurch Hall Road, Colchester.

87 Minutes of 15 August 2016

The minutes of the meeting held on 15 August 2016 were confirmed as a correct record, subject to the reference in minute no 83 to rural exception sites in East Mersea being amended to rural exception sites in Layer de la Haye.

88 Housing Numbers

The Committee considered a report by the Head of Commercial Services giving details of the most up to date evidence in relation to housing numbers which supported the targets being used in the emerging Local Plan.

Karen Syrett, Place Strategy Manager presented the report and responded to Councillors questions. Karen explained that prior to 2010, the housing targets used in local plans or the local development framework, had been informed by regional or county wide plans such as the Essex Structure Plan and the East of England Regional Plan. However, Regional Spatial Strategies had been abolished and the determination of housing numbers was instead now based on robust evidence established by each local authority, in line with Strategic Housing Market Assessments (SHMAs) and Strategic Housing Land Availability Assessments. The Government also indicated its intention to introduce new legislation on planning.

The Council's existing Core Strategy was based on housing numbers contained in the now revoked Regional Plan but the evidence base had been regularly updated to ensure it remained fit for purpose and annual targets had been adjusted to ensure a robust five year supply was retained

More recently, the emerging Local Plan had incorporated a housing target of 920 units a year, reflecting a comprehensive evidence base including:

- SHMAs for Chelmsford, Colchester and Braintree were prepared as part of a joint project also including Maldon and Brentwood and finalised in the summer of 2014;
- Objectively Assessed Housing Need Study produced in July 2015 for Braintree, Chelmsford, Colchester and Tendring Councils;
- Review of the SHMA work in Chelmsford, Colchester, Braintree and Tendring to bring it into compliance with the National Planning Policy Framework (NPPF) and Planning Policy Guidance - HDH Planning and Development Ltd, December 2015;
- Objectively Assessed Need (OAN) Update October 2016.

With the completion of the OAN update in October 2016, Braintree, Chelmsford, Colchester and Tendring Councils considered they had a comprehensive evidence base to address national guidance requirements for Local Plans. The report included a table summarising the updated analysis for the three districts of Braintree, Chelmsford and Colchester and comparing the results with those of the 2015 study. The report included an explanation of the analysis results which followed the stages of the Objectively Assessed Need (OAN) calculation. For the three districts together, the total OAN was 2,441 dwellings per year (dpa) which was within 5% of the 2,540 dpa calculated in the 2015 study. Whilst for Colchester itself the updated OAN remained unchanged at 920 dpa.

The report went on to address the argument for housing targets to be revised following the EU Referendum in June referring to various indicators including the 300,000 new homes a year needed just to meet existing demand as identified by the House of Lords Economic Affairs Committee, the House of Commons briefing paper 'Brexit: impact across policy areas' which stated that it was still it very unclear what kind of future relationship the UK might have with the EU and EEA/Swiss states after leaving the EU and the uncertain impact of leaving the EU on immigration policy and the immigration rights of British and EU/EEA citizens, concluding that currently the need for new housing in Colchester was unlikely to change significantly in the plan period.

In addition, recent Government statements were identified including facilitating the neighbourhood planning process, putting pressure on developers to speed up delivery, radically increasing brownfield development and the publication of a new housing white paper expected later in the year. The Financial Times' interview with Secretary of State for Communities and Local Government referred to his warning that he would "be very tough" with councils that failed to identify enough land for housing and the stated deadline of early 2017, by when councils must have completed Local Plans in place.

Amendments to the Neighbourhood Planning Bill referred to two or more local planning authorities being required to prepare a joint development plan document and also county councils being invited to prepare or revise a development plan document in cases where district councils were considered to be failing to prepare adequately.

Also included were details of a report by Nathaniel Lichfield & Partners ‘Positive Preparations, A Review of Housing Targets and Local Plans which reviewed 109 local plans submitted or examined since the NPPF had been introduced and confirmed that housing targets were the key issue at examination and the main reason plans were stalled with a third of plans needing to increase the housing target in order to pass examination. The report supported the view that for both plan-making and decision-taking, it was imperative that local authorities adequately assessed and identified a deliverable supply of housing land. It was also clear that adoption of an up-to-date plan, based on evidence, including a SHMA and making adequate provision for the area's housing need, offered greater protection to councils in an appeal situation.

Finally examples were provided from Castle Point, Uttlesford and Tendring giving details of the implication of not meeting an OAN.

Councillor Chillingworth attended and, with the consent of the Chairman, addressed the Committee. He explained that he was speaking on behalf of residents in the Rural North ward and welcomed confirmation that a meeting had been arranged between officers and representatives from the Campaign Against Urban Sprawl in Essex (CAUSE). He considered this would be a valuable opportunity to exchange information which would be relevant for Colchester, Braintree and Tendring councils. He voiced his concerns that the basis of the report on housing numbers was being called into question as this could jeopardise the timetable for the approval of the Local Plan. He referred to the West Colchester Garden Community proposals and queried whether they were deliverable within the proposed timescales, particularly given the current exploration by Essex County Council of options for the re-routing of the A120. He was aware that no funding had yet been committed to the road scheme and was concerned that there was therefore no certainty that the necessary highway infrastructure would be in place. He questioned the view that the West Colchester proposal, with the introduction of a new railway station, would provide a sustainable opportunity and sought clarification regarding the detail of the rail transport proposals and timescale. He was also concerned about the housing numbers being suggested and considered that the proposals were premature.

The Place Strategy Manager was of the view that it was not necessary for the evidence base to be amended given that it had been tested at appeal and could therefore be considered to be robust. In terms of deliverability, she explained that the phasing proposed for the West Colchester development suggested its development at the later stages of the Plan period with only a small number of houses due to be delivered within the lifetime of the Plan. She also confirmed that separate development plans would be produced for each of the proposed Garden Communities. There were various options in relation to transport improvements, including higher capacity trains, improvements to tracks, upgraded train fleet and faster timetables, all of which would need to be considered by the Government.

Members of the Committee commented, in particular, in relation to the previously lowered Objectively Assessed Need targets and the potential consequences if the target was lowered still further and the robustness of the Local Plan was called into question.

RESOLVED that the updates to the Objectively Assessed Housing Need Study and other relevant commentary be noted.

89 Local Plan Preferred Options - Consultation Responses

Councillor Jowers (in respect of his membership of Essex County Council's Development Regulation Committee, Anglian (Eastern) Regional Flood and Coastal Committee and the Regional Planning Panel) declared a non-pecuniary interest in this item pursuant to the provisions of Meetings General Procedure Rule 7(5).

Councillor Lissimore (in respect of her membership of Essex County Council's Development Regulation Committee and her responsibility as Essex County Council's Deputy Cabinet member for Lifelong Learning) declared a non-pecuniary interest in this item pursuant to the provisions of Meetings General Procedure Rule 7(5).

Councillor Warnes (in respect of his spouse's ownership of property in the vicinity of the Abberton and Langenhoe housing sites) declared a pecuniary interest in this item pursuant to the provisions of Meetings General Procedure Rule 7(5).

Councillor Warnes (in respect of his spouse's relatives' ownership of property in the vicinity of the site south of Berechurch Hall Road) declared a non-pecuniary interest in this item pursuant to the provisions of Meetings General Procedure Rule 7(5).

The Committee considered a report by the Head of Commercial Services giving details of the representations received following a public consultation on the Colchester Local Plan Preferred Options.

Karen Syrett, Place Strategy Manager presented the report and responded to Councillors questions. She explained that work on the Council's new Local Plan began in 2014 and involved an initial Issues and Options consultation. Landowners and developers were invited to put forward potential sites for development on two occasions which the Council had then assessed for suitability. An updated Local Development

Scheme was approved which set forth the timetable (subsequently amended) for Local Plan development. Selected draft development management policies were considered by the Committee in April 2016 and were incorporated into the full version of a Preferred Options Local Plan, containing both allocations and policies. Consultation on the Preferred Options document was then carried out from 9 July to 16 September 2016.

The consultation process involved publishing the document and supporting information on the website, notification of the consultation to the Council's extensive list of interested organisations and individuals, and a series of public drop-in sessions which were advertised through social media, press coverage, and posters circulated.
At the drop-in sessions, attendees were provided with background information on the Local Plan process, copies of the consultation document, opportunities to ask questions of the officers in attendance, and information on how to respond more formally to the consultation, including advice on using the consultation portal. Officers also attended a number of public meetings.

The consultation attracted 2,995 representations from 1,482 respondents although ongoing checking was still taking place to ensure all representations were logged and that there was no duplication. At the time of writing the report approximately 62.2% of the representations had been received by the on-line consultation portal, 27.5% had been received by email and 10.2% had been in writing. The report included a numerical summary of the number of responses received on each part of the plan with key issues being drawn out in an Appendix. Five petitions with corresponding signatures had also been received relating to East Colchester (733), CAUSE (8,482), Dedham 168), Langham (267) and Rowhedge (143).

The Place Strategy Manager further reported two omissions from the representations summary which had been identified since the report had been published. These were in relation to sites in Stanway from Andrew Martin Associates on behalf of R F West and in relation to a site in Queensbury Avenue, Copford.

John Akker, Chairman of Stop 350, addressed the Committee pursuant to the provisions of Meetings General Procedure Rule 5(3). He explained that he was the Chairman of Stop 350, representing 900 residents of Mersea Island. He wished to object to the identification of the caravan sites within the Options document. He was of the view that the concerns of the Group weren't being listened to and that the proposals were flawed. He considered that the proposals had been drawn up by people who were not familiar with Colchester who had not been presented with the full picture. The population of Mersea Island doubled in the summer months as a result of temporary residencies and tourists and the fishing industry needed to be taken into account. He referred to a public meeting which had drawn 600 people but had not been attended by officers of the council. He considered that Mersea had been discouraged from formulating a Neighbourhood Plan but that this advice had been detrimental to the future of that community. He also referred to representations submitted by Honorary Alderman

Richard Wheeler which had not been recorded and objected to submissions being summarising to the extent that they had lost their meaning and emphasis.

William Sunnocks, on behalf of Campaign Against Urban Sprawl in Essex (CAUSE), addressed the Committee pursuant to the provisions of Meetings General Procedure Rule 5(3). He acknowledged the importance of the Objectively Assessed Need (OAN) exercises but was concerned that some of the supporting information was not available on the Council's website. He was of the view that Braintree and Tendring councils had the ability to adopt lower OAN targets and that only one garden community should be planned. He did not consider it appropriate to commence planning for a West Colchester Garden Community until the road network routes had been determined. He challenged the views expressed in the report in relation to the economy and jobs on the basis that Braintree, Colchester and Tendring were all net exporters of labour and was of the view that the three districts' overall OAN target needed to be reduced by 841 per year.

Rosie Pearson, on behalf of Campaign Against Urban Sprawl in Essex (CAUSE), addressed the Committee pursuant to the provisions of Meetings General Procedure Rule 5(3). She was concerned that the responses submitted to the consultation had been amended and some had been omitted from the committee report. She considered that the decisions had already been taken and that the report would merely be accepted as a done deal. She was of the view that the residents views were not being listened to and concerns about major growth associated with the West Colchester Garden Community proposals being in the wrong location were being ignored. She urged the committee to relinquish its plans at the present time, bearing in mind the meeting which was taking place between officers and members of CAUSE.

Sir Bob Russell addressed the Committee pursuant to the provisions of Meetings General Procedure Rule 5(3). He explained that he had attended the Tendring District Council Local Plan Committee last week and he welcomed the efforts that they had made to prevent urban sprawl in East Colchester. He referred to the concerns which had been expressed in relation to the potential growth to the east of Colchester and the expansion planned to the University of Essex and the removal of the proposals which were located in Tendring District in order to retain a green buffer and to safeguard the countryside. He recollected the decisions taken by Colchester Borough Councillors against offficers' advice to protect the Southern Slopes of Highwoods Country Park from development. He advocated a similar approach to the current committee members, suggesting they opt to determine the boundaries of the Salary Brook Country Park prior to the approval of the development proposals.

Councillor T. Young attended and, with the consent of the Chairman, addressed the Committee. He explained his role as Portfolio Holder with responsibility for the Local Plan. He was of the view that the Garden Community proposals to the East and West of Colchester needed to be looked at in the context of the need for the Borough to find 920 houses per year for the foreseeable future. He agreed with the desirability of retaining green links between development and for wildlife to be safeguarded. However, he was of the view that the progression of a Garden Community for East Colchester was very important given the need for a robust Local Plan as a means to resist the aspirations of developers in the area and to protect the Borough from speculative planning applications. He acknowledged the concerns in relation to development in East Colchester but he was of the view that it needed to proceed.

Councillor Liddy attended and, with the consent of the Chairman, addressed the Committee on that part of the report relating to Battleswick Farm. He explained that matters had progressed in relation to the identification of farmland buildings on the site and in relation to an alternative development site which had been submitted by the Rowhedge Business Partners. He acknowledged the need to provide for additional housing for the benefit of the people of Colchester and he was of the view that the alternative proposal provided an opportunity for Rowhedge to remain as a village and to build a facility for the community.

Councillor Cory attended and, with the consent of the Chairman, addressed the Committee. He explained that he was making representations for the residents of Wivenhoe in opposition to the development in East Colchester. He acknowledged that concerns identified by residents had been addressed in the report but he remained of the view that the development would have significant environmental consequences and measures needed to be put in place to reduce the impact on the surrounding settlements. He referred to the need for a logical solution to deliver adequate transport links and for these solutions to be identified before the development went ahead. He was strongly of the view that the environmental impact and sustainability must be balanced and that the carbon footprint needed to be reduced. He continued to be concerned about the spread of urban development and the implications of a joint development involving Tendring District Council.

Councillor Arnold attended and, with the consent of the Chairman, addressed the Committee. He sought the agreement to an amendment to the reference in the Preferred Options document relating to Great Horkesley in order to accommodate a matter raised by a number of local residents. He was of the view that the reference to the enlargement of the Great Horkesley Village Hall would be more usefully changed to ‘enhancing community buildings’ whilst the provision of allotments and a scout headquarters with public access could also usefully be included as the principal public benefits to be achieved from allowing more development in Great Horkesley. He also referred to four further issues relating to the Essex Way, woodland being designated as public open space, walking on the A134 and allowing access to public facilities on Ivy Lodge Road but acknowledged that these could be addressed at a later stage in the Plan process. He further referred to the need for the delivery of a secondary school to serve the Great Horkesley community and for this to be acknowledged as a matter which needed to be resolved.

Mel Burley, on behalf of Stop 350, addressed the Committee pursuant to the provisions of Meetings General Procedure Rule 5(3). She referred to the 300 static and over 400 mobile caravans as well as houseboats already in Mersea. She explained that many continued to be occupied in the winter months and that the Plan needed to take account of this.

Chris Anglos, on behalf of Stop 350, addressed the Committee pursuant to the provisions of Meetings General Procedure Rule 5(3). He was of the view that the number of objections to the consultation was inaccurate as he was aware that people had people had been unable to navigate the website and were unable to complete their representation online. He considered that the council was unwilling to listen to older residents but that their views needed to be taken seriously. He mentioned the view that housing in Colchester was being allocated to residents from the London Boroughs rather than to local people.

David Broise, on behalf of Stop 350, addressed the Committee pursuant to the provisions of Meetings General Procedure Rule 5(3). He was concerned at the scale of development of Mersea. He stated that 30 years ago there were 1,000 dwellings and 2,360 people living on the island whilst currently there were 3,200 dwellings with around 8,000 residents. He was also concerned at the increase in housing across the Borough and was of the view that it was not appropriate for Colchester to assume responsibility to house residents from London Boroughs.

Sarah Shehadeh, on behalf of Mersea Island Society, addressed the Committee pursuant to the provisions of Meetings General Procedure Rule 5(3). She referred to the road infrastructure on and leading to Mersea Island. In particular she considered the Strood to be a bottle neck and its deep ditches had caused road traffic incidents over the years, particularly in the winter months. She cited the incident recently involving a low loader carrying a steam engine and a bus which had led to personal injuries. She was of the view that if development was to take place the road network needed to be widened but that this would create a race track for road users. She was also concerned about the increased numbers of visitors to the Island in the summer months and was concerned about the 40 mph limits currently applied to many of the roads.

Stephen Vince, on behalf of Stop 350, addressed the Committee pursuant to the provisions of Meetings General Procedure Rule 5(3). He explained that he was a former West Mersea Town Councillor when the previous Local Plan process had been undertaken. At that time no development was suggested for Mersea on the grounds that the road infrastructure was very poor and there were no brownfield sites for development. He accepted that some development would now be expected but assumed that this would be in the order of 175 dwellings whereas the current proposal for 350 would deliver development with significantly high density which would not be appropriate.

Tony Ellis, on behalf of Langham Parish Council, addressed the Committee pursuant to the provisions of Meetings General Procedure Rule 5(3). He explained that he was representing the views of Langham Parish Council. He referred to Option 3, development north of the A12, which had not been included as a preferred option and the principle of no development north of the A12 which had been agreed by the Committee. He was of the view that the development proposed for Langham was grossly out of proportion for the community as it represented a 30% increase compared to a proposed increase of 2% for Dedham. He explained that the accurate number of dwellings was currently 419 not 660 and he explained the need for adequate waste water treatment for any new development and that the village had recently suffered from an episode of flooding. He also made reference to the proximity of the Area of Outstanding Natural Beauty, the petition, signed by 267 residents together with large number of individual objections, the very narrow and hazardous road network and that other locations were likely to be considerably more sustainable.

Ian Crossley, on behalf of Stop 350, addressed the Committee pursuant to the provisions of Meetings General Procedure Rule 5(3). He referred to the growth in housing number proposed for Mersea but considered this lacked a corresponding number of new job opportunities.

Christopher Lee addressed the Committee pursuant to the provisions of Meetings General Procedure Rule 5(3). He referred to the Salary Brook Country Park which was considered to be a valuable green wedge on the boundary of Greenstead and Longridge. He was concerned regarding the extent of the green wedge and considered the width of 1.5 km which had been advocated by ward councillors needed to be confirmed and the boundary of the proposed Country Park to be drawn up to provide certainty to the residents.

Graham Willmott addressed the Committee pursuant to the provisions of Meetings General Procedure Rule 5(3). He was not so much concerned regarding the proposed introduction of 350 new dwellings for Mersea Island but was of the view that the proposal lacked information in respect of jobs, schools, bus links, roads, doctor’s surgeries and sewage treatment.

Paul Knappett, on behalf of Stop 350, addressed the Committee pursuant to the provisions of Meetings General Procedure Rule 5(3). In respect of the proposed development of houses on Mersea Island, he referred to the need for the adequate sewage treatment and sea water quality to be protected. He was concerned about the capacity of GP surgeries and local schools to accommodate additional residents and sought assurances regarding the capacity of roads such as Dawes Lane to cope with additional traffic numbers.

David McMullen, on behalf of Stop 350, addressed the Committee pursuant to the provisions of Meetings General Procedure Rule 5(3). He referred to the issue of local housing being allocated to residents from London Boroughs as well as potential problems associated with vandalism and nuisance.

Mark Goacher, on behalf of the Green Party, addressed the Committee pursuant to the provisions of Meetings General Procedure Rule 5(3). He considered that the Garden Community initiative needed to be referred to as a New Town initiative. He sought assurances that developers would not be in a position to acquire piecemeal planning application approvals on green field sites as a consequence of the Council's intention to deliver these types of new communities. He was also concerned about the local hospital which was already not able to cope with current demand and asked whether representatives from the NHS would be involved in the plans for the developments. He referred to plans for the widening of the A12 and the A120 but considered these alone would not be sufficient to resolve the anticipated traffic congestion. He was of the view that new housing needed to be built in accordance with standards fit for the next generation, he mentioned concern regarding housing for people moving out of London and considered it imperative that access would be provided from new developments to areas of green space.

Colin Tuckwell addressed the Committee pursuant to the provisions of Meetings General Procedure Rule 5(3). He explained that he had a background in strategic management. He acknowledged the complexity of the document and the associated implications in planning terms. He acknowledged that it was important to embrace progress and he was of the view that Colchester had a number of capabilities which had yet to be accounted for. These were in terms of economic development opportunities, the changing role of local government, Smart Cities and the role for the Borough, the weakness of heavily understated infrastructure planning and the need for the development or publication of an implementation plan.

Alan Walker, on behalf of Marks Tey Parish Council, addressed the Committee pursuant to the provisions of Meetings General Procedure Rule 5(3). He explained that he was representing the views of Marks Tey Parish Council. The Parish Council supported the principle of Garden Communities but considered that they needed to be done brilliantly. Marks Tey was the community most affected by the proposal. He considered that this aspect had not been addressed in the Options documents and that this was blatantly unfair on the residents of Marks Tey. He also considered that the Garden Communities concept was the biggest thing to impact on Colchester for a considerable time and it was of national significance. He considered that there were political risks attached to the proposals whilst that the Council was not well known for political co-operation but that a commitment was required in order to see the proposals through to successful implementation. He speculated that there may be a danger in the Council being seen as over confident and that there were improvements which needed to be made to give confidence to residents about the stated outcomes. He urged the Council to do its residents proud and to make something seen to be brilliant by the residents of Colchester.

The Place Strategy Manager responded to the comments made as follows:
- She did not consider that West Mersea Town Council had been discouraged from preparing a Neighbourhood Plan but that there were issues to be considered for parishes both in support and against the undertaking;
- She confirmed that the housing evidence was considered to be robust, the background work from Peter Brett would be made available on the website and the employment land and retail study information was in the process of being updated;
- She confirmed that development at Salary Brook was definitely not considered acceptable;
- The alternative site at Rowhedge would be included for consideration whilst the planning application in respect of Battleswick farm had now been submitted;
- She confirmed that housing sites were required to be deliverable in the first five years of the Plan, specific developable sites or broad locations for years 6 to 10 and, if possible for years 11 to 15;
- She confirmed that the two amendments suggested by Councillor Arnold for Great Horkesley could be accommodated;
- Regarding caravan parks on Mersea Island, she was aware of two families registered at the local school and 65 people registered at the doctor's surgery;
- She confirmed the attendance of officers at public meetings to assist with the discussions and representations and that the consultation period had been extended to 10 weeks in order to allow more time for responses to be submitted;
- Discussions were taking place with Essex County Council on the Plan in relation to highways issues;
- She confirmed that for the previous Local Plan process no sites had been allocated in the village areas, with sites predominantly being concentrated in the available brown field locations, but this approach could not be continued due to the brown field options no longer being available;
- In respect of Langham, the Environment Agency had confirmed that sufficient capacity could be secured for waste water and sewage treatment in the light of residential future development. She also confirmed that 85 houses had been considered appropriate but that Langham Parish Council had sought a reduction to something in the order of 50;
- The detail in relation to the boundaries of the Garden Communities would form part of separate pieces of work;
- People from London Councils would not be allocated housing as they would not meet the local connection test;
- She confirmed that Marks Tey was likely to be the community most affected by the Garden Community proposals and, in order to consider these types of concerns, separate plans were being prepared to provide more detail and to enable people to comment further.

Members of the Committee discussed the issues raised at length and, in particular, comments were made, as follows:

• The need to ensure the total OAN was not lowered further. Concern regarding the current numbers proposed to be allocated for Mersea, problems of access into and out of the island and the implication for emergency services or emergency evacuation should the site at Bradwell be designated again for nuclear power generation, the greater potential for one site in Mersea but the likelihood that this would be unpopular and the need for the proposed allocation to be reduced to 175 or 200 at most. The recent emergence of another site at Middlewick Ranges which may have the capacity to take pressure from Mersea but would be in need of solutions in relation to access from Mersea Road. The need for West Mersea Parish Council to revisit the idea of developing a Neighbourhood Plan.
• Provisional support for the Garden Community proposal to the East of Colchester and agreement for the need for the Salary Brook boundaries to be delineated in order to establish the green buffer. Welcoming the proposals for the establishment of Local Delivery Vehicles for both of the Colchester located Garden Community proposals. Doubts expressed regarding the delivery of two Garden Communities and concern in relation to the West Colchester proposal due to the absence of certainty regarding the relocation of the A120, whilst supporting the greater viability of the East Colchester proposal due in part to its proximity to the Knowledge Gateway and the A120 links. Welcoming the confirmation of a meeting with representatives from CAUSE.
• Consideration for smaller developments in the villages which would also help to support smaller building companies and with community vitality. The potential to secure affordable housing in the villages other than using the exception site option.
• The need for objectors to future housing development to acknowledge the plight of many younger people who wanted to build independent lives in their own homes. Welcoming the proposal for West Tey on the basis that this location would be able to deliver the largest number of houses required for the Borough. The need for the new Local Plan process to be progressed in order to continue Colchester's track record of working to a sound Local Plan and thus being protected in appeal situations. The importance of delivering infrastructure to accompany new housing development and the best mechanism to achieve and influence this being through the Garden Community initiative; Reference to the traveller's site in Severall's Lane and the potential to extend it with three additional pitches together with the need to co-operate with Essex County Council in delivering a transit site for the County. Concern regarding the existing high density of housing in the Highwoods area, given the reduction in numbers allocated for the site currently occupied by the rugby club. Potential for part of the rugby club site to be used for a church building and welcome the proposals to adopt a Country Park in the Salary Brook area along the same principles as that for Highwoods Country Park;
• Comment on the very high level of representations received to the consultation and the benefits for the public of illustrating the geographical extent of the proposals being put forward and of providing much more detail in relation to the Garden Community vision, what it will look like and what it will mean;
• Welcoming the challenging views expressed by Colin Tuckwell, including the need to consider in detail the potential impact on services such as the NHS, bearing in

mind the actual quantity of housing being planned and the current difficulty in delivering adequate services by the local hospitals. Support for the concerns regarding proposed housing numbers in Mersea, given similar problems of lack of local facilities and difficulty in accessing schools and GP practices by residents in Peldon. The need for the recently identified site at Middlewick Ranges to be considered in detail in terms of its viability. Welcoming the positive attitude expressed by Alan Walker from Marks Tey Parish Council, especially given the numbers of houses being contemplated over the life of the Plan and the absence of clearly defined boundaries. Concern regarding suggestions of representations being amended, a request to be permitted to attend the meeting taking place between officers and representatives from CAUSE and a comment that the 76 page representation submitted by CAUSE would need a separate briefing in its own right. A view that the Garden Community proposal for West Colchester was predicated on improvements to the A120 being delivered and was therefore premature to consider at this stage. Agreement with the argument that one Garden Community may be deliverable rather than two and the greater viability of the East Colchester proposal given the proximity to the Knowledge Gateway with the West Colchester proposal being considered towards the end of the Plan period. Agreement with the view that the Salary Brook Country Park boundaries needed to be defined and also, to help with engagement, the need for more detailed information about the Local Plan process to be available to the public. Support for the view that the Parish Council be invited to be involved in the Local Delivery Vehicle. Comments regarding the information in the options document relating to Birch and that it had become out of date in terms of the number shops, school places and lack of infrastructure which made its continued consideration unsuitable. Reference to the willingness of Layer Marney to plan for 15 houses across two sites and was a viable location given the bus route on the A1022 and links to Tiptree;

- The Garden Community initiatives provided an opportunity to develop green links within the Borough and the benefit therefore of considering the approach which had been adopted in relation to the establishment of Highwoods Country Park. Support for the phasing of the Garden Communities and for East Colchester to be developed earlier. Concern regarding the number of houses being proposed for Mersea, especially given the lack of resources and gratitude to the many Mersea residents who had taken the trouble to attend the meeting;
- Reference to the level of housing which had been continuously provided over the last 40 years in Colchester and the very large number of representations which had been received to the consultation. Acknowledgement that new housing was required for all families as children grew up and wished to lead independent lives but the vital need for residential development to be built in line with adequate infrastructure prior to the occupation of the houses. The need for strong political will over a long period of time to ensure the successful delivery of the Plan;
- The need for infrastructure to be considered as a vital piece of the Local Plan delivery and a recognition that to be successful various other agencies needed to be involved and supportive of the proposals. The added complexity of planning to deliver new communities across local authority boundaries and support for the meeting being

arranged with CAUSE. Support for the suggested amendments to the options document in relation to Great Horkesley to refer to enhanced community facilities as well as allotments and a scout headquarters as a benefit of further new development;
• Full support for the Garden Communities proposals and the need for both East and West Colchester locations to be pursued, given the number of houses which needed to be provided over the life of the Plan. Support for the Salary Brook Country Park and the need for it to be delivered following the same principles as that adopted for Highwoods Country Park. The need for the Middlewick Ranges initiative to be viewed with caution in terms of its ability to compensate for reductions in housing numbers elsewhere. Concern regarding the adoption of the Battleswick Farm site bearing in mind potential risk of flooding but also caution in relation to the suitability of the recently emerging alternative site and the need to avoid any encroachment to sites in Old Heath and the protection of historic buildings;
• The area of Berechurch had seen exponential growth over a number of years which had led to considerable pressure on GP practices. Acknowledgement that the Garden Communities proposals would take time to come to fruition but would provide more control over the delivery and timing of infrastructure as well as providing the best protection against development by default which was happening in neighbouring authorities. If these proposals were not pursued, or only one option rather than both, then this would create extra pressure on communities like Mersea. The requirement for sub-market rented housing to be included in the Garden Community model and for local developers to be supportive of this aspect.

The Chairman briefly summarised the pertinent matters which had come forward from the discussion in terms of:
• The Local plan process was acknowledged as the correct mechanism to plan properly and to put infrastructure in place;
• Concern about partners in the process such as the NHS and the need to bring these partners to discussions;
• A Neighbourhood Plan for Mersea needed to be considered, with acknowledgement that it may take around three years to implement;
• The Middlewick Ranges proposal needed to be looked at in more detail;
• Salary Brook was seen as key in East Colchester and the Country Park boundaries needed to be as wide as possible;
• Garden Community proposals needed to include community centres as part of the infrastructure requirements;
• A willingness for the individual identities of Wivenhoe and Rowhedge not to be lost;
• The alternative proposal for Rowhedge needed to be looked at in detail, including avoidance of encroachment into Old Heath;
• Further consideration of the housing numbers allocated to Mersea, bearing in mind the need for the overall OAN total to be delivered.

The Place Strategy Manager commented further to explain:

- The Middlewick ranges site had been put forward by the Ministry of Defence with an estimate of 2,000 homes. Officers were aware that the site would have associated ecology issues which would require investigation which meant it was likely to be considered towards the later stages of the Plan. She confirmed that an allocation at Middlewick would not eliminate the requirement to allocate housing at all other sites;
- There was not an ample supply of sites and it had not been possible to include a contingency;
- The Health Authority had proven to be difficult to engage with but more recently this had changed and contacts had been established locally with the Estates Manager;
- The Garden Community proposals reflected the terminology used by the Government and the principles contained in the Town and Country Planning Act;
- If errors had occurred in recording comments made in the consultation then this had been unintentional and, if requested, could be corrected;
- Steps were being taken to engage with the residents of Marks Tey in relation to the West Colchester proposals;
- The two minor changes suggested to the Great Horkesley section of the options document were able to be accommodated;
- It was possible to utilise local letting policies for affordable housing in certain circumstances;
- The case for sites to be allocated in Layer Marney would be investigated whilst the information relating to Birch and its continued relevance would be reviewed.

RESOLVED that, subject to the inclusion of the omissions referred to by the Place Strategy Manager in her introduction to the report, the reference to the enlargement of the Great Horkesley Village Hall being changed to 'enhancing community buildings' and the inclusion of the provision of allotments and a scout headquarters with public access as the principal public benefits from allowing more development in Great Horkesley, the representations received following the recent public consultation on the Colchester Local Plan Preferred Options be noted.

90 Adoption of the Myland and Braiswick Neighbourhood Plan

The Committee considered a report by the Head of Commercial Services providing details of the Myland and Braiswick Neighbourhood Plan.

Karen Syrett, Place Strategy Manager, presented the report and responded to Councillors' questions. Karen explained that in 2013 the Council had designated the area for the purpose of preparing the Myland and Braiswick Neighbourhood Plan. This included the whole of Myland parish and, following the 2016 Boundary Review, an additional area of Braiswick and a small area which was within the Highwoods Ward. Public consultation had been undertaken which included a household survey which received almost 800 responses and informed the following aspects of the plan:

- Housing should be of quality design and meet all needs;
- Education should cater for all needs in step with growth;

- Employment should be supported at a local level;
- Environment should be protected and enhanced where possible;
- Social amenity should meet the community's needs;
- Sport and leisure should be available as key to health and well-being;
- Roads and transport options should be available and effective.

A pre-submission draft consultation was also undertaken in in May/June 2015 as well as a Submission consultation in January/February 2016.

The Myland and Braiswick Neighbourhood Plan was examined during April and May 2016 and, subject to minor amendments, the independent examiner had found that the plan satisfied all the Basic Conditions and recommended that the plan proceed to Referendum. The Referendum on the Myland and Braiswick Neighbourhood Plan was held on 15 September 2016 with 1,070 (87.4%) in favour of the plan and 154 against.

Members of the Committee acknowledged the work required to bring the Plan to fruition and welcomed the adoption of this and the Boxted Neighbourhood Plan which would make Colchester the first Essex authority to adopt Neighbourhood Plans.

RECOMMENDED to Council that, following its approval at examination and referendum, the Myland and Braiswick Neighbourhood Plan be made (adopted) following which the Plan will become part of Colchester Borough Council's Local Development Plan.

91 Adoption of the the Boxted Neighbourhood Plan

The Committee considered a report by the Head of Commercial Services providing details of the Boxted Neighbourhood Plan.

Karen Syrett, Place Strategy Manager, presented the report and responded to Councillors' questions. Karen explained that, in 2012, the Council had designated the area for the purpose of preparing the Boxted Neighbourhood Plan which included the whole of Boxted Parish.

Extensive consultation had been undertaken to support the development of the Neighbourhood Plan, including a drop-in event attended by 250 people which generated 350 responses and the distribution of a household survey which received 226 responses. The questionnaire informed the following aspects of the plan:
- Housing development at Hill Farm, Boxted Cross;
- Support for appropriate small scale employment in Boxted, including smallholdings;
- Environment should be protected and enhanced through the provision of a new Village Green;
- Improvements to community infrastructure including sports & leisure facilities, open space, a village shop and broadband;

- Highway improvements;
- A Travel Plan to manage traffic issues at the village school.

After an initial Submission Consultation in 2014 the developer/owner of Hill Farm, lodged an appeal against the Council's decision to refuse planning permission to develop the only site being proposed for housing in the Boxted Neighbourhood Plan. The appeal was unsuccessful but required changes to be made to the Plan document to reflect the appeal inspector's comments. The amended document was subject to a second Submission consultation.

The Boxted Neighbourhood Plan was examined during April/May 2016 and, subject to minor amendments, the independent examiner had found that the plan satisfied all the Basic Conditions and recommended that the draft plan proceed to Referendum. The Referendum on the Neighbourhood Plan had been held on 15 September 2016 with 305 (81.5%) in favour of the plan and 69 against.

Members of the Committee acknowledged the work required to bring the Plan to fruition and welcomed the adoption of this and the Myland and Braiswick Neighbourhood Plan which would make Colchester the first Essex authority to adopt Neighbourhood Plans.

RECOMMENDED to Council that, following its approval at examination and referendum, the Boxted Neighbourhood Plan be made (adopted) following which the Plan will become part of Colchester Borough Council's Local Development Plan.

Local Plan Committee

Monday, 19 December 2016

Attendees: Councillor Nick Barlow, Councillor Nigel Chapman, Councillor Nick Cope, Councillor Andrew Ellis, Councillor Adam Fox, Councillor Martin Goss, Councillor John Jowers, Councillor Sue Lissimore, Councillor Martyn Warnes

Substitutes:

92 Minutes

The minutes of the meeting held on 7 November 2016 had been circulated to the members of the Committee in draft form only and, as such, their confirmation would be considered at the next meeting of the Committee.

93 Local Plan Preferred Options - Consultation Report with Responses

Councillor Jowers (in respect of his Vice-Chairmanship of Essex County Council, his membership of Essex County Council's Development Regulation Committee and his membership of the Rural Community Council for Essex) declared a non-pecuniary interest in this item pursuant to the provisions of Meetings General Procedure Rule 7(5).

Councillor Lissimore (in respect of her membership of Essex County Council's Development Regulation Committee, her responsibility as Essex County Council's Deputy Cabinet member for Lifelong Learning and her daughter's previous employment at Colchester Zoo) declared a non-pecuniary interest in this item pursuant to the provisions of Meetings General Procedure Rule 7(5).

Councillor Warnes (in respect of his spouse's ownership of property in the vicinity of the Abberton and Langenhoe housing sites) declared a pecuniary interest in this item pursuant to the provisions of Meetings General Procedure Rule 7(5).

Councillor Warnes (in respect of his spouse's relatives' ownership of property in the vicinity of the site south of Berechurch Hall Road) declared a non-pecuniary interest in this item pursuant to the provisions of Meetings General Procedure Rule 7(5).

The Committee considered a report by the Head of Commercial Services giving details of officers initial responses to the representations received following public consultation on the Colchester Local Plan Preferred Options.

Karen Syrett, Place Strategy Manager presented the report and responded to Councillors questions. She explained that consultation on the Local Plan Preferred Options document which had been carried out from 9 July to 16 September 2016 had attracted an all-time high number of responses totalling (at the time of writing the report) 3,102 representations from 1,539 respondents. Approximately 62.2% of responses were received by people using the on-line consultation portal, 27.5% had emailed and 10.2% had written in.
Whilst Committee Members had previously been asked to note the representations received these had now been analysed by officers and external organisations, such as Essex County Council and Essex Wildlife Trust, had been asked to address specific issues. In addition, Part 1 of the Plan was a joint plan and included cross boundary sites, the responses on which had been confined to comments on the two Garden Communities with allocations in Colchester. It was intended that further comments, to be jointly agreed with Tendring and Braintree, would be circulated to the Committee in the form of the three Councils' response to the Campaign Against Urban Sprawl in Essex (CAUSE) comments on Part 1. The evidence base had also been developed and had helped inform some of the changes proposed to the Plan. The Appendix to the report provided a summary of the number of responses received on each part of the plan and a summary of the key issues raised. The full responses were available on the website.

Any proposed changes to the Preferred Options Local Plan which would create the Submission version of the Local Plan would be presented to the next meeting of the Committee on 7 February 2017.

An Addendum Sheet had been published which identified amendments necessary to the forthcoming plan in relation to land at Achnacone Drive which was now recommended for removal from the Plan and the allocation of land South of Braiswick (Golf Club) and land at St Botolph's Farm which were now recommended for retention with further consideration given to policy wording to reflect adequate protection of relevant site constraints and to safeguard existing residential amenity.

William Sunnocks, on behalf of Campaign Against Urban Sprawl in Essex (CAUSE), addressed the Committee pursuant to the provisions of Meetings General Procedure Rule 5(3). He was disappointed that no response had been made in relation to the very detailed submission made by CAUSE despite the assurance they had been given that this would be provided before the Christmas break. He considered that the residents were not being listened to and that specific requests to Councillors Goss, Smith and T. Young to meet with members of CAUSE had not been agreed to. He considered that the debate on the issues raised in the consultation had been pitiful and that sound comments had been made which could not simply be ignored. He explained that CAUSE was concerned for the future of the Borough and would not be going away.

Councillor Arnold attended and, with the consent of the Chairman, addressed the Committee. He was concerned about the balance of information available on the Council's website in relation to the consultation and was of the strong view that more information needed to be made readily available to the public so that better understanding of the processes and issues was possible for a wider group of people. He also considered safeguards needed to be provided that views expressed were being based on the correct information. He sought clarification regarding the implications of the proposals in relation to West Colchester should the anticipated re-routing of the A120 not transpire and was concerned that this scenario may mean the Council would be deemed to have an unsound Local Plan with vulnerability to speculative development proposals. He also asked for assurances that his previous comments had been taken on board in relation to the loss of car parking facilities for the St Botolph congregation members and the need for consultation with the Highway Authority on an alternative access to the proposed site at Swan Grove, Chappel and he confirmed preference locally for the site at the Manor, Great Horkesley.

David Broise addressed the Committee pursuant to the provisions of Meetings General Procedure Rule 5(3). He was concerned about the pressure for new houses and the instruction to local authorities from the Government to set targets for housing development. He was of the view that communities were being forced to accept new development by Planning Inspectors and that green spaces were being massively reduced as a consequence. He asked for the targets for Colchester to be confirmed and questioned the ability of the new development to deliver the requisite infrastructure.

Christopher Lee addressed the Committee pursuant to the provisions of Meetings General Procedure Rule 5(3). He was concerned about the demands being placed upon local primary schools and doctor's surgeries by the additional numbers of residents and was also of the view that there was a considerable shortage of jobs for lower skilled workers. He questioned the ability of residents to respond adequately to the consultation exercise given the absence of all the background and supporting information required.

Joseph Greenhow addressed the Committee pursuant to the provisions of Meetings General Procedure Rule 5(3). He was concerned about rural housing provision and the need to retain local services for all the rural communities. He considered all settlements had a role to play in delivering new housing for the Borough and was concerned that the Local Plan would actively negate growth as a consequence of settlement boundary restrictions. This would lead to a scenario whereby in certain communities, such as Dedham, no village housing would be permitted which would adversely affect the social and economic needs of the communities. He requested that the strategy for rural communities be reviewed as a matter of urgency.

David Cooper addressed the Committee pursuant to the provisions of Meetings General Procedure Rule 5(3). He was concerned about the impact on health care capacity on

Mersea Island and asked whether an assessment had been undertaken, particularly bearing in mind the restrictions on access and the suspension of the bus services. He questioned the potential for Bradwell Nuclear Power Station to be the subject of re-commissioning and the likely impact in terms of population increases and he referred to the principles contained in the National Planning Policy Framework in terms of infrastructure requirements. He also referred to the need for consideration to be given to Sustainable Drainage Systems.

John Crookenden addressed the Committee pursuant to the provisions of Meetings General Procedure Rule 5(3). He was concerned regarding the lack of empathy with local residents in relation to the West Colchester Garden Community proposals and was of the view that residents were unable to feel confidence with the Council's negotiations due to its poor track record on the delivery of infrastructure. He considered developers had been allowed to reduce the delivery of Affordable Housing and that little consideration had taken place in relation to Community Infrastructure Levy or Section 106 Agreements. He was concerned that the Council did not have the ability to undertake negotiations on the scale required to deliver the number of houses being projected and that mistakes from previous generations would be repeated.

Sir Bob Russell addressed the Committee pursuant to the provisions of Meetings General Procedure Rule 5(3). He explained that he had addressed the Committee four times in relation to the Local Plan consultation and he had also attended Local Plan meetings at Tendring District Council where he considered he had received a more positive response to discussions about the retention of open space. He had attended a workshop on the protection of Salary Brook where participants had been unanimous in concluding that development should not be extended to include East Colchester. He also referred to the Local Plan Committee meeting on 5 July 2016, when he had been given the impression that there would be meaningful open space provision agreed for Salary Brook.

Councillor Cory attended and, with the consent of the Chairman, addressed the Committee. He explained that he had supported the view that the creation of a Local Delivery Vehicle (LDV) would be the best solution to relieve Colchester's housing problems. He further considered that the Council had, to some extent, been compelled into this course of action due to the Government's lack of a coherent housing strategy which was impacting most on those Counties surrounding the London area. He was particularly concerned about the need for infrastructure to be delivered with new housing, siting the considerable traffic problems associated with Clingoe Hill, and advocating the need for a visionary solution to be agreed promptly. He particularly welcomed the opportunities derived from the LDV to deliver more Affordable Housing but sought assurances in relation to the environmental impact of more development of green spaces. He also wanted the Council to strive to have better sustainable credentials such as through the delivery of zero carbon housing and to seek to engage the public in new and different ways in order to more greatly involve communities in shaping their own future.

Rosie Pearson addressed the Committee pursuant to the provisions of Meetings General Procedure Rule 5(3). She was of the view that the West Tey Garden Community proposals would do nothing for Colchester. She was concerned that the consultation exercise had not been a genuine consultation and she sought assurances that the detailed letter of complaint to the Council submitted by CAUSE setting out the shortcomings of the consultation had been forwarded to all the councillors. The 77 page submission from CAUSE in response to the consultation had identified that the evidence base was flawed and that the West Tey proposals were in the wrong location for a new town. She considered no adequate explanation had been given as to why West Tey was considered to be such a good location for development and, as such, called for the proposals to be dropped.

