Appendix 4 Household Survey

4.0 Household Survey

Survey Structure

4.1 NEMS Market Research carried out a telephone survey of 800 households across the Braintree Study Area in July 2012. The Study Area was split into ten zones, based on postcode sectors (see Table 1.1 and Figure 1.1, Appendix 1). The zones are based on the zones used in the North Essex Authorities Retail Study (2006) and the Retail Study Update 2010. For ease of comparison with the previous studies, we have retained the zone numbering.

4.2 Table 4.1 below sets out the sample size for each study zone.

Table 4.1: Braintree Survey Zones, Population and Sample Size

Zone		Postcode Sector	2010 Population	Target Survey No.
1/2	Haverhil/Sudbury	CB10 2 CB9 0 CB9 7 CB9 8 CB9 9 CO10 0 CO10 1 CO10 2 CO10 7 CO10 8 CO10 9 CO9 4	83,927	100
10	Coggeshall	CO6 1 CO6 2 CO8 5	19,009	75
11	Halstead	CO9 1 CO9 2 CO9 3	21,020	100
12a	Braintree West	CM7 1 CM7 2	14,568	50
12b	Braintree East	CM7 3 CM7 9	20,093	75
12c	Great Notley	CM77 7	7,685	50
12d	Braintree Other	CM7 4 CM7 5 CM77 6 CM77 8	20,369	75
13	Great Dunmow	CM3 1 CM3 3 CM6 1 CM6 2 CM6 3	33,096	100
14	Witham	CM3 2 CM8 1 CM8 2 CM8 3	37,781	100
15	Kelvedon	CO5 0 CO5 9	15,827	75
Total			**273,375**	**800**

4.3 The number of interviews undertaken reflects the population in each zone in order to provide statistically reliable sub-samples. The main aims of the survey were to establish patterns for the following:

- Main food and top up grocery shopping;
- Non-food shopping, including:
  - clothing and footwear;
  - domestic electrical appliances;
  - other electrical goods (TV, Hi-Fi and computers);
  - furniture, soft furnishings and carpets;
  - DIY/hardware items and garden items; and
  - other non-food items (eg. books, CDs, DVDs, toys and gifts).

4.4 The full questionnaire is appended to this section.

Main Food Shopping

4.5 Large food stores were identified by the majority of respondents as where they buy most of their household's main food and grocery shopping. Overall, the Tesco at Marks Farm, Braintree was the most popular shopping destination (12.3%), followed by Tesco at Great Notley (10.6%) and Sainsbury's in Braintree Town Centre (7.9%) for the study area as a whole.

Table 4.2 Most popular main food shopping destinations across all zones

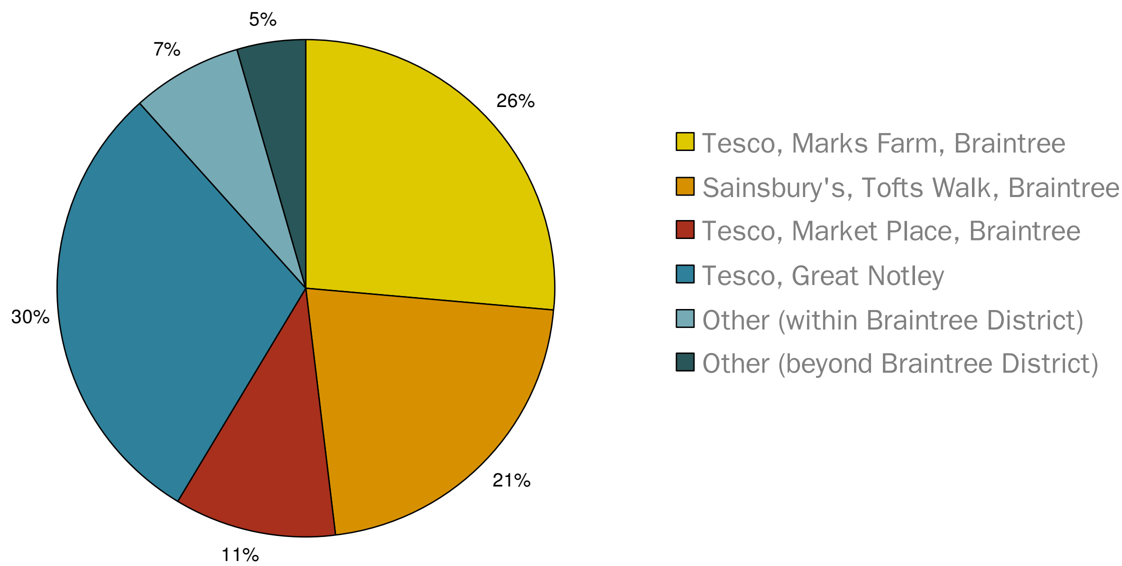
Destination	%
Tesco, Marks Gate, Braintree	12.3
Tesco, Great Notley	10.6
Sainsbury's, Tofts Walk, Braintree	7.9
Tesco, Sudbury	6.5
Tesco, Dunmow	6.2
Sainsbury's, Stanway, Colchester	6.1
Tesco, Witham	5.8
Morrisons, Witham	5.3
Tesco, Market Place, Braintree	3.8
Tesco, Tiptree	3.6
Waitrose, Sudbury	2.9
Co-op, Halstead	2.6
Sainsbury's, High Street, Halstead	2.6
Other	23.8

Source: NEMS Household Survey, July 2012 Question 01

4.6 However different zones recorded different responses as the most popular primary destination for their main food shopping trip:

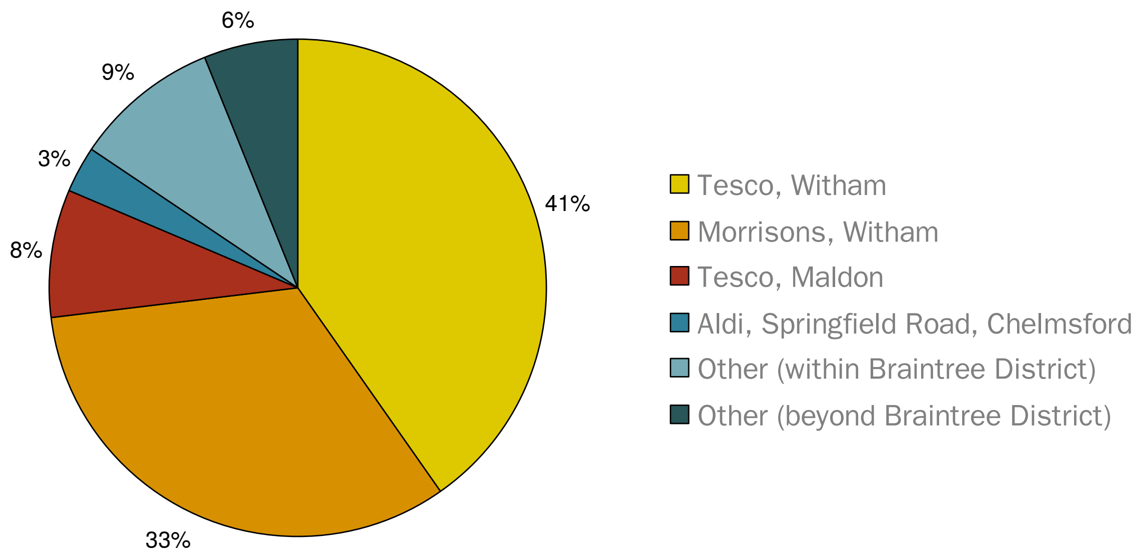
- **Zone 1/2 - Haverhill / Sudbury:** Tesco, Sudbury (35.1%), followed by Sainsbury's, Haverhill (14.4%), Waitrose, Sudbury (12.4%) and Tesco, Haverhill (12.4%);
- **Zone 10 - Coggeshall:** Sainsbury's, Stanway, Colchester (30.0%), Tesco, Marks Farm, Braintree (12.9%), followed by Asda, Colchester (8.6%);
- **Zone 11 - Halstead:** Tesco, Marks Farm, Braintree (19.8%), followed by Sainsbury's, Halstead Town Centre (18.8%), Co-op (Solar) Halstead Town Centre (17.7%) and Tesco, Sudbury (14.6%);
- **Zone 12 - Braintree (amalgamating Zones 12a, 12b, 12c and 12d):** Tesco, Great Notley (29.8%), followed by Tesco Marks Farm (26.4%), Sainsbury', Tofts Walk (21.5%) and Tesco, Market Place (10.7%).
- **Zone 13 - Great Dunmow:** Tesco, Dunmow (46.3%) followed by Sainsbury's in Springfield, Chelmsford (11.6%) and Tesco, Great Notley (10.5%);
- **Zone 14 - Witham:** Tesco, Witham Town Centre (40.2%) and Morrisons, Witham (33.0%) followed by Tesco in Maldon (8..2%); and
- **Zone 15** - **Kelvedon**: Tesco, Tiptree (35.6%) and Sainsbury's at Stanway, Colchester (27.4%) followed by Tesco, Witham (9.6%).

Figure 4.1 Most popular shopping destinations for respondents in Braintree



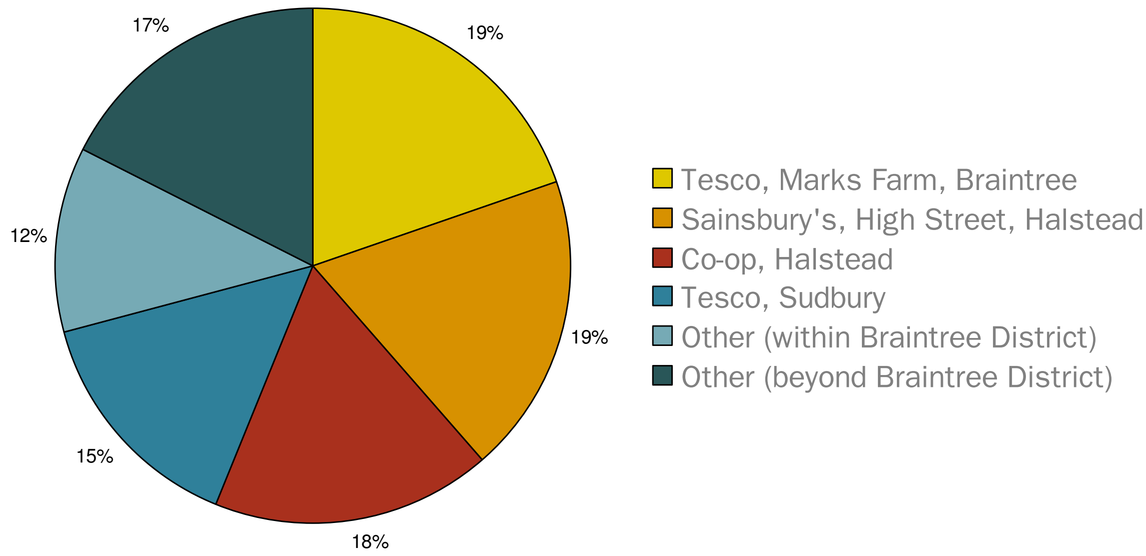
Source: NEMS Household Survey, July 2012 Question 01

Figure 4.2 Most popular shopping destinations for respondents in Witham



Source: NEMS Household Survey, July 2012 Question 01

Figure 4.3 Most popular shopping destination for respondents in Halstead



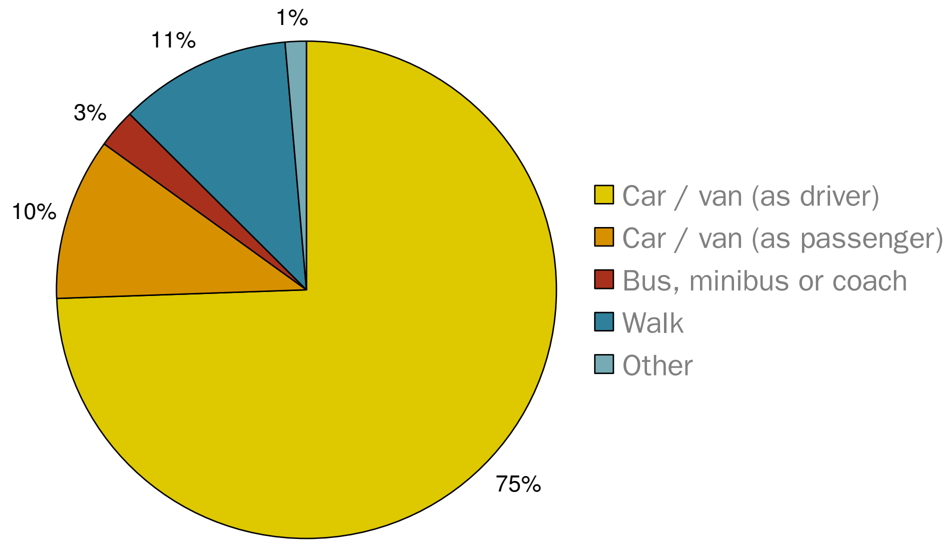
Source: NEMS Household Survey, July 2012 Question 1

4.7 Overall, 2.7% of respondents choose to do the majority of their main food shopping on the internet and have it delivered, which is higher than the average derived from similar NLP surveys across the country (1.5%).

Mode of Travel for Main Food Shopping

4.8 In the whole study area, 84.9% of respondents indicated that they travel to do their main food shopping by car (both driver and passenger) whilst 11.1% of respondents walk to their main food shopping destination. Just 0.3% of all respondents (0.3%) used a bike to travel to their last main shopping location.

Figure 4.4 Most popular mode of travel for main food shopping



Source: NEMS Household Survey, July 2012 Question 1

Linked Trips

4.9 Respondents were asked if they carry out any other activities while they are undertaking their main food shop. 58.4% of respondents confirmed that they did carry out any other form of activity. The most popular activity was to carry out non food shopping at the same time (30.4%), followed by getting petrol (9.1%) and visiting a bank / building society or post office (8.3%).

Table 4.3 Nature of linked trip with main food shopping trips in 3 main towns

	All Zones	Braintree	Witham	Halstead
Non-food shopping	17.5%	16.2%	22.9%	18.2%
Getting petrol	15.6%	16.2%	6.3%	18.2%
Financial services	14.3%	13.0%	8.3%	21.8%
Work	12.9%	11.0%	16.7%	12.7%
Other food shopping	9.2%	7.8%	14.6%	7.3%
Leisure activity	7.2%	7.8%	6.3%	7.3%

	All Zones	Braintree	Witham	Halstead
Eating/drinking out	6.6%	7.1%	10.4%	5.5%
Family/friends	5.3%	6.5%	4.2%	3.6%
Health services	4.6%	5.8%	2.1%	1.8%
Personal services	2.6%	4.5%	2.1%	1.8%
Window shopping	2.0%	1.9%	4.2%	1.8%
School/university	1.3%	0.6%	2.1%	0.0%

Source: NEMS Household Survey, July 2012 Question 5

4.10 This in turn equates to 54.9% of the survey's respondents not linking their main food shopping trip with any other activity / destination.

Top-Up Food Shopping

4.11 Top-up food shopping trips are normally made to supplement main food shopping trips and are undertaken on a more frequent basis for staples such as bread and milk. Overall 76.1% of households across the study area indicated that they undertake small-scale or top-up shopping trips in addition to their main food shopping trips.

Table 4.4 Most popular top-up shopping destinations by main towns

Braintree	Witham	Halstead
Tesco, Great Notley (21.8%)	Morrisons, Witham (32.9%)	Co-op, Halstead (33.8%)
Tesco, Marks Farm (15.5%)	Tesco, Witham (24.3%)	Sainsbury's, High Street, Halstead (18.2%)
Sainsbury's, Tofts Walk (14.5%)	Co-op, Silver End (8.6%)	Halstead Town Centre (16.9%)
Tesco, Market Place (9.8%)	Witham Town Centre (8.6%)	Co-op, Sible Hedingham (13.0%)
Lidl, Rayne Road (6.7%)	Asda, Witham (7.1%)	Tesco, Marks Gate, Braintree (3.9%)

Source: NEMS Household Survey, July 2012 Question 8

4.12 The overall results show that the main food stores continue to be well used for top-up food shopping with the main foodstores in all three towns again being the most commonly used stores. This is the case in particular in the amalgamated Braintree zone, where the top five 'top up' destinations stated by respondents are main foodstores. Even when looking at the individual sub-areas within the Braintree zone, the main foodstores continue to be the most popular locations to undertake top-up food shopping, with the only exception being in the Braintree West zone where a Co-op convenience store at Challis Lane was stated by 14% of respondents (3rd most popular destination).