Councillor Chillingworth attended and, with the consent of the Chairman, addressed the Committee. He congratulated the officers on the huge task to undertake the consultation exercise and he considered they had demonstrated a willingness to listen to comments and to reconsider some of the options. He was also aware that officers in the Planning Policy team had agreed to meet with the Parish Councils in the Rural North ward. He referred to the recent proposals for up to 1,000 homes on land at Middlewick Ranges and considered this to be a welcome opportunity to deliver much needed infrastructure to the south of the town. He was concerned that the proposals for West Tey were premature given the yet to be determined new route for the A120 and the absence of a funding allocation for that project as well as the untried issue of potentially seeking to deliver two LDVs within a similar time frame. He considered that the designation of Middlewick Ranges site as a preferred option would raise questions regarding the need for proposals for West Tey, particularly in relation to the former's brownfield status in comparison with the green field status of land in West Tey.

Councillor Barber attended and, with the consent of the Chairman, addressed the Committee. He had reservations about the West Tey proposals and endorsed previous comments about the environmental impact of Garden Communities, given his understanding that the development would include only 15% of land to be open space and the density of housing proposed. He was of the view that more innovative ways to deliver the required infrastructure needed to be explored so that more detailed plans about employment opportunities and the actual location of housing could be assessed in terms of the viability of the proposals. He explained that the existing allocation for the land at Middlewick Ranges was brownfield which he considered to be preferable to the use of green field land such as that at West Tey. He had been accused of nimbyism but he considered his role to be to safeguard the environment for the residents within the ward he represented. He would soon be welcoming a large number of new residents to North Colchester, however, he was aware that residents were concerned about the pressure on the local road network. He advocated a meeting to discuss the road infrastructure issues with representatives from Essex County Council and he invited

Councillor Goss to join him.

Tony Barker, on behalf of East Colchester Action Group, addressed the Committee pursuant to the provisions of Meetings General Procedure Rule 5(3). He referred to the proposals for the Salary Brook area and asked for details to be agreed in relation to the boundaries and extent of the area to be allocated. He considered discussions about its status in terms of a Nature Reserve or Country Park needed to be dealt with later as the most pressing issue was to secure the open space for the future.

Councillor Scordis attended and, with the consent of the Chairman, addressed the Committee. He referred to the proposals for land at Middlewick Ranges and his concern regarding the complete lack of existing infrastructure associated with the current use for military purposes only. Mersea Road, which provided the current access, was already very busy even outside of rush hour times. As such, he considered an alternative access solution needed to be found to enable the housing proposals to be included as an option for development. He was also concerned about the impact on local schools from additional numbers of children as a consequence of the development of the land. He considered the voicing of opinions about the potential suitability of the land at Middlewick Ranges to avoid the need to develop land at other proposed sites to be unhelpful and he cited the more helpful approach adopted in Rowhedge to identify an alternative site within the community in order to combat the unsuitability of an unpopular location.

Councillor Lilley attended and, with the consent of the Chairman, addressed the Committee. He acknowledged that Rowhedge does need additional housing and the local community members had always been willing to identify suitable locations. The community was waiting for housing to come on stream which already had the benefit of permission. Battleswick Farm had not been supported locally whilst the alternative site now being considered in preference had been welcomed by the community if nothing else on the basis of the associated benefit of an extension to the GP surgery. He regretted the tendency of other councillors to seek solutions to housing provision elsewhere from within other communities. He referred to the concerns expressed about West Tey in relation to the new route for the A120 but also acknowledged the views about lack of infrastructure at the Middlewick Ranges site.

John Akker addressed the Committee pursuant to the provisions of Meetings General Procedure Rule 5(3). He acknowledged that the report referred to revisions to the proposals for Mersea Island but he was concerned regarding inconsistencies he had identified and lack of detailed evidence and he maintained his concerns regarding the potential impact on the Coastal Protection Belt. He considered the consultation to be flawed in so far as it discriminated against older people who were less likely to choose to respond online. He continued to be of the view that Mersea was unsustainable for significant development due to its island characteristics. He also voiced his scepticism regarding the comments from Anglian Water in relation to sewage capacity and sought assurances that the implications for the fishing industry would be taken into account.

Councillor T. Young attended and, with the consent of the Chairman, addressed the Committee. He welcomed the contributions made by the various speakers. He explained his support for both the Garden Community proposals for East and West Colchester whilst also acknowledging the need to protect the green wedge between East Colchester and Tendring. As such, he was also supportive of the Salary Brook initiative and the benefits to be gained from protecting the view in this locality. He was of the view that both Garden Communities as well as the proposed development on land at Middlewick Ranges would need to be accepted and he agreed with the revised housing numbers for Mersea Island. He acknowledged the views expressed by community groups such as CAUSE but explained that the four Councils involved with the Garden Community proposals were all in favour of going ahead with the proposals and considered this to be a legitimate endorsement of the principles by democratically elected representatives. He noted the request to meet with representatives from CAUSE and indicated he would await the responses from Councillors Goss and Smith. He referred to Lord Bob Kerslake's review of the Garden Communities project and his published view that it had 'huge potential on a national scale', together with his praise for the progress made to date. Councillor T. Young acknowledged that the early delivery of infrastructure was essential to the success of the proposals, he confirmed that Garden Communities were a government initiative but they represented a welcome opportunity to deliver the necessary housing numbers to this Council. He welcomed the fact that there was demand for housing from people who wanted to live in Colchester and was of the view that most of this demand was from people already within the locality. He was also of the view that the Council had a good track record in delivering housing and its associated infrastructure.

The Chairman acknowledged the importance of infrastructure to the proposals and explained that there were other responsible authorities, such as Essex County Council and the National Health Service who would need to work collaboratively to deliver the necessary requirements. He referred to the comment regarding lack of information about Section 106 Agreements and confirmed that details were readily available online. He was also of the view that Colchester Borough Council's reputation in relation to the development of its Local Plan was acknowledged to be a very good one. He thanked members of CAUSE for their invitation to meet with them and explained that he had been unable to accept on the grounds that his position as Chairman of the Local Plan Committee required him to remain impartial, such that if he accepted one meeting invitation, he would have to accept all. He did, however, give an assurance that a detailed response to the submission from CAUSE would be provided before Christmas.

The Place Strategy Manager responded to the comments made as follows:

- She referred to the comments made by Lord Kerslake who had praised the work undertaken on the Garden Communities and the level of co-operation between local authorities that had been achieved. It had been agreed that more time needed to be built into the programme in order to further develop the evidence base, as a consequence of which, the Councils were each looking to hold an additional meeting cycle in May 2017 to facilitate this. Further consultation would also be undertaken which would take place before the school holidays and extend for a six week period;

- She referred to the detailed submission to the consultation from CAUSE and confirmed that, due to its very detailed nature, an individual response was deemed to be merited on this occasion which would demonstrate the Council's willingness to listen to the issues identified;
- She confirmed it would be possible for elements of the Local Plan to be reviewed and phased if, for example, it was considered that there may be deliverability issues;
- Further negotiation was being undertaken in relation to the sites identified in Chappel;
- The Council's Housing target had been identified as 920 per year whilst the detail of the Council's Community Infrastructure Levy would be set out in the form of a policy document;
- Questions in relation to school provision and school places were a matter for discussion with Essex County Council, as Education Authority;
- Additional work would be undertaken to address the employment criteria for the Garden Community projects and this would be included in the Submission Plan;
- She confirmed the argument that all communities should be permitted to accommodate additional growth but she was of the view that not all communities needed to do so;
- She disagreed with comments made regarding lack of provision of infrastructure. She explained that the Council had taken a decision not to proceed with the Community Infrastructure Levy up to now but to continue instead to use Section 106 Agreements which had been working and continued to work successfully;
- She explained that it would be inappropriate to define the boundaries for the Garden Communities at this stage of their development;
- She confirmed that the need for additional engagement opportunities had been identified for the Garden Community projects in the form of Community Enabling posts;
- She confirmed that a policy to address agriculture and soil issues would be investigated;
- A Brownfield Site Register had been compiled by the Council which listed all previously developed land with potential for development. This had been presented to the Committeeand the public had been asked to support sites for inclusion;
- Regular meetings were taking place with representatives from Essex County Council Highways and Education Departments;
- The land at Middlewick Ranges had been submitted as a late addition to the options document and, as such, a lot of detailed work was still required to determine its deliverability and viability;
- She agreed that the review of the Coastal Protection Belt would be made available on the Council's website;
- She remained of the firm view that there would be far greater matters of concern for the public if the Council had opted not to proceed with a new Local Plan and to leave development opportunities for speculative applications.

Members of the Committee discussed the issues raised at length and, in particular, comments were made, as follows:

- The importance of maintaining a sound Local Plan for the benefit of the borough as a whole;
- Acknowledgement that the consultation exercise needed to allow for detailed comments from members of the public and the importance of the Council being open and to engage fully with the public so far as possible;
- The likely need for a southern relief road to be acknowledged and for the opportunity to be taken now to include it in the infrastructure requirements for the future;
- The continuing importance of Neighbourhood Plans for local communities, giving them freedom to specify what residents want for their own communities, but qualified with the acknowledgement that they required a great deal of work to bring them to a conclusion;
- Welcome the maintenance of a green buffer between Colchester and Tendring;
- Welcoming the views expressed by Lord Kerslake and his proposal that more time be taken to develop the evidence base further;
- The benefits which had been obtained from the use of Section 106 Agreements, that the details were publicly available for the public to view and the fact that officers worked with ward councillors to agree what schemes are needed within the communities;
- Concern regarding the lack of infrastructure on the land at Middlewick Ranges and concern in relation to the sites viability and its potential to deliver housing on the scale currently envisaged;
- The need to start discussions with Essex County Council regarding the appropriate access arrangements for the Middlewick Ranges proposal, bearing in mind the shortcomings of both Mersea Road and Fingringhoe Road and the costs associated with improvements to Weir Road;
- The Garden Communities projects provided a mechanism to deliver infrastructure in a planned and measured way and to retain control of the developments;
- The need for a full transport analysis of the Borough to be undertaken, to include the rail as well as road the networks as well as a retail study to provide information on the number of accommodation spaces might be available;
- The encouragement of more innovative types of house design to be included in future developments to take advantage of low energy usage such as passivhaus systems;
- The need for infrastructure assessments to be on a more holistic basis so that for areas where a number of small developments have been created they can be looked at collectively;
- Tentative support for the removal of development boundaries in rural communities to allow for opportunity for growth without opening up to large scale development;
- Concern within some communities that no alternative sites were being identified in the event that the Garden Communities proposals do not proceed;
- The potential for the East Colchester Garden Community proposal to be more

successful given its smaller scale and the forward funding already identified by Essex County Council for the link road;
• The opportunity for a Garden Community workshop to be arranged to assist with councillors' understanding of the concepts and requirements;
• Support for the proposals identified at the site in Irvine Road, Colchester in the light of the benefit to be derived for residents in the nearby Prettygate ward;
• Support for the enhancement of non-car related transport links in the form of a cycle path from the town centre to Colchester Zoo which would assist with the Zoo's plans for future expansion;
• The importance of the protection of wildlife corridors and also the preservation and or creation of corridors between them;
• The anticipated timescale for the publication of Essex County Council's review of Protected Lanes;
• The changes made to the preferred options document as it was submitted to each meeting of the committee demonstrated that comments and submissions made by the public were being listened to and, in a number of cases, taken on board and the numbers of people who were in attendance at meetings of the Committee was testament to the successful engagement of the public with the processes.

The Place Strategy Manager commented further to explain:
• That there was scope for communities such as Marks Tey to identify smaller scale development by means of the Neighbourhood Planning model and that it might also be possible to allocate some support to the Parish Council from the Community Enabler posts once appointed;
• She welcomed the suggestion to arrange a Garden Community workshop for councillors' to aid their understanding of the issues;
• She confirmed that the publication on Protected Lanes would be made available on the website.

RESOLVED that –
(i) The representations submitted following public consultation on the Colchester Local Plan Preferred Options, together with the proposed officer response on each in order to inform the Full Submission version of the Draft Local Plan be noted and used to inform the emerging Local Plan.

(ii) Arrangements be made for a training session / workshop to be held for councillors on the Garden Community proposals.

94 Authority Monitoring Report

The Committee considered a report by the Head of Commercial Services providing details of the 2015-16 Authority Monitoring Report (AMR).

Laura Chase, Planning Policy Manager, presented the report and responded to

Councillors' questions. Laura explained that the AMR provided key information that helped the Council and its partners to evaluate planning policies in the context of current trends and delivery levels. The full report covering the period April 2015 to March 2016 was attached as an Appendix to the report.

The format of the AMR had been designed to clearly demonstrate how the Council was meeting targets and indicators arising from the adopted policies contained in its Local Plan and to provide information that could be used in reviewing the plan. The AMR also included information on how the Council was working with partners to meet the duty to co-operate on cross-boundary strategic matters.

An Addendum Sheet had been published which identified amendments to the AMR to reflect updated information.

Members of the Committee discussed the issues raised at length and, in particular, comments were made, as follows:

- Considerable surprise that the traffic levels were considered to have declined since 2014;
- Advice was sought as to the level of funds received in relation to commuted sums in relation to Affordable Housing for 2015-16 and how the funds were being spent;
- Advice as to what constituted rural and urban jobs;
- The considerable funds available to the Local Enterprise Partnership (LEP) and the importance of recognising the LEP had responsibility for allocating these funds there were benefits to be had from working with that body to a greater extent than previously;
- The statistics on house completions contained in the AMR appeared to be out of date compared to actual numbers on site;
- The attraction (but likely impracticality) of a policy to provide for developers to undertake to complete each site in turn before commencing work on another;
- Problems associated with the management of developments after the building companies had moved on and the likely benefit to be gained from local authorities retaining control of the delivery of infrastructure to communities;
- The potential to provide for location specific affordable housing provision on the basis that this was the optimum way to secure sub-market housing provision;
- Reference to pollution levels in town centres and the initiatives being adopted elsewhere to address this issue such as the installation of carbon filters on top of flat roof bus shelters.

The Planning Policy Manager responded to the comments made as follows:

- The Council's Affordable Housing Officer had responsibility for negotiating the level of commuted sums for Affordable Housing and she offered to provide this information to the Committee members after the meeting;
- Information in relation to the definition of urban and rural jobs had been derived from census data and she offered to provide further detail to members of the Committee after the meeting;

- The statistics contained in the AMR were in relation to the period up to 31 March 2016 and so would be different to those acquired through local knowledge currently. Also the statistics were based on information by the Building Control service from data supplied by developers who, individually, may use different criteria to define completions.

RESOLVED that the Authority Monitoring Report be agreed for adoption and publication and the various additional requests for information/ data be forwarded to members of the Committee following the meeting.

95 Mrs Louisa White

The Chairman reported that, Mrs Louisa White, a long standing attendee of the Local Plan Committee, was currently unwell and he requested that the best wishes of the Committee for a speedy recovery for Mrs White be recorded.

	Local Plan Committee		**Item 7**
Colchester	**7 February 2017**		
Report of	**Head of Commercial Services**	**Author**	**Karen Syrett 01206 506477**
Title	**Local Development Scheme**		
Wards affected	**All**		

The Local Plan Committee is asked to agree changes to the Local Development Scheme

1. Decision(s) Required

1.1 To agree changes to the Local Development Scheme (LDS).

2. Reasons for Decision(s)

2.1 The plan making process is regulated by the Planning and Compulsory Purchase Act 2004, as amended by the Localism Act 2011 (part 6, Planning, section 111 Local Development Schemes) which governs the production of development plan documents including the LDS through the Town and Country Planning (Local Planning) (England) Regulations 2012.

2.2 The LDS is an essential tool used to keep the Local Plan up to date and provide details of consultation periods, public examinations and expected dates of adoption and publication for each document. The Council previously reviewed the LDS in August 2016 for work up to 2019. The scheme now needs to be updated to adjust the timings of Local Plan and Community Infrastructure Levy preparation stages to reflect the latest timetable for joint work with neighbouring authorities on the Local Plan. The scheme also now needs to update several changes to Neighbourhood Plan preparation.

3. Alternative Options

3.1 The Committee could decide not to update the Local Development Scheme or to make amendments to it. The Council however is required under the Localism Act 2011 and the Town and Country Planning (Local Planning) (England) Regulations 2012 to publish up to date information for the public on the preparation and revision of development plan documents through the LDS.

4. Supporting Information

4.1 A local development scheme is required under section 15 of the Planning and Compulsory Purchase Act 2004 (as amended by the Planning Act 2008, the Localism Act 2011 and the Housing and Planning Act 2016). This must specify (among other matters) the local development documents which are to be development plan documents, the subject matter and geographical area to which each development plan document is to relate, and the timetable for the preparation and revision of the development plan documents. It must be made available publicly and kept up-to-date. It is important that local communities and interested parties can keep track of progress. Local planning authorities should publish their local development scheme on their website.

4.2 Colchester Borough Council first adopted a LDS in May 2005, with various revisions published at regular intervals to reflect changes in governing regulations and work programmes. The current LDS project chart which covers the period 2016-2019 was last reviewed by Local Plan Committee in August 2016. A new LDS is now required to reflect the latest developments in Colchester's plan-making including the new timetables required to facilitate the joint development of local plans with the adjacent authorities of Braintree and Tendring. Those authorities are also revising their LDS to reflect the new aligned schedules. The new timetable retains the same adoption date of September 2018 for the full plan, but provides for a longer period leading up to the submission of the plan with a shorter timeframe for the examination process. This reflects the Planning Inspectorate's current rate of delivery on plan examinations.

4.3 The LDS sets out which documents will form part of the Colchester Local Plan along with the timetable for the preparation and review of each document. The LDS is also reviewed annually as part of the Council's Authority Monitoring Report.

4.4 The LDS sets out which documents will be prepared and in what time frame. The revised LDS (which can be found in Appendix A) provides the scope and further details with regards to each document and includes the Project Chart which outlines the timescales proposed and shows how each document will be progressed over the next 3 years. Below is a summary of the proposed changes which are further explained within the LDS itself:

- Local Plan Review;
  - Member approval of Submission Draft – May 2017
  - Submission Draft consultation - June/July 2017
  - Submission – October 2017
  - Examination of Part 1 - December 2017
  - Examination Part 2 – April 2018
  - Adoption of Part 1 (if possible) – April 2018
  - Adoption of full plan – September 2018
- Community Infrastructure Levy Charging Schedule and Planning Obligations DPD, to be prepared in tandem with the Local Plan (Part 2)

- Joint Development Plan Documents for Garden Communities;
  - Preferred Options consultation – Oct/Nov 2017
  - Submission version consultation – June/July 2018
  - Submission – October 2018
  - Examination – December 2018
  - Adoption March 2019

- Neighbourhood Planning;
  - Boxted – NP Adopted December 2016
  - Myland – NP Adopted December 2016
  - West Bergholt – Plan Area adopted in July 2013
  - Wivenhoe – Plan Area adopted in July 2013
  - Stanway – Plan Area adopted in June 2014
  - Tiptree – Plan Area adopted in February 2015
  - Eight Ash Green – Plan Area adopted in June 2015
  - Marks Tey – Plan Area adopted in September 2015
  - West Mersea – Plan Area adopted in November 2016
- SPD's – un-adoption of two documents – if agreed by Committee.
- Evidence base documents and updates which will be necessary to support the Local Plan Review
- Changes to the text of the LDS to reflect the range of documents outlined above.

4.5 In earlier versions of the LDS, the Council was required to specify details of each Supplementary Planning Document (SPD) intended to be produced. Changes to the Regulations no longer require Supplementary Planning Documents to be included on the LDS. Currently, the only SPD programmed for the next three year period is one on Planning Obligations. This has been shown to demonstrate the links between all the documents which contribute to the Colchester Local Plan. Future additional SPDs as well as further guidance notes and development brief documents may however be produced by the Spatial Policy Team without formal modification of the LDS because of their non-statutory status in the decision making process.

5. Proposals

5.1 The Local Plan Committee is asked to agree changes to the Local Development Scheme.

6. Strategic Plan References

6.1 Effective strategic planning supports the Strategic Plan Action Plan which includes a commitment to make Colchester a vibrant, prosperous, thriving and welcoming place.

7. Consultation and Publicity

7.1 Public consultation on the LDS is not specifically required by the Regulations. Each document highlighted in the LDS will be subject to specific public consultation in line with the statutory regulations at the appropriate time. Attention could well be focused on plans listed in the LDS resulting in publicity for the Council but the Preferred Options are currently subject to consultation and the LDS reflects these.

8. Financial Implications

8.1 None.

9. Equality, Diversity and Human Rights Implications

9.1 An Equality Impact Assessment has been prepared for the Local Plan and is available to view by clicking on this link:- http://www.colchester.gov.uk/article/4962/Strategic-Policy-and-Regeneration or go to the Colchester Borough Council website www.colchester.gov.uk and follow the pathway from the homepage: Council and Democracy > Policies, Strategies and Performance > Equality and Diversity > Equality Impact Assessments > Strategic Policy and Regeneration and select Local Development Framework from the Strategic Planning and Research section.

9.2 There are no particular Human Rights implications.

10. Community Safety Implications

10.1 None

11. Health and Safety Implications

11.1 None

12. Risk Management Implications

12.1 None.

13. Disclaimer

13.1 The information in this report was, as far as is known, correct at the date of publication. Colchester Borough Council cannot accept responsibility for any error or omission.

COLCHESTER

Local Plan
COLCHESTER BOROUGH

Local Development Scheme

Colchester Borough Council's Local Development Scheme 2016-2019

February 2017

Contents

Introduction

The Local Development Scheme (LDS) sets out the Council's timetable for adopting new planning documents which will help guide development in the Borough. This LDS covers the period 2016 to 2019.

Colchester Borough Council first adopted a Local Development Scheme (LDS) in May 2005 with various revisions published since then. The latest revision was in August 2016 which this current version February 2017) now supersedes. Earlier versions of the Colchester LDS were prepared under the requirements of the 2004 Planning and Compulsory Purchase Act and The Town and Country Planning (Local Development) (England) (Amendment) Regulations 2008.

Since 2011 the production of an LDS has been guided by the requirements of s.111 of the Localism Act 2011 which amended s. 15 of the Planning and Compulsory Purchase Act 2004 and is further supported by the Town and Country Planning (Local Planning) (England) Regulations 2012.

The LDS will:

- Provide a brief description of all the Local Plan documents and Neighbourhood Plans to be prepared and the content and geographical area to which they relate.
- Explain how the different documents relate to each other and especially how they relate to the adopted and forthcoming Local Plan.
- Set out the timetable for producing Local Plan documents, giving the timings for the achievement of the following milestones:
    - consulting statutory bodies on the scope of the Sustainability Appraisal
    - publication of the document
    - submission of the document
    - adoption of the document
- Provide information on related planning documents outside the formal Local Plan, including the Statement of Community Involvement, Authority Monitoring Report and adopted guidance.

Progress of the scheme is reviewed at least annually as part of the Colchester Borough Council Authority Monitoring Report (usually published every December).

Planning context

The Council has a good record in meeting the milestones set out in the earlier versions of the LDS and our past delivery rates inform the future programme for the preparation of Local Plan documents up to the end of 2019.

Earlier plans were completed further to the provisions of the Planning and Compulsory Purchase Act 2004 and were known as Local Development Framework documents. Under the 2004 Act, Colchester adopted a full suite of Local Development Framework documents including a Core Strategy (adopted in 2008), Development Policies (adopted in 2010) and Site Allocations (adopted in 2010).

Following a change of government in 2010, a new set of Town and County Planning (Local Planning) (England) Regulations came into force in April 2012 (and amended in November 2012) and these revert to the former terminology of a 'Local Plan'. The purpose of the documents, however, remains the same whether they are referred to as a Local Development Framework or a Local Plan.

Local Plans need to be in conformity with national policy as set out in the National Planning Policy Framework (NPPF), with further guidance in the regularly updated Planning Practice Guidance available online: http://planningguidance.planningportal.gov.uk/.

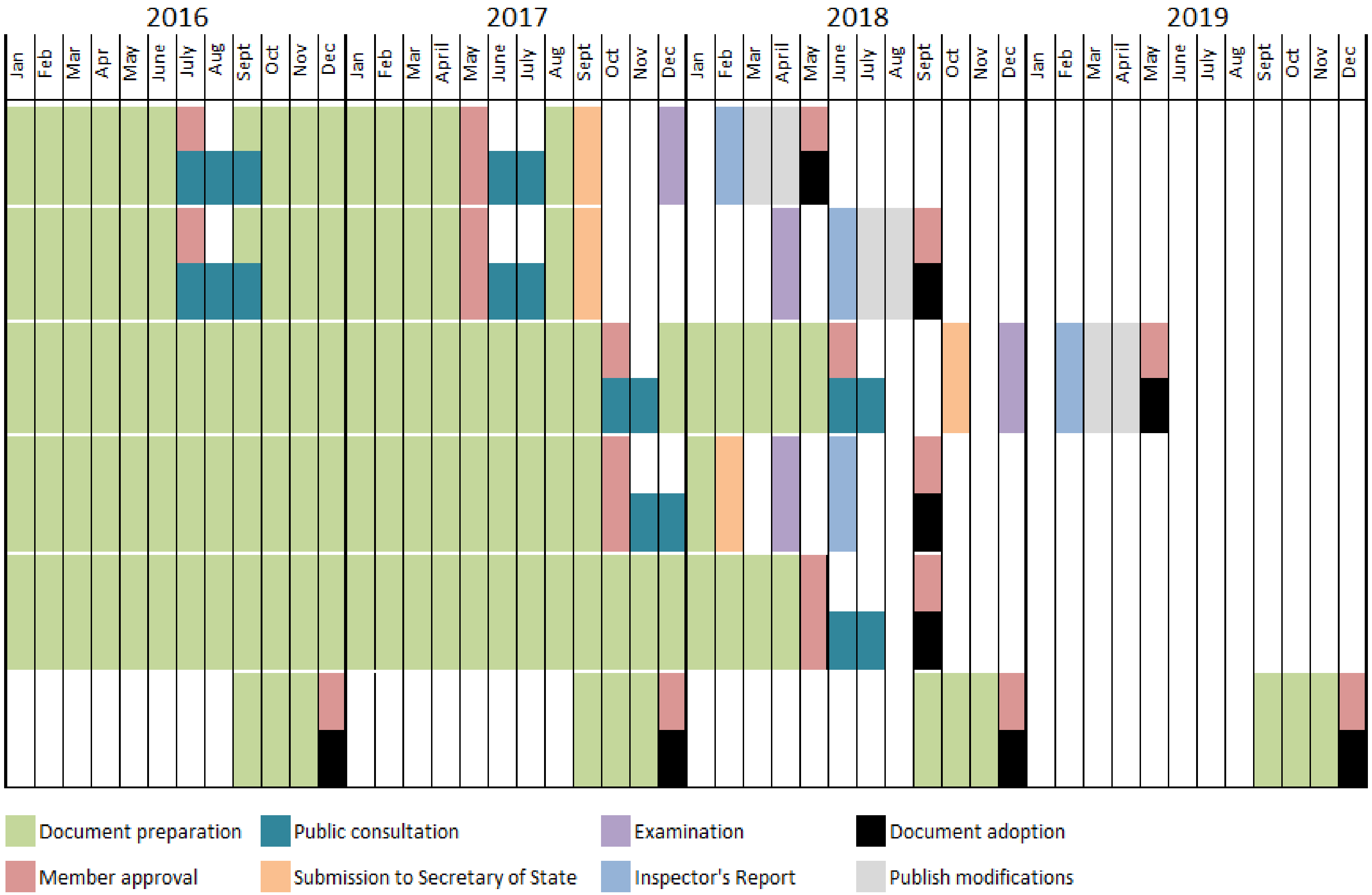
The Council completed a Focused Review of its Local Plan documents in July 2014 to bring selected policies into conformity with the NPPF.

For minerals and waste matters, Essex County Council are the authority responsible for production of the Waste and Minerals Local Plans, which forms part of the Colchester development plan. At present the adopted plans for are Essex is:

- Essex Minerals Local Plan (2014)
- Essex Waste Local Plan (2001) (pre-submission consultation for Revised Waste Plan programmed 2016)

More details on the waste and minerals development document can be found on the Essex County Council website (www.essex.gov.uk) following the links from planning to minerals and waste policy.

Documents to be prepared from 2016 to 2019 – an overview



5

Phasing of work for Local Plan documents

The overview above demonstrates the main milestones as set out in the Town and Country Planning (Local Planning) (England) Regulations 2012 for the production of each of the documents we intend to prepare over the next three years. The tables later in the document set out each stage of plan preparation and the amount of time the Council expects each stage to be completed. The LDS is kept under review to reflect any changes in local circumstances and/or government policy.

The new Local Plan 2017-2033

The Council is undertaking a thorough review of its adopted policies and allocations which will result in a new Local Plan to guide development until 2033 and beyond. An Issues and Options consultation was carried out in January/February 2015, with Preferred Options consultation in summer 2016 and submission of the document to the Secretary of State in October 2017.

Community Infrastructure Levy (CIL)

Colchester Borough Council expects to progress adoption of a CIL Charging Schedule in tandem with the Local Plan. Adoption of a Charging Schedule will allow the Council to charge a standard levy on some developments to fund additional infrastructure.

Neighbourhood Planning

The Localism Act 2011 and the publication of the NPPF in March 2012 placed greater emphasis on developing plans at the community level through a concept of neighbourhood planning. Neighbourhood plans are produced by local communities and once completed (subject to examination and local referendum) they become part of the local authorities' development plan and have a significant influence on the future growth and development of the respective area.

The first stage of developing a neighbourhood plan is to designate a neighbourhood area. A number of parishes in Colchester have now achieved this stage, as shown below. Once a neighbourhood area has been agreed, preparation of a neighbourhood plan can be carried out by a parish or town council, or in the case of unparished areas, a neighbourhood forum. Further neighbourhood plans will be added as required when they are brought forward by local communities when the LDS is revised in future.

Area	**Date NP Area agreed**	**Current stage**
Boxted	October 2012	Adoption 8.12.16
Myland and Braiswick	January 2013	Adoption 8.12.16
West Bergholt	July 2013	Preparation of draft plan
Wivenhoe	July 2013	Pre-submission plan published
Tiptree	February 2015	Preparation of draft plan
Stanway	June 2014	Preparation of draft plan
Eight Ash Green	June 2015	Preparation of draft plan
Marks Tey	September 2015	Preparation of draft plan
West Mersea	November 2016	Preparation of draft plan

Supplementary Planning Documents (SPDs)

Supplementary Planning Documents complement policy contained in the Local Plan. They cannot set new policy but are treated as a material consideration in the determination of planning applications across the Borough. Although SPDs are not subject to examination, they are produced in consultation with the community and other interested parties and are still subject to regulations regarding their consultations. In earlier versions of the LDS, the Council was required to specify details of each SPD intended to be produced. Changes to the Regulations no longer require SPDs to be included in the LDS. Currently the only SPD programmed for the next three year period is the Planning Obligations SPD. Future additional SPDs may however be produced by the Council if approved by the Local Plan Committee without formal modification of the LDS because they do not form part of the development plan. Appendix 1 lists details of existing SPD documents and the proposed Planning Obligations SPD.

Phasing of work for other Local Development Documents

Statement of Community Involvement (SCI)

The Statement of Community Involvement provides a first step in plan making as it outlines the processes for consultation and engagement during the production of future documents of all types. The SCI was originally submitted to the Planning Inspectorate in October 2005 and adopted by the Council in June 2006. It was subject to minor amendments in 2008 following changes to the Regulations and was also revised further early in 2011. In January 2013 a further revised SCI was published for consultation which focused primarily on consultation procedures for planning applications. The latest SCI revision was adopted in March 2013 following consideration of the consultation responses.

The production of an SCI is in part governed and directed by guidance and requirements at the national level. Should the regulations change or new examples of best practice be introduced the Council will update the SCI accordingly. At this time the Council is not aware of any need to update the SCI during the next three year period.

Authority Monitoring Report (AMR)

The Authority Monitoring Report, previously referred to as the Annual Monitoring Report, is published each December to demonstrate the progress of the objectives of the adopted Local Plan.

Adopted Guidance Notes

Guidance notes and other documents are produced as required by the Council to assist in explaining specific protocols and other technical matters. They are non-statutory documents that are essentially informative and may be used to assist the determination of planning applications or in other areas where planning decisions are required. These include guidance on topics such as air quality, contaminated land and archaeology but they may also contain spatially specific guidance in the form of site design briefs. The current guidance notes are listed in Appendix 1 and information on additional guidance will be added to the Council's Adopted Guidance area of the website as and when it is completed.

Local Plan Documents to be prepared during 2016 to 2019- detailed profiles

Details of the documents we intend to produce in the next three years follow in the tables below. The timetable for the production of documents reflects previous experience. The Planning Inspectorate (PINS) are also consulted about the production timetable specifically with regards to documents which require submission of the document to the Secretary of State and a formal examination in public.

Local Plan

Subject and Scope	This document will develop the overall strategic objectives and areas for growth in the Borough. The Local Plan will combine the policies and allocations currently found within the Core Strategy, Development Policies and Site Allocations documents. The Local plan is split into Part 1 (joint strategic plan with Braintree DC and Tendring DC) and Part 2 (specific to Colchester)
Geographical area	All Colchester Borough and cross border work with Tendring and Braintree
Status	Local Plan document
Chain of conformity	Must be in conformity with the National Planning Policy Framework.
Timetable for production	
Initial document preparation	January 2014 – June 2016
Member approval – Preferred Options	July 2016
Consultation on Preferred Options and Sustainability Appraisal	July - September 2016
Member approval – Submission Draft	May 2017
Publication Draft of Local Plan document and Sustainability Appraisal for consultation	June/July 2017
Submission of DPD and summary of comments received to Secretary of State	October 2017
Independent examination of Part 1	December 2017
Publication of Interim Report	February 2018
Independent examination of Part 2	April 2018
Inspector's report	June 2018
Consultation on modifications	July/August 2018
Adoption	September 2018
Production arrangements	Led by Spatial Policy group; input from all internal CBC service groups and Essex County Council as appropriate. The SCI outlines how external parties and members of the public will be involved.
Timetable for review	The Local Plan Full review will set the overall spatial strategy for the Borough and will be reviewed within 5 – 10 years of adoption.

Strategic Growth Development Plan Document(s)

Subject and Scope	This document(s) will include policies and allocations to support strategic allocations for new development. These are likely to be Joint Plans produced with Tendring DC and/or Braintree DC.
Geographical area	As specified in the Local Plan. Preferred Options show broad locations to the east and west of Colchester.
Status	Local Development Plan Document
Chain of conformity	Must conform with the broad allocations in the Colchester Local Plan and the relevant Local Plan of adjacent local authorities if appropriate. The plan will update the allocations for the relevant area of the Borough.
Timetable for production	
Document preparation	January 2016 – April 2017. Some community engagement in this period.
Member Approval – Preferred options	October 2017
Publication and 6 week consultation	October/November 2017
Member Approval – Submission document	June 2018
Pre-Submission consultation	June/July 2018
Submission of DPD and summary of comments received to Secretary of State	October 2018
Independent examination	December 2018
Inspector's report	February 2019
Consultation on modifications	March/April 2019
Adoption	May 2019
Production arrangements	Spatial Policy group in CBC will lead with input from internal CBC service groups, adjacent local authorities and Essex County Council as appropriate. The SCI has determined how external parties and members of the public will be involved.
Timetable for review	The Authority Monitoring Report (AMR) will assess the effectiveness of the policies and allocations.

Community Infrastructure Levy

Subject and Scope	Community Infrastructure Levy
Geographical area	Colchester Borough
Status	CIL charging schedule, governance arrangements, implementation plan, installment policy and other associated documents.
Chain of conformity	Must conform with Local Plan as well as the NPPF.
Timetable for production	
Previous consultation on draft documents	July – September 2011 and November – December 2011
Member Approval of draft Schedule	October 2017
Publication and 6 week consultation	November/December 2017
Submission of Charging Schedule and summary of comments received to Secretary of State	February 2018
Independent examination	May 2018
Inspector's report	June 2018
Adoption	September 2018
Production arrangements	Spatial Policy group. Input from internal CBC service groups and Essex County Council as required.
Timetable for review	It is anticipated that the regulation 123 list (infrastructure items) will be reviewed and updated as required on an annual basis. The charging schedule and other CIL documents will be reviewed as required. The AuthorityMonitoring Report will assess the effectiveness of CIL charges.

Authority Monitoring Report

Subject and Scope	This document provides an analysis of how the Colchester planning policies are performing against a range of established indicators.
Geographical area	Colchester Borough
Status	Annual production, non-statutory but meets need to show evaluation of policies.
Chain of conformity	None
Timetable for production – same process followed each year	
Project work	September – November
Member Approval	December
Publication	December
Production arrangements	Spatial Policy group. Input from internal CBC service groups and Essex County Council as required.
Timetable for review	The Authority Monitoring Report is produced in the autumn of each year and is presented to the last Local Plan Committee meeting in the calendar year.

Planning Obligations SPD

Title	Planning Obligations SPD
Role and content	To provide further details on the collection of the planning obligations received by the Council as a result of planned developments across the Borough.
Status	Supplementary Planning Document
Chain of conformity	The SPD will support the policies within the Local Plan and the Community Infrastructure Levy.
Geographic coverage	Colchester Borough
Timetable and milestones in months:	• Member approval for consultation – May 2018 • Public consultation – June/July 2018 • Adoption – September 2018
Arrangements for production	Colchester Borough Council (CBC) to lead with significant input from Essex County Council. Public consultation to include a press release, advertisement and letters/emails.
Post production - Monitoring and review mechanisms	CBC to monitor after adoption through a review of planning applications.

Evidence Base

The evidence base is a key feature of Colchester's Local Plan and associated planning documents and guidance. It seeks to guarantee that the development plan's proposals and policies are soundly based. To ensure this a number of specialist studies and other research projects are, or will be undertaken. These will also be important in monitoring and review, as required by the AMR.

Some documents will also be published that are not specifically for planning purposes but are important in informing the process (eg. the Colchester Borough Council's Strategic Plan and other service strategies).

Each document will be made publically available at the appropriate time in the process, on the Council's website (www.colchester.gov.uk). All documents will be made available at the relevant examination. These documents will be reviewed in the AMR to see if they need to be reviewed or withdrawn. Other documents may also be produced as needed during the process.

The table on the following pages identifies the reports and studies that will be used to provide a robust and credible evidence base for the Local Plan. This list will be added to if additional work is required.

Integration with other Strategies

The Local Plan has a key role in providing a spatial dimension for many other strategies and helping their co-ordination and delivery. The Council works closely with other public bodies and stakeholders to satisfy the duty to co-operate on strategic matters and the evidence base reflects collaborative working with other authorities and stakeholders.

Documents to be produced as part of the Evidence Base for Local Plan documents

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Title	**Purpose and Scope**	**Timescale and review**
Strategic Environmental Assessment & Sustainability Appraisal	To provide sound evidence base for all documents (except some guidance notes).	Sustainability Appraisal work will be undertaken alongside the formulation of policy documents.
Townscape Character Study	To provide a sound basis for the SHLAA and built environment policies.	Completed June 2006.
Strategic Land Availability Assessment (SLAA)	To provide evidence for housing land availability and distribution in relation to Local Plan requirements.	Completed July 2016.
Strategic Housing Market Assessment (SHMA)	Joint study with Braintree, Tendring and Chelmsford Councils. This updates the SHMA for Colchester undertaken in 2008. It assesses local housing markets and provides evidence on Objectively Assessed Housing Need. Ongoing work as required.	Completed July 2015. Further work on Affordable Housing need completed Dec. 2015. Objectively Assessed Need update published November 2016.
Employment Land Needs Assessment	The study looks at existing sites and future needs to at least 2032. Further detailed work to be undertaken to inform Local plan production	Completed January 2015. Update and Trajectory completed February 2017.
Retail study	The study analyses retail catchment areas and capacity to assess shopping patterns and assess the future capacity for retail floorspace in the Borough. Further work required to inform the Local Plan and ensure most up to date information is used.	Report completed March 2013, Update completed December 2016.
Infrastructure Delivery Plan	To assess capacity and requirements for infrastructure to support growth to 2032	Infrastructure Delivery Plan Study to be completed March 2017
Garden Communities Concept Framework	To provide assessment of options for Garden Community developments	Study completed June 2016
Landscape Character Assessment	To provide evidence for countryside strategies and housing allocations. East Colchester Environmental Audit to inform consideration of East Colchester Garden Community.	Assessment completed November 2005. Completed November 2015
Haven Gateway Green Infrastructure Study (HAGGIS).	To ensure there are sufficient open space, sport and recreational facilities, that they are in the right places, are of high quality, attractive to users and well managed and maintained.	Study completed April 2008.
Colchester Green Infrastructure Study	To provide additional detail at the local level	Work completed in October 2011.
PPG17 Study	To assess provision and requirements for open space and indoor/outdoor recreational facilities to 2021	PPG17 Study completed February 2008.

Sports Pitches and Indoor Sports Facilities Strategy	To update the PPG17 study and assess requirements for playing pitches and indoor sports facilities	July 2015
Strategic Flood Risk Assessment	To update 2007 and recommend mitigation measures	Spring 2017.
Water Cycle Study	To assess provision and need for water and waste infrastructure	February 2017.
Transport Model for Colchester	To enable area-wide traffic and public transport modelling to take place including the future traffic scenarios to be predicted and transport solution to be tested Further work required for Preferred Options	December 2015. July 2016, updated Sept 2016
East Transit Corridor study	To investigate options for a high-speed, high-frequency public transport link between the University, East Colchester regeneration area and the Town Centre.	Initial stage of feasibility study complete November 2015.
Review of Local Wildlife Sites	Update 2008 review of existing local wildlife sites	Review of 2008 work completed February 2016.
Coastal Protection Belt Review	Update evidence base for Coastal Protection Belt designation	Completed June 2016
Historic Environment Characterisation	This project design presents a programme of work to characterise the historic environment of Colchester Borough	Work completed November 2008.
CIL Viability work	To assess the impact of a Community Infrastructure Levy on the viability of schemes across the Borough	Initial work commenced in 2011, review of evidence base completed in October 2015, further analysis to be completed in 2017.
Demographic and Household Projections	To inform decisions on future Borough growth and Objectively Assessed Housing Need. Joint Essex project led by Essex Planning Officers Association	Phase 7 work published May 2015.
Essex Wide Gypsy and Traveller Accommodation Needs Assessment	An Essex wide study commissioned by the Essex Planning Officers Association to provide information on the appropriate number of gypsy and traveller pitches to be provided	Completed in November 2009. Review completed Summer 2014, updated October 2014. Further work underway reflecting national changes.

Monitoring and Review

Monitoring
The development plan system is a continuous process with monitoring and review being fundamental aspects to the delivery of a successful plan. While production of an Authority Monitoring Report is no longer a statutory requirement, local authorities continue to need to demonstrate how plan objectives are being delivered. The AMR has been used to inform the review of this Local Development Scheme.

The AMR will analyse the period of the previous April to March of the current year. The report will:

- Set out how the Council is performing in the production of documents against the timescales and milestones set out in the previous years LDS;
- Provide information on how the strategies/policies/targets in the Local Plan are being achieved;
- Advise on whether any documents need reviewing;
- Review progress on SPDs and whether any new ones are required or old ones withdrawn or reviewed;
- Advise on the need to update the LDS as appropriate; and
- Provide information on the 'State of the Borough'.

The LDS will be monitored, informed by the AMR, and a report produced and submitted to the Local Plan Committee for revision should changes be required.

Review
Following the initial adoption of development plan document, it is anticipated that subsequent reviews will be in the form of a rolling programme following recommendations from the Local Plan Committee.
The AMR will provide information regarding the performance of each document as well as identifying areas where strategies/policies/targets are not being achieved. The outcomes will be dependent on a variety of influences such as changes to Government policy or pressures for development(s) across the Borough.

Resources

Professional Officer Input
The Local Plan process will be led by the Spatial Policy Team as part of Commercial Services at Colchester Borough Council.

The Spatial Policy Team consists of Planning Policy and Transportation Policy, lead by the Place Strategy Manager who will be responsible for the overall project and policy direction. The team also includes a planning policy manager and four planning officers, who will be responsible for various elements of the Local Plan process and policy. Transportation officers will also be heavily involved in the production of the Local Plan, working alongside colleagues from Essex County Council.

Additional staff resources will be brought in to the process from time to time as required from other professional groups within the Council and outside agencies as follows:

Commercial Services
- Housing Policy
- Economic Growth
- Regeneration
- Leisure, Tourism and Cultural services

Other CBC Services
- Development Management
- Environmental Protection
- Research and Engagement
- Community Strategies
- Operational Services
- Elections

Others
- Highways England (strategic highways matters)
- Essex County Council (other highway matters, education, planning etc)
- Rural Community Council for Essex (to promote/facilitate links with parish councils)
- Specialist consultants (to develop elements of the evidence base).

Consultee groups
The Statement of Community Involvement (SCI) sets out in detail who we will consult and at what stage in the production of all documents. The SCI covers both plan making and decision taking so all aspects of the Council's statutory planning functions have been included within the SCI.