4.13 In Witham and Halstead, whilst the main foodstores in these towns are the most popular destinations to undertake top-up shopping, the town centre shops and Co-op stores in the large villages of Silver End and Sible Hedingham are within the 'top five'. The trade flowing to the town centre shops and village convenience stores indicates the continuing role of smaller scale facilities in meeting more immediate top up shopping needs of local residents.

4.14 Generally, across the entire household survey area, top-up shopping trips are dispersed over a larger number of stores than the main food shopping. Across the household survey area, "local shops" account for nearly two thirds of all responses (65.8%) in terms of top up shopping location, however it is primarily in the more rural zones where the main foodstores are not so dominant for top up shopping, rather than the three main towns.

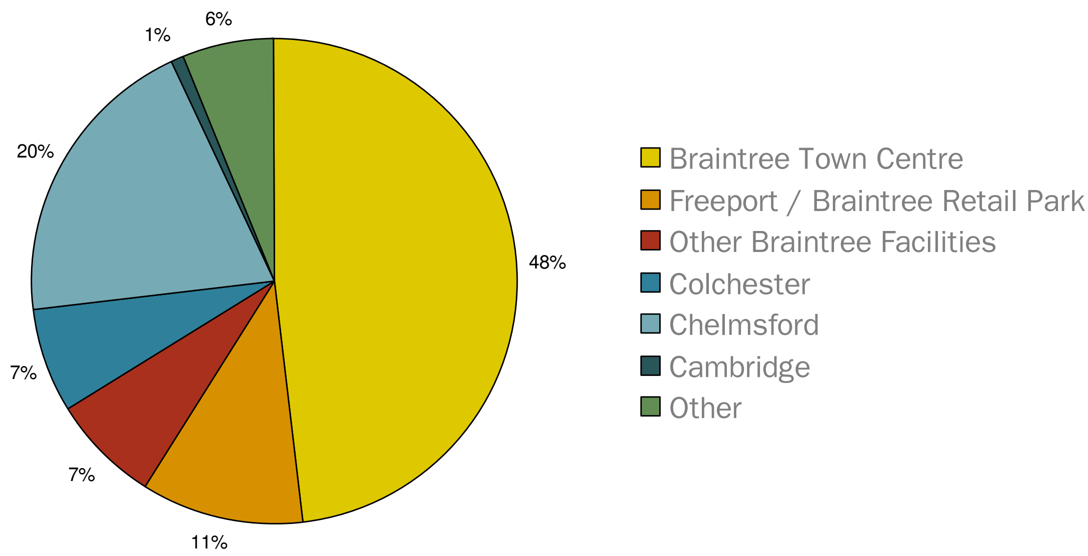
Non-Food Shopping

4.15 Respondents were asked in which location they buy most of their household's non-food shopping. For the study area as a whole, Chelmsford was the most popular destination with 19.2% of all respondents shopping there, followed by Braintree (18.9%) and Colchester (18.8%). Sudbury (6.1%) and Freeport Outlet Village (5.2%) were the next most popular locations. Whilst this shows that Braintree is used by residents, it does clearly demonstrate the influence that centres outside of the Braintree District have on the local authority area.

4.16 Once the results are broken down, Braintree is the most popular non-food shopping destination in the Braintree Other (50.7%), Braintree West (49.0%), Braintree East (45.7%) and Great Notley (39.5%) zones. Outside of the study area, Colchester is the most popular destination in Kelvedon (62.3%), Coggeshall (51.6%) and Halstead (34.0%) zones, whilst Chelmsford is the most popular destination in Witham (51.6%) and Great Dunmow (40.9%) zones. Sudbury is the most popular destination in Haverhill / Sudbury zone (23.3%).

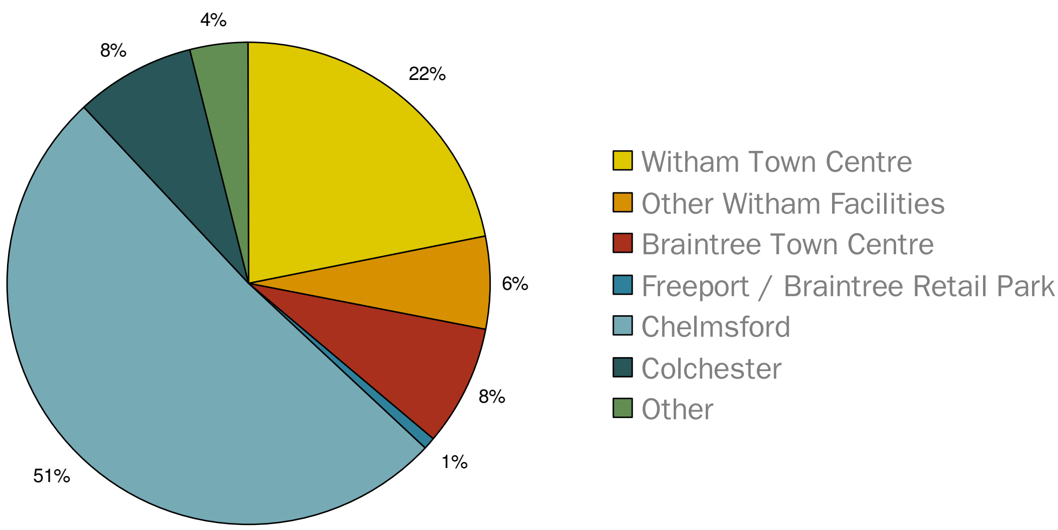
4.17 In terms of the amalgamated Braintree zone, as can be seen from Figure 4.5 below, 65.3% of respondents in the Braintree zone undertake most of their household's non-food shopping at facilities in Braintree. The most popular destination outside of the district for Braintree residents is Chelmsford (20.2%) followed by Colchester (6.9%).

Figure 4.5 Braintree Zone - Non Food Shopping Destinations



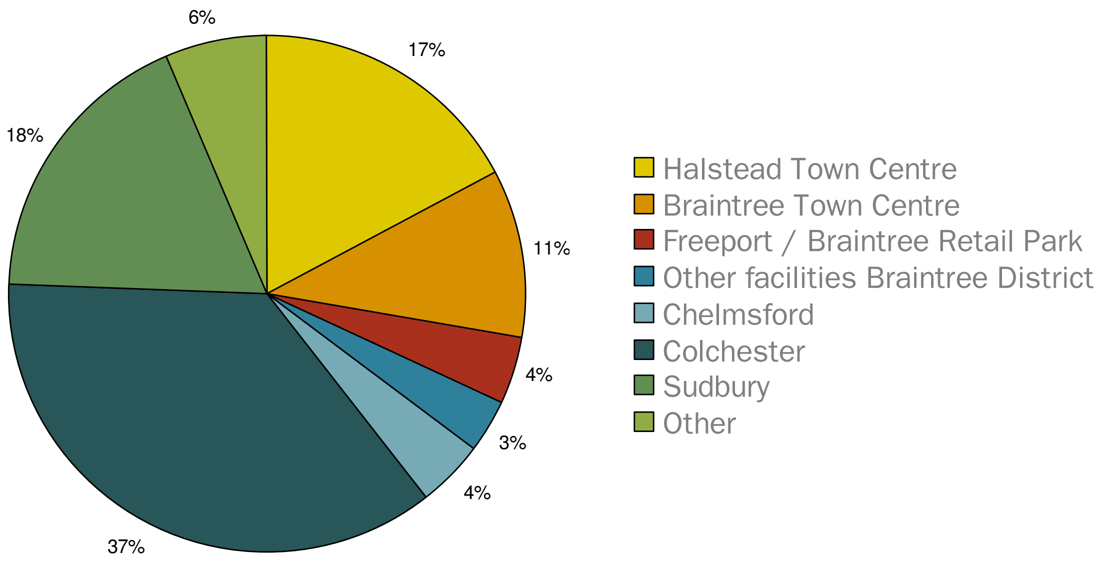
4.18 As demonstrated below, over half of respondents in the Witham zone undertake most of their non-food shopping in Chelmsford and a further 12% of respondents visit Colchester or other destinations outside the district. This indicates that there is significant flow of residents out of Witham, and indeed out of the district, to undertake non-food shopping.

Figure 4.6 Witham Zone - Non Food Shopping Destinations



4.19 The same trend is noticeable in Halstead, with a significant proportion of residents travelling outside of Halstead and the Braintree district to undertake their non-food shopping. Around 35% of respondents undertake most of their main food shopping at facilities within the Braintree district, with Halstead Town Centre being the most popular destination within the district for Halstead residents. The most frequented destinations by residents in the Halstead zone are, however, Colchester (36.1%) and Sudbury (18.1%).

Figure 4.7 Halstead Zone - Non Food Shopping Destinations



4.20 Across all the survey zones, 5.5% of respondents buy their non-food shopping on the internet or by mail order. The Great Notley and Great Dunmow zones have the highest proportion of respondents who buy most of their non-food shopping on the internet (8.0%).

Non-Food Shopping Destinations

The household survey asked specific questions to probe which destinations respondents last visited to undertake particular types of non-food shopping.

- **Clothing/footwear:** Chelmsford was the most popular destination in the study area for clothing/footwear shopping (21.1%), followed by Colchester (17.4%), Freeport Outlet Village (15.1%), Braintree (9.2%) and Internet/mail order (8.4%).
- **Furniture/Furnishings/Household Textiles**: the most popular destination was Colchester (18.2%), followed by the internet/mail order (16.0%), Chelmsford (8.6%) and Braintree and Tollgate Retail Park, Colchester (both 7.6%).
- **DIY and Decorating Goods:** the most popular destination in the study area respondents shop for DIY and decorating products was B&Q in Braintree (31.8% of all respondents), followed by Freeport Outlet Village (13.4%), B&Q Chelmsford (8.6%) and Colchester (5.9%). Only 0.7% of respondents buy DIY and decorating items on the internet/mail order.

- **Domestic electrical appliances**: the majority of respondents purchase domestic electrical appliances on the internet/mail order (22.0%), followed by Freeport Outlet Village (20.1%) and Tollgate Retail Park, Stanway, Colchester (12.0%).
- **Audio / visual goods** - The internet was also the most popular response as the location respondents last bought audio / visual electrical goods, such as TVs, Hi-Fis and computers, with 20.3% of all respondents, followed by Freeport Outlet Village (16.4%) and Tollgate Retail Park, Stanway, Colchester (10.8%).
- **Personal and Luxury Goods:** Again, the internet was the most popular destination (30.3%), followed by Chelmsford (15.6%), Braintree (14.2%) and Colchester (12.8%).

4.21 Table 4.5 shows the shopping destination(s) with the highest proportion of respondents for each comparison goods category in each zone (excluding internet shopping). This indicates broadly where people prefer to shop for each type of goods and allows comparison between each zone.

4.22 It can be seen from Table 4.5 that Freeport Outlet Village has been identified from the household survey zones as the most popular location within the Braintree and Halstead household survey zones to purchase domestic appliances and audio / visual goods. Given the range of retailers at Freeport, it is considered likely that some of these respondents were referring to the adjacent Braintree Retail Park when answering this question, as it can be perceived to form part of one complex with Freeport.

4.23 In terms of clothing / footwear shopping, the higher order centres of Chelmsford, Colchester and Cambridge are the most popular destination within all the zones. In respect of the other categories of goods, facilities in Braintree are primarily the most popular choice for residents in the Braintree area. The only exception being in the Great Notley zone where Chelmsford is the most popular destination to purchase furniture / carpets and personal / luxury goods, reflecting the location of Great Notley on a main vehicular route into Chelmsford.

4.24 The most frequently stated destinations by residents in Witham for all categories of goods are all located outside of the district in Chelmsford. This indicates the strong draw of Chelmsford to residents in Witham, despite the existence of retail warehousing facilities within the district in Braintree.

4.25 The comparison goods shopping patterns of residents in Halstead appear more varied with residents travelling to different locations depending on the category of good being purchased. Colchester is the most popular destination for 'non-bulky' goods such as clothing and personal goods, whilst with the exception of carpets / furniture, the most popular destinations for more bulky goods such as DIY products and domestic appliances are within the Braintree district.

Table 4.5: Destinations with Highest Proportion of Response

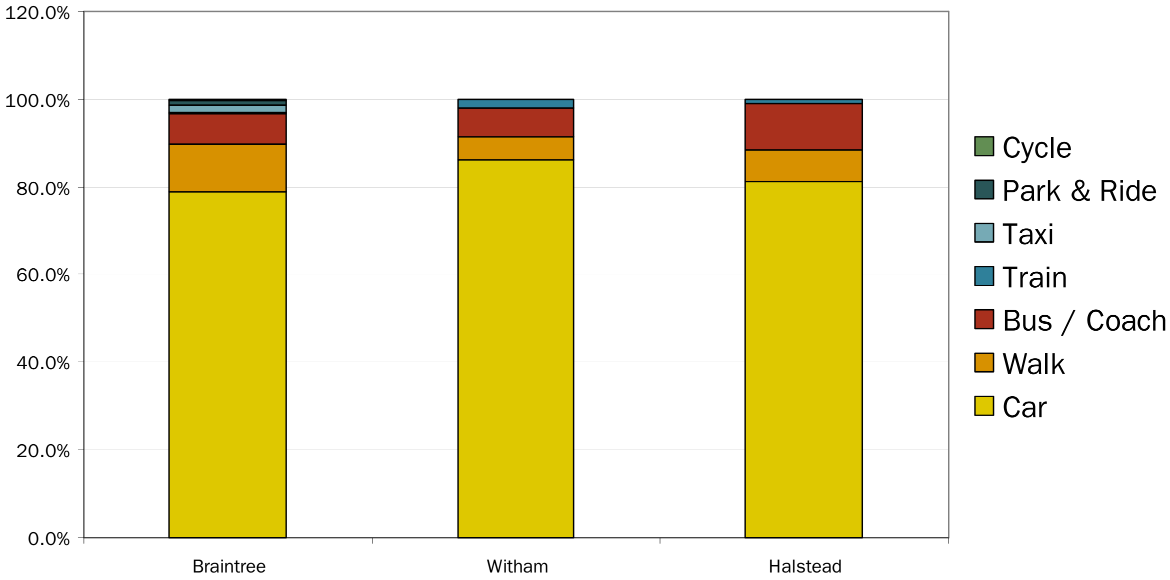
Zone	Haverhill/ Sudbury	Coggleshall	Halstead	Braintree West	Braintree East	Great Notley	Braintree Other	Great Dunmow	Witham	Kelvedon
Clothing / Footwear	Cambridge	Colchester	Colchester	Chelmsford	Chelmsford	Chelmsford	Chelmsford / Braintree	Chelmsford	Chelmsford	Colchester
Domestic Appliances	Sudbury	Tollgate R Park, Colchester	Halstead / Freeport Outlet	Freeport Outlet	Freeport Outlet	Freeport Outlet	Freeport Outlet	Chelmer Retail Park	Chelmer Retail Park	Tollgate R Park, Colchester
Audio / Visual Goods	Sudbury	Tollgate R Park, Colchester	Freeport Outlet	Freeport Outlet	Freeport Outlet	Freeport Outlet	Freeport Outlet	Chelmer Retail Park	Chelmer Retail Park	Tollgate R Park, Colchester
Furniture / Carpets	Cambridge	Colchester	Colchester	Braintree	Braintree	Chelmsford	Braintree / Colchester	Chelmsford	Chelmsford / Chelmer R Park	Colchester
DIY / Hardware	Sudbury	Colchester	B&Q Braintree	B&Q Braintree	B&Q Braintree	B&Q Braintree	B&Q Braintree	B&Q Braintree	B&Q Chelmsford	Colchester
Personal / Luxury Goods	Sudbury	Colchester	Colchester	Braintree	Braintree	Chelmsford	Braintree	Chelmsford	Chelmsford	Colchester

Source: NEMS Household Survey, July 2012

Mode of Travel for Non-Food Shopping

4.26 The predominant mode of travel for non-food shopping was the car (both driver and passenger) with 81.1% of respondents indicating that they use this form of travel. The second most popular mode of transport for travelling to non-food shopping destinations was by walking (7.5%) followed by bus/coach (7.4%).

Figure 4.8 Travel mode for non-food shopping in 3 main towns



4.27 Looking at travel patterns within the three main towns, it can be seen from the graph above that travel by car dominates the travel mode for non-food shopping. This is particularly the case from the Witham zone, which is likely to reflective of the fact that the most popular destinations for undertaking non-food shopping for residents in Witham is Chelmsford, outside the district.

Linked Trips

4.28 Respondents were also asked whether they undertook their non-food shopping as part of a linked trip with another activity. 48.9% of respondents confirmed that they did carry out any other form of activity. The most popular activity was eating / drinking out at the same time as non-food shopping (12.0%), followed by food shopping (9.6%) and visiting family and friends (9.0%).