Risk Assessment

There are several factors which may impact upon the ability of the Council to keep to the timetable for the production of documents. The table below considers and deals with the main risks.

Issue and level of risk	Comment and proposed mitigating measures
Significant public opposition to plan proposals. **High Risk, Medium Impact**	The production of the Local Plan and specifically the allocation of land is likely to be contentious. Whilst every effort will be made to build cross-community consensus, there is a high risk of significant public opposition.
Inability of PINS to deliver examinations/reports to timetable. **Low Risk, Medium Impact**	The capacity of the Planning Inspectorate is an issue given the demands on its limited resources. There is also uncertainty as to the Governments plans for planning policy. PINS may not be able to provide Inspectors at the appropriate times. If problems do occur, caused by factors outside the council's control, we may have to accept some slippage of the timetable. The LDS would need to be amended accordingly.
Loss/turnover of staff **Medium Risk, High Impact**	The Spatial Policy Team have benefitted from low turnover in recent years, but there is currently a national shortage of planning officers.
Financial shortfall **Medium Risk, High Impact**	Any review of documents is a costly exercise, involving preparation of an evidence base, production of documents, consultation and examination. In previous years the Council has allocated funds through the Housing & Planning Delivery Grant (HPDG) and its Service and Financial Planning process to allow for the preparation of the Local Plan. In the longer term no HPDG funding is available. Additional Council expenditure will be subject to scrutiny. Examination costs may inflate due to the length/complexity of the Examination. This will be kept under review.
Changing Political Priorities **High Risk, Medium Impact**	This document has been considered and approved by Local Plan Committee which has a cross party representation of members. Elections in the borough could result in political changes and/or there could be changing priorities. Any future changes in the documents to be produced can be dealt with at the annual review.

Legal Challenge **Low Risk, High Impact**	A legal challenge may be lodged to any document within six week of adoption. The degree to which this will happen is uncertain due to the untried nature of the system emerging. However, a challenge will only succeed if the Council (or Inspector) has made a mistake in procedure or in fact. To avoid a legal challenge, every effort will be made to ensure that procedures are followed and facts are correct.

Appendix 1 - Supplementary Planning Guidance/Documents and Planning Guidance Notes - status as at February 2017

Existing Supplementary Planning Documents

Subject	Approval Date
Provision of Open Space, Sport and Recreational Facilities	July 2006, charges updated 2012
Backland and Infill Development	December 2010
Community Facilities	September 2009, revised July 2013
Car Parking Standards (ECC)	September 2009
Shop front Design Guide	June 2011
Affordable Housing	August 2011
Cycling Delivery Strategy	January 2012
North Colchester Growth Area	June 2012
Street Services	October 2012, revised February 2016
Better Town Centre	December 2012
Sustainable Drainage Systems Design Guide	April 2015
Sustainable Construction	June 2011

Proposed Supplementary Planning Documents

Planning Obligations SPD (to align with Community Infrastructure Levy Charging Schedule)	Adoption 2017

If you need help reading or understanding this document, please take it to our Community Hub in Colchester Library or telephone 01206 282222. We will try to provide a reading service, a translation, or any other format you need.

Local Plan Committee			**Item 8**
7 February 2016			
Report of	**Head of Commercial Services**	**Author**	**Christopher Downes 01206 282476**
Title	**Unadoption of out-of-date supplementary planning documents**		
Wards affected	All		

The Local Plan Committee is asked to agree to un-adopt the *Extending Your House?* SPD and *Planning Out Crime* SPD

1. Decision(s) Required

1.1 To agree to un-adopt the *Extending Your House?* and *Planning Out Crime* Supplementary Planning Documents (SPDs).

2. Reasons for Decision(s)

2.1 The Supplementary Planning Documents have become out-of-date and are therefore no longer suitable for their intended purposes.

3. Alternative Options

3.1 The Committee could decide not to un-adopt these planning guidance documents however this would result in the Council continuing to have adopted planning guidance which conflicts with other guidance as well as current planning legislation and national policy. This situation is likely to cause uncertainty for applicants, causing unnecessary delay and confusion in the planning process.

4. Supporting Information

Extending Your House? SPD

4.1 The *Extending Your House?* SPD is a planning guide for applicants which describes the principles of domestic development which might make proposals acceptable to the Council in planning terms. The purpose of the guide was not for planning professionals but rather as a short hardcopy pamphlet for applicants with little or no planning experience. The principles of domestic development referred to in the document relate to local design considerations as well as more general principles relating to the avoidance of overbearing, overshadowing and reduction of privacy in built up areas.

4.2 The document was originally adopted in 2001 as a guidance note but was later formalised as an SPD in 2005. Whilst the document was a useful guide when it was originally adopted, much has changed within the planning system since it was published including successive changes to planning legislation and national policy. These changes have increased the types of development that can be carried out without planning permission including domestic extensions. Therefore parts of the *Extending Your House?* guide have fallen out-of-date as a result of recent legislative changes.

4.3 In addition to having fallen out-of-date with current planning legislation, the document also conflicts with the more comprehensive Essex Design Guide. In contrast to *Extending Your House?*, the Essex Design Guide is a comprehensive guidance document for planning professionals and covers all areas of development design from householder extensions right up to new settlement layouts and is used throughout the county to inform planning proposals. At the time of adopting *Extending Your House?* the Essex Design Guide was not available online, but now that all adopted guidance can be freely viewed on the Council's website, there is less need for a document designed as a pamphlet in place of comprehensive guidance.

Planning Out Crime SPD

4.4 The *Planning Out Crime* SPD was adopted by the Council in 2005 and sets out the principles of urban development included in the Government's *Safer Places: The Planning System and Crime Prevention* practice guidance which was published as a companion document to now withdrawn national planning guidance. The document essentially promotes good urban design to reduce the scope for criminal activity in new development including through the well-accepted principles of passive surveillance and good maintenance of public spaces.

4.5 Much of the development guidance contained in *Planning Out Crime* remains largely relevant however many of the references contained in the document are now out of date and refer to now defunct national policy. Moreover the principles of design contained in the document have been absorbed into later guidance documents such as the Essex Design Guide and the relationship between crime and good urban design is recognised in existing national policy.

4.6 Whilst both SPDs are now considered unfit for their intended purposes, the benefits of clear and simplified planning guidance are recognised and it is envisaged that the Council will produce updated planning guidance for applicants including those considering extending their homes. Updated planning guidance will be produced in conjunction with the emerging Local Plan, ensuring that applicants are signposted to relevant local planning policies where necessary. Updated guidance will also ensure that the latest changes to planning legislation and national policy are taken into consideration and suitably explained.

5. Proposals

5.1 It is proposed that the *Extending Your House?* and *Planning Out Crime* SPDs are un-adopted to ensure consistency with national policy and regional guidance and to provide clarity for applicants by removing the conflict currently contained between existing guidance.

6. Strategic Plan References

6.1 Effective strategic planning is essential to support the Strategic Plan Action Plan's commitment to make Colchester a vibrant, prosperous, thriving and welcoming place. The clarification of planning guidance for applicants encourages good design and contributes to an effective and efficient planning system.

7. Consultation

7.1 There is no consultation proposed however the proposal reflects feedback from planning applicants and planning professionals.

8. Publicity Considerations

8.1 It is unlikely the removal of these planning guidance documents will attract publicity however it will be important the Council advertises these changes clearly to ensure the documents are no longer referred to by applicants.

9. Financial Implications

9.1 There are no direct financial implications.

10. Equality, Diversity and Human Rights Implications

10.1 An Equality Impact Assessment has been prepared for the Local Development Framework and is available to view by clicking on this link:
http://www.colchester.gov.uk/article/4962/Strategic-Policy-and-Regeneration
or go to the Colchester Borough Council website
www.colchester.gov.uk and follow the pathway from the homepage: Council and Democracy > Policies, Strategies and Performance > Equality and Diversity > Equality Impact Assessments > Strategic Policy and Regeneration and select Local Development Framework from the Strategic Planning and Research section.

10.2 There are no particular Human Rights implications.

11. Community Safety Implications

11.1 None

12. Health and Safety Implications

12.1 None.

13. Risk Management Implications

13.1 The provision of clear and nationally compliant planning guidance documents ensures applicants have a clear understanding of the Council's requirements when considering and preparing development proposals. This reduces the risk of delays and inefficiencies in the planning system.

14. Disclaimer

14.1 The information in this report was, as far as is known, correct at the date of publication. Colchester Borough Council cannot accept responsibility for any error or omission.

Colchester

Local Plan Committee

Item 9

7 February 2017

Report of	**Head of Commercial Services**	**Author**	**Karen Syrett** **01206 506477** **Laura Chase** **01206 282473**
Title	**Retail and Town Centre Study**		
Wards affected	**All**		

The Local Plan Committee is asked to note the contents of the Retail and Town Centre Study which will be added to the Council's Local Plan Evidence Base and used to inform the Submission version of the Local Plan in line with the proposed changes set out in this paper.

1. Decision(s) Required

1.1 To note the Retail and Town Centre Study for publication on the Council's website and addition to the Local Plan Evidence Base.

1.2 To agree the approach to retail and town centre policies in the Submission version of the Local Plan (including the changes proposed to the Preferred Options version).

2. Reasons for Decision(s)

2.1 An up-to-date assessment of retail and town centre issues is required to underpin the development of a new Local Plan by providing a robust and credible evidence base. As noted at the meeting in December, the Centres and Employment policies will require revision in light of the new evidence base, which replaces the Retail Update 2013 prepared by NLP, and consultation responses received.

3. Alternative Options

3.1 The Council could choose not to include the Retail and Town Centre Study in its evidence base, but as the report is considered to be sound this is not an acceptable option since the Council needs to demonstrate that its Local Plan retail and town centre policies are founded on a solid evidence base.

4. Supporting Information

4.1 Paragraph 23 of the National Planning Policy Framework (NPPF) promotes competitive town centres and requires local planning authorities to positively plan for growth over the plan period. To provide the evidence base for new Local Plan policies and allocations in this area, Colchester Borough Council commissioned

Cushman & Wakefield (CW) to prepare a new and up-to-date Retail and Town Centre Study (the Study). This work now replaces the Retail Update 2013 prepared by NLP. The Study will also guide planning policies and decisions on planning applications.

4.2 The Study considers the qualitative and quantitative needs for town centre development over the period to 2033; how such needs should be accommodated; and a realistic strategy for growth and improvement. Given the dynamic nature of retailing, the Study (and the retail capacity forecasts in particular) should be periodically revised, as necessary.

4.3 The Study was prepared in the context of a number of events and forecasting issues, including;

- Current economic conditions
- The impact of consumer habits and expectations on the retail landscape; and
- Increasing competition from shopping destinations outside Colchester Town Centre.

4.4 The Study made a number of key policy and allocation recommendations which will inform the Submission Version of the Local Plan which are summarised below.

4.5 **Retail Hierarchy**

Town Centre. In response to paragraph 23 of the NPPF which requires local authorities to define a network and hierarchy of centres, it is recommended that the Council adopt a three-tier hierarchy of centres. This also reflects consultation responses received. Colchester Town Centre is at the top of the hierarchy given that it is the principal shopping destination in the Borough supported by an extensive range of related town centre uses. It is considered relatively healthy at present, although the Study research and analysis identified some weaknesses and areas for improvement to ensure its vitality and viability over the plan period. A robust 'town centre first' approach should be followed to ensure that larger scale retail development is focused on Colchester Town Centre. Restricting larger scale development in the Borough's lower order centres will maximize the prospects for achieving new development in Colchester Town Centre, thereby enabling the Town Centre to claw back comparison goods expenditure from competing shopping destinations and ensure its pre-eminence at the top of the Borough's retail hierarchy.

4.6 District Centres. The Urban District Centre category was removed in the Preferred Options version of the plan, but the Study recommends that Tollgate, Turner Rise, Peartree Road and Highwoods should all be considered for reclassification as district centres in the new Local Plan. The Rural District Centres will also be retained as district centres. This is to ensure that the Borough has a network and hierarchy of centres, as required by the NPPF, capable of serving their respective areas of the Borough. It will further help to ensure that the Council, as local planning authority, can effectively plan for these centres and formulate an appropriate policy response through the new Local Plan. The Study recommends further consideration as to whether Greenstead serves as a District or Local Centre. The assessment does not identify a qualitative need for substantial new retail floorspace in District Centres in order to ensure their vitality and viability. Instead, it recommends enhancement through non-retail uses, such as services and community facilities, is more appropriate to ensure that they better serve the day-to-day needs of their local communities. This approach will also ensure the District Centres retain their position in the retail hierarchy and do not undermine Colchester Town Centre's vitality and viability.

The Preferred Options version of the plan identifies two Proposed District Centres as part of New Garden Communities in East Colchester and West Colchester respectively. These will be retained in the Submission version of the plan.

4.7 Local Centres – The Study has not undertaken a full review of the Borough's local centres but considers that they perform an important role in terms of providing small scale retail and service uses to meet the basic needs of local communities. The Council will need to carry out further work to refine its list of Local Centres, given that those designated in the current Local Plan might in some instances be considered to be 'small parades of shops of purely neighbourhood significance' which are excluded from the NPPF's definition of 'centres'. It may however still be appropriate to retain them as they provide valuable community facilities.

4.8 **Capacity Forecasts** - The Study provides retail capacity forecasts for new convenience and comparison goods floorspace as well as considering future leisure requirements. For convenience goods (ie supermarkets) it is concluded that there could potentially be capacity for one new medium-sized foodstore in the Borough by 2028 if forecast trends occur. The preferable location for this would be in or on the edge of Colchester Town Centre in accordance with the sequential approach, and where a lack of main foodstore provision has been identified. For comparison goods (i.e. clothing, furniture etc) the Study considered two scenarios, one a continuation of existing shopping patterns (i.e. market shares) and the other assuming Colchester Town Centre increases its market share as a result of committed development (i.e. new Primark) and planned development (i.e. site allocations including Vineyard Gate) at 2023 to ensure the primacy of the Town Centre. Under this scenario, there would be capacity for up to 18,650 sqm net of comparison good floorspace by 2033 to support the redevelopment of Vineyard Gate and, to a lesser degree, Priory Walk.

4.9 **Future Town Centre Development Needs** – Cushman and Wakefield have identified and assessed four sites in and on the edge of Colchester Town Centre suitable for and capable of accommodating the full extent of future town centre floorspace needs to 2033:

Vineyard Gate – Vineyard Gate is classed as the prime opportunity to accommodate forecast capacity and need for new comparison good retail floorspace. It represents the most significant opportunity in Cushman and Wakefield's view to offer larger format shop units, which would be suitable for modern, high quality retailers seeking to locate or relocate within the town centre. In turn, this would help with the objective of enhancing the town centre's attractiveness to consumers and clawing back expenditure from competing shopping destinations. The Council's proactive approach to land assembly following Caddick Group's removal as developer partner is considered to improve the prospects of achieving the Council's long-standing objective for this key town centre site. The Council are, to this end, seeking to work alongside CBREGi, as owners of Lion Walk shopping centre, on a scheme which will extend the shopping area south of Lion Walk, across Vineyard Gate. Additionally, the Council is in a position to ensure the complex design, heritage and archaeological issues affecting the site are addressed early, given the relationship with Historic England it has on schemes elsewhere in the Town Centre and previously regarding the Vineyard Gate site.

<u>Priory Walk</u> – Cushman and Wakefield consider that there is substantial potential to improve the existing shopping centre's public realm and retail offer, either through extensive reconfiguration and refurbishment, or by redevelopment. The redevelopment of the centre could potentially accommodate some of the forecast capacity for comparison goods retail floorpsace in the Town Centre (up to an additional 5,000 sqm net), most likely following the successful delivery of Vineyard Gate and St Botolph's.

<u>St Botolph's</u> – Mixed use redevelopment of the St Botolph's site, with a focus on leisure uses is considered to significantly and positively transform this important part of the town centre. The qualitative assessment of Colchester Town Centre has identified a need for a focused critical mass of food and drink uses, and in the consultant's view, the St Botolph's site represents the most suitable opportunity for such development. It is sufficiently well-connected with the main shopping area to complement the town's retail offer.

<u>Town Centre West</u> – A site extended over approximately 7.7 hectares on the northwest edge of Colchester Town Centre, to the north of Colchester Retail Park (Middleborough/North station road.) The area is considered to be an appropriate location for further office development supported by residential. Based on the assumption that amenity/infrastructure enhancements would be required and that the developable area will not exceed 40% in order to allow for access, car parking and amenity, the site is considered to have the physical capacity to accommodate two-thirds commercial uses with the remainder dedicated to residential uses and other ancillary provision.

If any proposals come forward for new retail development in or on the edge of district centres, they should be proportionate to the role and function of that centre in the Borough's retail hierarchy. Larger scale retail development should be focused on Colchester Town Centre, in accordance with the retail hierarchy.

4.10 **Primary Shopping Area and Primary and Secondary Retail Frontages**
The NPPF (para 23) requires local planning authorities to define the extent of Primary Shopping Areas based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations. Appendix G of the Study maps these areas and provide the Council with clear direction on the approach to safeguarding retail uses in key areas. Within the primary areas, which includes the key areas of Lion Walk, Culver Square and Fenwicks, it is recommended that the Council should

take a restrictive approach to non-retail uses, with a policy seeking to maintain up to 70% A1 retail uses. Within the secondary frontages the Council is recommended to afford greater flexibility for changes of use within Classes A1-A15 in order to maximise the number of occupied units and sustain a more diverse composition of uses. A 50% A1 retail use policy is supported for those frontages.

5. Proposals

5.1 It is proposed that the Committee note the findings of the Retail and Town Centre Study and use them to inform policies and allocations in the emerging Local Plan.

5.2 Committee will recall at the December meeting that Officers made the following recommendations following the Preferred Options consultation;

- some rewording of the policies recommended to mention in particular role of evening economy;
- to clarify that the 500 sqm threshold applies to District Centres in Tiptree, West Mersea and Wivenhoe;
- a retail hierarchy will be reinstated based predominantly on the existing urban and rural district centres;
- Tollgate, Peartree Road, Highwoods and Turner Rise to be reinstated as Urban District Centres;
- Revisions to the Primary and Shopping area frontages to reflect the recommendations of the Retail Study update.

5.3 The following sections provide a proposed approach to the retail and centres chapter to be included in the Plan.

5.3.1 <u>Identify a Retail Hierarchy</u>
A three-tier hierarchy of centres is considered appropriate for Colchester Borough as follows:

1. Town Centre
2. District Centres
3. Local Centres

Colchester Town Centre is the principal shopping destination in the Borough supported by an extensive range of non-retail facilities such as day-to-day services and leisure, cultural and community uses.

Hierarchy	
Town Centre	Colchester's historic Town Centre
District Centres	Highwoods Peartree Road Tiptree Tollgate Turner Rise West Mersea Wivenhoe
Local Centres	Specific sites to be identified in Adopted Proposal Maps

Policies will set out the role and function of each centre in the hierarchy.

Policies on such centres will include the development management tests set out in paragraphs 24 (sequential test) and 26 (impact tests) of the NPPF.

5.3.2 <u>District Centres</u>

Policies will make it clear that within District Centres new retail and leisure proposals will only be supported where:

i) The proposal is of a type and scale appropriate to the role and function of the particular centre and would not threaten the primacy of Colchester Town Centre at the apex of the retail hierarchy
ii) Proposals to vary/remove conditions, including change the types of goods sold and the size of units, would not alter the centre's role as a district centre
iii) The proposal would not have a significant adverse impact on the vitality and viability of Colchester Town Centre and/or any other centre
iv) The proposal would not have a significant adverse impact on public or private investment in Colchester Town Centre and/or any other centre
v) Proposals will need to meet accessibility and design criteria.

Although the Council will seek the enhancement of district centres through non-retail uses (including services and community facilities): support for such uses will only be forthcoming where the concentration of such uses would not prejudice the viability of the centre's main retail function.

Development, including extensions to existing facilities, for main town centre uses outside of the district centres will only be permitted if, following a sequential assessment, it can be demonstrated that the development could not be accommodated more centrally having demonstrated flexibility in the format and scale of the proposal.

5.3.3 Definition of Primary Shopping Area.

Paragraph 23 of the NPPF requires local planning authorities to define the extent of Primary Shopping Areas (PSA), 'based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations.'

The Primary Shopping Area for Colchester Town Centre is shown in Appendix G to the Retail study attached.

A Primary Shopping Area for the district centres will also be identified in the Local Plan.

5.3.4 Define Primary Shopping Frontage and applicable policy.

In defining primary and secondary frontages and thus a PSA, it is prudent to take into account the following principles:

- composition of uses;
- key anchors/ attractors;
- vacancies;
- pedestrian footfall; and
- levels of accessibility/ connectivity.

The Primary Shopping Frontage for Colchester Town Centre is shown on the Plan attached as Appendix G to the Retail study attached.

Within the primary frontages the Council will take a more restrictive approach to further changes of use to non-retail / service uses. The policy will seek to maintain up to 70% A1 retail use. However, it is considered that A3 (food and drink) uses would be preferable to long term vacancies, if after extended marketing A1 retail use cannot be secured.

5.3.5 Define Secondary Shopping Frontages and applicable policy.

The Secondary Shopping Frontage for Colchester Town Centre is shown on the Plan attached as Appendix G to the retail study attached.

Within the secondary frontages the Council will afford greater flexibility for changes of use within Classes A1-A5, in order to maximise the number of occupied units and sustain a more diverse composition of uses. The Policy will seek to maintain 50% A1 retail use within the secondary frontages.

5.3.6 Identify sites to accommodate future development needs.

The following sites will be identified in the Local Plan as potential development opportunities to accommodate future comparison retail space and other town centre uses:

- Vineyard Gate;
- Priory Walk;
- St Botolph's (principally leisure and mixed use); and
- Town Centre North West (predominantly office and residential based mixed use scheme).

Policies will set out the detail for each site.

5.3.7 Impact Test Thresholds.

In accordance with the NPPF, when assessing applications for retail, leisure and office development outside of town centres, which are not in accordance with an up-to-date Local Plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500 sq m).

Further work will be undertaken to determine what local thresholds should be set for impact testing, when planning applications for retail development are submitted to make sure they are appropriate for Colchester.

6. Strategic Plan References

6.1 Effective strategic planning supports the Strategic Plan Action Plan which includes a commitment to make Colchester a vibrant, prosperous, thriving and welcoming place.

7. Consultation

7.1 The Retail and Town Centre Study will form part of the evidence base supporting the Council's Local Plan which is published on the Council's website. The Local Plan is covered by a comprehensive consultation programme as set forth in the Council's Statement of Community Involvement (SCI).

8. Publicity Considerations

8.1 The information on retail and town centre trends could warrant press attention.

9. Financial Implications

9.1 There are no direct financial implications.

10. Equality, Diversity and Human Rights Implications

10.1 An Equality Impact Assessment has been prepared for the Local Development Framework and is available to view by clicking on this link:-
http://www.colchester.gov.uk/article/4962/Strategic-Policy-and-Regeneration
or go to the Colchester Borough Council website www.colchester.gov.uk and follow the pathway from the homepage: Council and Democracy > Policies, Strategies and Performance > Equality and Diversity > Equality Impact Assessments > Strategic Policy and Regeneration and select Local Development Framework from the Strategic Planning and Research section.

10.2 There are no particular Human Rights implications.

11. Community Safety Implications

11.1 None

12. Health and Safety Implications

12.1 None

13. Risk Management Implications

13.1 Provision of a robust evidence base to inform planning policies is intended to reduce the risk of inappropriate development. It will provide consistent advice to landowners, developers, officers, Councillors and members of the public. Timely production of a Local Plan will avoid the potential risk of Government intervention to take over plan production.

14. Disclaimer

14.1 The information in this report was, as far as is known, correct at the date of publication. Colchester Borough Council cannot accept responsibility for any error or omission.

Background Papers

Full Report – Retail and Town Centre Study

Retail and Town Centre Study 2016

PREPARED FOR

COLCHESTER BOROUGH COUNCIL

DECEMBER 2016

Contents

Appendices

1. Introduction

1.1 Colchester Borough Council has commissioned Cushman & Wakefield (CW) to prepare a new and up-to-date Retail and Town Centre Study for the Borough (hereafter the 'Study'). It replaces the Retail Update 2013 prepared by NLP.

1.2 The purpose of this Study is principally to consider the qualitative and quantitative needs for development over the period to 2033; how such needs should be accommodated; and a realistic strategy for growth and improvement. Our work will inform the new Local Plan, helping to guide planning policies and decisions on planning applications.

1.3 The Study is prepared in the context of a number of events and forecasting parameters, including:

- Current economic conditions;
- The impact of consumer habits and expectations on the retail landscape; and
- Increasing competition from shopping destinations outside Colchester Town Centre.

1.4 It provides the Council with a sound evidence base for plan-making in accordance with paragraph 23 of the National Planning Policy Framework ('Framework'), which promotes competitive town centres[1] and requires local planning authorities to positively plan for growth over the plan period.

1.5 For ease of reference this Study is set out as follows:

- Section 2: Trends in Retail and Commercial Leisure
- Section 3: Qualitative Assessment – Colchester Town Centre
- Section 4: Qualitative Assessment – District Centres
- Section 5: Basis of Retail Capacity Forecasts
- Section 6: Quantitative Capacity for New Retail Development
- Section 7: Analysis of Commercial Leisure Provision
- Section 8: Review of Potential Development Opportunities
- Section 9: Policy Recommendations
- Section 10: Conclusions and Implications for Strategy

[1] The Framework (Annex 2) defines town centres as: *'Area defined on the local authority's proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.'*

2. Trends in Retail and Commercial Leisure

Introduction

2.1 This section reviews the latest trends in the retail sector, including commercial leisure, and their implications for the Borough and Colchester Town Centre in particular.

2.2 It is well-known that the retail sector is in a period of rapid change. According to the British Retail Consortium (BRC), the sector nationally employs over 3 million people[2]. However the new and emerging trends – augmented by cost pressures (e.g. the introduction of the National Living Wage) and subdued growth in consumer expenditure – could result in as many as 900,000 fewer jobs in retailing by 2025[3] as greater focus is placed on the productivity of people and retail space[4]. Another important factor is the recent rise in the cost of importing goods, caused by the falling value of the pound (post 'Brexit' vote). This is likely to result in higher prices as retailers pass the cost rises to consumers[5].

2.3 C&W research[6] found that national retailer demand was strong in H1 2016 (pre 'Brexit' vote), led primarily by food and 'value' fashion retailers, although there was some positive activity from mid and mass market retailers. The major regional cities and top market towns continue to benefit from the migration of demand from supply starved locations in London and the South East. The market has seen several new entrants recently, but established retailers such as Holland & Barrett, Joules and Paperchase are among the most active and are looking for opportunities to expand. The out-of-town retail sector is seeing rising footfall against declines in other sectors, with a wide range of retailers reporting expansion plans and new store formats.

2.4 The uncertainty over the longer term implications of the 'Brexit' vote is affecting confidence. Whilst demand from occupiers and investors is forecast to remain steady in prime markets, second tier and secondary markets (Colchester Town Centre falls within this bracket) are expected to see more selective demand in H2 2016, as occupiers and investors continue to re-assess risk.

2.5 Against this background, we outline below the national trends in the retail sector and the implications for town planning and development in the Borough. To that end, we consider the following factors:

- The growth of internet shopping;
- Retailer polarisation (and downsizing);
- Consumer expenditure;
- Changing store formats;
- Increasing importance of commercial leisure uses;
- Mix of uses including the balance between multiple and independent retailers; and
- Providing a high quality experience and environment.

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[2] Retail 2020 – What our people think (May 2016), BRC.
[3] Retail 2020 – Fewer but better jobs (February 2016), BRC.
[4] Retail Trends 2016 – Redefining convenience, Deloitte.
[5] The Guardian (12 October 2016).
[6] C&W UK Retail Market Snapshot (Second Quarter 2016).

The growth of internet shopping

2.6 Internet shopping has experienced rapid and significant growth since the late 1990s.

2.7 Cushman & Wakefield Research estimate that almost 15% of all retail sales will be conducted through online channels this year (2016), equating to more than £42.4 billion. Whilst the rate of online retail sales is slowing, they are forecast to reach £62.7 billion by 2020.

2.8 Information for the UK published by Pitney Bowes[7] forecasts that total non-store, including online, sales of comparison goods (i.e. non-food) will increase from 18.9% in 2015 to 22.7% by 2021. In terms of convenience goods, Pitney Bowes predict a relatively modest increase in such sales from 7.2% in 2015 to 8.4% by 2021.

2.9 The UK retail market has a dynamic landscape and internet shopping is not the only channel available to consumers. The market has an established multi-channel network meaning consumers purchase goods, wherever and whenever they want, through a combination of:

- In-store;
- Online;
- Mobile; and
- Tablet.

2.10 While it is difficult to accurately predict how these factors may continue to impact on retailer portfolios in terms of the quantum of retail space, we summarise below some of the possible implications for town planning and development:

- Some of the larger retailers are increasingly focusing on a smaller number of core locations for their store portfolios, where they can have flagship-type stores and attract the most affluent and extensive catchments (as considered below).
- Online retailers, such as Amazon, have started to open 'physical' stores in order to drive sales and create brand awareness as they are faced with an increasingly competitive online marketplace. That said, the boost of such retailers pursuing bricks-and-mortar growth is unlikely to account for more than 10% of total retail space in prime locations[8].
- Some retailers, such as foodstore operators, operate online sales from their traditional stores and thus the growth of internet shopping does not necessarily mean a pro-rata reduction in the need for retail space.
- While the larger, national and international retailers are investing in online retail channels, this is not necessarily the case with small, independent retailers and high street businesses. According to the 'Digital High Street 2020' report[9] the internet has created 'digital economy' demands and opportunities, which should be embraced by all retailers and businesses and, importantly, town centres if they are to be successful and compete. The extent to which town centres develop their digital capabilities, and other solutions such as traffic management, is likely to have spatial implications for high streets.
- Retailers will not only have to continue to adapt their online retail channels, but adapt their distribution and logistics infrastructure to meet the demands of increased

[7] Retail Expenditure Guide 2014/15 – Broad Definition and Central Case, Oxford Economics (Table 3.1).
[8] Property Week (21 April 2016).
[9] 'Five-year plan for high street rejuvenation', The Planner, RTPI (10 March 2015 edition).

home delivery and collection methods (a likely consequence of which is a reduction in retail space requirements).

- Greater collaboration between retailers in terms of sharing retail space (such as the Sainsbury's and Argos case example discussed below), and between shopping centre landlords and their retailer tenants in the provision of collection points and/or lockers[10]. Innovative collection arrangements are also being introduced at railway stations and other public places (i.e. not on the traditional high street) in response to the convenience-based demands of consumers.

2.11 Retailers are restructuring their organisations in response to 'omnichannel' retailing, designing their businesses around consumer personalisation and experience rather than by channel[11]. To this end, the town centres that can offer a wider, all-round experience to shoppers and other users are likely to be better positioned than others in terms of countering the challenges of internet shopping and its associated implications for town centres. The multi-channel environment is also an opportunity for town centres, in that retailers are pioneering and requiring retail space (e.g. Amazon, retail space sharing between Sainsbury's and Argos) albeit in new formats.

2.12 Attractions such as a good quality leisure offer will also help town centres, as considered below. Other attractions may include a good quality independent retail offer and/or a public realm with good quality seating and other street furniture. Essentially, however, it is shops that attract shoppers and therefore the priority for the Council should be retaining (and attracting) as many shops – together with catering and other leisure uses – as possible in this changing retail landscape.

[10] 'Alive and Clicking', Modus, RICS (January 2015 edition).
[11] Retail Trends 2016 – Redefining convenience, Deloitte.

Retailer polarisation (and downsizing)

2.13 The retail sector is ever-evolving, with retailers entering and exiting the market on a regular basis. Some of this change is due to the spate of retailer administrations since the economic downturn (with Comet, Game, Habitat, JJB Sports and Woolworths to name a few), leaving major voids within town centres and retail parks[12]. More recently (inter alia) BHS, Austin Reed and American Apparel have filed for administration. BHS occupied typically large, prominent stores (164 in total) and its failure in particular will have major challenges for landlords and town centres in terms of how this retail space will be re-utilised.

2.14 A further significant, recent change has been the strategy of new retailers entering the UK market and their approach to store expansion and coverage. This change is driving demand in a smaller number of larger, prime locations and at a time when there is an overall reduction in multiple retailer representation across the UK.

2.15 New international retailers are still entering the UK market; however they are increasingly selective about their store coverage. Major retailers to enter the UK in recent years include Hollister, Forever 21, Victoria's Secret, J.Crew and Aeropostale. Such retailers have, or are seeking, stores in London (often a flagship store with multiple satellite stores) and the next 10-15 major cities including the likes of Glasgow, Liverpool and Manchester. At this point, they have looked to increase their geographical spread across Europe (to similarly major cities) as opposed to achieving more concentrated coverage in the UK. This contrasts with the typical strategy of international retailers 15-20 years ago, when they would seek greater coverage across the UK before moving to the next market.

2.16 These strategies can be witnessed in the example of the upmarket fashion retailer Banana Republic and its parent company, Gap (more of a mid-market retailer). Banana Republic opened its first UK and European store in 2008 with a flagship offering on Regent Street, in the heart of the West End of London. Since then, only an additional eight stores have been opened; six of which are in prime retail areas of London. The other two stores are in prime regional shopping locations, namely Bath and Manchester's Trafford Centre. By comparison, Gap opened its first UK store in London in 1987. Since then, it has opened over 140 additional stores in the UK; this equates to around five stores per year.

2.17 This example illustrates the wider trend of polarisation between prime retail locations and the more secondary locations. Most existing, major retailers in the UK either have exited or are in the process of exiting large numbers of non-prime stores; so as to concentrate on stores with larger, more affluent catchments and better prospects to benefit from the multi-channel environment. The recent announcement that Marks & Spencer is set to close (or downsize) over the next five years up to 30 stores, focusing on smaller stores in under-performing towns and shopping centres, is a stark reminder of this[13.] This structural change has been driven considerably by the impact of the recession and the growth of internet shopping. In addition, there is a significant quantum of secondary/ tertiary retail space on the UK's high streets that – as predicted by the BCSC[14] back in 2012 – is no longer fit for purpose for modern multiple retailers.

[12] EGi (12 May 2016) report that around 46,000 UK shops are currently vacant, with a third having been empty for more than three years.
[13] Property Week (7 November 2016).
[14] The Rise and Rise of Multi-Channel Retailing (BCSC, 2012) estimated that almost 20% of UK retail space could be surplus to modern retailer requirements in its current form.

2.18 Service-based retail uses (i.e. financial services, travel agents) have also seen a gradual contraction in store numbers since the onset of the recession, and the continued growth of internet alternatives which provide convenient access to online banking and holiday price-comparison websites. For example, Thomas Cook closed 149 stores in the 12 months from September 2011 to 2012 and this downsizing has continued throughout the travel agency sector, with a reported 45% year-on-year rise in closures in April 2014[15]. This form of structural change has consequences for footfall and consumer spending, most notably in the secondary locations which are more dependent on retail-related service uses.

2.19 The trend towards right-sizing has led retailers and investors to target the most defensible (and therefore high-demand) locations, where footfall and consumer spending is most resilient to economic changes. This is now affecting more and more larger centres, as retailers become increasingly selective and polarise towards fewer, prime retail locations. We consider that Colchester Town Centre falls within the bracket of a town centre at risk from such trends.

Consumer expenditure

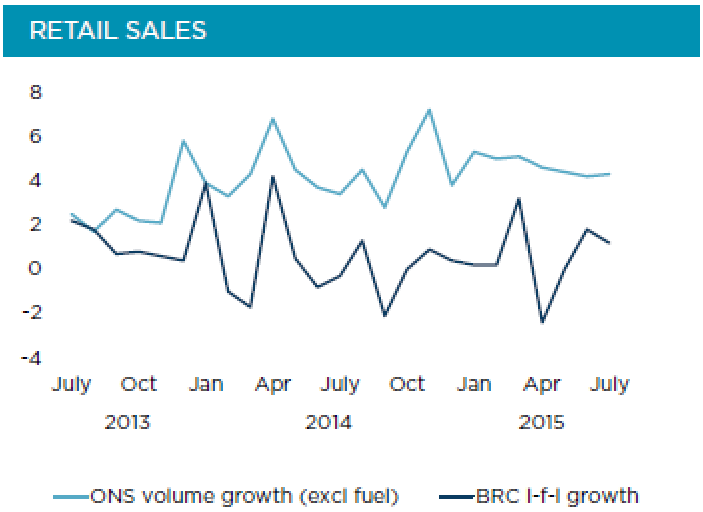
2.20 Historical trends, particularly since the late 1990s, indicate that there has been substantial growth in retail expenditure. MapInfo Brief 08/02 indicates that per capita expenditure on comparison goods in the UK increased between 1997 and 2007 at an annual average of 6.7% in real terms. This growth fuelled the development of new retail floorspace, including major out-of-centre retail parks. For convenience goods, expenditure growth has historically been considerably less at 1.1% per annum over the same period (1997 to 2007).

2.21 Retail sales volumes slowed as a result of the economic downturn. According to Pitney Bowes[16], *'total spending on convenience goods fell in real terms in 2009 and comparison goods spending practically ground to a halt as the recession took hold.'*

2.22 By July 2015, based on ONS figures, the volume of retail sales had increased (like-for-like) for the 28th consecutive month[17]. This was due to the combined effects of robust economic growth, low inflation and improving labour market conditions. The growth was fuelled by non-food stores at 4.7%, with household goods standing out at 13.8%. Homewares, furniture and flooring also performed strongly as a result of rising disposable incomes, housing market activity growth and record consumer confidence levels. More recently, however, the uncertainty around 'Brexit' has served to dilute consumer confidence in the UK and therefore retail sales[18].

[15] BBC News (14 April 2014).
[16] Retail Expenditure Guide 2012/13.
[17] UK Shopping Centre Development Report (September 2015), Cushman & Wakefield.
[18] Retail Week (26 February 2016).

Figure 1 – Retail sales volumes (July 2013-2015)



Source: UK Shopping Centre Development Report (September 2015), Cushman & Wakefield.

2.23 Like the retail market, the commercial leisure sector has seen significant growth in expenditure terms since the 1990s. Whilst not immune to the impact of the economic downturn, leisure spending fared relatively well as eating out and other leisure activities have become an important lifestyle choice and a priority for many consumers over other areas of spending. UK leisure spending is forecast to increase at an annual average rate of 1.3% during 2018-2022 and 1.4% during 2023-2035[19].

Changing store formats

2.24 Retailing is changing, with new formats emerging in recent years as an alternative to traditional retail space; much of which is now surplus to requirements. Modern multiple retailers demand flexible, more efficient retail space of a sufficient size to showcase their brand(s) in prime retail locations. This is largely in response to the growth of internet shopping and the increased importance of a multi-channel offer, including the use of smart phone technology (i.e. Apps) and social media (e.g. Facebook, Twitter, Instagram, Snapchat). Much of the redundant retail space is in commercially secondary or tertiary shopping areas in large centres, or in smaller town and district centres.

2.25 Retailers are increasingly refurbishing their existing stores to accommodate click-and-collect services, whereby customers can collect and return their goods ordered online. Major retailers such as Argos, John Lewis, Marks & Spencer and Next – as well as smaller, specialist retailers like Hobbycraft and Specsavers – are incorporating click-and-collect services into their stores, thus cutting out the expensive 'final mile' of delivery. Mintel Retail Rankings 2014 reports that one in eight online purchasers now use some form of collection service; while the RICS 'Modus' journal[20] predicted that 2015 would see, for the first time, sales of goods brought online but collected in-store outstrip home deliveries.

[19] Experian Retail Planner Briefing Note 13 (October 2015).
[20] 'Alive and Clicking', Modus, RICS (January 2015 edition).

2.26 In a further development, designed to reflect changing shopping habits and the increasing focus on e-commerce, Argos have introduced digital-concept stores; where tablets replace the traditional catalogues and paper forms. Some of these new stores have opened as concessions within existing Sainsbury's superstores[21] while Sainsbury's recently opened its first 'department store' format featuring Argos (in addition to a Foodhall, Starbucks, Lloyds Pharmacy and Explore Learning Centre) at Nine Elms, London[22].

2.27 Major retailers, for example Next, are opening new all-product out-of-centre store formats, providing a substantially expanded range of comparison goods (often including but not limited to clothing and footwear, furniture and soft furnishings, domestic appliances and DIY goods) and surface level car parking. Such stores, which require extensive showroom floorspace, enable the retailer to showcase their full range of products. These can be purchased online and collected via click-and-collect services. Meanwhile, John Lewis has opened smaller store formats with the click-and-collect option for their full range of products in locations such as Exeter, York and Ipswich. The same is true of House of Fraser in Aberdeen and Liverpool.

2.28 A key trend in the grocery sector in recent years is the strong performance and growth of the hard discounters such as Aldi and Lidl, which have fuelled the 'price war' with mainstream operators. Combined, Aldi and Lidl currently command a UK market share of around 10.4% according to Kantar Worldpanel (April 2016); and this is set to increase with the two retailers having built more than 100 stores in the last year[23].

2.29 The growth of smaller convenience store, or C-store, formats (such as Tesco Express and Sainsbury's Local) is another key trend, driven by the customer's demand for convenience and, in turn, operators seeking to enhance their market shares of 'top up' food shopping in a highly competitive environment. Marks & Spencer have opened 75 Simply Food stores in the last year and recently announced plans to expand its C-store opening programme on the back of increased profits[24]. The retailer is also looking to roll out its 'Food to Go' format across London in the first instance, selling just sandwiches, salads, and hot and cold beverages[25]. This follows Sainsbury's launch of their 'micro' C-store format in Holborn, London; approximately half the size of a typical Sainsbury's Local store[26].

2.30 The grocery sector has also been forced to react to changing shopping habits, in particular the decline of 'bulk' food shopping as customers shop around for best value and/or undertake more frequent top-up food shopping trips. This has prompted the main operators to reconsider their growth strategies, as the hard discounters continue to threaten and impact on their market shares. They are focusing on C-store format representation and improvements to existing superstores as opposed to opening new superstores (Tesco, for example, confirmed in early 2015 that it was abandoning 49 superstore developments and has since built just 4 stores[27]). In-store improvements include refurbishment programmes and a focus on better customer service, in addition to alternative complementary uses such as restaurants. This is discussed further below.

2.31 The UK's high streets have seen an increase in the number of pop-up shops since the economic downturn. This concept enables retailers, usually independents, to lease retail space on a short-term basis. Whilst temporary, such shops can generate interest and

[21] EGi (30 January 2015).
[22] Property Week (29 October 2016).
[23] EGi (16 April 2016).
[24] Property Week (25 May 2016).
[25] Property Week (14 May 2016).
[26] Retail Week (14 October 2015).
[27] EGi (16 April 2016).

activity in an area and are particularly popular for seasonal items (e.g. Christmas gifts, Halloween costumes, or fireworks). They are also often attractive solutions for landlords, providing flexibility and the ability to deflect some of the costs to the temporary tenant.

2.32 In part, changing store formats (i.e. larger and more modern floorplates) have enabled many non-food retailers to achieve improvements in the productivity and efficiency in the use of floorspace – thereby increasing retail sales densities. Other key drivers in this respect include extended opening hours, the growth of internet and multi-channel retailing, and the sale of higher value goods which do not necessarily need more space for storage and display.

2.33 The growing market of food and drink uses (as considered below) has also seen operators open new larger, family-friendly formats. Higher consumer leisure spending, as eating out becomes an increasingly important lifestyle choice for many, has driven this trend and is being exploited by operators – in and out of town – as they seek to enhance their market share in this very competitive marketplace.

Increasing importance of commercial leisure uses

2.34 There has been a twenty-fold increase in the number of UK coffee shops over the past 17 years (to more than 4,200) while the number of fast-food outlets has tripled (to more than 8,700)[28].

2.35 Retail space alone is no longer enough to attract consumers to a centre. The increased importance of leisure uses in terms of anchoring town centres and major new shopping centres has become apparent in recent years. This is due in part to subdued growth in retail sales, the growth of internet shopping and the polarisation of retailers to fewer, prime locations. There are also fewer retailers to fill the voids left by others, following the spate of retailer administrations since the economic downturn. Importantly, the growing importance of leisure uses further reflects changing consumer habits and needs as they seek experiences as much as retail goods.

2.36 This structural change in the retail landscape has highlighted the need to provide shoppers and other users with alternative, non-retail attractions and, ultimately, a high quality experience. One cannot visit a leisure attraction (such as a bar, cafe or restaurant) over the internet. In light of their ability to increase dwell time and thus consumer spending, such attractions are forming an increased proportion of floorspace in the most successful and prosperous centres.

2.37 Retail schemes now have more space allocated to commercial leisure – restaurants, cinemas, bowling alleys. To illustrate this point, Trinity Leeds shopping centre opened in Spring 2013 with 34% of total floorspace dedicated to leisure uses[29] including a cinema and a range of food and drink uses. Originally, only 12% of total floorspace was due to be occupied by leisure uses; however this increased due to soaring demand from operators. A third of the units in the new Birmingham Grand Central scheme are occupied by leisure uses, while the regeneration plans for Intu Broadmarsh shopping centre in Nottingham envisage a cinema plus around 25% of total floorspace dedicated to food and drink uses. In addition, British Land has recently announced plans for a 330,000 sq ft leisure ‘dining and entertainment’ hall extension of Sheffield’s Meadowhall shopping centre; to include

[28] EGi (19 May 2016).
[29] Cushman & Wakefield Research (April 2016).

restaurants, a cinema, a new café court, a gym, and other indoor and outdoor leisure space[30].

2.38 All this marks a considerable shift from retail to leisure uses within major new shopping centres. Whilst rents for leisure uses are typically lower than those achievable for retail uses, the owners of shopping centres (such as Land Securities in the case of Trinity Leeds) are recognising the value of providing leisure uses in order to create an all-round experience for shoppers.

2.39 Furthermore, according to Goad Centre Reports, the average proportion of floorspace dedicated to leisure uses (namely A3-A5) within centres across the UK has increased from 9.52% in 2008 to 12.63% in 2015; whilst the average proportion of such units has increased from 14.82% to 17.09% over the same period. By comparison, Colchester Town Centre's A3-A5 offer is currently 13.26% of the total floorspace (higher than the UK average) and 15.8% of the total number of units (lower than the UK average)[31].

2.40 There is evidence that consumers are spending more discretionary expenditure on eating out. Compared to say the early to mid-1990s, eating out is no longer seen as such a luxury item. The options in the marketplace for mid-market and higher-quality 'chain' dining have soared in recent years, particularly with the advent of television chefs and their branded restaurant chains. Some of the major chains that have emerged in recent years, as the branded element of the market has grown substantially, include:

- Fast Casual Dining – e.g. PieMinster; Pret-A-Manger; Yo! Sushi; Chop'd.
- Casual Dining – e.g. Prezzo; GBK; Leon; Giraffe.
- Premium/ Fine Dining – e.g. Jamie's Italian; Gaucho; Chaophraya; Bumpkin.

2.41 While in-store cafes are a long-standing feature of many larger stores (such as department stores and food/non-food superstores) retailers, recognising the importance of a strong in-store catering offer, are increasingly seeking to link-up with higher quality restaurant operators. Examples include John Lewis (Ham Holy Burger and Rossopomodoro), Selfridges (Aubaine and San Carlo Bottega) and Tesco (Giraffe)[32].

2.42 In terms of the cinema sector, the emergence of digital and 3D movies has served to revitalise cinema attendances; whilst enabling operators to charge premium prices for the product. Cinemas are also incorporating 'branded' coffee shops as concessions – such as Costa in Colchester's Odeon cinema on Head Street. The health and fitness market is an increasingly important town centre use, helping to generate footfall for other uses. The no-contract, budget operators such as The Gym Group, easyGym and Pure Gym are performing particularly well; while the larger commercial operators are diversifying their clubs with the introduction of childcare and dining facilities.

[30] CoStar (12 May 2016).
[31] Goad Centre Report – Colchester Town Centre (November 2015), Experian.
[32] Retail Week (27 June 2014).

Mix of uses including the balance between multiple and independent retailers

2.43 With many multiple retailers seeking to right-size and reduce their physical store footprint, this presents opportunities for alternative land uses. As mentioned, leisure uses are playing an increasingly important role in successful town centres in the wake of ongoing structural changes in the retail sector and changing consumer habits and needs. Other non-retail uses such as residential, office and community uses also have an important role to play in sustaining town centre vitality and viability. To that end, increasing a town centre's resident and worker population can help to create vibrancy and support other main town centre uses including retail and leisure.

2.44 The permitted development rights introduced by the Government since 2013 are having implications for town centres and their mix of uses, and particularly the office sector in terms of supply. The new, permanent permitted development right for office to residential conversions is the most significant in this respect. Information provided by the Council indicates that Colchester Town Centre has experienced a number of such conversions, with 33 'prior approval' consents between June 2013 and February 2016. Whilst all town centres require a balanced mix of uses, including offices, increasing the housing supply (and thus resident population) will help to support mixed and more vibrant high streets, creating activity for retail uses to be successful. That said, the town's worker population is important, especially in terms of supporting the 'lunchtime economy', while the permitted development rights will make it difficult for the Council to fully control the mix of uses and/or mitigate against any adverse impacts potentially arising from them.

2.45 As well as a mix of land uses, it is important to ensure that any town centre has an appropriate balance, or mix, between multiple 'chain' retailers (those trading from multiple stores with either a strong local or national presence) and independent retailers (those who tend to trade from a single store). Multiple retailers offer substantial benefits to town centres, including:

- The ability to offer to shoppers the products and goods that they require at the most competitive prices;
- The ability to drive substantial levels of footfall, especially with department store operators (e.g. Debenhams) and popular fashion/ technology operators (e.g. Apple) which can help to support independent retailers and other town centre uses; and
- They help to increase investment levels by providing landlords with greater security in terms of income relative to that offered by independent retailers.

2.46 The main issue with having too many multiple retailers is that of identity. Today, many of the UK's town centres look the same, with the same rows of shops (e.g. Boots, WH Smith, The Body Shop, Next) and no discernible difference and no character. It is important for town centres to differentiate themselves and provide a unique experience for shoppers, in order to increase their health and prosperity. A balanced mix of multiple and independent retailers should help to assist with this. As we consider in section 3 below, Colchester Town Centre currently benefits from a strong independent offer, complementing and helping to achieve a balance with the town's more mainstream attractions.

Providing a high quality experience and environment

2.47 An important consumer behavioural change to have had implications for retailers and town centres includes the desire for 'experience retail' – defined by the Department of Business Innovation and Skills as *'shopping experiences which are enjoyable in their own right, rather than just being about successfully purchasing a desired good'*. This recent change has been accelerated with the rapid emergence of and developments in e-commerce, which has meant that consumers are less likely to visit physical stores unless they provide an enjoyable experience[33].

2.48 Town centres that can offer experience retail and an excellent all-round experience to shoppers and other town centre users are likely to be better positioned than others in terms of countering the challenges of the changing retail landscape. The quality of the leisure offer can be as important as the retail offer in this respect. As per the case example of Trinity Leeds considered above, the owners of shopping centres are recognising the value of providing high quality leisure uses in order to attract and create an all-round experience for shoppers.

2.49 Towns such as Colchester with cultural, heritage and other visitor attractions should be well placed to take advantage of consumers' demands for an enjoyable experience. Information provided by the Council confirms that Colchester attracted over six million visitors in 2014, contributing some £245m (visitor spend only) to the local economy. Some key attractions include Colchester Castle Museum, Firstsite and Colchester Zoo, while the Town Centre further acts as a 'base' for visitor attractions in the wider area (e.g. Beth Chatto Gardens, Constable Country, the Essex coastline).

2.50 The quality of the physical environment is another important factor to consider. Good urbanism, design and definitions of place are an essential pre-requisite in order to attract inward investment from retailers and other businesses; create opportunities for interaction and exchange; and generate growth in commercial, community and/or aesthetic value over time.

2.51 Whilst it is very difficult to isolate the impact of improving the local environment and providing infrastructure elements on property values, there are some examples. The Cut in Southwark, London, benefitted from a £3m public realm renovation in 2007/2008 which included:

- widening and resurfacing of footways;
- improved lighting;
- planting trees; and
- new pedestrian signage.

2.52 Research on these improvements concluded that, as a result of the four infrastructure elements above, around £9.5m had been added to the value of private property in the area. Put simply, this is a circa 200% return on investment – thereby demonstrating the potential impact.

2.53 A larger scale example is The Arc in Bury St Edmunds. This circa £100m retail-led mixed use scheme included the regeneration of the town's civic core. As well as public realm improvements the scheme comprised a public arts venue, which has been important in

[33] Hart and Laing, 2014.

improving the town centre experience. The result was an increase in town centre footfall, dwell time and income, with a significant uplift in revenues though car parking.

2.54 Funding for these initiatives is challenging. Within a closed environment of single ownership such as a shopping centre, public realm improvements can be funded through service charges. However in town centres, where ownerships can extend to hundreds of parties, the solution is far more problematic but could include pooling developer contributions by town centre developers to fund off-site public realm works; and/or designating a Business Improvement District (BID) whereby businesses pay additional taxes to fund local projects and improvements.

Potential Impact of Trends on Colchester Town Centre

2.55 The importance of the retail sector to town centres should not be understated; being the key driver of activity and vital in creating the environment for other main town centre uses (and residential uses) to be successful. The trends identified above have a number of potential implications for town planning and development in Colchester Town Centre. These are summarised below:

- The retail sector, in spite of the ongoing structural changes and challenges, is and will continue to be the key driver of activity in the Town Centre and thus essential for its health and prosperity.
- The continued growth of internet shopping is likely to impact on footfall and squeeze retailers' profitability; not only national multiple retailers but also smaller, independent retailers. As discussed above, this is a nationwide issue (not borough-specific) but is very relevant to the future vitality and viability of Colchester Town Centre. E-commerce presents opportunities too, however, and the integration of 'click and collect' hubs and/or the use of digital technology should be encouraged.
- Colchester Town Centre will be constrained by the polarisation and downsizing of national multiple retailers, especially in terms of its ability to attract new such retailers. The major retailers will continue to focus representation in a small number of the UK's prime locations. While the Council should seek to retain (and attract) as many shops as possible, retailer 'right-sizing' is likely to present opportunities for alternative, non-retail land uses including leisure, office, residential and community uses – which can help to increase the resident and worker population of the Town Centre in order to support other uses.
- Alternative land uses should be complementary to the retail offer, being the key driver of activity.
- Successful town centres need scale, flexibility and a variety of store sizes in order to respond to the needs of major high street and specialist retailers, and the Council should seek to identify locations in and on the edge of Colchester Town Centre for accommodating such retail formats in accordance with the sequential approach.
- Key to attracting new modern retailers to Colchester Town Centre will be the provision of larger, flexible units – of the type that Fenwick is delivering on the High Street – in prominent and well connected town centre locations. Accordingly, the Council should consider favourably applications to amalgamate and/or extend retail

units[34] within primary shopping areas; and should work with its partners to positively plan for town centre development opportunities.

- Further key to attracting new modern retailers include creating the right conditions for investment, such as high quality public realm and a complementary mix of town centre uses including leisure.
- In order to prevent the loss of existing retailers and sustain as many shops as possible, Colchester Town Centre should be an attractive place to shop – whilst being more than simply a place to shop given changing consumer expectations for a high quality, combined retail and leisure experience. With its historic assets and existing leisure attractions, we consider that the Town Centre is well placed to strengthen the consumer experience and increase dwell time.
- The emergence of new store formats in out-of-centre locations, especially those being pursued by major retailers selling all-product ranges – including 'non-bulky goods' which, traditionally, have been sold from town centres – represent a threat to the future vitality and viability of Colchester Town Centre. This underlines the need for the Council to positively plan for town centre development opportunities and control non-central retail development including extensions and changes of use. Failure to do so will threaten the future vitality and viability of the Town Centre.
- It will be important to control the growth of commercial leisure/ food and drink uses outside Colchester Town Centre, given their increased importance for sustaining town centres and anchoring new schemes. There is a major role for such uses, including family-orientated catering, in order to create choice and increase dwell time in the Town Centre. New food and drink uses in non-central locations, of a type and scale which would compete with and undermine the role and status of the Town Centre, should be resisted by the Council. Failure to do so will potentially 'soak up' operator demand and threaten the delivery of new retail-led developments (which are increasingly dependent on complementary food and drink uses) in the Borough's principal centre.
- It will be increasingly important for the existing mix of independent retailers in the Town Centre to provide a high quality, distinguished offer. In the context of multi-channel retailing, such retailers should also be encouraged to establish their own transactional websites and/or marketing campaigns so as to expand their potential market and thus profitability.
- The provision of convenient and affordable town centre car parking is key in order to better compete with non-central shopping destinations, which are accessible by car and served by free surface level car parking.
- New representation in the grocery sector is likely to be focused on C-store formats and the hard discounters, in response to changing shopping habits.

[34] Subject to the provisions of the development plan and other material considerations.

3. Qualitative Assessment – Colchester Town Centre

Introduction

3.1 This section examines the vitality and viability of Colchester Town Centre, based on the healthcheck indicators set out in the national Planning Practice Guidance (PPG)[35], and considers its qualitative needs.

3.2 Policy CE1 of the Core Strategy sets out Colchester's retail hierarchy, with Colchester Town Centre identified at the top. Policy CE2a promotes the Town Centre as a prestigious regional centre.

3.3 A key indicator of the relative health of a centre is its retail ranking over time. Figure 3.1 below indicates the current status of Colchester Town Centre relative to surrounding and/or competing centres. Each centre is assessed (by CACI Retail Footprint) having regard for all factors affecting performance, including the quality and quantity of retail provision, centre function and level of competition. This methodology allows each centre to be scored relative to one another and provides a useful barometer of a centre's status and performance.

Figure 3.1 – Retail rankings

Centre	2015 Rank	2012 Rank	Change (2012-2015)
Colchester	59	51	-8
Tollgate	432	669	+237
Turner Rise	927	1,261	+334
Peartree Road	2,585	2,196	-389
Tiptree	2,493	2,492	-1
West Mersea	3,312	3,654	+342
Wivenhoe	3,112	3,720	+608
Chelmsford	79	71	-8
Ipswich	56	47	-9
Braintree	487	630	+143
Freeport Designer Outlet Village, Braintree	136	127	-9
Lakeside	40	40	0

Source: CACI Retail Footprint (2012 and 2015)

3.4 The retail rankings show a decline in Colchester Town Centre's status and performance since 2012. On the face of it, this may reflect the lack of inward investment (i.e. new major retail development and/or retailer representation) over this period. Another contributing factor is likely to be the relative improvement of similarly-ranked centres across the UK and, importantly, centres that directly compete with Colchester Town Centre for retailers and shoppers. To this end, whilst the analysis set out above indicates no relative improvement in some of Colchester's main competing centres such as Chelmsford[36] and Braintree's Freeport Designer Outlet Village, CACI Retail Footprint confirms Tollgate's significant rise in the retail rankings (from 669 in 2012 to 432 in 2015). This reflects the increasing strength of retail provision at Tollgate and its function as an attractive shopping destination. We would expect the new leisure-based scheme at Stane Park, once open, to further enhance Tollgate's attractiveness as a shopping destination and thus its status and performance. It is notable that some of the Borough's other centres –

[35] 'Ensuring the vitality of town centres' section.
[36] The 2015 retail rankings do not account for the new John Lewis anchored town centre scheme, which is likely to enhance Chelmsford's status and performance.

including Turner Rise, West Mersea and Wivenhoe – have also experienced a significant rise in the retail rankings since 2012, albeit they remain well below Colchester Town Centre and Tollgate.

3.5 Colchester Town Centre has also declined steadily in PMA's hierarchy (currently ranking 48 compared to 35 in 2005). PMA attribute this to retailer administrations and closures in particular, with the town experiencing:

'a significant decline in the higher scoring, middle and upper middle fashion retailers, as provision in Colchester town centre has shifted towards lower quality, value/mainstream retailers. At the same time, many multiple retailers have been considering their locational strategies and implementing store rationalisation programmes. Given the town's relatively distant location in a largely rural area, supported by a catchment population of comparatively modest affluence, some operators may prefer to trade from more dominant, strategic centres.'

3.6 Whilst retailer polarisation (and downsizing) is not a Colchester-specific issue, as mentioned at section 2 of this Study, it does highlight the fragility of the retail sector in towns like Colchester; and the Town Centre's decline in both the CACI Retail Footprint and PMA retail rankings is significant in this respect. With major retailers looking to consolidate their space requirements into a smaller number of prime locations, Colchester Town Centre's declining status and performance makes it vulnerable and at risk in terms of its ability to attract and retain investment. The reality of lease expiries of the next few years, which would enable retailers to easily exit poorer or under-performing locations, further underlines this potential risk to the vitality and viability of the Town Centre.

Healthcheck

3.7 Colchester Town Centre's main shopping area is focused on two shopping centres: Culver Square and Lion Walk. Smaller, more secondary shopping centres are Priory Walk (situated between Queen Street and Long Wyre Street) and St John's Walk (off St John's Street). High Street includes a number of important retailers and non-retail uses, while Sir Isaac's Walk/ Eld Lane – bordering the town's Roman Wall – provides a row of small scale units predominantly occupied by independent retail businesses. The wider Town Centre comprises a mix of retail and other main town centre uses.

Diversity of uses

3.8 Figure 3.2 below sets out the composition of ground floor uses in Colchester Town Centre based on the latest survey undertaken by Experian Goad. The analysis focuses on a number of use categories, as defined in the Experian Goad Category Report, namely:

- Comparison Retail (e.g. clothing and footwear, furniture, jewellery, electrical goods, toys);
- Convenience Retail (e.g. butchers, bakers, supermarkets);
- Retail Services (e.g. dry cleaners, hairdressers and beauticians, travel agents);
- Leisure Services (e.g. cafes, bars, restaurants);
- Financial & Business Services (e.g. banks, estate agents); and
- Vacant.

Figure 3.2 – Diversity of ground floor uses, Colchester Town Centre

Use Categories	Units (count)	Units (%)	Floorspace[37] (sq. m)	Floorspace (%)
Comparison Retail	241	36.7	53,856	44.9
Convenience Retail	49	7.5	7,618	6.3
Retail Services	93	14.2	7,953	6.6
Leisure Services	141	21.5	26,505	22.1
Financial & Business Services	64	9.7	10,322	8.6
Vacant	69	10.5	13,778	11.5
TOTAL	657	100	120,032	100

Source: Experian Goad Category Report (November 2015).

[37] Floorspace (sq. m) is Experian Goad gross floorspace.

3.9 The main findings from the analysis include:

- Colchester Town Centre has a reasonably strong representation of Comparison Retail floorspace, accounting for 44.9% of total floorspace (or 36.7% of total units). The dominance of Comparison Retail is to be expected in a centre the size of Colchester because, typically, the larger the centre the higher the proportion of floorspace attributed to this category. The majority of the town's Comparison Retail floorspace is located within Culver Square and Lion Walk shopping centres and, to a lesser extent, along High Street.
- Given the increasing role and importance of food and drink uses, and to some extent representing the town's cultural/ tourist attractions, Leisure Services account for the next highest proportion of units and floorspace (21.5% and 22.1% respectively). Provision is somewhat dispersed throughout the town centre, although small clusters of food and drink uses can be found along parts of High Street and Head Street (near the Odeon cinema) in particular.
- Unsurprisingly, the Convenience Retail offer is relatively modest with 7.5% of total units and 6.3% of total floorspace. Whilst there may be opportunities for new provision including town centre format convenience stores, thereby helping to improve consumer choice, this category is unlikely to become much more dominant.
- Retail Services account for 14.2% of the total number of units in Colchester Town Centre; but only 6.6% of total floorspace (indicating that such uses, as expected, occupy smaller-sized units in the town centre).

3.10 The composition of uses in Colchester Town Centre set out in Figure 3.2 above is notably different to the analysis presented in the Retail Update 2013. Whilst some changes would be expected, the two sets of analysis (at 2013 and 2015 respectively) suggest that total Comparison Retail floorspace has decreased by over a third from 84,800 sq. m gross to 53,856 sq. m gross. It would further suggest, inter alia, that the total number of units in the town centre has increased from 619 to 657 (despite no major retail development) over the same period. We consider that these 'changes' most likely reflect a different survey area covered by Experian Goad (the source of both datasets) rather than significant changes in the extent and composition of the town centre's retail and service uses. On this basis, we afford little consideration to the differences between the two sets of analysis.

Vacancy rates

3.11 As shown in Figure 3.2 above, which is based on the latest Experian Goad Category Report for Colchester, in November 2015 there were 69 vacant units in the Town Centre; a vacancy rate of 10.5% as a proportion of the total number of units. The overall quantum of vacant floorspace in Colchester Town Centre is 13,778 sq. m (11.5% of total floorspace).

3.12 During our inspections we identified that the vacant units are relatively dispersed throughout the Town Centre. Particular concentrations can be seen at Priory Walk shopping centre and along Red Lion Walk (between High Street and Lion Walk shopping centre). Further vacant units are scattered along High Street, Long Wyre Street (including the former Co-Op department store), Queen Street and Sir Isaac's Walk/ Eld Lane.

3.13 With the exception of the former Co-Op department store, and the former BHS store at Lion Walk (to be occupied by Primark in 2017), the vacant units are relatively small scale, typically measuring 50-200 sq. m gross.

3.14 We do not consider it particularly helpful to compare vacancy rates in Colchester Town Centre with national averages, given that these include shopping centres and much smaller centres including district/ local centres. However, for comparative purposes, we have considered in Figure 3.3 below vacancy rates in some of Colchester's main surrounding and/or competing centres.

Figure 3.3 – Vacancy rates

Centre	Units (count)	% of Total Units	Floorspace[38] (sq. m)	% of Total Floorspace
Colchester	69	10.5	13,778	11.5
Chelmsford	57	11	11,269	10.1
Ipswich[39]	112	20.2	28,177	22.3
Braintree	24	9.8	3,382	8.3

Source: Experian Goad.

3.15 This analysis shows that Colchester Town Centre sits between Chelmsford and Braintree in terms of vacancy rates as a proportion of the total number of units (10.5% compared with 11% and 9.8% respectively). However the Town Centre has a higher proportion of vacant floorspace (11.5%) relative to both Chelmsford (10.1%) and Braintree (8.3%). Figure 3.3 indicates substantial vacancies in Ipswich Town Centre and we would caution that Experian Goad's survey[40] coincided with the refurbishment works to the town's main shopping centre, thereby limiting the relevance of this comparison.

3.16 The Retail Update 2013 reported Colchester Town Centre's vacancy rate at 12% and, on the face of it, the fall in vacancy rates is encouraging in the context of retailer administrations and closures. However, as mentioned previously, we would caution that the two sets of analysis (at 2013 and 2015 respectively) are not based on a like-for-like survey area and thus there is little merit in comparing any 'changes' since 2013. A more relevant

[38] Floorspace (sq. m) is Experian Goad gross floorspace.
[39] We would note that latest Experian Goad survey of Ipswich Town Centre (October 2015) coincided with refurbishment works to the town's main shopping centre – Buttermarket. The level of vacancies identified is therefore likely to be over-stated to a degree.
[40] October 2015.

consideration, in our view, is the quality of retailers occupying previously vacant units or replacing other (former) town centre retailers; and/or the degree of changes of use from A1 retail to non-A1 (i.e. service-orientated) retail. We consider these factors below.

Retailer representation and demand

Representation

3.17 The town centre's fashion offer predominantly comprises middle market operators such as New Look, River Island and Next. According to CACI Retail Footprint, the mass market accounts for 54.9% of provision in Colchester Town Centre (up from 50.7% in 2012).

3.18 PMA report that the provision of upper market operators is relatively low for such a centre, and this is supported by CACI Retail Footprint which indicates that the town's premium market has contracted since 2012 (from 21.9% to 20%). This points to an under-representation of higher end comparison goods retailers in the town centre, the presence of which can greatly enhance a centre's attractiveness to consumers and influence the extent of its catchment area.

3.19 Colchester Town Centre includes 24 of the 29 'major retailers' defined by Experian Goad, as shown in Figure 3.4 below, which they consider to be key attractors and therefore most likely to improve the attraction of a centre for consumers[41]. These are predominantly concentrated within the Culver Walk and Lion Walk shopping centres, although there are exceptions including Argos (Long Wyre Street), Wilkinson (St John's Walk) and Sainsbury's (Priory Walk).

Figure 3.4 – Existing major retailers, Colchester Town Centre

Department Stores	Mixed Goods Retailers	Supermarkets	Clothing	Other Retailers
Debenhams Marks & Spencer	Argos Boots TK Maxx WH Smith Wilkinson	Sainsbury's Tesco (Express)	H&M New Look Next *Primark*[42] River Island Topman Topshop	Carphone Warehouse Clarks Clintons HMV O2 Superdrug Vodafone Waterstones

Source: Experian Goad Category Report – Cushman & Wakefield Update (October 2016).

3.20 Not all of these major retailers occupy high quality accommodation. For example, both Marks & Spencer and Next operate from somewhat dated and constrained stores. The same applies to Sainsbury's at Priory Walk.

3.21 The town centre is represented by a reasonably strong choice of other national multiple retailers. Around half (50.2%) of these can be categorised as Comparison Retail, reflecting the role and function of Colchester Town Centre in the retail hierarchy. Leisure Services, including 'chain' bars and restaurants, account for almost a quarter (23.2%) of total multiple

[41] The notable exclusions include House of Fraser, John Lewis, Waitrose, Burton and Dorothy Perkins.
[42] Scheduled to open in the former BHS store in 2017.

provision in the town centre[43].

3.22 Fenwick[44] is situated at the western end of High Street. This department store, which has recently been extended and refurbished, is a major shopping attraction and includes fashion-orientated concessions such as All Saints, Boss, French Connection, Hobbs, Joules and Ted Baker. Other fashion-orientated multiple retailers (i.e. those not defined as ‘major retailers’ by Experian Goad) present in the town centre include Superdry, Schuh, Monsoon and Accessorize. Non-fashion multiple retailers include Iceland, Poundland, Paperchase, Ernest Jones, Millets and The Body Shop.

3.23 Some 381 of Colchester Town Centre’s 588 occupied shop units[45] (64.8%) are operated by independent retail businesses according to Experian Goad which, in our judgement, is an appropriate balance and helps to differentiate the town centre from others. The independent sector performs an important role, selling (inter alia) clothing, gifts, jewellery, and arts and crafts. These shops – particularly along Sir Isaac’s Walk/ Eld Lane and the streets and passages between High Street and the town’s main shopping centres – are established components of Colchester’s overall retail offer.

Demand

3.24 Future retail development and investment in the town centre in terms of type, scale and location will be substantially influenced by the interest of retailers (and/or leisure operators) moving into, re-locating or expanding there. As set out in section 2 of this Study, second tier markets such as Colchester Town Centre are faced with increasingly selective demand, driven by the polarisation of retailers towards a smaller number of prime locations and, more recently, the cautious outlook following the ‘Brexit’ vote as retailers re-assess risk.

3.25 Figure 3.5 below sets out the retailers and leisure operators with published requirements for representation in Colchester. It is important to note that this list, sourced from a national database of property requirements in the retail sector, relates to Colchester as a whole (i.e. they are ‘blanket’ requirements and do not necessarily or exclusively relate to the Town Centre). The list should therefore be interpreted with some caution. Further, not all retailers register their requirements on one or more national databases; while the list only provides a broad indication of market interest at a particular point in time. For example, it does not allow for the significant uplift that may occur through planning permission for a new retail development. In addition, we would caution that the decisions of retailers to invest in competing shopping destinations is very likely to affect the level and nature of market interest in Colchester Town Centre.

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[43] Experian Goad Category Report (November 2015).
[44] Formerly named Williams & Griffin.
[45] Based on Figure 3.2 above (i.e. total town centre floorspace minus vacant floorspace).

Figure 3.5 – Registered retailer demand, Colchester

Name	Type	Minimum Size (sq. ft)	Maximum Size (sq. ft)
HSL	Sofas	2,000	4,000
Sofology	Sofas	10,000	15,000
Ponden Home	Homeware	2,000	3,000
Pets at Home	Pet	3,000	15,000
Rush Hair	Hairdressers	800	1,500
Red5	Toys	1,000	
Select	Budget Fashion	3,000	5,000
Cards Direct	Greeting Cards	1,200	2,000
Farmfoods	Frozen Foods	6,000	8,000
Starbucks	Coffee	1,500	2,000

Source: The Requirement List (accessed October 2016).

3.26 Notwithstanding the limitations of this analysis, the list set out in Figure 3.5 shows that there is potentially limited demand from retailers and leisure operators seeking representation in Colchester Town Centre (and Colchester generally). More significantly, those identified are not of a type that are capable of substantially improving the town centre's offer, while some (e.g. Pets at Home and the sofa/ furniture stores) are typically not suited to town centre locations.

3.27 The retailer make-up of the town centre has changed in recent years and continues to evolve, reflecting in part the dynamic nature of the sector. However, market activity also helps to identify the 'direction of travel' in terms of the quality of the centre's retail offer and therefore its attractiveness to consumers. Recent closures in the town centre include BHS (Lion Walk), GAP (Culver Street West), Burton and Dorothy Perkins (High Street) [46], while it is understood that planned closures include Karen Millen (Sir Isaac's Walk) and Oasis (High Street). On the face of it, these closures are significant[47] and point towards a potential reluctance of key retailers to continue investing in the town centre.

3.28 Some of this space is being re-occupied by Primark (former BHS store) and Metro Bank (former Burton and Dorothy Perkins store). We consider that the new Primark (scheduled to open in 2017) will be a positive for Colchester Town Centre, particularly in terms of attracting footfall. However – together with the recent fashion retailer closures set out previously – it underlines the shift towards value/ mainstream retailers[48] in the town centre. The introduction of Metro Bank along High Street (replacing Burton and Dorothy Perkins) further points towards a more service-orientated offer within the main shopping area.

3.29 The town's food and drink offer is reasonably well established with a variety of 'chain' and independent operators. However it lacks focus, as mentioned previously, and the part committed part proposed scheme at the St Botolph's Quarter off Queen Street should have a positive effect in this regard. It includes a (committed) new Curzon three-screen cinema together with A3/A4 units and a (proposed) mixed use development comprising a hotel, student accommodation and seven A3/A4 units. It is further understood that 'chain' restaurants – namely Las Iguanas and Wagamamas – are seeking representation on High Street close to the Fenwick department store.

[46] Both are 'major retailers' defined by Experian Goad.
[47] With the exception of BHS following administration and UK-wide closures in 2016.
[48] As reported by PMA.

Commercial rents and yields

3.30 The level of rent which retailers are prepared to pay for retail space in a centre is an indication of the perceived strength of that centre. PMA report that, as at mid-2016, prime Zone A rents in Colchester Town Centre were £170 per sq. foot (psf). This is approximately 3% above the pre-recession peak of £165 psf; however, the O2 (Lion Walk) letting in October 2012 achieved a headline rent of £174.50 psf.

3.31 PMA further report that:

- Culver Walk in Lion Walk shopping centre achieves the highest Zone A rents at around £170 psf, although estimates show some variation due to the lack of recent lettings/ market evidence.
- Culver Square shopping centre is achieving around £135 psf Zone A, falling to around £60-65 psf Zone A fronting Sir Isaac's Walk.
- Elsewhere in the town centre, Priory Walk is achieving Zone A rents in the region of £30-40 psf and High Street (both ends) around £45-50 psf. PMA indicate that rents at the centre of High Street are likely to be slightly higher.

3.32 In terms of commercial yields, which are an indicator of investor confidence in a centre (with lower yields indicating higher investor confidence in future rental growth), PMA report that prime retail yields in Colchester Town Centre were circa 6.25% at mid-2016, which is consistent with the level reported in late 2015/ early 2016.

Customers' views and behaviours

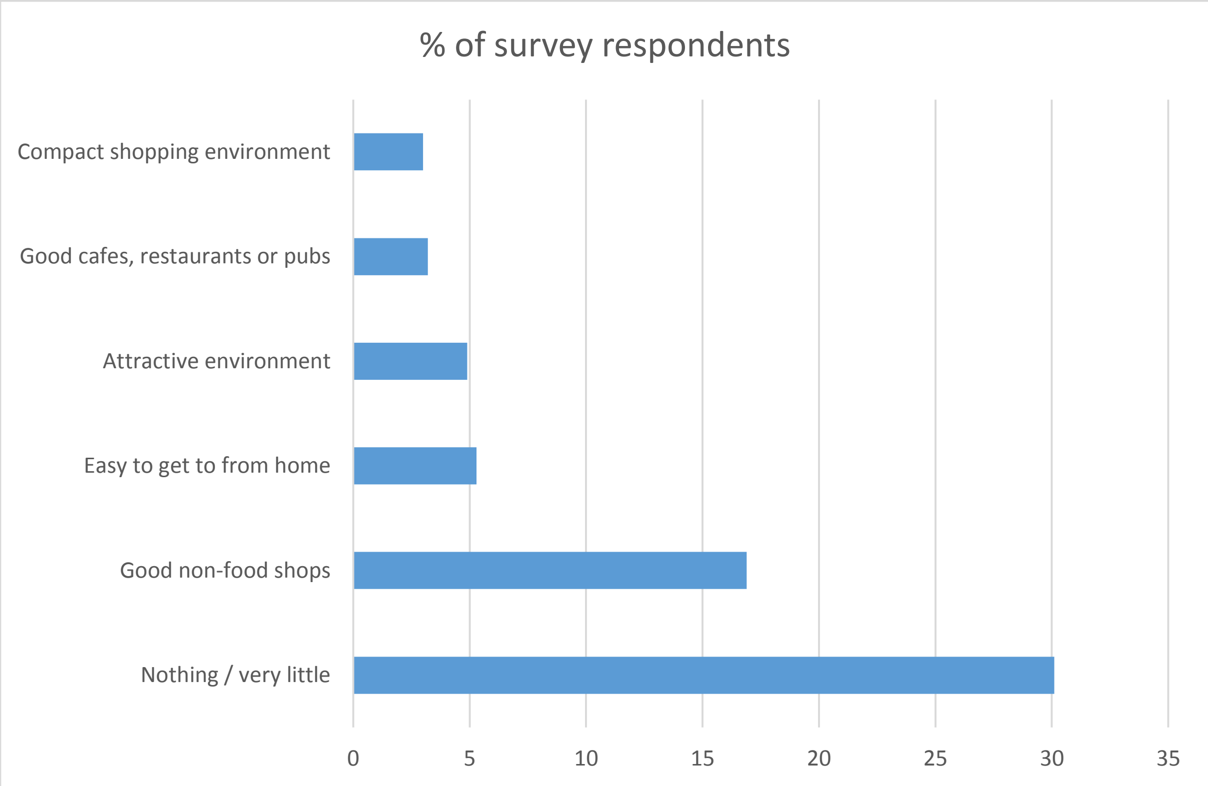
3.33 The 2016 household interview survey asked a number of specific questions about where respondents shop (i.e. their shopping behaviours). The survey results are provided at Appendix A and indicate that few consumers in Colchester Borough – including the town's immediate catchment (Zone 1) – do most of their main food shopping in the town centre. Non-central provision, particularly the Sainsbury's superstore at Tollgate, dominates in terms of the Borough's main food shopping destination.

3.34 As expected for a centre the size of Colchester, it secures substantial market shares of comparison goods expenditure from the catchment area. To this end, the town centre's comparison goods shopping offer is particularly strong in terms of *clothing and footwear* and *books; jewellery and watches; china, glassware and kitchen utensils; recreational and luxury goods.* The main competing destinations in this respect – according to the household interview survey – include Chelmsford (town centre), Braintree (town centre and retail parks), Clacton-on-Sea (town centre and retail parks) and Tollgate. Further consideration for the relative strength of particular comparison goods sub-categories in Colchester Town Centre is provided under the *Retail Sector Analysis* at section 6 of this Study.

3.35 Information on consumers' views on Colchester Town Centre has also been obtained from the results of the 2016 household interview survey. This includes the likes and dislikes of respondents who use the town centre for shopping and services.

3.36 Figure 3.6 below shows what users of the town centre like the most about Colchester for shopping and services. While some 30.1% indicated that they like nothing or very little about the town centre, 16.9% of users identified the good non-food shops. Other main 'likes' include easy to get to from home (5.3%) and the town's attractive environment (4.9%).

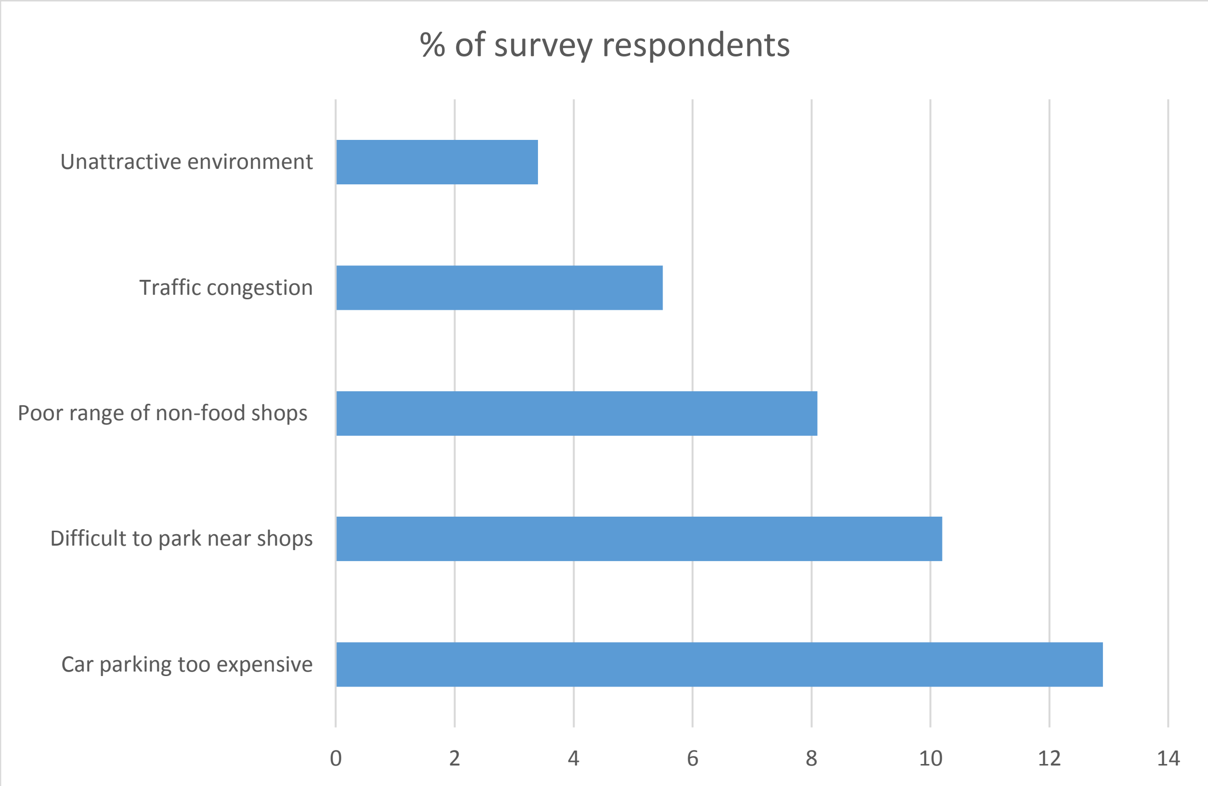
Figure 3.6 – Main likes about Colchester Town Centre



Source: 2016 household interview survey for Colchester Borough.

3.37 Figure 3.7 below shows what users of the town centre dislike the most about Colchester for shopping and services. Car parking is a notable dislike about Colchester Town Centre, with 12.9% expressing the view that parking is too expensive and a further 10.2% stating that it is difficult to park near shops. Some 8.1% of users consider that the town centre has a poor range of non-food shops.

Figure 3.7 – Main dislikes about Colchester Town Centre



Source: 2016 household interview survey for Colchester Borough.

Pedestrian flows

3.38 There is no published data on pedestrian footfall in Colchester Town Centre. At the time of our town centre inspections we observed relatively higher footfall within the town's main shopping area, close to the key retail attractions. There was generally more activity at Culver Square, which benefits from the dwell time opportunities created by the limited outdoor seating/ dining in this location, and along High Street close to Marks & Spencer and the taxi rank.

3.39 Unsurprisingly, pedestrian footfall tailed off towards the more peripheral areas of the town centre, where there is reduced quality in the retail offer and few substantial attractions.

Accessibility

3.40 Information derived from the 2016 household interview survey indicates that almost three-quarters (73.7%) of respondents who do most of their main food shopping in Colchester Town Centre usually travel by car as driver/ passenger. A further 11.7% usually travel by car using Park & Ride services, whilst 6.8% walk and 4.8% travel by bus. The non-food travel responses indicate slightly less dependence on the private car (64.5% as driver/ passenger and 8.9% using Park & Ride services) and a higher propensity to travel by bus (14.6%) or walk (9.2%).

3.41 Colchester Town Centre is bordered to the west and south by the A134, which serves the principal vehicular routes into the town centre. High Street/ East Street is another important vehicular route from the east. We consider the town centre to be well served in terms of car parking, with notable provision at St John's Car Park (645 spaces) and St Mary's Car Park (617 spaces). Further town centre car parking is provided at a number of predominantly smaller, surface level car parks. There are also Park & Ride services operating to/from Junction 28 of the A12.

3.42 Based on the results of the 2016 household interview survey, which asked respondents what they like and dislike about Colchester Town Centre, 12.9% consider car parking to be too expensive. Some 10.2% of respondents stated that it is difficult to park near shops, while a further 5.5% cited traffic congestion. Just 5.3% of respondents said that their main 'like' about the town centre is its ease of access to/from home.

3.43 Colchester Town Centre is served by two rail stations. Colchester Town rail station is located approximately 200m from St Botolph's Street to the south of the Town Centre, providing links with local communities across the Borough and beyond (including London Liverpool Street). The main rail station, Colchester, is located approximately 1.5km to the north of the town centre and serves a number of destinations (including London Liverpool Street, Ipswich, Norwich and Clacton-on-Sea), with highly frequent bus services available into the town centre as well as connecting rail services to Colchester Town rail station.

3.44 A number of bus stops serve the town centre, with frequent services to/from Colchester bus station (Osbourne Street) and along St John's Walk, High Street, Head Street and Queen Street.

3.45 The pedestrianised areas of Colchester Town Centre are focused largely on Culver Square and Lion Walk. There are numerous passages (e.g. Culver Walk, St Nicholas Passage) connecting High Street with these shopping centres, which comprise a high proportion of the key shopping attractions. Sir Isaac's Walk and Eld Lane, running east-west to the south of Culver Square and Lion Walk, are both pedestrian-friendly routes and help to support the retail circuit in this part of the town centre.

Environmental quality

3.46 As considered in section 2 above, the quality of a centre's physical environment is an important pre-requisite of attracting investment and providing shoppers and other users with a positive all-round experience.

3.47 Colchester Town Centre has, on the whole, a generally pleasant environment owing in part to its historic setting and buildings. The town centre comprises a number of distinct shopping areas. The headline findings from our town centre inspections include:

- The outdoor, purpose-built Culver Square and Lion Walk shopping centres offer a reasonably high quality shopping and built environment. They comprise the majority of the town's large, modern shop units. They are pedestrianised and relatively clean, however the degree of connectivity between them is relatively poor and creates an incoherent retail circuit.
- High Street is the town's traditional main shopping street. It is a busy, linear route for both vehicles and pedestrians; the former detracting somewhat from the quality of the shopping environment. Nonetheless, High Street includes a number of attractive buildings (such as the Town Hall) and some key retailers including Fenwick, Next and Marks & Spencer.
- Narrow streets and passageways connect the High Street with the main, outdoor shopping centres (including Pelham's Lane and Red Lion Walk). These are generally well maintained and make a positive contribution to the town's environmental quality.
- Sir Isaac's Walk and Eld Lane offer a pleasant shopping environment in a historic setting. The route is reasonably pedestrian-friendly and has good connections into the town's main shopping centres.
- In contrast to Culver Square and Lion Walk, the Priory Walk shopping centre is tired and dated and, in our view, requires significant investment in its shopping and built environment. It is a key pedestrian 'link' into the core shopping area from the east including the St Botolph's Quarter, but it currently presents a poor perception of the town centre and its general health.
- The same applies to St John's Walk shopping centre, in our view, and would benefit from investment. The route from the St John's multi-storey car park, through the indoor shopping centre, across St John's Walk, and into the core shopping area is particularly poor.
- The pedestrian route between the Town Centre and Colchester Town rail station has benefitted from the 'Fixing the Link' initiative. We consider that other key gateways into the town centre, such as from surrounding town centre car parks, could also be improved so as to enhance the visitor perception of the town centre.

3.48 Further observations on the quality of the environment can be drawn from the results of the 2016 household interview survey. It found that 4.9% of respondents consider the town's attractive environment to be their main 'like' about Colchester Town Centre. However, the main 'dislikes' include unattractive environment (3.4%) and dirty streets (2.6%).