Table 4.6 Linked Trips with Non-Food Shopping

	All Zones	Braintree	Witham	Halstead
Food shopping	16.1%	8.4%	9.8%	14.3%
Getting petrol	5.2%	7.2%	0.0%	10.7%

	All Zones	Braintree	Witham	Halstead
Financial services	9.4%	10.8%	11.8%	12.5%
Work	6.9%	6.0%	9.8%	5.4%
Other non- food shopping	8.8%	6.6%	3.9%	6.0%
Leisure activity	9.8%	13.2%	7.8%	5.4%
Eating/drinking out	20.1%	22.8%	27.5%	16.1%
Family/friends	15.1%	16.2%	21.6%	17.9%
Health services	3.8%	2.4%	3.9%	3.5%
Personal services	1.9%	2.4%	2.0%	1.8%
Window shopping	0.4%	1.2%	0.0%	0.0%
School/university	1.0%	0.0%	2.0%	0.0%

4.29 There is a good mix of linked trips occurring in association with non-food shopping trips to a variety of destinations. There does not appear to be any distinct patterns across the towns, and the nature of linked trips is likely to be dependent on the type of non-food shopping being undertaken. For example if residents are visiting higher order centres such as Chelmsford or Colchester there is likely to be more opportunity for linked trips than on retail parks.

4.30 It can, however, be seen from the table above that a significant proportion of residents in the Braintree (22.8%) and Witham zones (27.5%) link their non-food shopping trip with a visit to eating / drinking establishments. In Witham given the high levels of comparison shopping trips are undertaken outside the district in Chelmsford this indicates that leisure expenditure on food / drink is also leaking outside of the area.

Internet Shopping

4.31 Over 70% of respondents make use of electronic home shopping through the internet and respondents were asked what goods they regularly buy on the internet. The most popular response was books (43.4%) followed by clothes (35.6%), CDs, music, DVDs and games (33.2%), major electrical items (28.6%) and small electrical items (23.7%).

Conclusions

General Patterns

- The main foodstores dominate food shopping patterns across the district, being the most popular destinations for both main food and top up food shopping;
- For both food and non-food shopping, the car is the dominant travel mode by a significant margin;
- Around 60% of all food shopping trips and half of all non-food shopping trips are linked with another activity. The most popular associated trips for food shopping are non-food shopping, getting petrol and visiting financial services whilst the most popular linked activities with non-food shopping trips are eating / drinking at restaurants, food shopping and visiting friends / family. As such, and as expected, food shopping is generally more associated with essential or day to day tasks, while non-food shopping trips are more associated with leisure activities.

Braintree

- The majority of expenditure flows to convenience facilities within Braintree stem from the Braintree survey zone (Zone 12). Residents within the Braintree zone undertake the majority of their convenience shopping at facilities within Braintree. However, residents in the Halstead and Great Dunmow zones area also shop at foodstores in Braintree. Residents within the Braintree zone undertake the majority of their convenience shopping at facilities within Braintree;
- Around two thirds of residents in the Braintree zone undertake most of their household's non-food shopping at facilities in Braintree. The most popular destination outside of the district from Braintree residents is Chelmsford (20.2%) followed by Colchester (6.9%).
- Freeport Outlet Village / Braintree Retail Park are well used by residents in Braintree, and is the most popular location for purchasing bulky comparison good such as DIY / Hardware and domestic appliances.

Witham

- The main convenience provision within Witham - the Tesco foodstore in Witham Town Centre and out-of-centre Morrison's foodstores at Braintree Road - draw the majority of convenience expenditure from the Witham zone, at 34% and 31% of total expenditure respectively;
- Whilst Witham retains a significant proportion of convenience shopping trips, residents in Witham are primarily travelling to facilities in Chelmsford to undertaken comparison goods shopping, with destinations in Chelmsford the most stated for all comparison goods categories.

- Witham had the highest proportion of residents who link their non-food shopping trip with a visit to eating / drinking establishments. Given the high levels of comparison shopping trips undertaken outside the district this indicates that leisure expenditure on food / drink is also leaking outside of the area.

Halstead

- In the Halstead zone residents are undertaking their main food shopping at a number of locations. The most popular facility for main food shopping is Tesco, Marks Farm, in Braintree, which represents leakage outside the area. Leakage is also occurring to foodstores in Sudbury (18%);
- the most popular foodstore within Halstead used by residents in this zone are the Co-op (Solar) and Sainsbury's in Halstead Town Centre which capture 21% and 19% of total Halstead convenience goods expenditure respectively;
- a significant proportion of residents travelling outside of Halstead and the Braintree district to undertake their non-food shopping. Around 35% of respondents undertake most of their main food shopping at facilities within the Braintree district;
- the most popular locations for comparison goods shopping for residents in the Halstead zone are dependent on the type of good purchased. Colchester is the most popular location for clothing/footwear, furniture/carpets and personal / luxury goods, either Halstead or Freeport Outlet Village for domestic appliances, Freeport for audio/visual goods and B&Q Braintree for DIY/hardware products.

HOUSEHOLD SURVEY QUESTIONS

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

Aldi, Springfield Road, Chelmsford
Aldi, Haverhill
Aldi, Sudbury
Asda, Chelmer Village, Chelmsford
Asda, Colchester
Asda, Heybridge
Asda, South Woodham Ferrers
Asda, Witham
Co-op, Boreham
Co-op (East of England), Coggleshall
Co-op (East of England), Abbots Road, Colchester
Co-op (East of England), Stanway, Colchester
Co-op, Dunmow
Co-op (East of England), Earls Colne
Co-op, Great Bardfield
Co-op (Solar) Halstead
Co-op (East of England), Parkfields, Halstead
Co-op (East of England), Hatfield Peverel
Co-op, Haverhill
Co-op (East of England), Kelvedon
Co-op (East of England), Long Melford, Sudbury
Co-op (East of England), Sible Hedingham
Co-op (East of England), Silver End
Co-op, East Street, Sudbury
Co-op (East of England), The Drift, Sudbury
Co-op (East of England), Tiptree
Co-op (East of England), Spa Road, Witham
Co-op (East of England), Lynfield Motors (A12), Witham
Costcutter, Haverhill
Costcutter, Thaxted
Costcutter, Dorothy Sayers Drive, Witham
Farmfoods, Witham
Farmfoods, Chelmsford
Farmfoods, Sudbury
Iceland, Bank Street, Braintree
Iceland, Witham
Iceland, Springfield Road, Chelmsford
Iceland, St John's Walk, Colchester
Iceland, Tollgate Centre, Colchester
Iceland, Maldon
Lidl, Rayne Road, Braintree
Lidl, Chelmsford
Lidl, Colchester
Lidl, Sudbury
Londis, Felsted
Londis, Kelvedon
Londis, Sible Hedingham
Marks & Spencer, Bishops Stortford
Marks & Spencer Simply Food, Boreham
Marks & Spencer Simply Food, Duke Street, Chelmsford
Marks & Spencer, Chelmsford Town Centre
Marks & Spencer, Colchester
Marks & Spencer Simply Food, Maldon
Marks & Spencer Simply Food, Sudbury
Morrisons, George Yard, Braintree
Morrisons, Melbourne, Chelmsford

Morrisons, Maldon
Morrisons, Witham
One Stop, Springfield, Chelmsford
One Stop, Kelvedon
One Stop, Wickham Bishops
One Stop, Great Dunmow
Premier Convenience Store, Cross Road, Witham
Premier Convenience Store, Hatfield Peverel
Premier Convenience Store, Cressing
Roys Wroxham, Great Dunmow
Sainsbury's, Tofts Walk, Braintree
Sainsbury's, Jackson Square, Bishops Stortford
Sainsbury's. Thorley Centre, Bishops Stortford
Sainsbury's, Springfield, Chelmsford
Sainsbury's, Priory Walk, Colchester
Sainsbury's. Stanway, Colchester
Sainsbury's, Haverhill
Sainsbury's, Maldon
Spar, Rayne Road, Braintree
Spar, Laurence Avenue, Witham
Tesco, Bishops Stortford
Tesco, Marks Gate (Marks Farm), Braintree
Tesco, Market Place, Braintree
Tesco, Princes Road, Chelmsford
Tesco, Springfield Road, Chelmsford
Tesco, Greenstead Road, Colchester
Tesco, Dunmow
Tesco, Great Notley
Tesco, Maldon
Tesco, Saffron Walden
Tesco, Sudbury
Tesco, Tiptree
Tesco, Witham
Waitrose, Bishops Stortford
Waitrose, Saffron Walden
Waitrose, Sudbury
Welcome (Co-op), Panfield Lane, Braintree
Local Shops, Braintree Town Centre
Local Shops, Chelmsford Town Centre
Local Shops, Chelmer Village Neighbourhood Centre
Local Shops, Coggeshall Local Centre
Local Shops, Colchester Town Centre
Local Shops, Earls Colne Local Centre
Local Shops, Great Dunmow Town Centre
Local Shops, Great Notley District Centre
Local Shops, Halstead Town Centre
Local Shops, Hatfield Peverel Local Centre
Local Shops, Heybridge District Centre
Local Shops, Kelvedon Local Centre
Local Shops, Maldon Town Centre
Local Shops, Saffron Waldon Town Centre
Local Shops, Sible Hedingham Local Centre
Local Shops, Silver End Local Centre
Local Shops, Sudbury Town Centre
Local Shops, Tiptree District Centre
Local Shops, Wickham Bishops Village Centre
Local Shops, Witham Town Centre
Local Market
Internet / home delivery

Other (Please state)
Don't know / varies

2 From which food retailer do you normally buy your main food goods when shopping on-line?
Those who use the internet at Q01
Asda
Iceland
Marks and Spencer
Morrison’s
Sainsbury’s
Tesco
Waitrose / Ocado
Other

3 What is the main reason you choose (STORE/CENTRE MENTIONED AT Q01) to do your main food and grocery shopping?
Café / restaurant
Convenient to home
Convenient to work
Delivery service
Easy to get to
Ethical supplier
Good / cheap parking
Good bus service
Good internal layout
Good opening hours
Good place to meet friends / family
Good service / friendly staff
Habit / always used it
Has petrol station
Larger store
Lower prices
Offers internet shopping / home delivery
Only one in the area / no other choice
Other shops/services nearby / convenient
Preference for retailer
Quality of goods
Range of goods available
Rewards scheme
Sells clothing
Staff discount
To support local traders
Value for money
Other
(No reason in particular)
(Don't know)

4 How do you normally travel to…? (Store/destination mentioned at Q01 and those who don't use the internet)
Car / van (as driver)
Car / van (as passenger)
Bus, minibus or coach
Motorcycle, scooter or moped
Walk
Taxi
Train
Bicycle
Mobility scooter

Other
(Do not travel, goods delivered)
(Don’t know / varies)

5 When you go shopping for main food goods, do you link this trip with another activity? [THOSE WHO DON'T USE THE INTERNET AT Q1]
Yes - travelling to/from work
Yes - travelling to / from school / college / university
Yes - non-food shopping
Yes - other food shopping
Yes - leisure activity
Yes - visiting services such as banks and other financial institutions
Yes - Other
No
(Don’t know)

6 Now thinking about your last Main food and grocery shopping trip to (STORE/CENTRE MENTIONED AT Q01) Where did that trip start?
Home
Work
Friend/Relatives house
Leisure facility - inc Church
Another store/service - inc Bank / Post office
University / College / School
Internet / Home Delivery
(Don't know / cant remember)
Other

7 Where did the trip end?
Home
Work
Friend/Relatives house
Leisure facility - inc Church
Another store/service - inc Bank / Post office
Internet / Home Delivery
(Don't know / cant remember)

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

[SAME ANSWER LIST AS Q1]

9 How often do you usually undertake your main food / grocery shopping trip?
Daily
Two or more times a week
At least once a week
At least once a fortnight
At least once a month
At least every two months
Less often
Have only visited once
(Don’t know / varies / no particular pattern)

10 Do you make small-scale/'top up' shopping trips for basic food goods, such as bread and milk, in between your main food shopping trip?
Yes
No

11 In which store or shop do you buy most of this small scale/ 'top-up' shopping?

[SAME ANSWER LIST AS Q1]

12 In which town or centre do you buy most of your household's non-food shopping?
Braintree Town Centre
Chelmsford City Centre
Chelmer Village Neighbourhood Centre
Coggeshall Local Centre
Colchester Town Centre
Earls Colne Town Centre
Great Dunmow Town Centre
Halstead Town Centre
Hatfield Peverel Local Centre
Heybridge District Centre
Kelvedon Local Centre
Maldon Town Centre
Saffron Walden Town Centre
Sible Hedingham Local Centre
Silver End Local Centre
Sudbury Town Centre
Tiptree District Centre
Wickham Bishops Village Centre
Witham Town Centre
Freeport Outlet Shopping Village
Lakeside Shopping Centre, Thurrock
Bluewater Shopping Centre
Westfield Centre, Stratford (London)
London
Braintree Retail Park, Braintree
Chelmer Village Retail Park, Chelmsford
Riverside Retail Park, Chelmsford
Tollgate Retail Park, Stanway, Colchester
Turner Rise Retail Park, Colchester
Colchester Retail Park, Colchester
Shawlands Retail Park, Sudbury
Sudbury Retail Park, Sudbury
Asda, Chelmer Village, Chelmsford
Asda, Colchester
Asda, South Woodham Ferrers
B&Q Braintree
B&Q Chelmsford
B&Q Colchester
B&Q Sudbury
Homebase Chelmsford
Homebase, St Andrew's Ave, Colchester
Homebase, Stanway, Colchester
Homebase, Sudbury
Morrisons, Maldon
Morrisons, Witham
Sainsbury's, Jackson Square, Bishops Stortford
Sainsbury's. Thorley Centre, Bishops Stortford
Sainsbury's, Springfield, Chelmsford
Sainsbury's, Priory Walk, Colchester

Sainsbury's. Stanway, Colchester
Sainsbury's, Haverhill
Sainsbury's, Maldon
Tesco, Bishops Stortford
Tesco, Marks Gate, Braintree
Tesco, Market Place, Braintree
Tesco, Princes Road, Chelmsford
Tesco, Springfield Road, Chelmsford
Tesco, Greenstead Road, Colchester
Tesco, Dunmow
Tesco, Great Notley
Tesco, Maldon
Tesco, Saffron Walden
Tesco, Sudbury
Tesco, Tiptree
Tesco, Witham
Wickes, Braintree
Wickes, Chelmsford
Wickes, Colchester
Wickes, Maldon

13 What are your main reasons for visiting (LOCATION MENTIONED AT Q14)
Accessibility by public transport
Car parking prices
Car parking provision
Choice of non food goods available
Choice of shops nearby selling food goods
Choice of shops selling non food goods
Cleanliness
Habit / always use it / preference for retailer
Lower prices
Near to home
Near to work
Provision of leisure facilities nearby
Provision of services nearby, such as banks and other financial services
Public information, signposts and public facilities
Quality of non food goods available
Quality of shops selling non food goods
Shopping environment
Staff discount / work there
Value for money
Close to family / friends
Convenient/easy to get to
Delivery service
For a day out
Free parking
Good bus service
Has a good market
Rewards scheme
To support local traders
Other
(Don’t know)
(No reason in particular)

14 How do you normally travel to...? (LOCATION MENTIONED AT Q14)
Car / van (as driver)
Car / van (as passenger)
Bus, minibus or coach
Motorcycle, scooter or moped
Walk
Taxi
Train
Bicycle
Mobility scooter
Other
(Do not travel, goods delivered)
(Don't know / varies)

15 When you go shopping for non-food goods, do you link this trip with another activity?
Yes - travelling to / from work
Yes - travelling to / from school / college / university
Yes - other non-food shopping
Yes - other food shopping
Yes - leisure activity
Yes - visiting services such as banks and other financial institutions
Yes - Other
No
(Don't know)

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

[SAME ANSWER LIST AS Q12]

16A Do you mean Braintree town centre or Braintree factory Outlet Village (Freeport)? THOSE WHO MENTIONED BRAINTREE AT Q. 16
Braintree town centre
Braintree factory outlet (Freeport)
Don't know

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

[SAME ANSWER LIST AS Q12]

17A Do you mean Braintree town centre or Braintree factory Outlet Village (Freeport)? THOSE WHO MENTIONED BRAINTREE AT Q. 17
Braintree town centre
Braintree factory outlet (Freeport)
Don't know

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

[SAME ANSWER LIST AS Q12]

18A Do you mean Braintree town centre or Braintree factory Outlet Village (Freeport)? THOSE WHO MENTIONED BRAINTREE AT Q. 18
Braintree town centre
Braintree factory outlet (Freeport)
Don't know

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

[SAME ANSWER LIST AS Q12]