Perception of safety

3.49 Based on crime statistics sourced from the Essex Police website, Figure 3.8 below shows the number of crimes reported in 'Colchester Town' between July 2012 and July 2016.

Figure 3.8 – Number of crimes, Colchester Town Centre

Year	2012	2013	2014	2015	2016
Number of Crimes	393	391	265	363	334

Source: https://www.police.uk/essex/39/crime/ (accessed October 2016).

3.50 The number of crimes reported in Colchester Town has remained relatively consistent year-on-year since 2012, with only a slight decrease recorded in 2014. Most recently, the main type of crime within the area was anti-social behaviour, followed by violence and sexual offences, shoplifting and other theft.

3.51 Based on the results of the 2016 household interview survey, 1.8% of respondents who use Colchester Town Centre the most for shopping and services considered a lack of safety/ security to be their main 'dislike' about the town centre.

Conclusions and Qualitative Needs

3.52 On the basis of the foregoing, Colchester Town Centre clearly performs an important role and function as the Borough's principal shopping destination. It further performs important wider town centre, non-retail functions through the provision of day-to-day services and leisure, cultural and community uses. We consider that the town centre, as a whole, is relatively healthy at present.

3.53 However our work has identified some weaknesses and areas for improvement in the town centre, which threaten its relative health and attractiveness. In our view, these threats are real, particularly in the light of the challenges and trends affecting town centres like Colchester as considered at section 2 of this Study.

3.54 The headline findings from our detailed qualitative (healthcheck) assessment can be summarised as follows:

- The town centre has a reasonable range of shops for its size, although there is evidence that the quality of the retail offer is weakening through recent fashion retailer closures.
- Two sets of published retail rankings indicate the decline of the town centre's status and performance in recent years. This is significant, particularly in the context of the increasing polarisation (and downsizing) of major retailers to a smaller number of prime locations, and puts at risk the town's ability to attract and retain investment.
- Vacant shop units are typically small scale and mainly located in the more secondary shopping areas, while the Town Centre has a higher proportion of vacant floorspace relative to both Chelmsford and Braintree (but less than Ipswich).
- There is a qualitative need for modern, larger units to provide 'prime' space for retailers looking to locate to or re-locate within the town centre.

- The results of the 2016 household interview survey show that Colchester Town Centre attracts expenditure from a wide area, particularly on comparison goods.
- The town centre is a highly accessible location by all modes, served by strategic bus and rail stations, although car parking is a problem (in terms of its convenience and affordability) and threatens the town's appeal to shoppers and other users.
- It generally has a good quality shopping environment; however, we consider that the retail circuit within the main shopping area is somewhat incoherent and could be improved.
- The town's leisure offer lacks focus and, being increasingly important in terms of enhancing dwell time and a centre's attractiveness to consumers, there is an opportunity for improvement at the St Botolph's Quarter in particular.

3.55 It is important that Colchester Town Centre sustains and improves its retail offer, and other attractions, in order to maintain its position at the top of the Borough's retail hierarchy and ensure its vitality and viability. Key to this will be the achievement of new development and investment in the Town Centre, as considered later in the Study.

4. Qualitative Assessment – District Centres

Introduction

4.1 This section provides an overview of the health and role of the Borough's district centres. Our more detailed analysis is set out at Appendix B and has been informed by audits carried out in September 2016. Where possible we have drawn on the key healthcheck indicators set out in the national PPG[49]. The available baseline evidence is not as detailed for some of the centres as for Colchester Town Centre, however.

4.2 Colchester's retail hierarchy, as defined by Policy CE1 of the Core Strategy, identifies eight district centres with two classifications as follows:

- Rural District Centres – Tiptree; West Mersea; and Wivenhoe.
- Urban District Centres – Tollgate; Turner Rise; Peartree Road; Highwoods; and Greenstead Road.

4.3 Each of these district centres has its own characteristics. They all contain at least one foodstore or food/non-food superstore; however, their respective non-food (comparison goods) and service-based functions differ considerably. Typically, the currently defined Rural District Centres contain a wider range of non-retail uses such as services and community facilities; whereas the Urban District Centres (albeit to varying degrees) are stronger comparison goods shopping destinations and are lacking in terms of service-orientated functionality.

4.4 We therefore consider that Policy CE2b of the Core Strategy – which broadly supports an enhanced range of uses and only new retail development which caters for local needs and does not compete with Colchester Town Centre – is an appropriate and positive strategy for the Borough's district centres. Such an approach seeks to ensure that they better serve the day-to-day needs of their local communities. To this end, we do not consider that any of the Borough's district centres require substantial new retail development in order to ensure their vitality and viability. Enhancement through non-retail uses, such as services and community facilities, is much more important and thus an appropriate 'retail' strategy. This approach further respects the objective for a balanced network and hierarchy of centres across the Borough (as required by the Framework).

Tiptree

4.5 Tiptree (approximately 10 miles to the southwest of Colchester Town Centre) is dominated by Tesco and Asda superstores. Tesco in particular – given its closer relationship with the core shopping area focused along Church Road – is an important anchor to the centre. According to the market share evidence, Tiptree's substantial convenience goods shopping offer principally serves the western parts of the Borough (namely Zone 6).

4.6 The centre includes a wider range of retail, service and community uses including a library. Key retailers include Iceland and Boots, while there are several independents. There were two vacant units at the time of our site inspection. It is situated within a substantial residential area and is reasonably well served by bus.

4.7 Overall, we consider that Tiptree performs an important role in terms of serving predominately

[49] 'Ensuring the vitality of town centres' section.

localised shopping and service needs, and it is a vital and viable centre.

West Mersea

4.8 West Mersea (approximately 10 miles to the south of Colchester Town Centre) includes a modest range of retail, service and community facilities (i.e. Post Office, library, leisure/ community centre). Key retailers include Boots, Tesco Express, Co-Op and Spar. Reflecting its localised nature, the market share evidence indicates that the centre principally draws trade from its immediate catchment (namely Zone 3). West Mersea also has a tourist/ holidaymaker function, which is likely to help support its retail and other facilities.

4.9 The centre's retail offer is somewhat dispersed but relatively distinct owing to the diversity of independent retailers. It has a substantial walk-in catchment and is reasonably well served by bus.

4.10 Overall, we consider that West Mersea is a vital and viable centre within the limitations of its small scale and localised nature. The mix of uses and the high level of occupancy would suggest that it serves an important role in the retail hierarchy.

Wivenhoe

4.11 Wivenhoe (approximately four miles to the southeast of Colchester Town Centre) has a limited range of retail, service and community facilities (i.e. Post Office, library, hair/ beauty salon). Key retailers include Boots, Co-Op and One Stop. Thus the centre has a convenience-based function, principally serving the day-to-day needs of the local community, and this is reflected by the market share evidence.

4.12 The centre has an attractive 'rural' character and is reasonably well served by bus and rail. However there was limited pedestrian activity at the time of our site inspection, perhaps not helped by the fragmented nature of the shopping environment.

4.13 Overall, we consider that Wivenhoe is a vital and viable centre within the limitations of its small scale and localised nature. The mix of uses (albeit very limited) and the high level of occupancy would suggest that it serves an important role in the retail hierarchy.

Tollgate

4.14 Tollgate is located in Stanway (approximately three miles to the west of Colchester Town Centre) and is the largest of Colchester's district centres. It has evolved from a predominantly 'bulky' retail park into an established shopping destination with a substantial range of multiple comparison goods retailers (such as Next, Argos, Sport Direct, Boots and Currys & PC World), a Sainsbury's food/non-food superstore, and a number of food and drink uses. The new Stane Park development will further enhance Tollgate's role as a leisure-based destination.

4.15 The market share evidence demonstrates that Tollgate continues to exert a significant influence over shopping patterns across the catchment area, which extends well beyond Colchester Borough, securing substantial market shares of comparison goods expenditure from all catchment zones. This underlines the strength and attractiveness of Tollgate as a shopping destination and confirms its sub-regional function.

4.16 The centre is easily accessible from the local and strategic road network, including London Road (A1124) and Junction 26 of the A12. It has extensive surface level car parking. It is served by bus but does not have a rail station.

4.17 Overall, we consider that Tollgate performs successfully to the degree that it substantially competes with Colchester Town Centre for comparison goods expenditure. Its role and function as a district centre would be enhanced through the introduction of new services and/or community facilities, as opposed to further new retail (and leisure) development.

Turner Rise

4.18 Turner Rise is situated less than one mile to the north of Colchester Town Centre, off the A134. The centre comprises an Asda superstore and a retail park with multiple retailers focused predominantly on the 'value' end of the market (i.e. Poundland, Home Bargains, Dunelm, Iceland). According to the market share evidence, the Asda superstore principally serves the central and northern parts of the Borough, securing convenience goods expenditure from Zone 1 (and to a lesser extent Zone 2) in particular. The centre's comparison goods offer, however, draws trade from the wider catchment area. It also includes some food and drink uses.

4.19 The centre is well served by bus and is relatively close to Colchester rail station. It is highly accessible by car.

4.20 Overall, we consider that Turner Rise is performing well, largely underpinned by the Asda superstore and a 'value' focused comparison goods retail offer. Its role and function as a district centre would be enhanced through the introduction of new services and/or community facilities, as opposed to new retail development.

Peartree Road

4.21 Peartree Road (approximately three miles to the southwest of Colchester Town Centre and close to Tollgate) comprises a group of retail parks and terraces. The main retailers are Co-Op[50] and Poundstretcher, focused on Fiveways Retail Park, with the wider retail area predominantly characterised by 'bulky' trade outlets. The market share evidence indicates that few consumers do 'most of' their convenience and/or comparison goods shopping at the centre. However, the extent and type of provision (and the high level of take-up) would suggest that it performs an important shopping function, likely involving consumers travelling and doing 'some' of their shopping at Peartree Road, perhaps for occasional bulky goods.

4.22 The centre further comprises leisure uses (i.e. children's soft play, gymnastics club, gymnasiums). It is reasonably well served by bus and at the time of our site inspection, there was one vacant unit.

4.23 Overall, we consider that Peartree Road is performing well albeit is lacking in terms of services and/or community facilities. Its role and function as a district centre would be enhanced through the introduction of such uses, to complement the existing retail and leisure attractions.

Highwoods

4.24 Highwoods (approximately two miles to the northeast of Colchester Town Centre) includes a Tesco Extra superstore. Based on the market share evidence it is the Borough's second most popular main food shopping destination, securing trade from Zones 1, 2 and 3 of the catchment area in particular. The superstore has an element of comparison goods floorspace and a limited range of in-store concessions (i.e. café, print shop, optician,

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[50] Includes a small Boots chemist.

pharmacy). Highwoods further comprises a Post Office and a doctor's surgery.

4.25 The centre is situated within a substantial residential area and is well served by bus.

4.26 Overall, it is considered that this district centre caters well for the main food shopping needs of the surrounding communities. It also has a limited but important service-based role and function.

Greenstead Road

4.27 Greenstead Road comprises a Tesco superstore less than one mile to the east of Colchester Town Centre. It principally serves a localised catchment, securing convenience goods expenditure from Zone 3 (and to a lesser extent Zone 1) in particular.

4.28 The centre is well served by bus and rail. However, the vehicular approach is somewhat congested.

4.29 Overall, we consider that Greenstead Road performs well – within the clear limitations of its retail composition (i.e. Tesco only) – in terms of serving the main food shopping needs of the local community.

5. Basis of Retail Capacity Forecasts

Introduction

5.1 For the retail capacity forecasting in this Study, we have used our RECAP retail capacity forecasting Model. The RECAP Model is an empirical step-by-step model, based on the results of the 2016 Colchester household interview survey of shopping patterns as its method of allocating retail expenditure from catchment zones to shopping destinations. It is therefore not a theoretical gravity model, but is based on consumer responses about actual shopping patterns. It is also a growth allocation model; which allocates growth in expenditure to shopping destinations based on shopping patterns indicated by the household interview survey, and informed professional judgements about how these will be likely to change in the future as a result of committed or potential new retail developments.

5.2 We have modelled the following shopping destinations:

- Colchester Town Centre;
- Tollgate;
- Turner Rise;
- Peartree Road;
- Highwoods;
- Greenstead Road;
- Tiptree; and
- Non-central stores in Borough[51].

5.3 The RECAP Model forecasts the expenditure-based capacity for additional retail floorspace in the following way:

- Calculate the total amount of convenience and comparison goods expenditure which is available within the 9 zones comprising the catchment area;
- Allocate the available expenditure to the Borough's shopping destinations (based on the results of the 2016 household interview survey of shopping patterns); so as to obtain estimates of current sales and forecast future sales in each shopping destination;
- Compare the estimated sales in the Borough's shopping destinations with existing floorspace; so as to assess the current trading performance of each shopping destination, and the capacity to support further growth in convenience and comparison goods floorspace; and
- Assess the potential impact on sales and capacity forecasts of any future changes to the measured 2016 pattern of market shares; specifically higher market shares in Colchester Town Centre arising from committed and planned new retail development.

5.4 The RECAP Model (like any other forecasting model of this type) is an exploratory tool, rather than a prescriptive mechanism. Thus the resulting forecasts serve as a realistic guide to planning policies and decisions on planning applications. Separate capacity forecasts have been prepared for Colchester Town Centre and other shopping destinations in order to assist the Council with developing a preferred strategy and formulating policies for new retail development.

[51] Including stores outside of the defined town/ district centres.

5.5 When using the retail capacity forecasts as a guide to future planning policies, it is also important to remember that the further ahead the forecasting date, the less certain the forecast. Thus the forecasts for 2018 are more robust than those for 2033. In particular for 2028 and 2033, we suggest that forecasts such as these should be treated with some caution, since they only indicate the broad order of magnitude of retail capacity at this date, if all of the forecast trends occur. There are also particular uncertainties in the UK and global economies at the present time; for which there is very little precedent. The future outlook is therefore a matter of some conjecture. Furthermore, long term growth in the use of internet shopping is unknown (although an assessment has been made in this Study) and reinforces the need to revise the forecasts of retail floorspace capacity before 2021.

5.6 We describe below the principal data inputs, the scenarios assessed, and the format of the RECAP Model tables.

Principal Data Inputs

5.7 The principal data inputs (and assumptions) used for this Study have been obtained from reliable sources and are as up-to-date as possible; while our interpretation and analysis of such data is based on our professional judgements, in the light of our extensive experience of retail capacity forecasting. The retail capacity forecasts set out and described below are compliant with the Framework and accompanying Guidance; and comprise a robust retail evidence base for the emerging Local Plan.

Catchment Area

5.8 For this Study, the catchment area is informed by the results of the most recent previous household interview survey for Colchester (September 2012), together with those of recent household interview surveys undertaken for surrounding local planning authorities (e.g. Braintree District Council in October 2015). This catchment area was divided into 9 catchment zones. A map of the catchment area showing these 9 zones is included at Appendix C. These zones were defined having regard to the results of previous surveys in order to obtain the most robust and cost-effective sampling specification.

5.9 Appendix D sets out details of the postcode sectors comprising each of the 9 catchment zone, as adopted for the purpose of this Study.

Base and Forecasting Years

5.10 The new household interview survey was undertaken in September and October 2016, and we have used 2016 as our base year for the forecasts. The RECAP Model therefore provides estimates of the current retail sales in each of the Borough’s shopping destinations as at 2016. As instructed by the Council, we have prepared capacity forecasts for the years 2018, 2023, 2028 and 2033, so as to cover the forthcoming plan period.

Catchment Population

5.11 The starting point for the population forecasts was a report, dated September 2016, commissioned from Pitney Bowes on the current and projected future population of each catchment zone. These population forecasts cover the period up to 2026; and we have therefore extrapolated them to 2028 and 2033 by trend projection. The result is that for the catchment area as a whole the population is expected to increase from 486,000 in 2016 to 554,636 by 2033, which is an increase of about 14%.

5.12 The 9 catchment zones adopted for the purpose of this Study are based on postcode geography and do not match local authority administrative boundaries. They cover and extend beyond Colchester's local authority boundary to reflect shopping patterns in the catchment area (i.e. the area from which the Borough's shopping destinations capture significant market shares of available expenditure).

5.13 We acknowledge the planned Garden Communities within Colchester Borough and the adjacent boroughs of Braintree and Tendring, which we understand will provide for around 2,500 new homes towards the end of the plan period (2033). The Council should undertake further work, in due course, to consider the likely effect of this and the overall scale of 'Garden Communities' growth on forecast retail capacity in the Borough.

5.14 For the avoidance of doubt, we have not made any specific allowance for 'Garden Communities' growth in our population forecasts to 2033. This is because the population forecasts derived from Pitney Bowes are sufficient to account for this.

Price Basis

5.15 All monetary values in this Study are in constant 2014 prices, unless otherwise stated, so as to exclude the effects of price inflation. Price conversions, for both comparison and convenience goods, from other price bases have been undertaken using Table 3.1 of 'Retail Expenditure Guide' 2015/2016 (Pitney Bowes & Oxford Economics).

Per Capita Expenditure

5.16 For this Study, we obtained from Pitney Bowes a report setting out estimated average per capita expenditure on convenience and comparison goods in each catchment zone for the years 2013, 2014 and 2015, together with forecasts for 2020, 2025 and 2026. These estimates and forecasts take account of differences in average per capita expenditure on convenience and comparison goods from zone to zone. We have used these figures as the basis for our base year (2016) estimates and new forecasts. For the forecasting years of 2018 and 2023 we interpolated between the Pitney Bowes figures; and for our forecasting years of 2028 and 2033 we applied trend extrapolation to the Pitney Bowes figures. The resulting estimates and forecasts of per capita expenditure on both convenience and comparison goods, including expenditure on Special Forms of Trading, are set out in the top half of RECAP Model Table 2 in Appendix E.

5.17 The forecast growth in per capita expenditure in RECAP Model Table 2 is specific to the catchment area, and does not apply national average growth forecasts to the local catchment area base figures. Use of local growth forecasts is expected to be more reliable, as stated by Oxford Economics in the Pitney Bowes report for the catchment area:

'The forecasts are taken from Oxford Economics published UK Macroeconomic forecasts and the local level estimates are modelled using various elements of the Economics Regional and Local forecasting services together with additional ONS data. The result is much more targeted to the prospects for a particular locality than simply taking the latest expenditure estimates for the area and growing them in line with national trend-based projections for the appropriate category of goods. This is partly because our consumer spending forecasts enable us to take account of changes in the underlying forces driving different elements of consumer spending in a much more sophisticated way than simply

extrapolating trends. However, equally importantly, Oxford Economics' regional forecasts allow us to take account of how underlying differences in economic performance in different parts of the country are likely to affect relative spending power in different locations.'

Special Forms of Trading (including internet shopping)

5.18 We have made deductions from the per capita expenditure figures supplied by Pitney Bowes to allow for expenditure via special forms of trading (SFT). This includes mail order, vending machines, party plan retailing, on-line shopping via the internet or interactive TV, and expenditure at temporary market stalls; and is therefore expenditure not made in retail shops[52]. RECAP Model Table 2 shows the growing deductions which we have made. The bottom half of RECAP Model Table 2 shows forecast growth in per capita expenditure on convenience and comparison goods in each catchment zone, after deducting expenditure on SFT at the rates indicated in the table.

5.19 The combined effect of the forecast growth in population and in per capita expenditure is that (after deducting expenditure on SFT) we expect total catchment area expenditure on comparison goods to increase by about £1,234m (about 79%) over the period 2016 to 2033; as set out in RECAP Model Table 3 in Appendix E. This compares with growth in total catchment area population of around 14% over the period. Thus only a small proportion of the growth in catchment area expenditure on comparison goods is accounted for by forecast growth in population. This means that the comparison goods floorspace capacity forecasts are particularly insensitive to population growth assumptions, principally because:

- Any population growth is likely to be only a very small proportion of total catchment area population (and its available expenditure); and
- The expenditure arising from any population growth is likely to be attracted by a number of shopping destinations (as shopping patterns vary greatly), therefore having only a small effect on capacity forecasts in any individual centre.

5.20 The comparison goods floorspace capacity forecasts are much more sensitive to the assumptions about growth in per capita expenditure, however, especially in the later part of the forecasting period. This is because, as per capita expenditure increases over time, more expenditure becomes available to support new floorspace. The substantial increase in forecast expenditure on comparison goods indicates that a need for additional comparison goods retail floorspace will grow substantially to 2033 (particularly in the middle and later parts of this forecasting period). However, this should be reviewed at regular intervals over that period.

[52] Importantly, we have excluded from the results of the 2016 household interview survey (and therefore our retail capacity forecasting) the 'SFT' responses, so as to avoid double-deductions that would otherwise under-state total available expenditure in the catchment area.

Shopping Patterns in the Catchment Area

5.21 For this Study, we designed and commissioned a new household interview survey of shopping patterns in the catchment area – the results of which are included at Appendix A. It covered the area shown on the map in Appendix C which was divided into the 9 catchment zones shown on that map. A total of 1,200 interviews were undertaken for us by NEMS Market Research in September and October 2016. These interviews were divided between the 9 catchment zones approximately in proportion to the population of each zone; but with adjustments to ensure that not less than 100 interviews were undertaken in any zone, and to optimise confidence limits within the budgeted limit of 1,200 interviews. Within each zone, the interviews were distributed as far as practicable in proportion to the distribution of population within the zone.

5.22 We are confident that the number and distribution of interviews (by catchment zone) has produced results that are sufficiently reliable for the purpose for which the household interview survey was designed. Further details of the sampling specification for the household interview survey are set out in NEMS Market Research's technical report included at Appendix D.

5.23 The survey asked questions about households' shopping habits for main food and top-up food (i.e. convenience goods) shopping. The survey also asked questions about households' shopping habits for 8 different sub-categories of comparison goods shopping. These categories were closely matched to the international COICOP categories of retail expenditure to ensure compatibility with the RECAP Model. We combined the results of Questions 4 to 11 of the household interview survey to provide weighted average market shares of all comparison goods expenditure which are attracted to each shopping destination, using weights according to the amount of expenditure on each of these 8 sub-categories of comparison goods. These are set out in RECAP Model (Scenario 1) Table 7 for Colchester Town Centre, Table 15 for Tollgate, and so on. The weighted averages are then corrected as described below, rounded to the nearest integer, and set out in RECAP Model (Scenario 1) Table 8 for Colchester Town Centre, Table 16 for Tollgate, and so on.

Market Share Corrections

5.24 The household interview survey provides a detailed picture of where households in each of the 9 catchment zones do 'most of' their shopping for convenience goods and the 8 different categories of comparison goods. This is common practice for a survey of this nature, since it is not practical to ask respondents to quantify how much they spend on convenience goods and the various categories of comparison goods, and where and how often. Thus the results of the household interview survey do not directly indicate actual expenditure flows, but are the best available data to use as a proxy for modelling retail expenditure flows from residential areas to shopping destinations. However, like all such surveys, this means that its results cannot be applied uncritically in the RECAP Model. Thus for example, in our extensive experience, such surveys (undertaken by ourselves and by other consultants) tend to over-emphasise comparison goods shopping in large centres, and under-represent it in small centres[53]. The main reason is because in a small sample survey, the probability of interviewing the small number of people who use small centres is much less than the probability of interviewing the much larger number of people who use larger centres.

[53] This is confirmed by the now revoked DCLG 'Practice Guidance' which states, *'Also, surveys that use simple questions about where people shop, provide answers that relate to trips and not spending flows. They can also overstate the importance of the larger centres and stores, and can understate the smaller and less frequently visited stores.'* (Appendix B, paragraph B.34).

5.25 It is therefore sometimes necessary to introduce market share correction factors; so as to transfer expenditure in the Model from one or more locations to others, to balance (or calibrate) the Model and make it represent reality more accurately. This is not uncommon, and has been necessary in this case for some of the shopping destinations for comparison and/or convenience goods market shares.

5.26 These market share corrections do not alter the centres or retail parks themselves in any way, but are simply a means of calibrating the Model to make it as realistic as possible a representation of actual expenditure flows. There is an approximate correlation between centre size and average sales density, with larger centres generally having higher sales densities than smaller centres (and hence higher shop rental values). This experience, together with our inspections of each of the centres modelled, has informed our judgements about the market share corrections needed to make the RECAP Model a realistic representation of sales in the Borough’s shopping destinations.

5.27 Thus for Colchester Town Centre, for example, use of the comparison goods market shares from the 2016 household interview survey without correction would result in an unrealistically high sales density for the town centre. Respondents to the survey were asked where they do ‘most of’ their shopping for the 8 categories of comparison goods. However, we consider that the uncorrected survey results have over-estimated the scale of expenditure in Colchester Town Centre (and under-estimated it in some of the Borough’s smaller centres). We have therefore decreased the survey-indicated comparison goods market shares for every catchment zone by the market share correction factor of 90% indicated in the header to RECAP Model Table 8 for Scenario 1 and Table 76 for Scenario 2 (i.e. we have decreased them by 10% from the no-change default factor of 100%), in order to make the Model represent reality more accurately. In terms of convenience goods market shares in Colchester Town Centre, we have increased the survey-indicated market shares by the correction factor of 120% (i.e. we have increased them by 20% from the no-change default factor of 100%). In our professional judgement, it is not uncommon that household interview surveys under-state convenience goods shopping in large town centres such as Colchester given that they do not usually contain full-range food superstores (as comparison goods shopping is their principal function).

5.28 As with Colchester Town Centre, the uncorrected survey results for Tollgate result in an unrealistically high average comparison goods sales density. As well as the over-representation of actual expenditure flows due to it being a large and very attractive centre, we consider that some respondents to the household interview survey are likely to have answered ‘Stanway’ or ‘Tollgate’ or ‘the retail park near Tollgate’ when actually they meant Peartree Road, which is very close to Tollgate but probably less prominent in the minds of shoppers. Such responses would have been coded by the interviewers as ‘Tollgate’, thus inflating that centre’s market shares, whilst depressing the market shares of Peartree Road. In order to make the Model represent reality more accurately, therefore, we have decreased the survey-indicated comparison goods market shares for every catchment zone by the market share correction factor of 75% indicated in the header to RECAP Model Table 16 for Scenario 1 and Table 79 for Scenario 2 (i.e. we have decreased them by 25% from the no-change default factor of 100%). In terms of convenience goods market shares in Tollgate, whilst we consider that the Sainsbury’s superstore is likely to be trading above ‘company benchmark’ average sales density, we have decreased the survey-indicated market shares by the correction factor of 80% to reflect reality more accurately.

5.29 Adjustments for other shopping destinations modelled are indicated in the equivalent RECAP Model tables. In the case of Non-central stores in the Borough, we consider that the survey-indicated comparison goods market shares do not require correction, as the resulting sales density is realistic for (non-food) retail warehouses. In other cases, we have increased the comparison goods market shares, for those centres where the survey-indicated market shares result in unrealistically low sales[54]. These corrections to the survey-indicated market shares are our professional judgement, in the light of centre inspections (to understand how each centre performs from a qualitative perspective, the level and type of retailer representation, etc.) and our experience with undertaking a large number of such studies over many years. We therefore consider that the RECAP Model realistically represents the current patterns of shopping in the Borough's shopping destinations, and provides a reliable basis for forecasting future comparison goods floorspace capacity.

5.30 Some market share corrections have also been necessary for convenience goods, additional to those previously described for Colchester Town Centre and Tollgate. When judged against 'benchmark' sales densities of the retailers and in the light of our experience elsewhere, we consider that the survey results over-represent use of Tesco Extra at Highwoods, and the three Aldi discount supermarkets and Waitrose out-of-centre. Conversely, they under-represent use of Asda at Turner Rise, Co-op at Peartree Road, and the supermarkets in Tiptree. We have therefore applied the market share corrections in order to balance the Model realistically. In the case of Greenstead Road, no correction was necessary, as the survey results indicated that the Tesco superstore is trading at close to its 'benchmark' level, which is realistic for that store.

5.31 Again, these market share corrections simply calibrate the RECAP Model to represent current trading patterns as accurately as possible. On this basis, we consider that the Model also provides a reliable basis for forecasting future convenience goods floorspace capacity.

Visitor Expenditure on Comparison Goods

5.32 We have adopted the assumption that expenditure on comparison goods in Colchester Town Centre by visitors who live outside the 9 catchment zones amounts to 1% of expenditure by catchment area residents. This allowance for visitor expenditure would therefore account for spending arising from cultural, business trips etc. We consider that this is realistic for the town centre – given the wide catchment area covered by the household interview survey and RECAP Model.

5.33 For Tollgate we have assumed that comparison goods expenditure by visitors who live outside the 9 catchment zones amounts to 0.5% of expenditure by catchment area residents. Again, this takes into account the extensive catchment area covered by the household interview survey (and the market share evidence available from it) and the RECAP Model.

5.34 For all other shopping destinations modelled, we have made no allowance in the RECAP Model for visitor expenditure on comparison goods, as these have more localised catchments.

5.35 For clarity, we have not allowed for visitor expenditure on convenience goods when modelling any of the Borough's shopping destinations, given that such shopping trips are usually localised in nature.

[54] In some cases, households may not do 'most of' their shopping for certain comparison goods sub-categories at a particular centre but do 'some of' it, and thus the survey (which asked where they do 'most of' their shopping for the 8 categories of comparison goods) is likely to under-represent comparison goods shopping in that centre.

Existing Shop Floorspace

5.36 We have obtained the details of existing shop floorspace in the Borough's centres from a number of reliable sources including Experian Goad, IGD, Trevor Wood Database and Valuation Office Agency. For each shopping destination we have made an allowance for lower and upper (including mezzanine) floors, based on our site inspections, as required. We have used these figures in our RECAP Model.

Committed Developments

5.37 We have included in the RECAP Model the new retail floorspace expected to result from a number of committed developments. These include the following:

- Primark occupying the former BHS store, Lion Walk (Colchester Town Centre[55]);
- Lidl, Gosbecks Road (Non-central stores in Borough[56]); and
- Sainsbury's occupying the B&Q Extra store, Lightship Way (Non-central stores in Borough[57]).

5.38 Also in Colchester Town Centre, there is currently a substantial amount of vacant retail floorspace. We have included a proportion of the vacant such floorspace in RECAP Model Table 12 as committed development for comparison goods floorspace[58]; on the assumption that a high proportion of it will be reoccupied for retail use over the plan period. Thus we have assumed that, of the total vacant A1 retail floorspace[59], 60% would be comparison goods retail; and that 50% of this floorspace is sufficiently 'prime' to be reoccupied.

5.39 For Tollgate, we have included the currently vacant, former Seapets unit in the Model as committed development for comparison goods floorspace (refer to RECAP Model Table 21).

Growth in Sales Densities

5.40 For comparison goods floorspace, we have assumed that both existing and new floorspace will increase its sales density by 2.5% per annum from 2016 onwards. This allocates a substantial proportion of the forecast growth in expenditure to existing shops and stores to help ensure their continued vitality and viability, before new floorspace becomes necessary.

Scenarios Assessed

5.41 We have assessed two scenarios for new strategic retail development, as set out and described below.

5.42 **Scenario 1** – the baseline scenario, in which we assume that the 2016 pattern of market shares of convenience and comparison goods shopping in the Borough's shopping destinations indicated by the household interview survey (corrected as described above) remains unchanged throughout the forecasting period to 2033. The implicit assumption in

[55] See RECAP Model Table 12.
[56] See RECAP Model Table 74.
[57] See RECAP Model Table 74.
[58] We have not assumed any committed development for convenience goods floorspace given the role and function of the town centre in providing principally for comparison goods shopping.
[59] Excluding the currently vacant, former BHS store which is to be reoccupied by Primark in 2017.

this scenario is that any new retail development in these shopping destinations does not change the market shares of expenditure attracted from the catchment area.

5.43 Scenario 1 is conservative, because it assumes that new retail development in Colchester Town Centre will be unable to change shopping patterns and increase the market shares of catchment area expenditure attracted by the Town Centre. However, new retail development of the scale represented by the long-standing Council objective for Vineyard Gate (in particular) would be likely to make the Town Centre more attractive to shoppers from the catchment area.

5.44 **Scenario 2** – in which we take account of the Primark commitment in Colchester Town Centre at 2018 increasing the town centre's market shares of comparison goods expenditure; and allow for substantial further new retail development in Colchester Town Centre, increasing its market shares of catchment area comparison goods expenditure further from 2023 onwards. Also in Scenario 2, the potential growth of expenditure at Tollgate (after allowing for the existing retail floorspace there to grow its sales in real terms from 'benchmark' levels) is transferred to Colchester Town Centre.

5.45 Scenario 2 is therefore specifically designed to test the concept of diverting growth in trade (above an allowance for growth in expenditure in the existing stores) from Tollgate to Colchester Town Centre; and the resultant capacity for new town centre comparison goods retail development to support it. This scenario demonstrates the practical implications of this growth transfer, consistent with the Council's retail strategy and the Framework (paragraph 23) requirement for a network and hierarchy of centres. However in the absence of a designed scheme or schemes in the town centre with defined retail content which could be tested, at this stage our assumptions about increased town centre market shares in this scenario are necessarily conceptual.

5.46 We accept that other committed development in Colchester would be likely to alter the pattern of market shares to some extent, most notably Sainsbury's replacing the B&Q Extra at Lightship Way, and Lidl at Gosbecks Road (which is now open for trading). The effects of such changes are likely to be fairly diffused amongst the existing centres and out-of-centre stores, and not sufficient to necessitate modelling them in a separate scenario. However we comment further, in Section 6 below, in relation to our forecast retail capacity for all the centres and out-of-centre retailing in Colchester combined.

5.47 We would further note that retail capacity forecasts have not been prepared for the Borough's neighborhood or local centres, or the smallest district centres (namely West Mersea and Wivenhoe). This is primarily because they do not feature notably in the results of the household interview survey – which asked where respondents do 'most of' their shopping for convenience goods and each category of comparison goods. As a result, there is no reliable data available on the (very small) market shares of catchment area expenditure which they attract. We are aware of the committed new 2.500 sq m GIA foodstore in a North Colchester neighbourhood centre[60] as part of an urban extension, and any further new retail development in such centres is likely to arise from population and expenditure growth, as opposed to the transfer of expenditure growth from other shopping destinations.

[60] Application ref. 121272.

Format of the RECAP Model Tables

5.48 The RECAP Model Tables for Scenarios 1 and 2 are set out in Appendix E. For Scenario 1, Tables 1 to 5 set out the population and expenditure forecasts for the catchment area. Tables 6 to 13 are the Scenario 1 tables for Colchester Town Centre. Tables 6 and 7 show the pattern of market shares of expenditure on each category of convenience and comparison goods respectively attracted from the catchment area, as indicated by the household interview surveys before correction. Table 8 shows the corrected market share patterns for all convenience and comparison goods expenditure in the town centre. Table 9 shows the amounts of expenditure on each comparison goods sub-category attracted, and the amounts of all comparison goods. Table 9 is the product of Table 5 and Table 7. Table 10 sets out forecast retail sales for both convenience and comparison goods, on a zone-by-zone basis and overall. Table 11 accounts for the sales capacity of existing main food and convenience goods shops in the town centre, and Table 12 sets out the committed town centre developments and their expected sales levels (for both convenience and comparison goods). Table 13 brings together the expenditure attracted, existing floorspace and committed developments, to arrive at the retail capacity forecasts for Colchester Town Centre. It also shows the overall market shares of total catchment area expenditure on convenience and comparison goods which are shown as attracted by the town centre.

5.49 Tables 14 to 22 are the Scenario 1 tables for Tollgate. These tables follow the same arrangement as the tables for Colchester Town Centre; however an additional table is included (Table 20) indicating 'benchmark' comparison goods sales in the existing retail stores, warehouses and main foodstores.

5.50 The tables for Turner Rise, Peartree Road, Highwoods, Greenstead Road and Non-central stores in Borough follow the same arrangement as the tables for Tollgate.

5.51 The tables for Tiptree follow the same arrangement as the tables for Colchester Town Centre.

5.52 The RECAP Model tables for Scenario 2 are simpler. For Colchester Town Centre these are Tables 76 to 78, and are the same as Tables 8, 10 and 13 respectively in Scenario 1. For Tollgate these are Tables 79 to 81, and are the same as Tables 16, 18 and 22. Tables 76 (Colchester Town Centre) and 79 (Tollgate) show the revised comparison goods market shares from 2018 to account for the Primark commitment, and from 2023 onwards to reflect the concept of transfer of market shares of expenditure from Tollgate to Colchester Town Centre to support new retail development

5.53 The RECAP Model is completed by summary Tables 82 to 84. Table 82 shows the (corrected) market shares attracted in 2016 by each of the shopping destinations modelled for each of the 8 comparison goods categories. This provides the basis for the *Retail Sector Analysis* described below. Tables 83 and 84 show the patterns of combined market shares (as corrected) for all comparison goods, attracted by Colchester Town Centre and Tollgate respectively in Scenarios 1 and 2. Table 84 for Scenario 2 shows how these combined market shares for all comparison goods are expected to increase from 2018, and further from 2023, as a result of the conceptual growth transfer scenario (from Tollgate to Colchester Town Centre).

6. Quantitative Capacity for New Retail Development

Introduction

6.1 In this section, we set out our retail capacity forecasts for each shopping destination throughout the forecasting period (i.e. 2018, 2023, 2028 and 2033), and discuss the implications of new retail development in Colchester Town Centre in particular. The convenience goods forecasts are summarised in Figure 6.1, and the comparison goods forecasts in Figures 6.2 and 6.3. We also comment on the implications for future development strategy. In setting out our forecasts, we distinguish between convenience goods and comparison goods, defined as follows:

- **Convenience goods:** Food, alcoholic drink, tobacco products, newspapers and periodicals, non-durable household goods.

- **Comparison goods:** Clothing and footwear; household textiles and soft furnishings; Furniture and floor coverings; household appliances; audio visual equipment; hardware, DIY goods, decorating supplies; chemist and medical goods, cosmetics and beauty products; books, jewellery, watches, china, glassware and kitchen utensils, recreational, personal and luxury goods.

Convenience Goods Forecasts

6.2 Our forecasts of the need for new convenience goods floorspace in the Borough are summarised in Figure 6.1 below. This represents the Scenario 1 forecasts (i.e. no change in convenience goods market shares throughout the forecasting period). We have not modelled an additional scenario for convenience goods shopping, given that any new retail-led development in Colchester Town Centre will predominantly comprise comparison goods floorspace and will not therefore substantially affect convenience goods market shares.

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Figure 6.1 – Summary of Retail Capacity Forecasts: Convenience Goods (sq m net sales area): Scenario 1

Location	2018	2023	2028	2033	RECAP Model Table
Colchester Town Centre	50	250	500	700	13
Tollgate	400	800	1,250	1,650	22
Turner Rise	350	750	1,150	1,550	31
Peartree Road	50	100	150	200	40
Highwoods	500	750	1,050	1,300	49
Greenstead Road	0	200	400	600	58
Tiptree	-300	-100	50	200	66
Non-central stores in Borough	-3,200	-2,800	-2,400	-2,000	75
TOTAL COLCHESTER BOROUGH	**-2,150**	**0**	**2,150**	**4,250**	

Source: Colchester RECAP Model 2016.

Notes:

(a) The forecasts are 'baseline' forecasts i.e. they assume that any new convenience goods floorspace in the Borough does not change the survey-derived market shares of catchment area expenditure.

(b) The forecasts are cumulative, i.e. the forecasts for each date include the forecasts for the previous dates and are not additional to those earlier forecasts.

(c) The forecasts are for future retail capacity after allowing for the committed developments.

(d) Floorspace figures from RECAP Model rounded to the nearest 50 sq m net.

(e) The sub-totals and grand totals may not exactly equal the sum of their parts, owing to rounding.

6.3 Before we comment on the convenience goods retail capacity forecasts in Figure 6.1, some additional general points should be noted. First, the forecasts are all on the assumption that where retailers are shown by the RECAP Model to be trading above or below the level based on estimated 'benchmark' company average levels, their sales densities will fall or rise to that company average based level. This is a conventional assumption in retail studies of this type. However, some stores may well continue to trade successfully above or below their company average sales density.

6.4 Second, the convenience goods forecasts are all on the assumption that potential new floorspace will be provided in the form of new foodstores trading at a 'generic' average sales density of £12,000 per sq m net. Whilst some grocery operators trade above this level (i.e. Asda and some smaller town centre formats), others trade below £12,000 per sq m net. Thus the format in which new convenience goods floorspace is provided will affect the amount of such floorspace which can be supported in terms of retail capacity. At this time, it is of course not possible to predict over the forecasting period the format in which potential foodstore developments might come forward. It will therefore be necessary to review the implications for retail capacity in each shopping destination when specific proposals for new stores come forward, taking account of the format of the proposed stores and their likely occupiers.

6.5 Third, we have made no allowance for increases in sales densities of convenience goods floorspace over the forecasting period. This is because convenience goods sales densities have not been rising across the board over the last few years. For some retailers (namely the 'discount' operators such as Aldi) they have risen but for others they have fallen. However, at the next review of the forecasts, the most up-to-date sales densities should be used, so as to take account of any changes in real terms.

6.6 Fourth, although our forecasts distinguish between the Borough's town and district centres, and non-central shopping locations, this is merely for forecasting convenience and reliability. It does not mean that any capacity forecast as non-central should be accommodated in the form of out-of-centre development. Rather, the sequential approach should be applied, and new developments to accommodate any of the forecast need should be located in-centre or edge-of-centre, in preference to out-of-centre locations, if possible. Further, new development in or on the edge of the Borough's district centres should be proportionate to the role and function of that centre, having regard for the network and hierarchy of centres, and thus it does not mean that capacity forecast for district centres should necessarily be accommodated there.

6.7 Figure 6.1 shows that after allowing for already committed developments, there will be limited capacity for convenience goods floorspace in Colchester Town Centre in 2023 of about 250 sq m net (increasing to about 500 sq m net by 2028 and 700 sq m net by 2033), if forecast trends occur. These capacity forecasts demonstrate that Colchester Town Centre, which has a modest role in providing for convenience goods shopping, is sufficiently represented by convenience goods floorspace; with limited growth potential over the forecasting period. However, if opportunities arise for the expansion of existing convenience goods floorspace in the town centre, these should be supported in accordance with the sequential approach.

6.8 The only locations with substantial capacity over the forecasting period are Tollgate, Turner Rise and Highwoods, which already contain the Borough's main superstores. There will be a significant theoretical over-supply of convenience goods floorspace in Non-central stores in the Borough, mainly as a result of the new Sainsbury's superstore replacing B&Q Extra, and the new Lidl discount supermarket. Whilst these committed developments have been included in the RECAP Model, no increases in market shares have been allowed as a result of them. In practice, we consider that they will be supportable as a result of increased market shares of catchment area expenditure attracted (i.e. 'clawback' of expenditure and impacts on over-trading stores), at the expense of some of the superstores in existing centres and existing discount foodstores.

6.9 Overall, after allowing for the committed developments, we conclude that there could potentially be capacity for one new medium-sized foodstore in the Borough by 2028, if forecast trends occur. The preferable location for this would be in or on the edge of Colchester Town Centre in accordance with the sequential approach, and where we have identified a lack of main foodstore provision (and thus consumer choice). This additional convenience goods floorspace might also come forward as an extension to an existing store in the Town Centre.

Comparison Goods Forecasts

6.10 Our Scenario 1 forecasts of the need for new comparison goods floorspace in the Borough are summarised in Figure 6.2 below. As with convenience goods, the capacity for additional out-of-centre comparison goods floorspace has been distinguished in the RECAP Model from that in the centres merely for forecasting convenience. Again, it does not mean that forecast capacity should be accommodated in the format of out-of-centre retail warehouses. New floorspace should be located in accordance with the sequential approach, rather than in relatively low sales density retail warehouse format buildings, wherever possible. New development in or on the edge of the Borough's district centres should also be proportionate to the role and function of that centre, having regard for the network and hierarchy of centres.

6.11 Again for forecasting convenience, we have assumed that new floorspace forecast as non-central (i.e. Non-central stores in Borough) would trade at typical average sales densities for non-food retail warehouses. However, in the event that the forecast capacity or any part of it can be accommodated in town centre or edge-of-centre format developments, the capacity would be less than forecast in Figure 6.2; because town centre format retail floorspace typically trades at higher sales densities than retail warehouses. Also, if some was to be accommodated in food/non-food superstores, the capacity would be less than forecast, because their comparison goods sales densities are significantly higher than those of most retail warehouses. The summary figures in Figure 6.2 reflect this, and assume that all new floorspace forecast as non-central would trade at an average sales density representative of Colchester Town Centre.