19A Do you mean Braintree town centre or Braintree factory Outlet Village (Freeport)? THOSE WHO MENTIONED BRAINTREE AT Q. 19
Braintree town centre
Braintree factory outlet (Freeport)
Don't know

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

[SAME ANSWER LIST AS Q12]

20A Do you mean Braintree town centre or Braintree factory Outlet Village (Freeport)? THOSE WHO MENTIONED BRAINTREE AT Q. 20
Braintree town centre
Braintree factory outlet (Freeport)
Don't know

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

[SAME ANSWER LIST AS Q12]

21A Do you mean Braintree town centre or Braintree factory Outlet Village (Freeport)? THOSE WHO MENTIONED BRAINTREE AT Q. 21
Braintree town centre
Braintree factory outlet (Freeport)
Don't know

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

[SAME ANSWER LIST AS Q12]

22A Do you mean Braintree town centre or Braintree factory Outlet Village (Freeport)? THOSE WHO MENTIONED BRAINTREE AT Q. 22
Braintree town centre
Braintree factory outlet (Freeport)
Don't know

23 Do the people who live in your house, including you, make use of electronic home shopping (i.e. Internet or TV Shopping)?
Yes, Internet
Yes, TV Shopping
Yes, both
No

24 Which goods or services does your household currently purchase via electronic home shopping, or might you purchase in the future? [THOSE WHO SAID YES AT Q23]
Banking
Books
CDs, music, videos
Clothes
DIY goods
Food
Furniture / Carpets

Garden items
Health / beauty and chemists
Holiday and / or Travel Tickets
Jewellery
Major electrical items
Small electrical items
Small household goods
Sports goods
Toys
Collectables / ornaments
Computer games
Concert Tickets
Footwear
Gifts
Hobby / Craft items
Insurance
Musical instruments
Pet products
Printer cartridges
Vehicle parts
Vehicles
Other
(Don't know)

GEN Gender of respondent
Male
Female

AGE For the purposes of the survey, could I ask how old are you please?
18-24 years
25-34 years
35-44 years
45-54 years
55-64 years
65 plus
(Refused)

ETH For the purposes of the survey, could I ask what ethnicity you consider yourself to be?
White
Indian
Pakistani
Bangladeshi
Other Asian
Black Caribbean
Black African
Other Black
Chinese
Other ethnic group
Mixed Race
(Refused)

ADU How many adults, including yourself, live in your household (16 years and above)?
One
Two
Three
Four
Five
Six or more
(Refused)

CHI How many children live in your household, aged 15 years and under?
None
One
Two
Three
Four
Five
Six or more
(Refused)

CAR How many cars does your household own or have the use of?
None
One
Two
Three or more
(Refused)

SEG Socio-economic group
A
B
C1
C2
D
E
(Refused)

Appendix 5 In-Centre Survey

5.0 In-Centre Survey

Method & Sampling

5.1 NEMS Market Research carried out a street survey of 400 visitors in July and August 2012, with 100 interviews in each of the three main shopping centres of Braintree, Witham and Halstead, and 100 interviews in Freeport Outlet Village. The surveys were undertaken at the following locations across the centres:

- **Braintree:** Junction of Great Square and George Yard (49 surveys) and Market Place (51 surveys);
- **Witham:** Newland Street nr Boots (47 surveys) and Newland Street nr HSBC / Barclays (53 surveys);
- **Halstead:** High Street nr Sainsbury's (52 surveys) and High Street nr Co-op (48 surveys)**;** and
- **Freeport:** Centre entrance nr Moss Hire (51 surveys) and Centre entrance nr Card Factory (49 surveys).

5.2 The survey was undertaken to provide information on the role each town centre plays, and the reasons why visitors come to each centre. Visitors were also asked a range of questions relating to their use of the centre and their views on how the centres could be improved. These results have provided valuable information, which has been used in the town centre health checks undertaken in this study. The respondents were asked:

a the purpose of their visit;

b what else they will be doing that day;

c whether they intend to do any shopping;

d what they intended to buy;

e how much they would spend in the centre;

f how they travelled to the centre;

g how long they intended to stay in the centre;

h how often they visit the centre;

i reasons for visiting the centre;

j likes and dislikes about the centre;

k what improvements they would like to see; and

l awareness of the "Backing Braintree/Witham" parking initiative.

5.3 The questions asked for Freeport Outlet Village differed slightly to the town centre in-centre surveys given the different nature and composition of uses in the Outlet Village. At Freeport, respondents were asked a different question in relation to purposes of visits and were not asked any questions in relation to food shopping expenditure. Respondents were also asked:

a Whether they visited Freeport to for most of their clothes and footwear shopping, and if not, where they undertook most of this shopping

b Whether they ever linked a visit to Freeport with a trip to the town centre, and if so how frequently, and why they did or did not undertake a linked trip

c Whether they linked a trip to Freeport with a visit to other destinations such as leisure facilities or other retail destinations, and if so where

5.4 Where possible the questions asked for both the town centre and in-centre surveys replicate those used in the in-centre surveys undertaken in Braintree Town Centre and Freeport Outlet Village for the 2006 North Essex Retail Study.

5.5 The in-centre survey results are not directly comparable with the household survey. The in-centre surveys were undertaken during the daytime and interviews were conducted in the main shopping areas and therefore the results may overstate the importance of shopping and understate other reasons for visiting the town centres.

Main Purpose of Visit to the Town Centres

5.6 The main purpose for visiting the three town centres of Braintree (27%), Witham (27%) and Halstead Town Centres (51%) was to undertake food shopping. Braintree had the highest proportion of the main purpose of the visit for non-food shopping (21%), whilst Witham had the highest proportion of respondents using the centre for browsing (21%). Freeport Outlet Village is not included within this table as respondents were not asked their reason for visit given it is a comparison goods shopping destination and does not contain the range of town centre uses.

Table 5.1 Reason for Visit

Reason for Visit	% Respondents in Each Town Centre		
	Braintree	Halstead	Witham
Food Shopping	27%	51%	27%
Browsing	12%	4%	21%
Eating or Drinking Out	5%	2%	4%
Education	0%	0%	0%
Financial Services	6%	12%	18%
Health & Fitness / Gym	0%	0%	0%
Health	1%	2%	0%
Leisure	1%	1%	1%
Non-food shopping	21%	8%	16%
Personal Services	5%	4%	3%
Other Services	7%	1%	0%

Reason for Visit	% Respondents in Each Town Centre		
	Braintree	Halstead	Witham
Socialising	2%	2%	0%
Specific Shop	3%	5%	2%
Tourism / sight-seeing	1%	5%	0%
Work / business	1%	1%	4%
Other	8%	2%	2%
Don't Know	0%	0%	2%

Source: Question 2, NEMS Town Centre Survey, July / August 2012

5.7 Compared with the 2006 in-centre survey in Braintree Town Centre, the proportion of respondents visiting the centre for food and non-food shopping has increased since 2006. This has been offset by a significant reduction in people visiting the centre to access financial services - down from 15% in 2006 to 6% in the 2012 surveys.

Other Purpose of Visit

5.8 Respondents were asked what else they would be doing in the town centre, aside from the main purpose of their visit. In each centre, the most common response (31%) was that they would be doing nothing other than the main purpose for their visit. The next most popular responses in Braintree were to undertake food shopping (26%) and non-food shopping (20%). In Witham, the next most popular responses were shopping for food (16%) and shopping for non-food items and browsing (both 13%). In Halstead, the next most popular response was also to undertake food shopping (21%), followed by non-food shopping (19.0%).

Intended Visitor Purchases

5.9 Some 67% of those respondents who intended to purchase goods during their visit intended to buy food and grocery items. This figure was highest in Halstead (73%) and lowest in Braintree with 63% of respondents, although Witham was only marginally higher at 64%. The intended purchases of respondents are shown in Table 5.2.

Table 5.2 Intended Purchases

Intended Purchases	% Respondents in Each Centre			
	Braintree	Halstead	Witham	Freeport
Food / groceries / off-licence sales	62.8%	72.8%	64.4%	0.0%
Chemist Goods	5.8%	7.6%	11.0%	0.0%
Clothes and Shoes	11.6%	5.4%	21.9%	57.1%
Electrical Goods	1.2%	1.1%	1.4%	2.5%

Intended Purchases	% Respondents in Each Centre			
	Braintree	Halstead	Witham	Freeport
Food / Drink at restaurants / cafes	16.3%	16.3%	15.1%	13.5%
Furniture / furnishings	1.2%	1.1%	1.4%	1.7%
Household goods / hardware	11.6%	8.7%	2.7%	8.4%
Leisure goods (i.e. sportswear / gifts / toys / books)	3.5%	4.4%	0.0%	15.1%
Newspapers / magazines	10.5%	5.4%	2.7%	0.0%
Other Non-food	19.8%	15.2%	8.2%	1.2%
Services (hairdressers / dry cleaners)	4.7%	3.3%	0.0%	0.0%
Greetings Cards	1.2%	3.3%	1.4%	0.0%

Source: Question 4, NEMS Town Centre and Freeport Surveys, July August 2012.