Figure 6.2 – Summary of Retail Capacity Forecasts: Comparison Goods (sq m net sales area):

Scenario 1

Location	2018	2023	2028	2033	RECAP Model Table
Colchester Town Centre	-5,300	-1,250	2,300	4,300	13
Tollgate	5,500	7,200	8,700	9,600	22
Turner Rise	-100	650	1,250	1,650	31
Peartree Road	-150	250	650	900	40
Highwoods	100	250	400	450	49
Greenstead Road	100	200	300	350	58
Tiptree	100	350	550	650	66
Non-central stores in Borough	-2,750	-1,550	-550	50	75
TOTAL COLCHESTER BOROUGH	**-1,350**	**6,750**	**13,850**	**17,950**	

Source: Colchester RECAP Model 2016.

Notes:

(a) The forecasts are ‘baseline’ forecasts i.e. they assume that any new comparison goods floorspace in the Borough does not change the survey-derived market shares of catchment area expenditure.

(b) The forecasts are cumulative, i.e. the forecasts for each date include the forecasts for the previous dates and are not additional to those earlier forecasts.

(c) Floorspace figures from RECAP Model rounded to the nearest 50 sq m net.

(d) The forecasts are for new floorspace additional to committed retail developments and ‘prime’ vacant floorspace (in the case of Colchester Town Centre and Tollgate).

(e) The sub-totals and grand totals may not exactly equal the sum of their parts, owing to rounding.

6.12 In RECAP Model Table 13, we estimate that the existing comparison goods floorspace in Colchester Town Centre was achieving in 2016 an average sales density of £6,379 per sq m net. This is a realistic sales density for a town centre of this size and type, having regard for its catchment and retail composition.

6.13 After allowing for existing town centre floorspace to become more efficient by 2.5% per annum from 2016 onwards (an assumption applied to all other shopping destinations modelled), Figure 6.2 shows that under Scenario 1, in which the market shares indicated by the 2016 household interview survey (as corrected) remain unchanged throughout the forecasting period, there is forecast to be a theoretical over-supply of comparison goods floorspace in Colchester Town Centre until 2023. This is principally due to Primark absorbing growth in expenditure without (in Scenario 1) increasing the town centre's market shares. Forecast capacity rises to about 2,300 sq m net by 2028 and 4,300 sq m net by 2033, if forecast trends occur. Thus in Scenario 1, there is limited expenditure-based capacity to support significant new comparison goods floorspace in Colchester Town Centre over the forecasting period, which would otherwise enable the town centre to clawback some growth in trade from out-of-centre retail warehouses and/or from other competing shopping destinations in the catchment area. The implications of this clawback in trade are considered under Scenario 2 below.

6.14 Under Scenario 1, there would be significant capacity for more comparison goods floorspace at Tollgate[61] (about 9,600 sq m net by the end of the forecasting period). This magnitude of growth, if accommodated in or on the edge of Tollgate, would not be proportionate to the centre's role and function, having regard for the Borough's network and hierarchy of centres. It would further increase its attractiveness and catchment to the potential detriment of Colchester Town Centre at the top of the retail hierarchy.

6.15 The forecasts summarised in Figure 6.2 also show that there will be substantial capacity for more comparison goods floorspace at Turner Rise, albeit significantly less than forecast at Tollgate under Scenario 1. Whilst we have not modelled a growth transfer scenario for Turner Rise, the principles of proportionality and functionality should apply there too; any new retail development should be commensurate with the centre's role and function in the retail hierarchy.

6.16 Figure 6.2 indicates that there will be modest capacity (if forecast trends occur) for new comparison goods floorspace in the other shopping destinations modelled, while the forecast over-supply in non-central locations is likely to be eliminated following the closure of B&Q Extra to the east of Colchester.

6.17 In Figure 6.3 below, we set out the results of our comparison goods retail capacity forecasts under the exploratory Scenario 2. These forecasts are based on a limited redistribution of market shares of catchment area expenditure to Colchester Town Centre (principally from Tollgate[62]) from 25% in 2016 to 27.1% in 2018 to account for the Primark commitment, and rising to 29.6% in 2023 to allow for further new retail development in the Town Centre.

[61] We estimate that the existing comparison goods floorspace at Tollgate was achieving in 2016 an average sales density of £5,495 per sq m net, while we assume that new comparison goods retail development at Tollgate would achieve a 'base year' sales density of £6,000 per sq m net (like Colchester Town Centre).
[62] Scenario 2 also assumes that some of the additional comparison goods expenditure secured by Colchester Town Centre will come from clawback of leakage (i.e. not all of the additional expenditure will be diverted from Tollgate).

Figure 6.3 – Summary of Retail Capacity Forecasts: Comparison Goods (sq m net sales area): Scenario 2

Location	2018	2023	2028	2033	RECAP Model Table
Colchester Town Centre	200	12,100	16,250	18,650	78
Tollgate	2,250	-450	700	1,350	81

Source: Colchester RECAP Model 2016.

Notes:

(a) The forecasts are based on the assumption that Colchester Town Centre increases its market shares of catchment area expenditure, as a result of new comparison goods retail development in accordance with the Council's policy objectives.
(b) The forecasts are cumulative, i.e. the forecasts for each date include the forecasts for the previous dates and are not additional to those earlier forecasts.
(c) Floorspace figures from RECAP Model rounded to the nearest 50 sq m net.
(d) The forecasts are for new floorspace additional to committed retail developments and 'prime' vacant floorspace.

6.18 As the forecasts show, (after allowing for the Primark commitment) there would be sufficient expenditure to support a prime comparison goods retail development of about 12,100 sq m net in Colchester Town Centre by 2023. If the increased market shares at 2023 remained unchanged thereafter, capacity for additional comparison goods floorspace would rise further as a result of growth in population and expenditure; such that it would be about 18,650 sq m net by 2033. However there would be relatively little capacity for any additional comparison goods retail floorspace at Tollgate towards the end of the plan period.

6.19 These forecasts (under Scenario 2) assume a realistic growth transfer scenario i.e. an increased capacity figure for Colchester Town Centre and a reduced capacity figure for Tollgate. They explore the implications for the Town Centre of transferring, as a matter of policy and the Framework requirement for a network and hierarchy of centres, a considerable proportion of the potential growth in floorspace (after allowing for existing floorspace to increase its sales at 2.5% per annum above 'benchmark' level in real terms) at Tollgate to Colchester Town Centre at 2023.

6.20 Section 8 of this Study, below, helps to establish how the Town Centre could accommodate this level of forecast growth; principally at Vineyard Gate and, to a lesser degree, Priory Walk.

Retail Sector Analysis (Comparison Goods)

6.21 RECAP Model Table 82 shows the 2016 market shares of expenditure on each category of comparison goods, which we estimate are secured by Colchester Town Centre and all other shopping destinations modelled from the whole catchment area. It also shows the combined market shares attracted by the Borough's shopping destinations.

6.22 Table 26 shows that Colchester Town Centre attracts by far the highest market shares of expenditure on clothing and footwear, from the 'all other comparison goods' category and, to a lesser extent, on medical and beauty products. The retention figure for clothing and footwear (40.8%) is strong for a centre the size of Colchester and is secured from a wide, sub-regional catchment.

6.23 Tollgate (compared with the Town Centre) attracts higher and significant market shares of expenditure on furniture and flooring, household appliances, audio-visual equipment, and hardware and DIY goods. Tollgate further attracts high market shares of expenditure on household textiles, albeit slightly less than Colchester Town Centre. Like the Town Centre, Tollgate has a far-reaching and sub-regional catchment, partly due to the speed and convenience of access by car along the A12 dual carriageway. To illustrate, it attracts significant market shares of expenditure on furniture and flooring from the most peripheral parts of the catchment area (i.e. Zone 3, 40%; Zone 9, 28.3%; Zone 4, 23.7%)[63].

6.24 Some of the Borough's other centres have particular strengths too. Turner Rise performs very well in terms of securing market shares of expenditure on household textiles, approximately double the level attracted by Colchester Town Centre and Tollgate respectively. Peartree Road is the Borough's second most dominant shopping destination for market shares of expenditure on furniture and flooring. Non-central stores in the Borough perform very well with regards to hardware and DIY goods and, to a lesser extent, furniture and flooring (although this picture will change with the closure of B&Q Extra).

6.25 Unsurprisingly, the Borough's smaller centres secure their highest market shares of expenditure on medical and beauty products. Shopping patterns for these types of comparison goods are generally localised in nature, and therefore it is unsurprising that such centres perform better in this respect. Their performance regarding other comparison goods categories (for which little or no market shares are secured) reflects their size and functionality.

6.26 Overall, we consider that retailing in the Borough as a whole (i.e. all shopping destinations modelled) is performing in a reasonably balanced way across the comparison goods sectors. It is attracting particularly high market shares of expenditure on household textiles and furniture and flooring (and to a lesser extent hardware and DIY goods) which, in our judgement, indicates that the Borough does not need any more retail warehouses selling such goods[64]. Therefore it is likely that there would be increasing pressure for retail warehouses, such as those at Tollgate and elsewhere, to be 'unrestricted A1' thereby leading to much greater competition with Colchester Town Centre.

Use and Review of the Forecasts

6.27 Finally, we must emphasise that all expenditure-based forecasts of future shop floorspace capacity are based on imperfect data and contain a number of assumptions. Our forecasts set out in this Study are based on the most up-to-date and reliable information currently available to us. However, they are intended as an indication of the likely order of magnitude of future shop floorspace capacity (if forecast trends are realised) rather than as growth targets or rigid limits to future growth. The forecasts should be periodically revised as necessary, as advised above, in the light of actual population and expenditure growth, and as development proceeds and its effects become measurable.

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[63] See RECAP Model Table 15 for this finer-grain market share analysis.
[64] This is reinforced by the decision of B&Q to close their 'Extra' store on Lightship Way.

7. Analysis of Commercial Leisure Provision

Introduction

7.1 The increasing importance of leisure uses and their role in terms of sustaining town centres and anchoring new schemes is considered in some detail at section 2 of this Study. This section therefore assesses existing and the potential for new commercial leisure provision in Colchester.

7.2 Whilst it is possible to undertake a baseline quantitative assessment of residents' potential future spending on leisure activities, we consider that the value of such an exercise is limited due to the highly unpredictable nature of leisure spending. We have therefore sought to assess the Borough's commercial leisure provision from a qualitative perspective.

7.3 In the first instance, we review the current supply of key leisure attractions in the Borough by type and location. This aspect of our work draws on Experian Goad's latest survey data and the results of the 2016 household interview survey, which asked respondents a series of leisure-based questions. We set out new hotel provision in and close to Colchester Town Centre[65]. We then identify the commercial leisure developments currently proposed in the Borough (specifically those with planning permission or awaiting determination), before concluding whether there are any conspicuous gaps in provision.

Current Commercial Leisure Provision

7.4 Our assessment of current provision accounts for cafes (Use Class A3[66]), restaurants (Use Class A3), bars and wine bars (Use Class A4) and public houses (Use Class A4) in Colchester Town Centre, in addition to a number of main commercial leisure facilities across the Borough.

7.5 Colchester Town Centre comprises 86 units dedicated to A3/A4 leisure uses, equating to some 14,827 sq. m in floorspace terms. Figure 7.1 below shows the breakdown of such uses.

Figure 7.1 – Current A3/A4 Leisure Provision, Colchester Town Centre

Category (Use Class)	Floorspace (sq. m gross)	Number of Units	% of Total Leisure Floorspace	% of Total Leisure Units
Cafes (A3)	3,595	32	24.2	37.2
Restaurants (A3)	4,357	28	29.4	32.6
Bars & Wine Bars (A4)	3,140	13	21.2	15.1
Public Houses (A4)	3,735	13	25.2	15.1
TOTAL LEISURE FLOORSPACE	**14,827**	**86**		

Source: Experian Goad Category Report (November 2015).

[65] Since 2008 based on information provided by the Council.
[66] Although some cafes operate under Use Class A1, they still have a 'quasi' leisure-based function and therefore we have included them in our analysis.

7.6 Our general observations are as follows:

- There is almost 15,000 sq. m gross dedicated to A3/A4 leisure uses in Colchester Town Centre, illustrating that it is clearly an important component of the wider town centre offer.
- The food and drink sector in Colchester Town Centre is reasonably dispersed and characterised by a mix of independent and multiple 'chain' operators. Existing family-orientated multiple representation includes the likes of ASK Italian, Prezzo, Pizza Express, Bill's and Nando's; while it is understood that Las Iguanas and Wagamamas are seeking representation on High Street.
- The results of the household interview survey indicate that Colchester Town Centre is a popular destination for eating out, with 20% of residents in Colchester's catchment area confirming that they 'last' visited the Town Centre for such purposes. Unsurprisingly, given the relatively localised nature of eating out, a higher proportion of residents from the Town Centre's immediate catchment (i.e. Zones 1 and 3 and to a lesser extent Zones 2 and 6) undertook these trips; with residents in the more distant parts of the catchment looking instead towards other, closer destinations such as Clacton-on-Sea, Braintree or Chelmsford.
- A significant proportion of residents in Colchester's catchment area (42.7%) stated that they do not drink out. Of those that do, 10.9% 'last' visited Colchester Town Centre. The survey evidence confirms that drinking out habits are even more localised than those for eating out. To this end, a higher proportion of such trips to the Town Centre were by residents from Zone 1 and to a lesser extent Zone 3.

7.7 We set out in Figure 7.2 below the current provision of other key leisure attractions in Colchester Town Centre[67]. These include:

- Cinemas;
- Bowling Centres;
- Gymnasiums/ Health Clubs; and
- Other Leisure Facilities.

[67] Our list is not exhaustive of all current provision (it excludes smaller, typically independent leisure facilities).

Figure 7.2 – Current Commercial Leisure Facilities, Colchester Borough

Cinemas	**Location**
Odeon	Head Street (Colchester Town Centre)
Bowling Centres	**Location**
Tenpin	Cowdray Avenue
Gymnasiums/ Health Clubs	**Location**
Bannatyne Health Club	Grange Way
David Lloyd Leisure	United Way, Mile End
Leisure World	Cowdray Avenue
Leisure World	Brinkley Lane
Leisure World	Maypole Road
Sports Direct Fitness	Cowdray Avenue
Anytime Fitness	Haven Road
Livia Gym	Moorside
Spirit Health Club	Holiday Inn, Abbotts Lane
The Gym Group	Queen Street (Colchester Town Centre)
Topnotch Health Club	Wyncolls Road
Clarice House	Kingsford Park, Layer Road
Fit 4 Less	Peartree Road
Gym 4 U	Peartree Road
Gymophobics	The Mulberry Centre, Albany Gardens, Haven Road
Other Leisure Facilities	**Location**
Mercury Theatre (theatre)	Balkerne Gate (Colchester Town Centre)
Headgate Theatre (theatre)	Chapel Street North (Colchester Town Centre)
Gala Bingo (bingo hall)	Osbourne Street (Colchester Town Centre)
Rollerworld & Quasar (roller skating/ quasar laser)	Eastgate Industrial Estate
Jump Street (trampoline centre)	Mason Road, Cowdray Centre
Go Bananas (children's soft play)	Mason Road, Cowdray Centre
Childsplay Adventureland (children's soft play)	Clarendon Way, North Station
Jungle Adventure (children's soft play)	Peartree Road
Colchester School of Gymnastics (gymnastics)	Brinkley Grove Road
Iceni (gymnastics)	Peartree Road

Source: 2016 household interview survey for Colchester Borough, and C&W research.

7.8 We set out below our observations regarding the extent and usage of the Borough's key leisure attractions.

Cinemas

7.9 There is currently only one cinema in Colchester; the Odeon in the Town Centre. This facility has eight screens and a 1,257 seating capacity. The survey evidence indicates that 23.8% of residents in Colchester's catchment area 'last' visited this cinema, more than any other competing cinema.

7.10 Over half (54%) of residents in Zone 1 'last' visited the Odeon on Head Street. A lower but still considerable proportion of residents in other, more peripheral areas of the Borough also undertook such trips (e.g. Zone 2, 20.5%; Zone 3, 33.9%).

7.11 The extent of cinema trips currently being undertaken to destinations outside of Colchester is substantial. The most popular cinemas in this regard include Cineworld at Braintree's Freeport Designer Outlet (drawing residents from the western and to a lesser extent central parts of the Borough) and the Cineworld in Ipswich (drawing residents from the northern part of the Borough in particular).

Bowling Centres

7.12 The results of the household interview survey indicate that only around 40% of residents in Colchester's catchment area visit bowling centres. This is not entirely surprising given the effect of the economic downturn on disposable incomes and the UK-wide trend of lower usage[68].

7.13 Colchester has one bowling centre, Tenpin at Colne View Retail Park, which has 24 bowling lanes, pool tables and an amusements arcade. This is the most popular facility for residents in Zone 1 (31.8% 'last' visited Tenpin), Zone 2 (16.9%) and Zone 3 (15.8%).

7.14 The main competing bowling centre is Namco Funscape at Braintree's Freeport Designer Outlet, which principally attracts a limited proportion of residents from the western part of the Borough.

Gymnasiums/ Health Clubs

7.15 Colchester Borough is well served in terms of gymnasiums/ health clubs. National operators such as Bannatyne Health Club, Sports Direct Fitness and David Lloyd Leisure[69] are represented; while Leisure World (Cowdray Avenue) has a number of pool flumes, dedicated leisure and fitness swimming pools, gymnasium, and indoor sports courts and pitches.

7.16 The survey evidence indicates that Leisure World is the most popular facility for residents in the central part of the Borough (e.g. Zone 1, 7.4%). A high proportion of residents in the northern part of the Borough 'last' visited Busy Body's Fitness in Manningtree (e.g. Zone 2, 9.3%). Bannatyne Health Club is the most popular facility for residents in the southern part of the Borough (e.g. Zone 3, 4.1%).

[68] According to Mintel.

Other Leisure Facilities

7.17 Colchester Borough further includes a range of other leisure facilities. The main attractions are identified in Figure 7.2 above and include the Mercury and Headgate Theatres and Gala Bingo in Colchester Town Centre, Rollerworld & Quasar at Eastgate Industrial Estate, and a number of children-orientated facilities and clubs.

New Hotel Provision

7.18 Information provided by the Council indicates the extent and quality of new (post-2008) hotel provision in and close to Colchester Town Centre. Such provision assists in improving the attractiveness of the Town Centre for both visitors and leisure operators.

Figure 7.3 – New Hotel Provision (post-2008)

Hotel / Address	Rating	Number of Rooms
North Hill Hotel, 51 North Hill	3 Star	26
Star Anglia Hotel, 75 North Station Road	3 Star	27
Greyfriars, High Street	n/a	26
Blue Ivy Hotel, 4-6 North Hill	n/a	12
Premier Inn, 30 St Peter's Street	n/a	85

Source: Colchester Borough Council.

7.19 Figure 7.3 indicates that 176 hotel rooms have been developed since 2008 in or close to Colchester Town Centre. Of these, Greyfriars (currently not rated) is considered the best quality; while the Premier Inn budget hotel is the largest with 85 rooms.

[69] David Lloyd Leisure at Mile End is relatively less established.

Proposed Commercial Leisure Provision

7.20 Figure 7.4 below identifies the commercial leisure developments currently proposed in the Borough, specifically those with planning permission or awaiting determination.

Figure 7.4 – Proposed Commercial Leisure Facilities, Colchester Borough

Location	Summary of Scheme Description	Status (Application Ref.)
St Botolph's Quarter, Queen Street, Colchester Town Centre	Refurbishment of Roman House to provide three-screen D2 cinema (Curzon) and 2 no. A3/A4 units totaling 881 sq m	Extant planning permission (application 160943)
Greytown House, High Street, Colchester Town Centre	Refurbishment of Greytown House including rear extension to provide 3. A1/A3 units totaling approximately 600 sq m	Extant planning permission (application 152506)
Stane Park, Tollgate	Erection of 6 no. A3/A4 units totaling 2,296 sq m	Extant planning permission (applications 146486 and 150945)
Northern Gateway (new full application)	Erection of A3/A5 units totaling 3,808 sq m, A3/D2 units totaling 799 sq m, C1 hotel, 12-screen D2 cinema and additional D2 units totaling 3,286 sq m	Awaiting determination (application 160825)
Northern Gateway (reserved matters application)	Erection of A3 units totaling 10,400 sq m and C1 hotel	Awaiting determination (application 160623 following outline planning permission O/COL/01/1622)
Tollgate Village, Tollgate	Outline application for the development of A1 Comparison Retail (16,304 sq m), A1 Convenience Retail (1,858 sq m), flexible A1-A5 uses (5,010 sq m), flexible A3-A5 uses (950 sq m) and multiplex D2 cinema (6,690 sq m)	Awaiting determination (application 150239 and duplicate application 160868)

Source: C&W research.

7.21 We consider that the schemes with extant planning permission in Colchester Town Centre will help to strengthen the family-orientated food and drink offer, whilst the Curzon (cinema) based scheme at the St Botolph's Quarter will be a major attraction. It should also act as a catalyst for further investment at this key town centre site, which is identified elsewhere in this Study as the primary opportunity for an improved, more focused leisure offer.

7.22 It is beyond the scope of this Study to comment on the merits or otherwise of the proposed schemes currently awaiting determination.

Conclusions

7.23 It is important that the Borough and Colchester Town Centre in particular maintains and improves its commercial leisure offer over the plan period. This is underlined by the increasing role and importance of leisure uses in terms of providing shoppers with a combined retail and leisure experience.

7.24 Our analysis of commercial leisure provision suggests:

- The Borough has an established mix of food and drink uses – and an increasingly family-orientated offer. We recommend that the priority should be further diversifying Colchester Town Centre's food and drink offer, particularly through the continued promotion of the St Botolph's Quarter as the primary opportunity for new provision.
- Odeon on Head Street is currently the only cinema in Colchester Borough and, on this basis, the level of cinema 'leakage' identified by the household interview survey is not entirely surprising. The extent of cinema trips being undertaken outside of Colchester should however be reduced, to some degree, once the new Curzon cinema at the St Botolph's Quarter opens. That said, this new cinema will have only three screens and thus there is likely to be scope for additional cinema provision in the Borough over the plan period. Any proposals should be considered on their merits having regard for the development plan and other material considerations.
- Whilst there is only one bowling centre (Tenpin) in the Borough, the survey evidence would suggest a limited degree of leakage to destinations outside of Colchester. In addition, this sector is seeing relatively limited growth. We therefore consider there to be limited prospects, or need, for further provision over the plan period.
- Throughout the Borough there are a number of public and private gymnasiums/ health clubs. There is likely to be continued market demand for new provision over the plan period, as commercial operators look to take advantage of consumers' lifestyle choices and increasing awareness around health and fitness. Any proposals should be considered on their merits having regard for the development plan and other material considerations.
- We do not consider that the Council needs to proactively plan for any other form of commercial leisure provision. Operator-led proposals should be considered in accordance with the development plan and other material considerations.
- Some new hotels have opened since 2008 in or close to Colchester Town Centre. We have not assessed hotel demand in Colchester but would note that demand may arise from an increase in business, retail and/or leisure uses (e.g. St Botolph's Quarter).

8. Review of Potential Development Opportunities

Introduction

8.1 Our retail capacity forecasts set out and described in section 6 identify a quantitative need for additional retail floorspace in Colchester Borough over the plan period. As explained, our Scenario 2 comparison goods retail capacity forecasts are more realistic and are based on a limited redistribution of market shares of catchment area expenditure to Colchester Town Centre, to support new retail development and sustain its position at the top of the Borough's retail hierarchy.

8.2 This section focuses on potential opportunities for new retail development (and other main town centre uses) in and on the edge of Colchester Town Centre, as agreed with the Council, namely:

- **Vineyard Gate**
- **Priory Walk**
- **St Botolph's**

8.3 We also consider the **Town Centre North West** site for office uses in particular.

8.4 We assess below the development potential of these town centre sites. Our assessment considers the suitability of each site to accommodate new retail development and/or other potential uses, and of what scale and form, having regard for its location. We then outline a strategy for Colchester Town Centre to accommodate the levels of retail capacity forecast under Scenario 2.

8.5 For the avoidance of doubt, our commentary on each site does not predetermine any particular form of development; this will be a matter for the Council (based on the provisions of the development plan and other material considerations) should proposals come forward. Further, our assessment is not informed by detailed feasibility studies to better understand the development potential of a site and its constraints; or financial appraisals to test and identify the viability of a development (although we have commented in broad terms on site-specific commercial viability factors as appropriate). It is however an appropriate basis on which to formulate the retail and town centre policies (and allocations) for the new Local Plan.

8.6 It is considered that identifying sites for new retail development in the Borough's district centres, capable of accommodating the Scenario 1 based magnitude of forecast capacity over the plan period, is not realistic or sustainable. This is especially true for Tollgate, where we have identified significant expenditure-based capacity for more comparison goods floorspace under Scenario 1. It would promote a scale of retail development out of scale with the role and function of a district centre, and would therefore cause harm to the Borough's hierarchy of centres and Colchester Town Centre in particular.

8.7 We would re-emphasise here that retail capacity forecasts are less certain the further ahead the forecasting date and therefore, the forecasts for 2028 and 2033 should be treated with some caution for plan-making purposes. It will be important that such forecasts are reviewed in due course.

Vineyard Gate

8.8 The site is broadly triangular and extends to approximately 1.2 hectares. It is bound by Osborne Street to the south and Eld Lane/ Vineyard Street to the north. The town's Roman Wall abuts the site to the north, creating a substantial change of level between Eld Lane (higher) and the Vineyard Gate site (lower).

8.9 Notwithstanding the change of level the site is closely related with the main shopping area, including Lion Walk, which we explore further below. The site currently comprises a surface level car park and several buildings around its perimeter, most of which are vacant and/or in a poor condition. To the immediate south is the Osbourne Street multi-storey car park with approximately 600 spaces, which is an established footfall generator in this location. A short distance (less than 200m) further east is Colchester Town rail station.

8.10 The site is designated on the adopted Proposals Map within the Inner Core and therefore forms part of the Town Centre Core, where Policy CE2a of the Core Strategy supports new retail and related development.

8.11 The retail-led redevelopment of Vineyard Gate is a long-standing Council objective. The site is identified in the St Botolph's Quarter Masterplan (adopted in June 2005) as one of three key development sites, and specifically for *"prime retail development"* thereby creating *"an active and efficient extension"* of the town centre's main shopping area.

8.12 We consider that Vineyard Gate is the Borough's best and a prime opportunity to accommodate forecast capacity and need for new comparison goods retail floorspace (in the region of 10,000-15,000 sq m net[70]) with potentially some additional leisure (e.g. A3/A4) uses. The site is suitable for significant retail-led redevelopment, being well related to the town's main shopping area. It is considered that, with an innovative design solution perhaps elevating the site to the level of Eld Lane, Vineyard Gate could provide a multi-level shopping environment; and reinforce and extend the retail circuit between Lion Walk and the retail attractions further west. Such a scheme represents a significant opportunity in our view to offer larger format shop units, which would be suitable for modern, high quality retailers seeking to locate to or relocate[71] within the town centre. In turn, this would help to enhance the town centre's attractiveness to consumers and 'claw back' expenditure from competing shopping destinations, thereby supporting the overall vitality and viability of the town centre and its competitiveness in accordance with the key objective set out in the Framework.

8.13 The Council owns large parts of the Vineyard Gate site including the surface level car park and some buildings in Osbourne Street and Arthur Street. In addition, and significantly, the Council has recently purchased the former Kwik-Fit building in Osbourne Street from the Caddick Group, who had previously been unable to progress a deliverable scheme for the site. This proactive approach to land assembly will, in our judgement, fundamentally improve the prospects of achieving the Council's long-standing objective for this key town centre site.

8.14 Like most town centre sites, particularly in Roman towns like Colchester, *"complex design, heritage and archaeological issues"* (as identified in the 2005 Masterplan) would need to be

[70] The adopted Core Strategy identifies the site for approximately 35,000 sq m net retail floorspace; however, it is not clear whether this relates to A1 (convenience and comparison goods), A1 (comparison goods only) or A1-A5 retail.
[71] We identify in section 3 that some of the town centre's major retailers, for example, currently occupy sub-standard stores.

addressed and overcome in order to achieve the site's regeneration. These challenges, in our view, necessitate a proactive Council role through planning policies. Importantly, they also point to the need for even greater protection against competing retail development, which could put at risk the retail-led redevelopment of Vineyard Gate.

Priory Walk

8.15 Priory Walk shopping centre is situated between Queen Street and Long Wyre Street to the east of the town centre. It is anchored by Sainsbury's and has a secondary retail offer, and includes a number of vacant units. That said the centre is well connected to the core shopping area and, to this end, benefits from a strategic position between this area and the St Botolph's Quarter where, as considered separately in this section, the Council has a long-standing objective to achieve a leisure-based mixed use development.

8.16 The centre is designated on the adopted Proposals Map within the Inner Core and therefore forms part of the Town Centre Core, where Policy CE2a of the Core Strategy supports new retail and related development.

8.17 In our judgement, the centre appears tired and dated by modern standards. We consider that there is substantial potential to improve the shopping centre's public realm and retail offer, either through extensive reconfiguration and refurbishment, or by redevelopment. The redevelopment of the centre could potentially accommodate some of the forecast capacity for comparison goods retail floorspace in the Town Centre (potentially up to an additional 5,000 sq m net in our view).

8.18 Any scheme should make better use of the centre's linkages with existing (and potential new) retail and leisure attractions in and on the edge of the town centre. It could include provision of a larger, more modern foodstore[72] and other shop units in order to make the centre more attractive to the market and consumers. Such improvements would potentially act as a catalyst for further investment in this part of the town centre, such as along Long Wyre Street (where the former Co-Op department store has been a long-term vacancy), and/or help to sustain the high proportion of independent retail businesses focused along Eld Lane and nearby streets. It would also complement and support the part committed part proposed scheme at the St Botolph's Quarter (considered in further detail below).

St Botolph's

8.19 The site occupies a prominent location along Queen Street on the eastern edge of the town centre. It broadly measures 0.9 hectare and comprises vacant land and buildings, including Roman House[73] to the west. Firstsite (Visual Arts Facility) is situated to the immediate east.

8.20 The St Botolph's site is considered edge-of-centre in sequential terms, being very well connected with and adjacent to the Town Centre Core on the adopted Proposals Map. To this end, the site is very close to other main town centre uses and is a short walk to/from key retailers concentrated within the town's core shopping area.

[72] We consider it important to retain a foodstore element given the lack of other main foodstore provision in Colchester Town Centre, while the provision of a larger foodstore in this location could accommodate some of the forecast capacity for additional convenience goods floorspace in the later part of the plan period (as identified in section 6 above).
[73] The former Keddies department store.

8.21 The site is also a designated ‘Regeneration Area’ and forms part of the Council’s St Botolph’s Quarter Masterplan (adopted in June 2005). This promotes the site for *“new cultural, retail, residential and visitor facilities”* including a Visitor Arts Facility (which has been delivered as mentioned) and *“restaurant, café and arts related uses.”*

8.22 The leisure-based mixed use development of the St Botolph’s site is therefore a long-standing Council objective. The Council owns the site, having assembled it over a period of years since the adoption of the 2005 Masterplan, while full planning permission has recently been approved for a new Curzon three-screen cinema at Roman House together with two ground floor A3/A4 units[74]. This, we understand, constitutes the first phase of the redevelopment of the wider site; with Building Partnership/ Citygrove recently selected by the Council to deliver the emerging plans for a mixed use development comprising a hotel, student accommodation and seven A3/A4 units.

8.23 We consider that the mixed use redevelopment of the St Botolph’s site, with a focus on leisure and related uses, would significantly and positively transform this important part of the town centre. Leisure uses are performing an increasingly important role in terms of helping to sustain the principal shopping function of centres and improve dwell time, while our qualitative assessment of Colchester Town Centre has identified a need for a focused ‘critical mass’ of food and drink uses. In our view, the St Botolph’s site represents the most suitable opportunity for such development, and is sufficiently well connected with the main shopping area to complement the town’s retail offer. As considered separately in this section, improvements to Priory Walk (a key pedestrian ‘link’ into the core shopping area from the east) are likely to enhance the success of the St Botolph’s Quarter and the propensity for linked trips. We further consider that the site offers an opportunity to better link visitor attractions, such as St Botolph’s Priory/ Rowan Wall, with the core shopping area.

8.24 Similar to the Vineyard Gate site, we acknowledge the heritage and archaeological challenges with regenerating a site of this nature. However the recent investment from Curzon, and Building Partnership/ Citygrove who will take forward the mixed use scheme for the wider site, would indicate that there is market appetite to overcome such challenges and deliver a leisure-orientated ‘quarter’ in this location.

Town Centre North West

8.25 The site extends over approximately 7.7 hectares on the northwest edge of Colchester Town Centre, to the north of Colchester Retail Park. It benefits from good access to the A134 and A133, the latter providing a direct link (approximately two miles) to the A12. Colchester rail station is situated circa 10 minutes’ walk to the north.

8.26 The site has multiple ownerships. It currently comprises a range of uses, primarily commercial and (to a lesser extent) residential predominantly comprising terraced and semi-detached dwellings of standard quality. The best quality commercial space is largely clustered around the Middleborough Roundabout including The Octagon, Hiscox, Rowan House and Colwyn House. Whilst none of this is new or Grade A supply, it is well occupied. Other office provision within the area includes The Riverside Office Centre, which is based to the far northeast of the site and comprises four somewhat dated premises (with car parking).

8.27 The site as a whole is generally lacking in terms of amenity value and active frontages. These

[74] Application ref. 160943.

are key considerations, as occupiers are increasingly demonstrating a preference for premises which, if not benefiting from a town centre location, provide the amenities of a mixed use, campus-style offer with green space and opportunities for pedestrian activity.

8.28 In terms of the development potential of this site to accommodate further office provision – to be read in conjunction with our Office Market Review provided at Appendix F – there is considered to be a gap in the market for modern Grade A office premises, particularly those with smaller floorplates. However the rental levels achievable in this location are unlikely to justify speculative office development without significant public sector support and infrastructure upgrades. Further deliverability challenges are summarised at Appendix F.

8.29 We consider that an office and residential-based mixed use scheme is the most suitable and likely opportunity for this site. To maximise the prospects for a successful commercial scheme, the quality of the public realm and the provision of amenities to cultivate a sense of place will be important, and will help to generate pedestrian activity. Based on the assumption that the developable area will not exceed 40% (or approximately three hectares) in order to allow for access, car parking and amenity, we consider that the site has the physical capacity to accommodate two-thirds commercial uses (circa two hectares), with the remainder dedicated to residential uses and other ancillary provision.

Overview of Potential Development Opportunities and Strategy

8.30 Our work set out and described above has shown that:

- There will be increasing and sufficient capacity to support major new retail development in Colchester Town Centre over the forecasting period, much of which will arise from 2023 onwards[75].
- Accommodating the magnitude of forecast capacity identified for Tollgate (under Scenario 1) is not realistic or sustainable in the context of a balanced network and hierarchy of centres. It is therefore appropriate to consider the transfer the potential growth of floorspace at Tollgate to Colchester Town Centre (i.e. Scenario 2), to help achieve the Council's long-standing objective for new prime retail development.
- There is a qualitative need to improve and regenerate areas of Colchester Town Centre. Our work has identified that the Town Centre requires new retail development and investment in order to sustain and improve its retail offer. This will require (inter alia) larger shop units to meet the needs of modern retailers, a stronger retail circuit and an improved, more focused leisure offer to support the town's principal comparison goods shopping function.
- Meeting identified qualitative and quantitative needs will help to ensure the future vitality and viability of Colchester Town Centre and protect its positon at the top of the Borough's retail hierarchy.
- The most suitable and sustainable opportunity for substantial increases in comparison goods retail floorspace, to accommodate forecast capacity, is Colchester Town Centre and the Vineyard Gate site in particular. A new prime retail development at this site would extend and improve the retail circuit, providing modern units for retailers looking to locate to or re-locate within the town centre.
- Priory Walk comprises a further opportunity to enhance the town's retail offer, and is potentially capable of accommodating more comparison goods retail floorspace. It also provides an opportunity to improve the quality of the shopping environment and linkages to/from the St Botolph's Quarter in this part of the town centre.
- The St Botolph's site is the primary opportunity for an improved, more focused

[75] See Figure 6.3 in section 6 above.

leisure offer as part of a mixed use development. It further provides an important opportunity to better link the town's visitor attractions with the core shopping area.
- The Town Centre North West site provides a suitable opportunity for office provision on the edge of Colchester Town Centre, most likely as part of a mixed use scheme including residential uses.

8.31 Where possible, the objective is obviously for development to be led and delivered by the private sector. However it is acknowledged that there are many issues in relation to bringing forward new town centre, particularly retail, development (especially in historic centres such as Colchester), which is slow, expensive and difficult (relative to new retail warehouses such as at Tollgate). Therefore, for the scale of identified retail needs to come forward will require a positive plan-led approach by the Council as outlined in the Framework, together with action to drive forward the process of regeneration on sites which are allocated for redevelopment. In practice[76] this will mean:

- Providing planning policy support in the new Local Plan; including articulating a vision and positive strategy for the regeneration of Vineyard Gate and other priority areas of the town centre, such as Priory Walk and the St Botolph's Quarter.
- Commitment by the Council to make its land ownerships available for redevelopment in partnership with other landowners and developers, and to enter into development agreements with them as necessary.
- Entering into early negotiations with potential development partners, with the aim of bringing forward new town centre development as soon as possible.

8.32 It will also mean controlling and limiting out-of-centre retail development, and inappropriate proposals in and on the edge of the Borough's district centres, which are not proportionate to the role and function of that centre. This will be necessary in order to protect the Borough's network and hierarchy of centres (in accordance with the Framework). It will also be important so as not to put at risk the Council's vision for high priority, retail-led regeneration in Colchester Town Centre. Our research and analysis has found that Tollgate is already a competitor to the Town Centre and thus, the Council should continue to seek to restrict substantially the potential expansion of retail (and leisure) floorspace in and on the edge of Tollgate. Furthermore, our qualitative assessment set out in section 5 concludes that Tollgate – and the Borough's other district centres – does not require substantial new retail development in order to ensure its vitality and viability.

8.33 We therefore recommend that the Council actively pursue continued regeneration of town centre retailing, particularly through the retail-led redevelopment of Vineyard Gate. The regeneration of other key sites such as Priory Walk and the St Botolph's Quarter should also be a priority, while the Council should support more modest increases in existing retail floorspace (e.g. through store extensions and reconfigurations) in accordance with the sequential approach.

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[76] As noted previously, there are recent examples of Council intervention at the Vineyard Gate and St Botolph's sites, which illustrate the proactive role that it can take to assist delivery.

9. Policy Recommendations

Introduction

9.1 We provide below our policy recommendations, taking into account our findings and conclusions from the foregoing sections of this Study.

Retail Hierarchy

9.2 In Framework terms, 'town centre' means[77]:

'Area defined on the local authority's proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. <u>References to town centres or centres apply to city centres, town centres, district centres and local centres</u> but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.' (our emphasis).

9.3 The Framework does not define the characteristics of city centres, town centres, district centres and local centres[78]; nor does it determine their respective role and function. It is for local planning authorities to fill the gaps[79] by meeting the criteria set out under paragraph 23 of the Framework, including *'a network and hierarchy of centres'.*

9.4 Policy CE1 of the Core Strategy identifies, under Table CE1a, a hierarchy of centres with varying uses and scales. The identification of 'Edge of Centre Locations' above District Centres and Local Centres in the hierarchy is not consistent with the sequential approach set out in the Framework and we therefore support the removal of such locations from the hierarchy identified in the Council's Preferred Options Local Plan.

9.5 At sections 3 and 4 of this Study, we have assessed the relative health and role of Colchester Town Centre and the Borough's eight district centres (classified in the adopted Core Strategy as either Rural District Centres[80] or Urban District Centres[81]). We have not undertaken a full review of the Borough's local centres as part of this Study; however, they perform an important role in terms of providing small scale retail and service uses to meet the basic needs of local communities.

9.6 Accordingly, a three-tier hierarchy of centres is considered appropriate for Colchester Borough as follows:

- Town Centre
- District Centres
- Local Centres

9.7 Colchester Town Centre is the principal shopping destination in the Borough supported by

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[77] Based on the definition set out in Annex 2 of the Framework.
[78] However, Annex 2 of the Framework does confirm that a 'town centre' cannot be *'small parades of shops of purely neighbourhood significance'*, or *'existing out-of-centre developments, comprising or including main town centre uses [unless they are identified as centres in Local Plans].'*
[79] As confirmed by the Secretary of State for Communities and Local Government on 30 June 2016 (recovered appeal APP/Y1110/W/15/3005333, paragraph 14).
[80] Rural District Centres are Tiptree, West Mersea and Wivenhoe.
[81] Urban District Centres are Tollgate, Turner Rise, Peartree Road, Highwoods and Greenstead Road.

an extensive range of non-retail facilities such as day-to-day services and leisure, cultural and community uses. It is considered relatively healthy at present, although our research and analysis has identified some weaknesses and areas for improvement to ensure its vitality and viability over the plan period; while long-standing development proposals have not come forward. Our work has also identified strong competition with the Borough's district centres (Tollgate in particular) and out-of-centre shopping destinations.

9.8 As such, we recommend a robust 'town centre first' approach to ensure that larger scale retail development is focused on Colchester Town Centre. This will help to strengthen the Town Centre's primary role as a sub-regional comparison goods shopping destination. Restricting larger scale development in the Borough's smaller centres and non-central locations will maximise the prospects for achieving new development in or on the edge of Colchester Town Centre, thereby enabling the Town Centre to 'claw back' comparison goods expenditure from competing shopping destinations and ensure its pre-eminence at the top of the Borough's retail hierarchy.

9.9 Colchester Borough has a number of district centres, each with their own characteristics and functionality. We note that the Preferred Options Local Plan proposes to de-classify Tollgate, Turner Rise, Peartree Road, Highwoods and Greenstead Road as district centres[82]. We do not support this proposed approach and recommend that their 'centre' status is retained. We consider that this is necessary to ensure that the Borough has a network and hierarchy of centres (as required by the Framework) capable of serving their respective areas of the Borough. It will further help to ensure that the Council, as local planning authority, can effectively plan for these centres and formulate an appropriate policy response through the new Local Plan.

9.10 Our assessment does not identify a qualitative need for substantial new retail floorspace in these centres in order to ensure their vitality and viability. We consider that enhancement through non-retail uses, such as services and community facilities, is more appropriate to ensure that they better serve the day-to-day needs of their local communities.

9.11 In conjunction with this approach (which we note is broadly consistent with Policy CE2b of the Core Strategy), the Council will need to control the range of 'high street' comparison goods which can be sold in these centres[83] to ensure that they do not undermine Colchester Town Centre as the Borough's principal comparison goods shopping destination.

9.12 We recommend that Tollgate, Turner Rise, Peartree Road and Highwoods should all be considered for reclassification as district centres in new Local Plan. Given that Greenstead Road comprises (only) Tesco, with a relatively localised main food shopping function, the Council may wish to consider its reclassification as a local centre. However, it may be more appropriate to reclassify Greenstead Road as a district centre if its main food shopping function is not compatible with the Borough's other local centres.

9.13 It is appropriate, in our view, to define Tollgate as a district centre to serve the local communities of the Stanway area. Notwithstanding its (recommended) district centre designation, we consider it particularly important that the Council formulate strong policies to restrict substantially its potential expansion. Our research and analysis has found that Tollgate directly competes with Colchester Town Centre for comparison goods expenditure. Further substantial comparison goods retail development at Tollgate would potentially change its position in the retail hierarchy and undermine the Town Centre's vitality and viability.

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[82] We acknowledge and support the classification of Tiptree, West Mersea and Wivenhoe as district centres in the Preferred Options Local Plan.
[83] The same applies to out-of-centre shopping destinations in the Borough.

Future Development Needs

9.14 As considered throughout this Study, Colchester Town Centre should be the priority focus for the development of new retail and other main town centre uses. This strategy reflects the pre-eminence of the Town Centre at the top of the Borough's retail hierarchy and will help to ensure its vitality and viability over the plan period.

9.15 We do not consider that the Borough's district centres require substantial new retail development to ensure their vitality and viability. Thus, we have not assessed the potential for the district centres to expand and accommodate additional retail floorspace. Our work has shown that the future development needs of the district centres are focused on the appropriate diversification of the non-retail offer, including services and community facilities, to better serve the day-to-day needs of their local communities. Should any proposals come forward for new retail development in or on the edge of district centres, they should be proportionate to the role and function of that centre in the Borough's retail hierarchy and should not compete with Colchester Town Centre. To this end, the Town Centre should be the focus for larger scale retail development.

9.16 We have identified and assessed four sites in and on the edge of Colchester Town Centre suitable for and capable of accommodating new retail and other main town centre uses. These potential development opportunities are:

- Vineyard Gate;
- Priory Walk;
- St Botolph's; and
- Town Centre North West.

9.17 Section 8 of this Study provides an assessment of the development potential of these town centre sites.

Primary Shopping Areas

Colchester Town Centre

9.18 Paragraph 23 of the Framework requires local planning authorities to define the extent of Primary Shopping Areas (PSA), *'based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations.'*

9.19 In defining primary and secondary frontages and thus a PSA, it is prudent to take into account the following principles:

- composition of uses;
- key anchors/ attractors;
- vacancies;
- pedestrian footfall; and
- levels of accessibility/ connectivity.

9.20 These principles have helped us to define the extent of Colchester Town Centre's PSA, based on primary and secondary frontages, as shown on the plan at Appendix G. It includes Vineyard Gate which, as considered in section 8 above, is the prime retail-based development opportunity and a natural extension to the town's retail circuit. We recommend that this PSA is adopted for the new Local Plan.

9.21 As noted previously, the Framework requires local planning authorities to set policies that make it clear which uses will be permitted within specific parts of a PSA. We note that the Preferred Options Local Plan, under Policy TC2, proposes (inter alia) to '*maintain at least 50% retail use on each street frontage within the Primary Shopping Area'*. We support this approach in principle; however, we recommend that separate policies for change of use are set for primary and secondary frontages. This will enable the Council to manage shopping frontages and permit only compatible retail and service uses. In particular, it will ensure that the primary frontages (comprising the key retail attractions and relatively higher footfall) are afforded greater protection against the loss of A1 retail use so as to sustain the vitality and viability of these frontages and their principal shopping function.

9.22 To this end:

- within the primary frontages; we consider that the Council should take a more restrictive approach to further changes of use to non-retail / service uses. We consider that a policy seeking to maintain up to 70% A1 retail use is reasonable. However, we consider that A3 (food and drink) use would be preferable to long term vacancies, if after extended marketing A1 retail use cannot be secured.
- within the secondary frontages; we consider that the Council should afford greater flexibility for changes of use within Classes A1-A5, in order to maximise the number of occupied units and sustain a more diverse composition of uses. On this basis, we would support a policy seeking to maintain 50% A1 retail use within the secondary frontages.

District Centres

9.23 Whilst defining PSAs for the Borough's district centres will be important, we do not consider it necessary to define these on the basis of primary and secondary frontages (or set separate policies for change of use within these frontages). This is because the over-arching recommended strategy for the district centres, as described above, is their enhancement through non-retail uses including services and community facilities. This approach requires a higher degree of flexibility in order to permit such uses.

9.24 Moreover, in the case of centres such as Tollgate, Turner Rise, Peartree Road, Highwoods and Greenstead Road[84] (which typically comprise retail parks and terraces and/or standalone stores) it is not realistic to distinguish between primary and secondary frontages.

9.25 We therefore recommend that the Council define the PSA boundaries for each district centre in the new Local Plan primarily having regard for the extent of main retail and service uses, similar to the approach taken on the adopted Proposals Map.

[84] Subject to their 'centre' status being retained by the Council.

Sequential Test Approach

9.26 PSA boundaries should be the basis for applying the sequential test to planning applications for retail development that are not in an existing centre and are not in accordance with an up-to-date Local Plan (as set out in paragraph 24 of the Framework).

9.27 In Framework terms, 'edge of centre' means[85]:

'For retail purposes, a location that is well connected and up to 300 metres of the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge of centre, account should be taken of local circumstances.'

9.28 Accordingly, when applying the sequential test to planning applications for retail development, proposals that are well connected to and within 300 metres of a PSA should be considered edge-of-centre; and thus proposals that are located more than 300 metres from a PSA should be considered out-of-centre.

9.29 Paragraph 011 of the national PPG[86] states that:

'Use of the sequential test should recognise that certain main town centre uses have particular market and locational requirements which mean that they may only be accommodated in specific locations. Robust justification must be provided where this is the case, and land ownership does not provide such a justification.'

9.30 No definition is provided in the national PPG, or the Framework, to differentiate between main town centre uses which may or may not have particular market and locational requirements. In practice, we consider that there are few main town centre uses which may have such requirements per se; and that the Council does not need to proactively plan for such. Proposals for main town centre uses should be considered in accordance with the development plan and other material considerations, having regard for the 'town centres first' approach.

Impact Test Thresholds

9.31 We recommend that further work is undertaken to advise the Council on what local thresholds should be set for impact testing, when planning applications for retail development are submitted.

[85] Based on the definition set out in Annex 2 of the Framework.
[86] 'Ensuring the vitality of town centres' section.

10. Conclusions and Implications for Strategy

10.1 This Study has considered the qualitative and quantitative needs for development in Colchester Borough over the period to 2033; how such needs should be accommodated; and a realistic strategy for growth and improvement. By way of an overview of the main findings, and the future implications for strategy and planning policies, we summarise our principal findings and conclusions below.

- The UK's retail landscape has been and is changing at pace. This brings challenges and opportunities. The retail sector will continue to be the key driver of town centre activity; however, second tier markets such as Colchester Town Centre are faced with increasingly selective demand. This is being driven by the polarisation (and downsizing) of retailers towards a smaller number of prime locations, primarily in response to the continued growth of internet shopping and changing consumer habits and expectations. The provision of modern and more flexible retail floorspace, and non-retail attractions such as food and drink uses to help create a better all-round experience for consumers, will be increasingly important therefore.

- Colchester Town Centre is the Borough's principal centre and highest order comparison goods shopping destination, supported by an extensive range of non-retail facilities. It is considered relatively healthy at present, although our research and analysis has identified some weaknesses and areas for improvement to ensure its vitality and viability over the plan period; while long-standing development proposals have not come forward. Perhaps significantly in this respect, two sets of national retail rankings report the relative decline of the Town Centre's status and performance in recent years.

- Colchester Town Centre is surrounded by a network of district centres, each with their own characteristics and functionality. They all contain at least one foodstore or food/non-food superstore; however, their respective non-food (comparison goods) and service-based functions differ considerably. Tollgate is the Borough's largest district centre and includes a substantial range of multiple comparison goods retailers, to the extent that it is a sub-regional shopping destination and competes with Colchester Town Centre for market shares of comparison goods expenditure.

- Our retail capacity forecasts show that there is sufficient population and expenditure growth to support additional comparison goods floorspace, including a major retail-led development, in Colchester Town Centre from 2023 onwards. These forecasts are based on a limited redistribution of market shares of catchment area comparison goods expenditure to Colchester Town Centre, principally but not exclusively from Tollgate, to allow for substantial new retail development in the Town Centre. They therefore explore the practical implications of transferring potential growth to the Town Centre, as a matter of policy and the requirement for a clear network and hierarchy of centres in accordance with the Framework.

- There is a qualitative need for new retail development in Colchester Town Centre in order to enhance its attractiveness to (and ability to retain) modern retailers, of a type that are capable of substantially improving the town centre's status and performance.

- The best and most prime opportunity for large scale retail (and potentially some leisure) development is Vineyard Gate, which would serve to extend and improve the retail circuit to the south of Lion Walk shopping centre. This site should continue to be actively promoted by the Council and its partners. It would make a substantial contribution towards the regeneration of town centre retailing and help to ensure the pre-eminence of the Town Centre at the top of the Borough's retail hierarchy.

- Achieving this scale of retail development at Vineyard Gate will require positive planning by the Council to articulate a vision and strategy for the area, together with action to bring forward new town centre development as soon as possible. Significantly, it will also mean controlling and limiting inappropriate proposals for the expansion of Tollgate and other competing shopping destinations in the Borough; which would put at risk or substantially defer achievement of the Council's strategy for the retail-led redevelopment of Vineyard Gate in particular.

- Other development opportunities in Colchester Town Centre include Priory Walk and St Botolph's. The former has redevelopment potential and could make an important contribution towards accommodating forecast retail capacity, while the St Botolph's site is the primary opportunity for an improved, more focused leisure offer. These prominent and well connected sites, if brought forward, would certainly help to improve the future vitality and viability of the Town Centre as a whole.

- The strategy for the Borough's district centres should be focused on the appropriate diversification the non-retail offer, including services and community facilities, to better serve the day-to-day needs of their local communities. They do not require substantial new retail development to ensure their vitality and viability over the plan period. Instead, larger scale retail development should be focused on Colchester Town Centre to help strengthen its primary role as a sub-regional shopping destination.

- The Council should take into account, and apply, the policy recommendations set out in section 9 when formulating the planning policies for the new Local Plan.

10.2 This Study therefore provides the Council with a sound and Framework-compliant basis for planning policies in the new Local Plan

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Appendix A

Results of the 2016 Household Interview Survey

Colchester Borough Retail Study 2016
for Cushman & Wakefield

Q01 At which food store or shopping centre does your household do most of its main food shopping, and where is that?
Excludes SFT and Nulls

	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	
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

	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

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?

	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	
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

	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 (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

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?
Excludes SFT and Nulls

	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	
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

	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	0.4%	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

	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

Q04 Where does your household do most of its shopping for clothing and footwear?
Excludes SFT and Nulls

	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	
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

	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

Q05 Where does your household do most of its shopping for furniture, carpets and other floor coverings?
Excludes SFT and Nulls

	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	
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

	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	0.0%	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	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	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	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	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	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	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	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	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	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	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	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	0.0%	0
Halstead Town Centre	0.8%	6	0.0%	0	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	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	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	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	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	7.8%	3
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	5.4%	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	2.3%	1
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	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	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	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	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	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	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	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	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	1.1%	1
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
Other	0.9%	6	0.6%	1	3.2%	2	0.0%	0	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	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	0.0%	0

	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

Q06 Where does your household do most of its shopping for household textiles and soft furnishings, including bedding?
Excludes SFT and Nulls

	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	
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

	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	0.0%	0	0.0%	0	0.9%	1	0.0%	0
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	4.5%	2
Clacton-on-Sea Town Centre	5.8%	46	0.0%	0	0.0%	0	2.0%	2	32.3%	40	6.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brook Retail Park, Clacton-on-Sea	2.1%	17	0.0%	0	0.0%	0	0.0%	0	11.8%	14	3.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Clacton Factory Outlet, Clacton-on-Sea	1.3%	10	0.0%	0	0.0%	0	1.6%	1	5.6%	7	3.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
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	0.0%	0	0.0%	0	0.0%	0	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	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Ipswich Town Centre	3.1%	25	1.3%	3	27.7%	16	2.1%	2	0.0%	0	5.4%	4	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Anglia Retail Park, Ipswich	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.7%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Euro Retail Park, Ipswich	0.8%	7	0.8%	2	8.4%	5	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	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Futura Park, Ipswich	0.2%	1	0.0%	0	1.2%	1	1.0%	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	0.5%	4	0.5%	1	5.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Halstead Town Centre	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.7%	4	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	0.0%	0	1.4%	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	4.2%	2	14.0%	4	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	0.0%	0	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	0.0%	0	0.0%	0	0.0%	0	4.3%	2
Dovercourt	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
Frinton-on-Sea	0.4%	4	0.5%	1	0.0%	0	0.0%	0	0.0%	0	3.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hadleigh	0.3%	2	0.5%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	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	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Maldon	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	1.5%	1
Manningtree	0.2%	2	0.0%	0	1.2%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	1.7%	2	0.0%	0
Bluewater Shopping Centre, Greenhithe	0.3%	3	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.8%	1	0.0%	0
Bury St Edmunds	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
Cambridge	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	1	1.5%	2	1.2%	1
Lakeside Retail Park, West Thurrock	0.5%	4	1.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Lakeside Shopping Centre, West Thurrock	0.2%	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	1.2%	1
Stanway	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	3.2%	1
London	1.1%	9	1.3%	3	1.3%	1	1.1%	1	1.4%	2	0.0%	0	1.2%	1	0.0%	0	1.7%	2	0.0%	0

	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

Q07 Where does your household do most of its shopping for household appliances, such as fridges, washing machines, kettles or hairdryers?
Excludes SFT and Nulls

	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	
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

	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

	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

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?
Excludes SFT and Nulls

	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	
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

	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 warehouses and superstores in Ipswich	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
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	0.0%	0	3.1%	1	1.8%	2	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

Q09 Where does your household do most of its shopping for hardware, DIY goods, decorating supplies and garden products?
Excludes SFT and Nulls

	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	
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

	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

Q10 Where does your household do most of its shopping for chemists and medical goods, cosmetics and other beauty products?
Excludes SFT and Nulls

	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	
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

	Total		Zone 1: Colchester		Zone 2: Rural North		Zone 3: Rural South		Zone 4: Clacton	
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
Elsewhere in Clacton-on-Sea	2.1%	24	0.0%	0	0.0%	0	0.0%	0	13.4%	22
Ipswich Town Centre	0.4%	5	0.4%	1	4.4%	4	0.0%	0	0.0%	0
Halstead Town Centre	2.9%	32	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Elsewhere in Halstead	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sudbury Town Centre	2.5%	27	0.0%	0	19.3%	16	0.0%	0	0.0%	0
Elsewhere in Sudbury	0.1%	1	0.0%	0	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
Retail Parks, retail warehouses and superstores in Witham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Witham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brightlingsea	1.1%	12	0.0%	0	0.0%	0	12.4%	12	0.0%	0
Coggeshall	0.4%	5	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Dovercourt	1.2%	13	0.0%	0	2.5%	2	0.0%	0	0.0%	0
Frinton-on-Sea	2.0%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hadleigh	1.1%	12	0.0%	0	15.2%	12	0.0%	0	0.0%	0
Harwich	4.6%	50	0.0%	0	1.9%	2	0.0%	0	0.0%	0
Maldon	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Manningtree	2.6%	29	0.0%	0	34.1%	28	0.0%	0	0.0%	0
Marks Tey	0.7%	7	0.4%	1	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
Walton	0.6%	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
Wivenhoe	0.6%	7	0.0%	0	0.0%	0	6.9%	7	0.0%	0
Other	2.5%	28	1.9%	6	4.7%	4	2.0%	2	3.9%	6
Great Notley	0.7%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Holland-on-Sea	0.5%	5	0.0%	0	0.0%	0	0.0%	0	3.0%	5
Kelvedon	0.5%	6	0.0%	0	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
Sible Hedingham	0.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0
London	0.3%	4	0.3%	1	0.9%	1	0.7%	1	0.0%	0
Weighted base:		1105		316		82		99		166
Sample:		1109		222		94		107		152

	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	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Clacton-on-Sea	1.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ipswich Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Halstead Town Centre	0.0%	0	0.8%	1	63.4%	30	0.0%	0	0.0%	0
Elsewhere in Halstead	0.0%	0	0.8%	1	4.3%	2	0.0%	0	0.0%	0
Sudbury Town Centre	0.0%	0	8.1%	7	9.2%	4	0.0%	0	0.0%	0
Elsewhere in Sudbury	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Witham Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	73.4%	47
Retail Parks, retail warehouses and superstores in Witham	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1
Elsewhere in Witham	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1
Brightlingsea	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coggeshall	0.0%	0	4.5%	4	0.0%	0	0.0%	0	0.0%	0
Dovercourt	11.3%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Frinton-on-Sea	21.3%	21	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Hadleigh	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harwich	49.5%	49	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Maldon	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	2
Manningtree	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks Tey	0.0%	0	7.1%	6	0.0%	0	0.0%	0	0.0%	0
Tiptree	0.8%	1	21.5%	19	0.0%	0	0.0%	0	2.2%	1
Walton	6.2%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
West Mersea	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wivenhoe	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	1.7%	2	3.5%	3	0.0%	0	1.3%	2	4.0%	3
Great Notley	0.0%	0	0.0%	0	0.0%	0	5.5%	8	0.0%	0
Holland-on-Sea	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kelvedon	0.0%	0	6.5%	6	0.0%	0	0.0%	0	0.0%	0
Nayland	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sible Hedingham	0.0%	0	0.0%	0	13.8%	7	0.0%	0	0.0%	0
London	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Weighted base:		99		88		48		144		64
Sample:		105		96		90		150		93

Q11 Where does your household do most of its shopping for books; jewellery and watches; china, glassware and kitchen utensils; recreational and luxury goods?
Excludes SFT and Nulls

	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	
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

	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	0.0%	0	0.0%	0	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	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Frinton-on-Sea	0.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hadleigh	0.4%	2	0.0%	0	5.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harwich	1.4%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.6%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Maldon	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	4.3%	1
Manningtree	0.3%	2	0.0%	0	3.7%	2	0.0%	0	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	0.0%	0	0.0%	0	0.0%	0	4.2%	2	0.0%	0	0.0%	0	4.3%	1
Walton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
West Mersea	0.6%	4	0.0%	0	0.0%	0	7.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	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	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	2	0.0%	0	5.3%	1	0.0%	0	0.0%	0
Bluewater Shopping Centre, Greenhithe	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
Cambridge	0.2%	1	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1	0.0%	0	0.0%	0
Lakeside Retail Park, West Thurrock	0.3%	2	0.0%	0	0.0%	0	4.1%	2	0.0%	0	0.0%	0	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	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Nayland	0.3%	2	1.1%	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
Stanway	0.2%	1	0.7%	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	3.2%	19	3.9%	7	2.0%	1	7.8%	4	2.1%	2	0.0%	0	3.1%	2	0.0%	0	3.4%	3	4.3%	1
Weighted base:		586		172		41		49		83		49		53		24		83		32
Sample:		567		119		46		49		72		51		55		45		83		47

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

Those asked Q11X

	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 (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

Q12 What do you like most about Colchester town centre for shopping and services?

	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	
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

Q13 What do you dislike most about Colchester town centre for shopping and services?

	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 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

	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

Q14 Where did you last go for the purpose of eating out?

	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	
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
Layer 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
Layer 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

	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

	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

Q15 Where did you last go for the purpose of drinking out?

	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	
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

	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	0.0%	0	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	20.4%	24	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%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	2
Manningtree	1.5%	19	0.0%	0	20.6%	18	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walton	0.7%	8	0.0%	0	0.0%	0	0.7%	1	0.0%	0	6.6%	8	0.0%	0	0.0%	0	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	1.9%	2	8.1%	4	4.1%	6	4.4%	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	0.7%	1
Bures	0.2%	3	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	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	0.0%	0	0.0%	0	1.4%	1	0.7%	1	0.0%	0
Colne Engaine	0.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	1.8%	1	0.0%	0	0.0%	0
Copford	0.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0
Earls Colne	0.4%	5	0.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.0%	0	0.0%	0	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	0.1%	2	0.0%	0	0.0%	0	1.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	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	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Great Holland	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Great Leighs	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
Great Notley	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	3	0.0%	0
Hatfield Peverel	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	0.7%	1
Holland-on-Sea	0.5%	6	0.0%	0	0.0%	0	0.0%	0	3.2%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kelvedon	0.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	4	0.0%	0	0.0%	0	0.0%	0
Little Dunmow	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
Other (Colchester)	0.3%	4	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	1.7%	2	0.6%	0	0.7%	1	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	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0
Ridgewell	0.2%	3	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0
Stoke-by-Nayland	0.5%	6	1.1%	4	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	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	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nayland	0.3%	4	0.0%	0	4.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	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	1.4%	1	2.5%	1	0.5%	1	0.8%	1
Cambridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	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	1.7%	2	3.3%	2	2.2%	3	1.5%	1
(Don't do this)	42.7%	513	46.5%	160	31.1%	27	38.5%	45	36.5%	63	44.0%	51	39.4%	36	55.9%	29	45.5%	70	47.4%	33
Weighted base:		1200		343		86		116		173		116		91		52		153		69
Sample:		1200		240		100		120		160		120		100		100		160		100

Q16 Where did you last visit the cinema?

	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	
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, Balkerne 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

Q17 Where did you last visit the bowling alley?

	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	
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

Q18 Where did you last visit the gymnasium / health club?

	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	
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, Abbotts 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

	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	
Gymophobics, 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
Lifehouse 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:

	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	
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

Colchester Borough Retail Study 2016
for Cushman & Wakefield

AGE Could I ask how old you are please?

	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	
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?

	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	
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?

	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	
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

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)?

	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	
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?

	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	
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?

	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	
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

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)

	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	
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:

	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	
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

PC Postcode sector:

	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	
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

	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.

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.

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.

CUSHMAN & WAKEFIELD

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.

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 serious 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

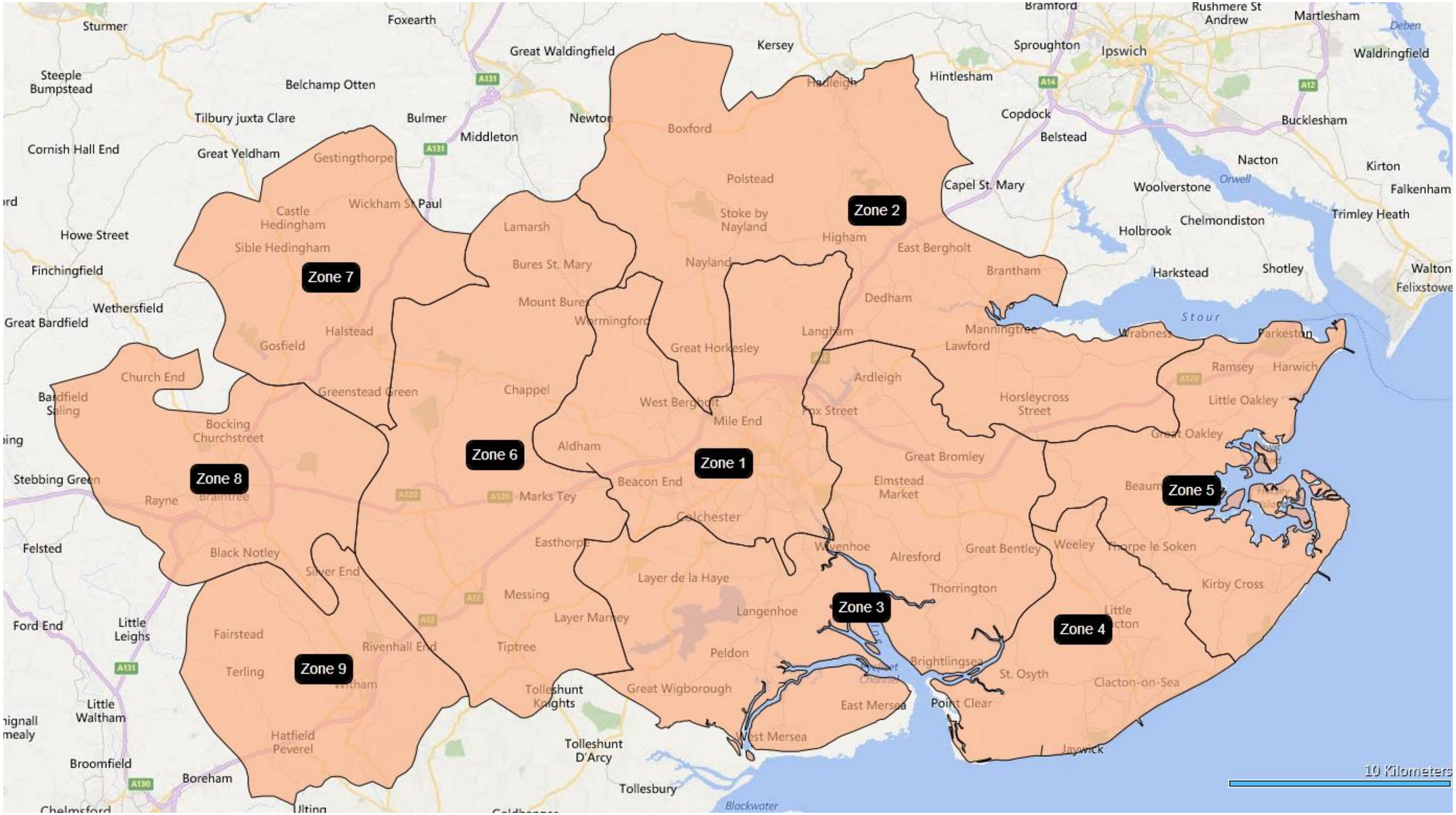
The centre is dominated by the Tesco superstore and surface level car park, surrounded by brick walls and railings (notably to the east along Greenstead Road). High traffic flows and general congestion create a relatively poor pedestrian experience.

PERCEPTION OF SAFETY

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

Appendix C

Plan of Catchment Area



Zone 1
Zone 2
Zone 3
Zone 4
Zone 5
Zone 6
Zone 7
Zone 8
Zone 9
Sturmer
Foxearth
Great Waldingfield
Kersey
Bramford
Rushmere St Andrew
Martlesham
Deben
Steeple Bumpstead
Belchamp Otten
Sproughton
Ipswich
Waldringfield
Hadleigh
Hintlesham
Tilbury juxta Clare
Bulmer
Middleton
Newton
Boxford
Copdock
Belstead
Bucklesham
Cornish Hall End
Great Yeldham
Gestingthorpe
Nacton
Kirton
Polstead
Capel St. Mary
Woolverstone
Orwell
Falkenham
Castle Hedingham
Wickham St Paul
Stoke by Nayland
Trimley Heath
Holbrook
Chelmondiston
Howe Street
Lamarsh
Higham
Sible Hedingham
East Bergholt
Finchingfield
Bures St. Mary
Nayland
Brantham
Harkstead
Shotley
Walton
Felixstowe
Dedham
Mount Bures
Wethersfield
Wormingford
Stour
Great Bardfield
Halstead
Langham
Manningtree
Wrabness
Parkeston
Gosfield
Great Horkesley
Lawford
Ramsey
Harwich
Church End
Ardleigh
Greenstead Green
Chappel
Horsleycross Street
Little Oakley
West Bergholt
Fox Street
Bardfield Saling
Bocking Churchstreet
Mile End
Great Oakley
Aldham
Great Bromley
Stebbing Green
Beacon End
Elmstead Market
Rayne
Braintree
Marks Tey
Colchester
Felsted
Easthorpe
Wivenhoe
Weeley
Thorpe le Soken
Black Notley
Alresford
Great Bentley
Silver End
Layer de la Haye
Kirby Cross
Messing
Thorrington
Ford End
Little Leighs
Langenhoe
Layer Marney
Little Clacton
Fairstead
Rivenhall End
Tiptree
Peldon
Terling
Witham
Brightlingsea
St. Osyth
Tolleshunt Knights
Great Wigborough
Clacton-on-Sea
Little Waltham
East Mersea
Point Clear
Hatfield Peverel
West Mersea
Jaywick
Tolleshunt D'Arcy
Broomfield
Boreham
Tollesbury
Blackwater
10 Kilometers
A131
A14
A12
A120
A130

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

Table of Contents

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 2016	Forecasting Years 2018	2023	2028	2033
1	Details of the Postcode Sectors comprising each Zone set out	137,156	140,511	148,208	156,144	164,085
2	at Appendix accompanying the main report.	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 - GeoInsight 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 Per Capita Expenditure Including Special Form of Trading Base Year 2016	Forecasting Years 2018	2023	2028	2033	COMPARISON GOODS Per Capita Expenditure Including Special Form of Trading Base Year 2016	Forecasting Years 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 Base Year 2016	Forecasting Years 2018	2023	2028	2033	Per Capita Expenditure EXCLUDING* Special Form of Trading Base Year 2016	Forecasting Years 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 'GeoInsight Report' for the Catchment Area, September 2016; with interpolation for 2018 and 2023, and trend-based extrapolation to 2028 and 2033, by C&W. SFT deductions by C&W, based on forecasts by Oxford Economics and Experian Retail Planner Briefing Note 13.

Table: 3

CATCHMENT AREA EXPENDITURE FORECASTS

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

Sources: RECAP Tables 1 and 2

Table: 4

COMPARISON GOODS PER CAPITA EXPENDITURE BY GOODS TYPE

Per Capita Comparison Goods Expenditure in 2016 for the catchment area as a whole **2014** Prices

	Clothing & footwear	Furniture & floor coverings	Household textiles	Domestic appliances	Audio-visual & computer equipment	DIY goods & decorating supplies	Chemist's goods, medical & beauty products	All other comparison goods	Total Comparison Goods
Including SFT (£)	893	302	100	84	520	171	576	1,188	3,834
Deduction for SFT (%)	11.5	8.0	11.0	18.0	31.0	6.0	5.5	21.7	16.0
Excluding SFT (£)	790	278	89	69	359	161	544	930	3,220

Source: Pitney Bowes 'GeoInsight 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.

Table: 5

CATCHMENT AREA COMPARISON GOODS EXPENDITURE BY GOODS TYPE IN 2016

Catchment Zone	Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden prdcts (£000)	Chemists, medcl & beauty goods (£000)	All other comprsn 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

Sources: RECAP Tables 1 and 4

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	Top-up convenience	WEIGHTED AVERAGE
	Q1	Q3	
	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

Zones	Clothing & footwear	Furniture/ florcvrgs 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	
	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.

Table: **8**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

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

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	43	43	43	43
2	2	2	2	2	2	26	26	26	26	26
3	7	7	7	7	7	37	37	37	37	37
4	0	0	0	0	0	13	13	13	13	13
5	0	0	0	0	0	26	26	26	26	26
6	4	4	4	4	4	32	32	32	32	32
7	2	2	2	2	2	17	17	17	17	17
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 corrections.

Table: **9**

COMPARISON GOODS SALES BY GOODS TYPE IN 2016

Catchment Zones	Clothing & footwear (£000)	Furniture/ florcvrgs 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)
	2016 Sales in **Colchester Town Centre** By Comparison Goods Type.							
1	65,530	4,132	2,689	713	4,140	1,109	21,563	83,645
2	10,362	2,026	387	138	1,190	327	1,482	13,154
3	21,830	1,948	1,300	341	2,244	837	7,084	20,693
4	14,986	1,620	504	109	508	64	0	7,528
5	18,624	2,684	885	99	460	225	175	14,350
6	16,433	1,161	587	114	654	346	1,516	17,303
7	4,204	753	401	70	402	0	344	5,971
8	3,109	402	211	56	187	65	567	1,184
9	1,731	237	251	105	546	0	0	621
TOTALS	156,809	14,962	7,215	1,746	10,332	2,974	32,730	164,450
MARKET SHARES	40.8%	11.1%	16.7%	5.2%	5.9%	3.8%	12.4%	36.4%

Sources: RECAP Model.

Table: **10**

FORECAST RETAIL SALES

Scenario: 1 Location: **Colchester Town Centre**

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	27,733	28,204	30,029	31,907	33,659	183,040	197,723	236,782	281,776	328,719
2	1,340	1,363	1,453	1,542	1,627	29,111	31,489	37,796	44,589	51,280
3	6,333	6,441	6,863	7,290	7,700	55,579	60,118	72,112	85,282	98,469
4	0	0	0	0	0	26,331	28,446	34,218	40,615	47,278
5	0	0	0	0	0	37,285	40,330	48,436	57,347	66,411
6	2,841	2,889	3,077	3,271	3,457	37,974	41,076	49,278	58,390	67,563
7	902	917	978	1,038	1,097	12,398	13,407	16,111	19,154	22,315
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	423,610	507,982	602,887	700,334

Sources: RECAP Model.

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 2016 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 flrspce (£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 flrspc (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	Top-up convenience	WEIGHTED AVERAGE
	Q1	Q3	
	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

Zones	Clothing & footwear	Furniture/ florcvrgs 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	
	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

Scenario: 1 Location: **Tollgate**

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: 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	20	20	20	20
2	1	1	1	1	1	4	4	4	4	4
3	8	8	8	8	8	14	14	14	14	14
4	0	0	0	0	0	3	3	3	3	3
5	1	1	1	1	1	4	4	4	4	4
6	25	25	25	25	25	21	21	21	21	21
7	0	0	0	0	0	5	5	5	5	5
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 corrections.

Table: **17**

COMPARISON GOODS SALES BY GOODS TYPE IN 2016

Catchment Zones	2016 Sales in **Tollgate** By Comparison Goods Type. Clothing & footwear (£000)	Furniture/ florcvrgs 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	7,365	14,708	2,682	5,128	27,460	5,673	12,573	9,865
2	0	1,036	149	330	2,526	134	156	0
3	2,737	4,374	753	1,402	7,242	894	933	2,408
4	522	3,106	336	188	575	53	0	483
5	633	1,800	672	446	2,277	91	0	0
6	1,223	4,384	1,006	1,466	7,754	2,168	4,137	2,416
7	0	916	171	350	2,371	74	65	0
8	229	2,545	571	820	6,660	77	0	0
9	1,393	2,432	187	347	1,498	104	0	0
TOTALS	14,102	35,302	6,527	10,479	58,364	9,269	17,864	15,172
MARKET SHARES	3.7%	26.1%	15.1%	31.3%	33.5%	11.9%	6.8%	3.4%

Sources: RECAP Model.

Table: **18**

FORECAST RETAIL SALES

Scenario: 1 Location: **Tollgate**

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	47,903	48,717	51,868	55,113	58,138	85,135	91,964	110,131	131,058	152,892
2	670	681	726	771	814	4,479	4,844	5,815	6,860	7,889
3	7,238	7,361	7,844	8,331	8,799	21,030	22,747	27,286	32,269	37,258
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	7,452	8,823	10,217
6	17,755	18,056	19,234	20,447	21,607	24,920	26,956	32,339	38,318	44,338
7	0	0	0	0	0	3,647	3,943	4,739	5,634	6,563
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	180,155	216,012	256,512	298,197

Sources: RECAP Model.

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 Flrspce (sq m)	Net Flrspce (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 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	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 flrspce (£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 flrspc (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

Zones	Clothing & footwear	Furniture/ florcvrgs 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	
	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.

Table: **26**

COMPARISON GOODS SALES BY GOODS TYPE IN 2016

Catchment Zones	Clothing & footwear (£000)	Furniture/ florcvrgs 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)
	2016 Sales in **Turner Rise** By Comparison Goods Type.							
1	3,395	551	6,823	114	0	2,072	12,771	3,381
2	0	0	774	0	0	154	1,751	0
3	0	0	1,723	0	0	0	571	2,820
4	870	393	1,217	76	0	0	0	0
5	880	0	793	0	0	0	0	0
6	874	0	1,140	0	0	0	1,153	0
7	1,029	503	297	47	264	0	586	0
8	0	0	358	0	519	0	0	0
9	0	0	229	0	0	0	0	0
TOTALS	7,047	1,447	13,354	236	783	2,225	16,832	6,200
MARKET SHARES	1.8%	1.1%	30.9%	0.7%	0.4%	2.8%	6.4%	1.4%

Sources: RECAP Model.

Table: **27**

FORECAST RETAIL SALES

Scenario: 1 Location: **Turner Rise**

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	52,945	53,845	57,328	60,914	64,257	29,797	32,187	38,546	45,870	53,512
2	5,360	5,451	5,811	6,167	6,508	2,239	2,422	2,907	3,430	3,945
3	3,619	3,681	3,922	4,165	4,400	4,506	4,874	5,847	6,915	7,984
4	2,673	2,715	2,898	3,073	3,244	2,025	2,188	2,632	3,124	3,637
5	3,655	3,716	3,962	4,204	4,441	1,434	1,551	1,863	2,206	2,554
6	2,131	2,167	2,308	2,454	2,593	3,560	3,851	4,620	5,474	6,334
7	1,803	1,833	1,955	2,077	2,193	2,917	3,154	3,791	4,507	5,251
8	2,552	2,592	2,768	2,938	3,101	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0
TOTALS	74,740	76,000	80,953	85,993	90,738	46,480	50,229	60,206	71,526	83,217

Sources: RECAP Model.

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 Flrspce (sq m)	Net Flrspce (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
Jollyes 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 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	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 flrspce (£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 flrspc (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	Top-up convenience	WEIGHTED AVERAGE
	Q1	Q3	
	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

	Clothing & footwear	Furniture/ florcvrgs 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	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.

Table: **34**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Peartree Road**

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:	550	% 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	2	2	2	2	2	4	4	4	4	4
2	0	0	0	0	0	0	0	0	0	0
3	5	5	5	5	5	2	2	2	2	2
4	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	1	1	1	1	1
6	0	0	0	0	0	2	2	2	2	2
7	0	0	0	0	0	2	2	2	2	2
8	1	1	1	1	1	1	1	1	1	1
9	0	0	0	0	0	1	1	1	1	1

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

Table: **35**

COMPARISON GOODS SALES BY GOODS TYPE IN 2016

Catchment Zones	2016 Sales in **Peartree Road** By Comparison Goods Type. Clothing & footwear (£000)	Furniture/ florcvrgs 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	0	12,523	0	0	0	2,571	1,187	0
2	0	0	204	158	0	0	0	0
3	0	1,782	251	0	0	289	0	0
4	0	0	246	0	0	0	0	0
5	0	0	741	0	0	0	0	0
6	0	2,534	216	0	0	0	0	0
7	0	1,107	355	0	0	0	0	0
8	0	1,768	0	0	0	909	0	0
9	0	693	0	0	0	0	0	0
TOTALS	0	20,408	2,014	158	0	3,769	1,187	0
MARKET SHARES	0.0%	15.1%	4.7%	0.5%	0.0%	4.8%	0.4%	0.0%

Sources: RECAP Model.

Table: **36**

FORECAST RETAIL SALES

Scenario: 1 Location: **Peartree Road**

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 2016 (£000)	2018 (£000)	2023 (£000)	2028 (£000)	2033 (£000)	COMPARISON GOODS 2016 (£000)	2018 (£000)	2023 (£000)	2028 (£000)	2033 (£000)
1	5,042	5,128	5,460	5,801	6,120	17,027	18,393	22,026	26,212	30,578
2	0	0	0	0	0	0	0	0	0	0
3	4,524	4,601	4,902	5,207	5,500	3,004	3,250	3,898	4,610	5,323
4	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	1,434	1,551	1,863	2,206	2,554
6	0	0	0	0	0	2,373	2,567	3,080	3,649	4,223
7	0	0	0	0	0	1,459	1,577	1,895	2,253	2,625
8	1,276	1,296	1,384	1,469	1,551	2,070	2,236	2,691	3,198	3,729
9	0	0	0	0	0	1,328	1,438	1,725	2,046	2,371
TOTALS	10,842	11,025	11,746	12,477	13,170	28,696	31,012	37,178	44,175	51,403

Sources: RECAP Model.

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: 90 % (unless otherwise indicated)

Date of sales densities: 2014

Store	Gross Flrspce (sq m)	Net Flrspce (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 flrspce (£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 flrspc (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	Top-up convenience	WEIGHTED AVERAGE
	Q1	Q3	
	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

	Clothing & footwear	Furniture/ florcvrgs 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	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.

Table: **43**

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 2016 (%)	2018 (%)	2023 (%)	2028 (%)	2033 (%)	COMPARISON GOODS 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/ florcvrgs 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

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: 90 % (unless otherwise indicated)	Date of sales densities:			2014
Store	Gross Flrspce (sq m)	Net Flrspce (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 flrspce (£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 flrspc (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	Top-up convenience	**WEIGHTED AVERAGE**
	Q1	Q3	
	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

	Clothing & footwear	Furniture/ florcvrgs 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	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.

Table: **52**

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.

Table: 53

COMPARISON GOODS SALES BY GOODS TYPE IN 2016

Catchment Zones	Clothing & footwear (£000)	Furniture/ florcvrgs 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)
	2016 Sales in **Greenstead Road** By Comparison Goods Type.							
1	6,137	918	74	0	0	0	3,238	2,151
2	0	0	50	0	0	0	0	0
3	415	405	109	92	1,506	0	1,238	868
4	0	0	0	0	0	0	0	0
5	0	0	0	0	340	0	0	0
6	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0
9	0	0	92	0	0	0	0	0
TOTALS	6,552	1,323	325	92	1,846	0	4,475	3,019
MARKET SHARES	1.7%	1.0%	0.8%	0.3%	1.1%	0.0%	1.7%	0.7%

Sources: RECAP Model.

Table: 54

FORECAST RETAIL SALES

Scenario: 1 Location: **Greenstead Road**

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	20,170	20,512	21,839	23,205	24,479	12,770	13,795	16,520	19,659	22,934
2	2,010	2,044	2,179	2,313	2,441	0	0	0	0	0
3	11,762	11,962	12,746	13,538	14,299	4,506	4,874	5,847	6,915	7,984
4	1,337	1,358	1,449	1,537	1,622	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
TOTALS	35,278	35,876	38,214	40,592	42,841	17,277	18,669	22,367	26,574	30,918

Sources: RECAP Model.

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: 90 % (unless otherwise indicated)	Date of sales densities:			2014
Store	Gross Flrspce (sq m)	Net Flrspce (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 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	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 flrspce (£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 flrspc (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: 60

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2016

2016 Allocations to

Tiptree

Indicated by Household Interview Survey

	Clothing & footwear	Furniture/ florcvrgs 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.

Table: **62**

COMPARISON GOODS SALES BY GOODS TYPE IN 2016

Catchment Zones	Clothing & footwear (£000)	Furniture/ florcvrgs 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)
	2016 Sales in **Tiptree** By Comparison Goods Type.							
1	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0
3	0	518	0	0	0	281	222	0
4	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	242	0
6	0	371	0	276	463	696	5,390	1,799
7	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0
9	0	158	0	291	1,332	83	617	2,062
TOTALS	0	1,047	0	567	1,795	1,060	6,472	3,861
MARKET SHARES	0.0%	0.8%	0.0%	1.7%	1.0%	1.4%	2.4%	0.9%

Sources: RECAP Model.

Table: **63**

FORECAST RETAIL SALES

Scenario: 1 Location: **Tiptree**

Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.

Catchment zone	CONVENIENCE GOODS 2016 (£000)	CONVENIENCE GOODS 2018 (£000)	CONVENIENCE GOODS 2023 (£000)	CONVENIENCE GOODS 2028 (£000)	CONVENIENCE GOODS 2033 (£000)	COMPARISON GOODS 2016 (£000)	COMPARISON GOODS 2018 (£000)	COMPARISON GOODS 2023 (£000)	COMPARISON GOODS 2028 (£000)	COMPARISON GOODS 2033 (£000)
	RETAIL SALES BY CATCHMENT ZONE									
1	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0
3	2,714	2,761	2,941	3,124	3,300	1,502	1,625	1,949	2,305	2,661
4	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0
6	24,146	24,557	26,159	27,807	29,386	9,493	10,269	12,319	14,597	16,891
7	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0
9	2,459	2,503	2,665	2,834	2,995	3,985	4,313	5,176	6,139	7,114
TOTALS	29,320	29,820	31,766	33,765	35,681	14,980	16,207	19,444	23,042	26,666

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 flrspc (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	Furniture/ florcvrgs 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	0.8	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.

Table: 69

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Non-central stores in Borough**

Baseline - Market shares indicated by the Household Interview Survey 2016 remain unchanged throughout the forecasting period.

Market shares correction factors:
Convenience Goods: 90 % of survey indicated figures
Comparison Goods: 100 % 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	9	9	9	9	9
2	4	4	4	4	4	3	3	3	3	3
3	18	18	18	18	18	7	7	7	7	7
4	1	1	1	1	1	1	1	1	1	1
5	1	1	1	1	1	3	3	3	3	3
6	6	6	6	6	6	4	4	4	4	4
7	0	0	0	0	0	2	2	2	2	2
8	0	0	0	0	0	1	1	1	1	1
9	0	0	0	0	0	0	0	0	0	0

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

Table: **70**

COMPARISON GOODS SALES BY GOODS TYPE IN 2016

Catchment Zones	Clothing & footwear (£000)	Furniture/ florcvrgs 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)
	2016 Sales in **Non-central stores in Borough** By Comparison Goods Type.							
1	836	5,619	1,188	656	2,229	10,666	15,973	1,598
2	0	715	121	125	162	1,598	189	0
3	885	1,490	357	135	469	4,116	2,488	0
4	0	1,258	224	0	0	61	0	0
5	317	1,064	139	34	767	1,367	218	0
6	349	532	275	0	0	1,007	1,143	960
7	0	591	40	126	106	127	0	484
8	0	929	269	146	1,153	0	0	0
9	0	390	0	31	0	0	0	0
TOTALS	2,387	12,589	2,613	1,252	4,886	18,942	20,011	3,042
MARKET SHARES	0.6%	9.3%	6.0%	3.7%	2.8%	24.2%	7.6%	0.7%

Sources: RECAP Model.

Table: **71**

FORECAST RETAIL SALES

Scenario: 1 Location: **Non-central stores in Borough**

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	47,903	48,717	51,868	55,113	58,138	38,311	41,384	49,559	58,976	68,802
2	2,680	2,725	2,906	3,084	3,254	3,359	3,633	4,361	5,145	5,917
3	16,286	16,563	17,649	18,744	19,799	10,515	11,374	13,643	16,134	18,629
4	1,337	1,358	1,449	1,537	1,622	2,025	2,188	2,632	3,124	3,637
5	914	929	991	1,051	1,110	4,302	4,653	5,589	6,617	7,663
6	4,261	4,334	4,616	4,907	5,186	4,747	5,135	6,160	7,299	8,445
7	0	0	0	0	0	1,459	1,577	1,895	2,253	2,625
8	0	0	0	0	0	2,070	2,236	2,691	3,198	3,729
9	0	0	0	0	0	0	0	0	0	0
TOTALS	73,380	74,625	79,478	84,436	89,109	66,788	72,180	86,530	102,747	119,446

Sources: RECAP Model.

Table: **72**

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: **73**

SALES CAPACITY OF EXISTING COMPARISON GOODS FLOORSPACE

Net to gross ratio: 90 % (unless otherwise indicated) — Date of sales densities: 2014

Store	Gross Flrspce (sq m)	Net Flrspce (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: **74**

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 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	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 flrspce (£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 flrspc (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

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

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 flrspce (£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 flrspc (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

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

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 flrspce (£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 flrspc (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	Clothing & footwear	Furniture/ florcvrgs etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY & garden goods	Chemists, medical & beauty goods	All other comparison goods
	COMPARISON GOODS TYPE							
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 2016 (%)	2018 (%)	2023 (%)	2028 (%)	2033 (%)	COMPARISON GOODS 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 2016 (%)	2018 (%)	2023 (%)	2028 (%)	2033 (%)	COMPARISON GOODS 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&Ws 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 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.

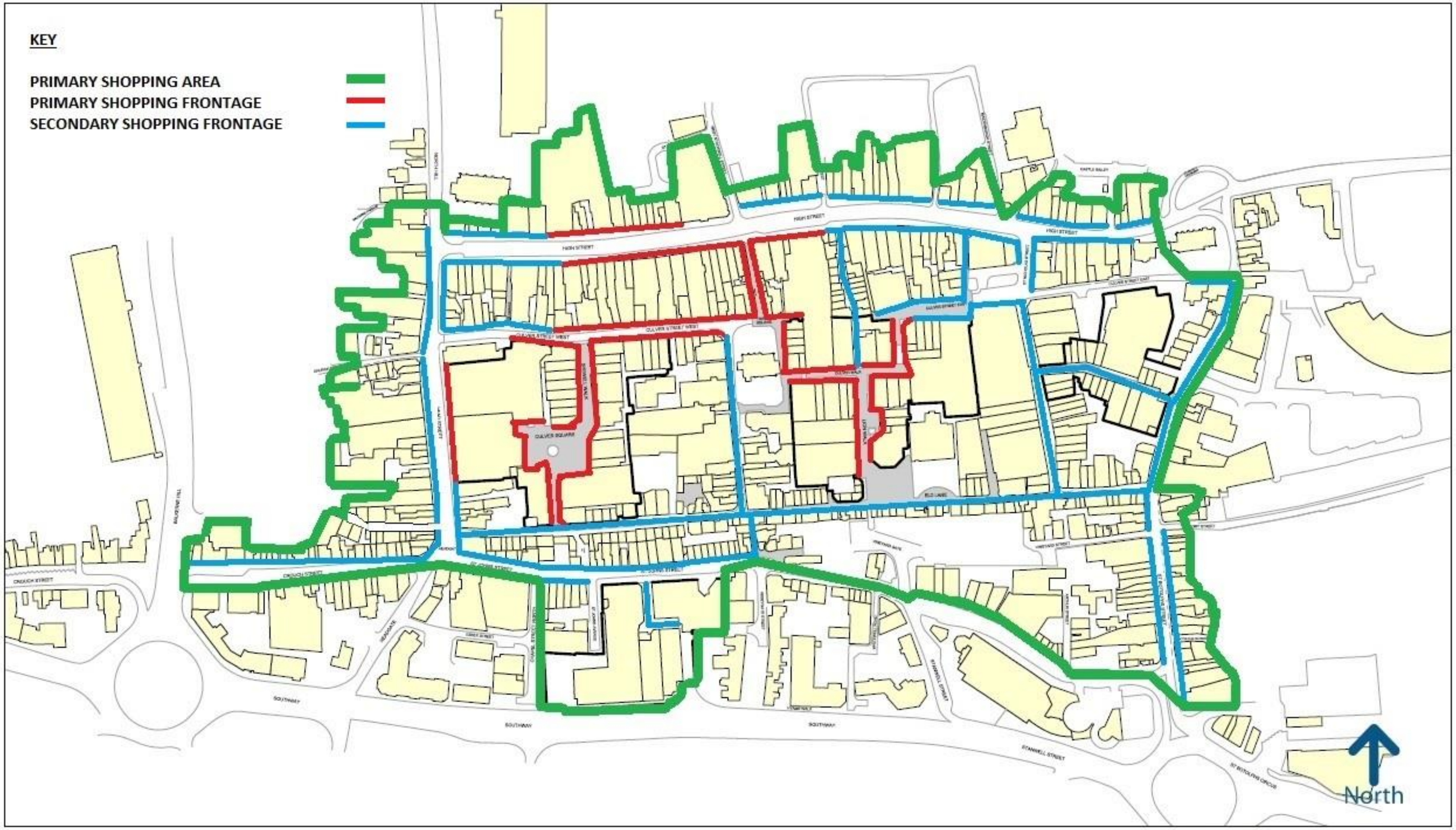
- Deliverability:
  - A key factor which could impact on the site's deliverability is our understanding that the site is made up of disparate ownerships; the site has disjointed land uses which includes residential elements (likely to be in held in a large number of individual freeholds) and there is 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

Colchester



125 metres

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

Colchester	**Local Plan Committee**		**Item 10**
	7 February 2017		
Report of	**Head of Commercial Services**	**Author**	**Beverley McClean☏ 282480**
Title	**Coastal Protection Belt Review**		
Wards affected	**Marks Tey and Layer, Mersea and Pyefleet, Old Heath and Hythe and Wivenhoe Wards**		

The Local Plan Committee is asked to note the changes as the result of the review of Colchester's Coastal Protection Belt

1. Decision(s) Required

1.1 The Local Plan Committee is asked to note revisions to the Coastal Protection Belt (CPB) policy and map. The revised Coastal Protection Belt forms part of the evidence base for the emerging Local Plan for Colchester.

2. Reasons for Decision(s)

2.1 To ensure that the evidence base for the Local Plan provides a robust basis to support decisions on future planning applications affecting coastal wards of the Borough.

3. Alternative Options

3.1 The alternative would be rely on the current Coastal Protection Belt policy and map as evidence for the emerging Local Plan. The current policy was based on the Essex County Council 1984 Subject Plan and Structure Plan both of which are now obsolete as planning documents. Planning decisions based on these documents or the current Coastal Protection Belt policy and maps would not be made on the most up to date evidence and could be challenged.

4. Supporting Information

The original Coastal Protection Belt was originally defined in 1984 by Essex County Council in the Essex Coast Protection Subject Plan and included as policy in subsequent County Structure Plans for Essex until their abolition. A Coastal Protection Belt policy was also included in successive Local Plans for Colchester from 1984 onwards. It is still a valid policy in the current Local Plan for the Borough.

4.1 The Subject Plan recognised the rural and undeveloped character of the Essex coastline as a unique, finite and irreplaceable resource in its own right. In recognition, the Subject Plan set out a coastal protection policy, the main objective of which was to protect the coast outside built-up coastal areas from development that would adversely affect the open and rural character or wildlife within the area known as 'The Coastal Protection Belt'.

4.2 The original Coastal Protection Belt was defined using the following principles. The inland extent of the Coastal Protection Belt was delineated using the tidal influence of the river estuaries as the inland cut off point. The boundary was also delineated using permanent physical features on the ground i.e. roads, field boundaries and Public Rights of Way as these were readily identifiable and defensible features. The criteria below were also used to determine what land to include within the Coastal Protection Belt policy:

- **Areas of open, undeveloped and rural character with coastal/estuary views** – the areas excluded included urban coastline, larger towns/villages and industrial areas (with the exception of small villages and areas of development that retain their open quality such as minerals extraction sites).

- **Areas of high landscape value** – as defined by a landscape quality appraisal undertaken in 1976-78 that formed the basis for Special Landscape Areas in the Essex County Structure Plan.

- **Areas of designated nature conservation value** – Sites of Special Scientific Interest and Nature Conservancy Zones associated with coastal habitats such as saltings, marshes and mudflats.

4.3 The supporting documents underpinning the current Coastal Protection Belt designation are no longer valid. A review of Colchester's Coastal Protection Belt was commissioned to ensure that a Coastal Protection Belt policy based on up to date evidence could be included in the new Local Plan for the Borough.

4.4 The approach used to re-define the extent of the Coastal Protection Belt builds on the principles and criteria used in the original Essex Coast Subject Plan referred to above. It was also informed by legislative change (the 2006 European Landscape Convention), policy changes in the National Planning Policy Framework in relation to the protection and management of coastal areas in England and the need to manage climate change and to reflect updates to the Borough's Landscape Character Assessment.

4.5 The criteria and factors used to define which land to include and which to exclude from the Coastal Protection Belt were also reviewed. These are set out below:

- **Coastal Character** – inclusion of open, undeveloped and rural areas (terrestrial and inter-tidal) that have a distinctive coastal/estuarine character and sense of place as defined by the Colchester Borough Landscape Character Assessment. This criterion is in line with NPPF objectives to protect the open, undeveloped and rural character of the coast.

- **Coastal Designations** – inclusion of designated sites of nature conservation value associated with coastal habitats such as saltings, marshes and mudflats; and designated sites of cultural heritage value associated with the Borough's coastal/maritime history. This criterion is in line with NPPF objectives to protect natural and historic environment designated assets in coastal areas.

- **Coastal Change Areas** – inclusion of coastal areas that are likely to experience significant physical changes as a result of permanent or temporary inundation. This criterion is in line with NPPF objectives for management of coastal change.

4.6 In determining whether to include areas in the CPB or not, the area should wholly or predominantly meet criterion A; or meet criteria B and/or C. In this way, greatest weight is given to criterion A in line with the main objective to protect the open, undeveloped and rural character of the coast.

4.7 Built up areas that were not predominantly rural, undeveloped and open have been excluded from the review, while Colchester Borough administrative boundaries and permanent identifiable and defensible physical features on the ground roads, field boundaries and the low-water mark in inter-tidal areas were also used to define the extent of the revised Coastal Protection Belt.

4.8 As a result of the review a new Coastal Protection Belt has been defined. The changes are discussed below in section 5 of this report and shown in the accompanying plans.

5. Proposals

5.1 The main policy objective of the Coastal protection Belt to protect open undeveloped areas of the coast remains unchanged following the review. The key change was the extent of the land designated as falling within the Coastal Protection Belt. Following review, 4 new areas of land were proposed for addition to the Coastal Protection Belt and 4 areas were proposed for deletion. The Review was split into five zones as set out below;

Zone 1 – This zone covers the Mersea Flats on the seaward side of Mersea Island. Within this zone the Coastal Projection Belt was amended to include a coastal Schedule Ancient Monument in compliance with criteria B. The sea area below low water mark was deleted as it did not meet any of the revised criteria.

Zone 2 – No amendments were proposed within this zone which covers the Blackwater Estuary.

Zone 3 – Within this zone, 3 linear areas were added to the existing Coastal Protection Belt along the western boundary. The additional areas to be protected are located around Abberton, Peldon and to the north - west of Great and Little Wigborough and lie within the Northern Coastal Farmland Landscape Character Area.

Zone 4 – Zone 4 covers land around Wivenhoe and Rowhedge in the vicinity of the Upper Colne Estuary. Two areas of land; an area of coastal grazing marsh and designated Local Site and a previously excluded part of the Drained Estuarine Marsh Landscape Character Area were added to the Coastal Protection Belt. An area of land to the south of Rowhedge and land to the north west of Wivenhoe and another plot of land to the south east of Wivenhoe were deleted from the Coastal Protection Belt.

Zone 5 - No amendments were proposed within this zone which covers the lower Colne Estuary.

5.2 The deletions and additions to the revised Coastal Protection Belt within zones 1, 3 and 4 are shown diagrammatically in Figure 2 in Appendix 2 to this report. A new Coastal Protection Belt policy drafted as part of the review has also been included in the emerging Local Plan.

5.3 The Wivenhoe Neighbourhood Plan Working Group has challenged the removal of the area of land to the south east of Wivenhoe as they are seeking to protect this land from development through their emerging Neighbourhood Plan. The Council is working with the Neighbourhood Plan Group to identify an alternative approach for protecting this piece of land to avoid inconsistencies between the Coastal Protection policies in the Local Plan and Wivenhoe Neighbourhood Plan.

5.4 It is proposed that the Coastal Protection Belt Review is used to inform the designation of a new Coastal Protection Belt and revised policy wording in the Submission draft of the Local Plan.

6. Strategic Plan References

6.1 The Strategic Plan Action Plan includes a commitment to promote Colchester's heritage and wide ranging tourism attractions to enhance our reputation as a destination and to cultivate Colchester's green spaces and opportunities for health, wellbeing and the enjoyment of all.. The Coastal Protection Belt policy will help deliver these objectives.

7. Consultation

7.1 The revised Coastal Protection Belt Policy and map have not been issued for public consultation. The Coastal Protection Belt Policy review paper is a technical document that forms part of the Local Plan evidence base. The Coastal Protection Belt Review paper and map are publically available on the Council's website under the new evidence base webpage.

8. Publicity Considerations

8.1 The Coastal Protection Belt Review is not expected to generate publicity.

9. Financial Implications

9.1 None

10. Equality, Diversity and Human Rights implications

10.1 An Equality Impact Assessment has been prepared for the Local Development Framework and is available to view on the Colchester Borough Council website by following this pathway from the homepage: Council and Democracy > Policies, Strategies and Performance > Equality and Diversity > Equality Impact Assessments > Commercial Services > Local Plan.

10.2 There are no particular Human Rights implications.

11. Community Safety Implications

11.1 None identified.

12. Health and Safety Implications

12.1 None identified.

13. Risk Management Implications

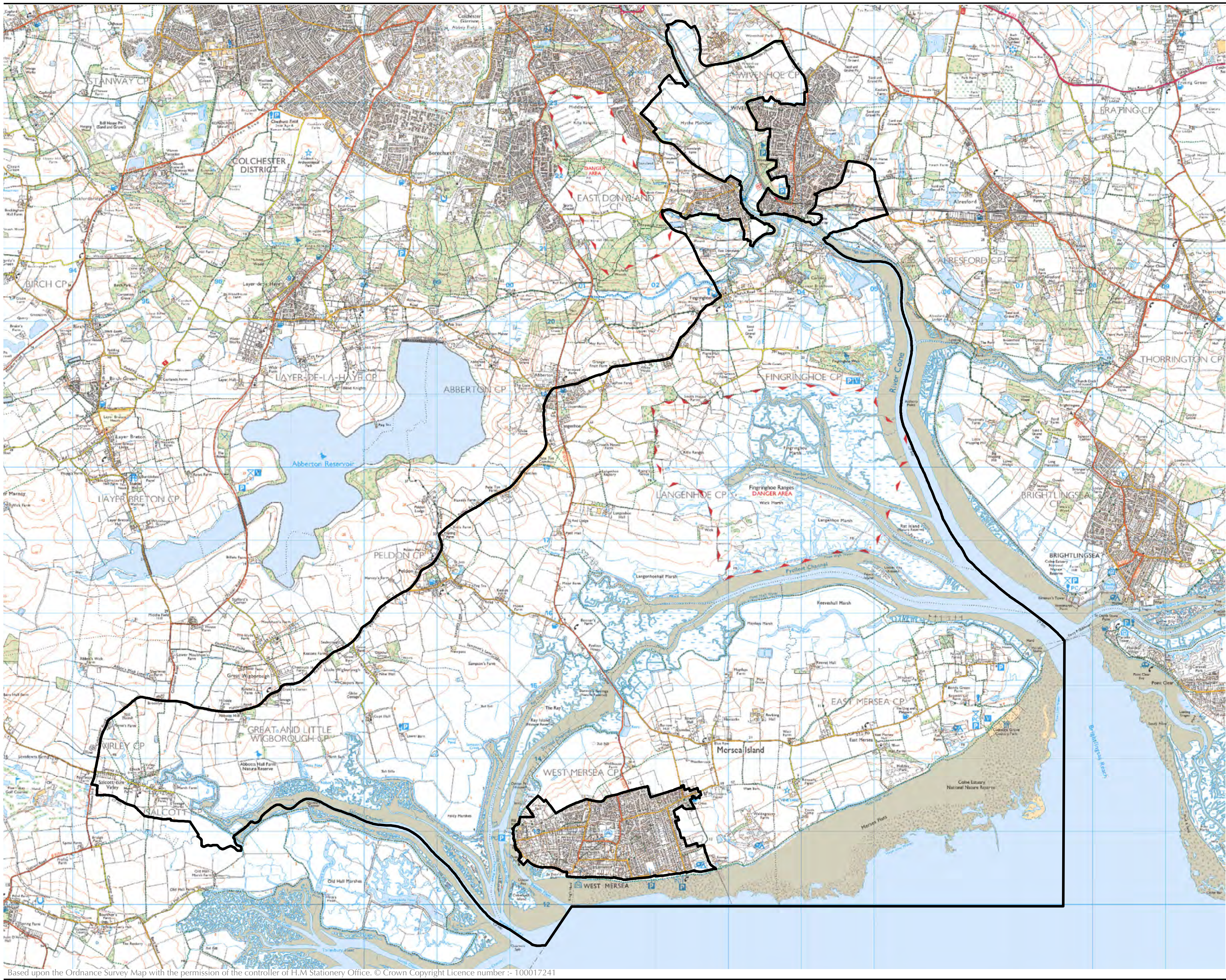
13.1 The updated Coastal Protection Belt Policy will help ensure that the Council's planning policies are robust and based on up-to-date evidence that will prevent inappropriate development being permitted along the Borough's coast.

14. Disclaimer

14.1 The information in this report was, as far as is known, correct at the date of publication. Colchester Borough Council cannot accept responsibility for any error or omissions.

Supporting Papers

Coastal Protection Belt Review Paper
Coastal Protection Belt Review Maps



KEY

Coastal Protection Belt - Existing

N

0 1 2 Kilometres

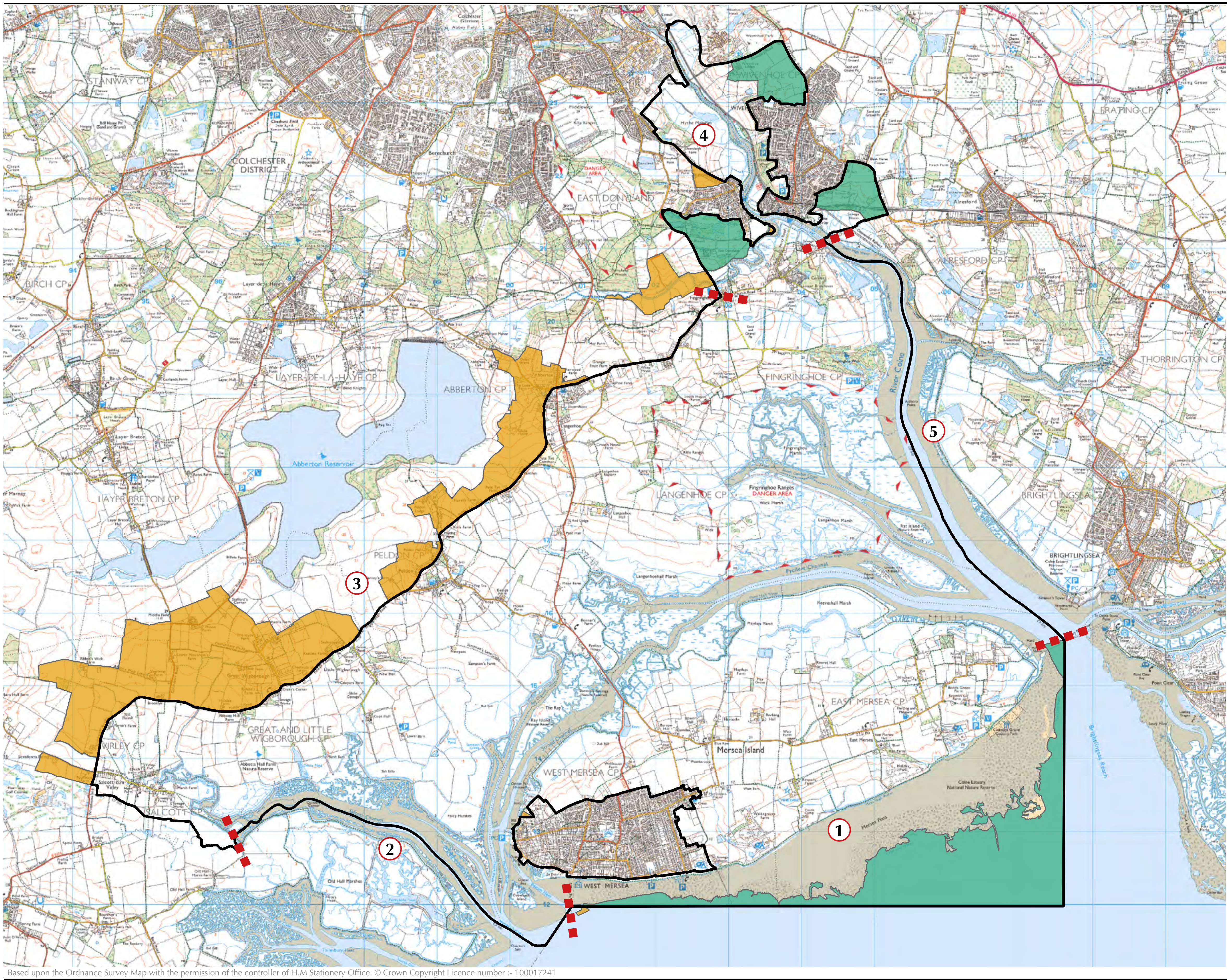
CHRIS BLANDFORD ASSOCIATES
cba landscape | environment | heritage

COLCHESTER COASTAL PROTECTION BELT REVIEW
COLCHESTER BOROUGH COUNCIL

FIGURE 1
EXISTING COASTAL PROTECTION BELT

January 2017

11121601_Figures_04-01-16.indd



KEY

Appraisal Sections:

1 Mersea Flats
2 Blackwater Estuary
3 Northern Coastal Farmland
4 Upper Colne Estuary
5 Lower Colne Estuary

Coastal Protection Belt - Existing

Proposed Changes:

Proposed Additions
Proposed Deletions

N
0 1 2 Kilometres

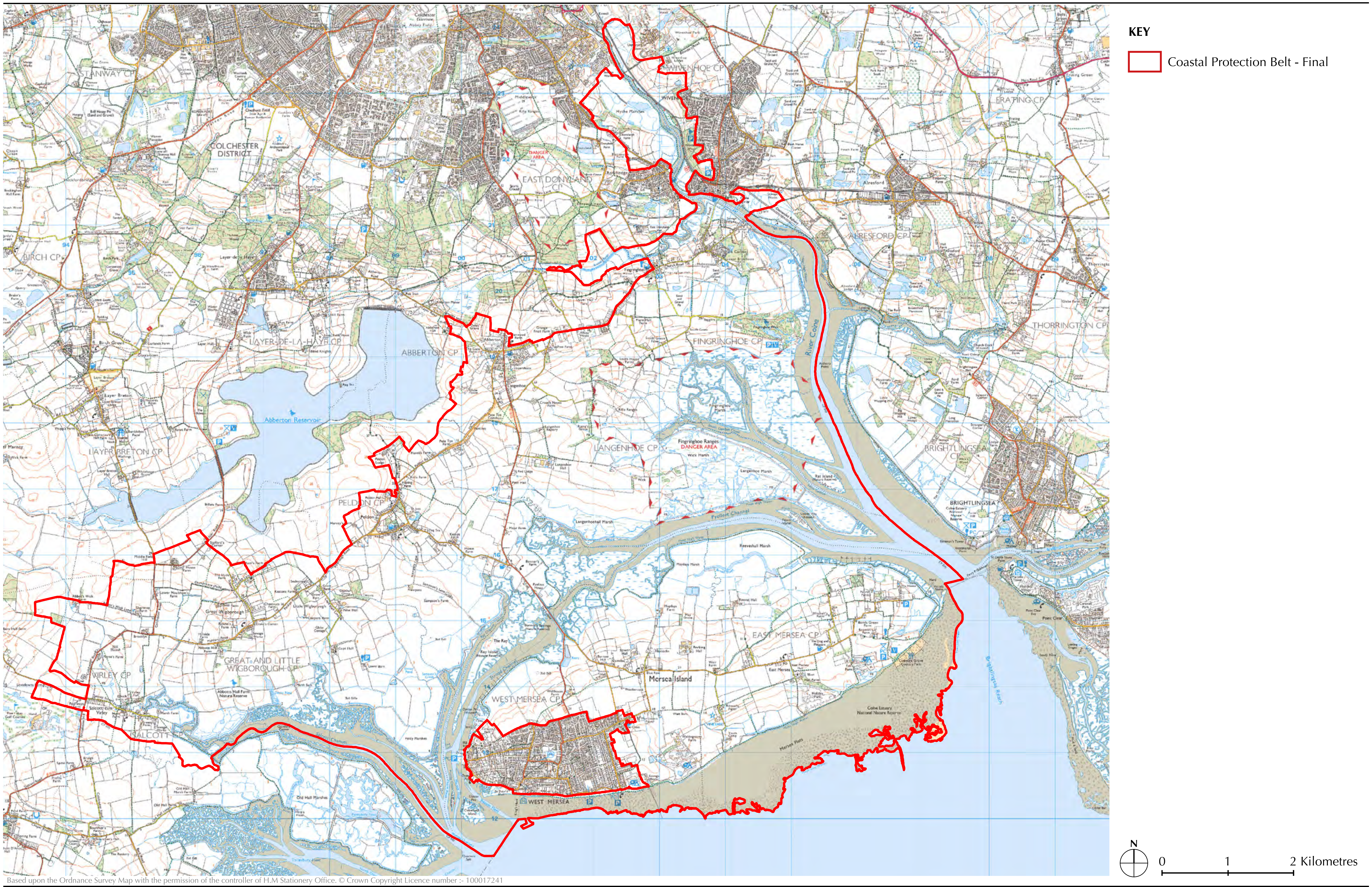
CHRIS BLANDFORD ASSOCIATES
cba landscape | environment | heritage

January 2017

11121601_Figures_04-01-16.indd

COLCHESTER COASTAL PROTECTION BELT REVIEW
COLCHESTER BOROUGH COUNCIL

FIGURE 2
PROPOSED CHANGES TO EXISTING COASTAL PROTECTION BELT



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COLCHESTER COASTAL PROTECTION BELT REVIEW
COLCHESTER BOROUGH COUNCIL

FIGURE 3
PROPOSED COASTAL PROTECTION BELT

January 2017

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Colchester Coastal Protection Belt Review

Chris Blandford Associates (CBA) was appointed by Colchester Borough Council to undertake a review of the existing Coastal Protection Belt (CPB) boundary and policy to inform the new Colchester Local Plan (2017-2032). The review involved the following tasks:

1. Review of existing CPB boundary.
2. Identify CPB mapping criteria.
3. Map proposed updated CPB boundary.
4. Recommend a revised coastal areas policy.

1. Review of Existing Coastal Protection Belt Boundary

The existing CPB boundary considered by this review is shown on **Figure 1**[1]. This is the CPB boundary referred to within Policy DP23 (Coastal Areas) of the Colchester Local Development Framework adopted in 2010[2].

The current CPB boundary used in Colchester Borough is based on the CPB defined in 1984 by Essex County Council in the Essex Coast Protection Subject Plan[3], as subsequently refined to a degree by Colchester Borough Council in successive local plans. The Subject Plan recognised the rural and undeveloped character of the Essex coastline as a unique, finite and irreplaceable resource in its own right. The Subject Plan set out a coastal protection policy, the main objective of which was to protect the coastline outside built-up areas from development that would adversely affect the open and rural character or wildlife within an area known as 'The Coastal Protection Belt'.

A broad study area was selected as a starting point for defining the CPB area from first principles in the 1984 Subject Plan. The study area used the tidal influence of river estuaries as the inland cut-off point. The criteria used to determine whether land within the study area should be included or not within the CPB boundary is documented in detail within the Subject Plan.

The criteria can be summarised as follows:

[1] Existing CPB boundary provided digitally by Colchester Borough Council, August 2015
[2] Colchester Local Development Framework - Adopted Development Policies (Colchester Borough Council, October 2010)
[3] Essex Coast Protection Subject Plan - Written Statement and Proposals Map (Essex County Council, Adopted 14th December 1984)

A. **Areas of open, undeveloped and rural character with coastal/estuary views** – the areas excluded included urban coastline, larger towns/villages and industrial areas (with the exception of small villages and areas of development that retain their open quality such as minerals extraction sites).

B. **Areas of high landscape value** – as defined by a landscape quality appraisal undertaken in 1976-78 that formed the basis for Special Landscape Areas in the Essex County Structure Plan.

C. **Areas of designated nature conservation value** – Sites of Special Scientific Interest and Nature Conservancy Zones associated with coastal habitats such as saltings, marshes and mudflats.

In defining tracts of land to be included in the CPB, the Subject Plan placed greatest weight upon the first criterion in line with the main objective to protect the open, undeveloped and rural character of the coast. In addition, the Subject Plan required that the CPB boundary be delineated in detail along permanent physical features on the ground that were readily identifiable and defensible (such as roads, field boundaries and rights of way for example).

2. Coastal Protection Belt Mapping Criteria

The proposed approach to mapping the updated CPB is based on the principles and criteria established by the 1984 Essex Coast Protection Subject Plan. In addition, the approach has been informed by a brief review of the current legislative and policy framework for the protection and management of coastal areas in England. In line with the 1984 Subject Plan's main objective to protect the open, undeveloped and rural character of the coast, the proposed approach also draws on the latest available evidence in relation to landscape character.

European Landscape Convention

The European Landscape Convention (ELC), a Europe-wide agreement supported by the Council of Europe ratified in 2006, is the first international treaty specifically relating to landscape[4]. It aims to promote co-operation on improving approaches to the planning, management and protection of landscapes throughout Europe. The ELC came into force in the UK on 1 March 2007.

The ELC defines landscape as '*an area, as perceived by people, whose character is the result of the action and interaction of natural and/or human factors*'. The ELC adopts a broad and inclusive definition of landscape embracing landscapes, seascapes and townscapes, as well as all forms of rural landscape. Article 2 states: *'the Convention...covers natural, rural, urban and peri-urban areas. It includes land, inland water and marine areas. It concerns landscapes that might be considered outstanding as well as everyday or degraded landscapes.'*

[4] European Landscape Convention (Council of Europe ETS No. 176, Ratified 2006)

National Planning Policy

Section 10 of the National Planning Policy Framework (NPPF)[5] sets out the Government's policy on meeting the challenge of climate change, flooding and coastal change. The accompanying Planning Policy Guidance (PPG) on Flood Risk and Coastal Change[6] provides guidance to Local Planning Authorities (LPAs).

The aim of the policy on coastal change, as set out in paragraphs 105-108 of the NPPF, is to reduce risk from coastal change by avoiding inappropriate development in vulnerable areas or adding to the impacts of physical changes to the coast. LPAs should apply Integrated Coastal Zone Management, a joined-up and participative approach towards the planning and management of land and marine elements in coastal areas.

LPAs should also identify Coastal Change Management Areas in their Local Plans where rates of physical changes to the shoreline through erosion, coastal landslip, permanent inundation or coastal accretion are likely to be significant over the next 100 years, taking into consideration shoreline management plans. The current Essex and South Suffolk Shoreline Management Plan[7] identifies polices for managing the flood and coastal erosion risks to the coastline within Colchester Borough. The polices for the Colne Estuary (Unit D), Mersea Island (Unit E) and the Blackwater Estuary (Unit F) include managed realignment of the coastal defences between 2025 and 2055. The landscape in these areas of the coast are therefore likely to experience significant physical changes as the shoreline is restored to a more natural coastal and estuarine character during the lifetime of the new Colchester Local Plan.

LPAs are expected to be clear what development will be appropriate in Coastal Change Management Areas and make provision for development and infrastructure that needs to be relocated away from Coastal Change Management Areas. When assessing applications in such areas, LPAs should consider the degree to which the character of the coast, including its environmental designations (natural and historic) may be compromised, and also the implications for provision of a continuous recreational route along the coast.

Landscape Character Evidence Base

The 2005 Colchester Borough Landscape Character Assessment[8] was prepared in accordance with the 2002 Landscape Character Assessment Guidance for England and Scotland[9], which is widely acknowledged as good practice for assessing landscape character in England and Scotland. The Landscape Character Assessment reflects the principles of the European Landscape Convention, and is also generally consistent with Natural England's 2014 advice on landscape character assessment and evaluation[10].

[5] National Planning Policy Framework (DCLG, March 2012)
[6] Planning Policy Guidance - Flood Risk and Coastal Change (DCLG, ID: 7, Updated: 15/04/2015)
[7] Essex and South Suffolk Shoreline Management Plan 2 (Environment Agency, Final Version, 15th October 2010)
[8] Colchester Borough Landscape Character Assessment (Chris Blandford Associates for Colchester Borough Council, 2005)
[9] Landscape Character Assessment Guidance for England and Scotland (The Countryside Agency/Scottish Natural Heritage, 2002)
[10] An Approach to Landscape Character Assessment (Natural England, 2014)

The Landscape Character Assessment identifies a range of generic Landscape Character Types (LCTs) throughout the Borough. These are broad tracts of land that share common characteristics of geology, landform, vegetation, land-use and settlement. In relation to the definition of the CPB, the following LCTs represent areas of coastal/estuarine landscape character within the Borough:

- Estuarine Marsh/Mudflats (LCT C)
- Drained Estuarine Marsh (LCT D)
- Coastal Farmland (LCT E)

Criteria

The following criteria have been used to validate the existing CPB boundary as shown on **Figure 1**:

A. **Coastal Character** – inclusion of open, undeveloped and rural areas (terrestrial and inter-tidal) that have a distinctive coastal/estuarine character and sense of place as defined by the Colchester Borough Landscape Character Assessment. This criterion is in line with NPPF objectives to protect the open, undeveloped and rural character of the coast.

B. **Coastal Designations** – inclusion of designated sites of nature conservation value associated with coastal habitats such as saltings, marshes and mudflats; and designated sites of cultural heritage value associated with the Borough's coastal/maritime history. This criterion is in line with NPPF objectives to protect natural and historic environment designated assets in coastal areas.

C. **Coastal Change Areas** – inclusion of coastal areas that are likely to experience significant physical changes as a result of permanent/temporary inundation. This criterion is in line with NPPF objectives for management of coastal change.

In determining whether to include areas in the CPB or not, the area should wholly or predominantly meet criterion A; or meet criteria B and/or C. In this way, greatest weight is given to criterion A in line with the main objective to protect the open, undeveloped and rural character of the coast.

Table 1 provides details of the evidence used to inform the CPB boundary mapping process.

The following factors were used in the detailed delineation and digitisation of the CPB boundaries:

- **Exclude built-up urban areas that are not predominantly rural, undeveloped and open** – as determined by reference to the latest available Ordnance Survey MasterMap data (date?) and settlement boundaries from the Colchester Local Plan (date?).

- **Follow the administrative boundary of Colchester Borough where appropriate** – as determined by reference to the latest available Ordnance Survey MasterMap data (date?)

- **Wherever possible, follow permanent physical features on the ground that are readily identifiable and defensible (such as roads, field boundaries and the low-water mark in inter-tidal areas)** – as determined by reference to the latest available Ordnance Survey MasterMap data (date?) and aerial photographs *(source: Bing maps website accessed January 2016).*

Table 1: CPB Boundary Definition Criteria Evidence

Criteria	Evidence
A. Coastal Character	Open, undeveloped and rural areas (terrestrial and inter-tidal) that have a distinctive coastal/estuarine character and sense of place defined by the Colchester Borough Landscape Character Assessment (2005) as represented by the following Landscape Character Types: • Estuarine Marsh/Mudflats (LCT C) • Drained Estuarine Marsh (LCT D) • Coastal Farmland (LCT E)
B. Coastal Designations	Designated sites of nature conservation value associated with coastal habitats such as saltings, marshes and mudflats as represented by: • Ramsar Sites *(source:* MAGIC *website accessed January 2016)* • Special Protection Areas (source: MAGIC website *accessed January 2016*) • Special Areas of Conservation *(source:* MAGIC *website accessed January 2016)* • Sites of Special Scientific Interest *(source:* MAGIC *website accessed January 2016)* • National Nature Reserves *(source:* MAGIC *website accessed January 2016)* • Local Wildlife Sites *(source: supplied by EECOS July 2015)* Designated sites of cultural heritage value associated with the Borough's coastal/ maritime history as represented by: • Scheduled Monuments *(source: Historic England website accessed January 2016)* • Conservation Areas *(source:* CBC website & Historic Environment Record *accessed January 2016)* • Registered Historic Parks and Gardens *(source: Historic England website accessed January 2016)*

Criteria	Evidence
C. Coastal Change Areas	Areas that are likely to experience significant physical changes as a result of permanent and/or temporary inundation as represented by: • Coastal areas within the Borough identified for managed realignment of coastal defences between 2025 and 2055 - the Colne Estuary (Unit D), Mersea Island (Unit E) and the Blackwater Estuary (Unit F). *(source: Essex and South Suffolk Shoreline Management Plan, 2010)* • Coastal areas within Flood Zone 3 *(source: Environment Agency website accessed January 2016)*

3. Mapping of Proposed Updated CPB Boundary

The proposed changes to the existing Coastal Protection Belt are shown on **Figure 2** and detailed in **Table 2**.

Table 2: Schedule of Proposed Changes to the CPB Boundary

Appraisal Sections	Proposed Additions	Proposed Deletions	Comments
1	Addition of a coastal Scheduled Monument in accordance with Criteria B.	Deletion of sea area below low-water mark as it does not meet criterion A; or B and/or C.	None
2	None	None	The existing CPB boundary follows the administrative boundary between Colchester Borough and Maldon District. NB. there is no reference to a CPB policy in the Maldon Submission Local Plan 2014.
3	Addition of land to encompass the full extent of the Coastal Farmland LCT E as defined by the Colchester Borough Landscape Character Assessment.	None	None
4	Addition of an estuarine grazing marsh Local Wildlife Site in accordance with Criteria B. Addition of land to encompass the full extent of the Drained Estuarine Marsh LCT D as defined by the Colchester	Deletion of three areas of land that do not meet criterion A; or B and/or C.	None

Appraisal Sections	Proposed Additions	Proposed Deletions	Comments
	Borough Landscape Character Assessment.		
5	None	None	The existing CPB boundary follows the administrative boundary between Colchester Borough and Tendring District. NB. the Tendring District Local Plan Strategic Green Gaps and Coastal Protection Belt Review (September 2015) makes reference to the intention to subsume the existing CPB policy into a new combined Coastal and Strategic Green Gaps policy/designation.

The proposed CPB boundary is shown on **Figure 3**. The proposed CBP boundary has been digitised in using Ordnance Survey MasterMap data and provided as an ESRI GIS shapefile.

4. Revised Coastal Areas Policy

In light of this review, it is recommended that consideration is given to the proposed revisions to the current adopted Policy DP23 on Coastal Areas of the Colchester Local Development Framework[11] set out in **Appendix A** in order to align it with national planning policy and guidance for the protection and management of coastal areas in England.

[11] Colchester Local Development Framework - Adopted Development Policies (Colchester Borough Council, October 2010)

Appendix A

Revised Coastal Areas Policy

Policy DPXX: Coastal Areas

Within the Coastal Protection Belt including undeveloped sections of the coast an integrated approach to coastal management will be promoted and, development will only be supported where it can be demonstrated that it:

(i) *Requires a coastal location and is located within the developed area of the coast;*

(ii) *Will be safe from flooding over its planned lifetime and will not have an unacceptable impact on coastal change;*

(iii) Will not be significantly detrimental to conserving important nature conservation, historic environment assets, *maritime uses and the landscape character of the coast;*

(iv) *Will deliver or sustain social and economic sustainability benefits considered important to the well-being of the coastal communities;*

(v) *Provides opportunities and scope for adaptation to climate change; and*

(vi) *Will not hinder the potential future creation and maintenance of a continuous signed and managed coastal access route.*

In exceptional circumstances, development may be permitted where it is proven that the proposal provides an overwhelming public or community benefit that outweighs all other material considerations. In such instances applications must demonstrate that the site is the only available option and be acceptable in terms of its other planning merits.

Proposals for all development and change of use on both the landward and seaward sides of Coast Road, West Mersea will be expected to enhance the existing traditional maritime character of the West Mersea Waterside Area of Special Character, and its role as a major yachting, fishing and boating centre. Proposals which result in the development of existing undeveloped areas of foreshore will be refused.

New moorings for permanent residential houseboats will not be permitted in coastal areas because of their landscape and environmental impact. Applications for infrastructure to support existing houseboats including jetties, sheds, platforms and fences and for those replacement houseboats or houseboat alterations considered to result in material alterations will be considered on the basis of their scale and impact on surrounding amenity, environment and landscape.

Explanation

The open, undeveloped and rural landscape character of the coastal area of Colchester Borough is an extremely rich, diverse and irreplaceable natural asset in terms of its natural and cultural features. It includes substantial parts of the Colne and Blackwater Estuaries. The ecological importance of the Colne and Blackwater Estuaries is reflected by the variety of international and European designations covering them i.e. Ramsar sites, Special Protection Areas (Birds Directive), and the Essex Estuaries Special Area of Conservation (SAC) designated under the Habitats Directive. There are also a number of Sites of Special Scientific Interest and Local Wildlife Sites designated around the estuaries.

The Borough's coastline is also home to a number of sizeable communities in West Mersea Rowhedge, and Wivenhoe. As a consequence there are a number of diverse and competing interests which all need to be managed in an integrated way within the Borough's coastal belt. These include internationally important habitats, land and water-based recreation, fishing, archaeological and historic environment assets. Obligations to protect the important natural and cultural assets have to be balanced against the wider socio-economic needs of the Borough's coastal communities. Climate change including sea level rise is likely to present increasing pressure on the management of coastal habitats and coastal communities along Colchester's coastal fringe. The National Planning Policy Framework highlights the need to identify 'Coastal Change Management Areas'. The Essex and South Suffolk Shoreline Management Plan (October 2010) has shown that the coastal frontage within the Borough is highly vulnerable to the effects of climate change and coastal processes. It will be important that future land uses and developments along this frontage, in particular built-up frontages, can demonstrate a high level of resilience in response to changing local climatic conditions.

In 1984, Essex County Council produced the Essex Coast Protection Subject Plan. This defined ~~the~~ a Coastal Protection Belt, which was reviewed and updated in 2016 by the Borough Council. The Coastal Protection Belt aims to protect the rural and undeveloped coastline from inappropriate development that would adversely affect its rural, undeveloped and open character and irreplaceable assets, landward and marine sites of nature conservation importance, and buildings and areas of special architectural, historic or archaeological importance. The Belt's rural and undeveloped coastline is of international, national and regional significance for its historic environment assets, and nature conservation interest. These multiple assets are strongly focussed and interrelated within the defined area, including between the coastline and adjoining inland areas. The Belt has a unique and irreplaceable character which should be strongly protected and enhanced.

Because the Coastal Protection Belt has a unique and irreplaceable character, there is a local need for greater priority to be given to the restraint of potentially damaging development than is normally possible under national planning policies. The Coastal Protection Belt adopts the precautionary principle and seeks to restrict development to within the built up areas of the coast. Some developments however require a coastal location and cannot be located elsewhere or are needed to help sustain the socio-economic base of a coastal area or serve the needs of the local coastal community. This may include sustainable tourism or leisure related developments, where they meet the requirements of policies elsewhere in the Plan.

The majority of the estuarine frontage of West Mersea comprises the West Mersea Conservation Area and is shown on the Proposals Map. The western end of Coast Road was designated as the West Mersea Waterside Area of Special Character in the Local Plan due to the unique character of this part of Mersea which has been strongly influenced by maritime, fishing and boating uses. This is carried forward in the Site Allocations DPD.

The Council is keen to conserve and improve the character of West Mersea Waterside. Proposals for the expansion, development, redevelopment of, or change of use of existing premises/sites used for boating/marine related uses will only be permitted where they remain compatible with the special traditional maritime character of the area, and there is a related need for the use to be located within the West Mersea Waterside Area of Special Character.

The Borough contains areas of houseboat development at West Mersea and East Colchester. These small scale developments are accepted as part of the character of these areas, but any further extension of houseboat development would be considered to have an unacceptable impact on these sensitive coastal/estuarine areas. Appropriately scaled and located development essential to the maintenance and sustainability of existing houseboats will be supported to the extent it addresses impact and design criteria as contained in national and local planning policy and guidance~~.~~