N.B - May not sum to 100% as more than one response may be given

5.10 In all three town centres, most people intended to buy food and groceries. 'Other non-food' items were the second most popular response in Braintree, followed by food / drink at restaurants / cafes. In Halstead meanwhile the second most popular response was food and drink at restaurants (16%) followed by other non-food. For those who intending to make a purchase in Witham, after food and groceries, clothes and shoes were the next most popular response (22%), followed by food and drink in restaurants (15%).

5.11 The above table excludes those respondents who did not intend on purchasing anything and it should be noted that a significant proportion of respondents in Witham Town Centre (25%) did not intend to purchase any items, whilst this figure was 15% for Braintree and 9% in Halstead. For Braintree, the proportion of respondents not intending to purchase anything remains broadly unchanged since 2006.

5.12 In Freeport meanwhile, given the absence of any foodstores in the centre or personal services (i.e. hairdressers / dry cleaners), none of the respondents intended to purchase these goods / services. The majority of respondents intended to purchase clothes and shoes (57.1%), with leisure goods (15.3%) and food / drink at restaurants / cafes (13.4%) the next most popular purchases. 12% of respondents were not intending to purchase anything whilst at Freeport, which is 50% higher than when the survey was undertaken in 2006. Comparison with the 2006 surveys shows that the number of respondents who intend to purchase leisure goods has increased significantly from 4% to 15%, whilst spending at restaurants / cafes has fallen slightly.

5.13 Respondents in Freeport were also asked whether they visit the centre for most of their household's clothing and footwear shopping. 26% of respondents answered positively to this question, an increase of 14% from the 2006 surveys. Of those that do not undertake most of their household's clothing and footwear at Freeport, Cambridge and Chelmsford were the 2 most popular destinations to undertake this type of shopping. This is a slight variation from the 2006 surveys, where Colchester rather than Cambridge was identified as a popular destination.

Expenditure During Visit

5.14 Visitors were asked to estimate how much they would spend during their visit to the centres. The results for the town centres are shown in Table 3 (Food & Grocery) and 4 (Non-food items). Freeport is not included in these tables, as respondents were not asked to quantify their expenditure on food and grocery items due to the absence of any foodstores in the centre. Instead respondents were asked to quantify how much they spent on different categories of non-food items. The results of these questions are provided further below.

5.15 The average spend is highest in Witham Town Centre (£24.00), followed by Braintree (£21.69) and then Halstead (£17.95). However, the average spend on food and groceries in all the centres is low, with 85% of respondents across all three town centres spending less than £50 on food shopping.

Table 5.3 Food and Grocery Expenditure within the centres

Food and Grocery Expenditure	% Respondents in Each Centre		
	Braintree	**Halstead**	**Witham**
Nothing	31%	22%	33%
£5.00 or less	11%	22%	14%
£6-£10	16%	19%	8%
£11-£15	6%	2%	6%
£16-£20	12%	12%	9%
£21-£30	8%	9%	10%
£31-£50	7%	11%	10%
£51-£75	4%	2%	3%
£76-£100	3%	0%	0%
£101-£200	0%	1%	2%
£200 +	0%	0%	0%
Don't know/refused	2%	0%	5%
Average per visitor (£)	**£21.69**	**£17.95**	**£24.00**

Source: Question 5, NEMS Town Centre Survey, July / August 2012

5.16 Referring back to the previous 2006 survey in Braintree Town Centre, this identified that over 11% of people anticipated spending over £50 on food / groceries during their visit. The current survey identifies that this has reduced to just 7% of respondents in Braintree Town Centre would be spending over £50.

5.17 Looking at non-food shopping expenditure, the average non-food spend in all three town centres was reasonably low. Witham respondents spent on average £22.20 whilst Braintree and Halstead respondents spent just £13.70 and £12.25 respectively. Indeed, around 45% of respondents in all the town centres did not intend to spend any money on non-food products whilst in the town centre.

Table 5.4 Non-Food Expenditure

Non Food Expenditure	% Respondents in Each Centre		
	Braintree	Halsted	Witham
Nothing	44%	46%	45%
£5 or less	14%	24%	10%
£6-£10	16%	12%	5%
£11-£15	4%	3%	3%
£16-£20	10%	3%	3%
£21-£30	4%	6%	9%
£31-£50	6%	3%	5%
£51-£75	0%	2%	3%
£76-£100	0%	0%	1%
£101-£200	0%	0%	0%
£200+	0%	0%	0%
Don't know/refused	2%	1%	16%
Average per visitor (£)	**£13.70**	**£12.25**	**£22.23**

Source: Question 6, NEMS Town Centre Survey, July / August 2012

5.18 As with intended spending on food shopping, the planned spending of respondents in Braintree Town Centre on non-food shopping as fallen since 2006. The previous surveys identified that 38.9% of respondents planned on spending over £20 on non-food items during their visit to the centre, this has now fallen to just 10% of respondents.

Mode of Travel

5.19 Walking and by car were the two most popular methods of travelling to all three town centres. Between 36.0%-41.0% of respondents travelled to the town centres by foot suggesting that these centres have a relatively localised catchment areas.

5.20 The highest patronage of public transport into the centre was identified in Braintree, with 16% of respondents travelling to the centre by bus and a slightly lower proportion of respondents travelling by foot than the other town centres (36.0%). However the proportion travelling by both bus and on foot into Braintree Town Centre has increased since the 2006 surveys. This has been offset by a reduction in car travel to the town centre from 55.2% in 2006 to 47.0% in 2012.

5.21 The in-centre surveys suggest a higher proportion of visitors walk to the town centres, and a lower proportion travel by car than the household survey results, which may be explained by the higher frequency of trips made to the town centres on foot, i.e. frequent day to day trips to the town centre are more likely to be made on foot, whilst more infrequent shopping trips (eg. bulk food shopping) are made predominantly by car.

5.22 At Freeport Outlet Village meanwhile, the vast majority of respondents (92%) travel to the centre by car, with just 1% of respondents arriving at the centre by foot. It is notable that just 5% of respondents travelled by public transport and none by train, despite the close proximity of the Freeport train station and bus interchange. This is, however, a reduction in car use from the 2006 surveys, when 97% of shoppers travelled to the Outlet Village by car and just 3% used public transport.

Table 5.5 Mode of Travel

Mode of Travel	% Respondents in Each Centre			
	Braintree	Halstead	Witham	Freeport
Car	47%	53%	46%	92%
Bus	16%	3%	10%	5%
Train	0%	0%	2%	0%
Taxi	0%	0%	2%	1%
Walk	36%	41%	38%	1%
Cycle	1%	2%	2%	1%
Motorcycle	0%	0%	0%	0%
Other	0%	1%	0%	0%

Source: Question 7 NEMS Town Centre Survey & Question 12 NEMS Freeport Survey, July / August 2012

Duration of Visit

5.23 Table 5.6 shows the time visitors intended to spend in each centre. The highest proportion of people in Braintree and Witham spent between 30 minutess and an hour in the centre, whilst in Halstead the highest proportion of respondents spent less than 30 minutes in the centre.

5.24 In terms of the town centres, respondents spent the longest time on average in Braintree (75 minutes) and the least amount of time in Halstead (59 minutes). The average length of stay appears to be closely linked with the range and choice of shops and services available within each town centre, ie. the more facilities the longer customers tend to stay.

5.25 Looking at Freeport Outlet Village, respondents spend on average longer in this Outlet Village (89 minutes average), than the town centres with 29% of respondents spending over 2 hours in the centre, compared to 18% of respondents in Braintree and just 12% and 9% in Halstead and Witham respectively. Compared to the 2006 in-centre surveys, this indicates a reduction in the average time spent in Freeport as back in 2006, 41% of respondents spent over 2 hours in the centre.

Table 5.6 Duration of Visit

Time	% Respondents in Each Centre			
	Braintree	Halstead	Witham	Freeport
Less than 30mins	13%	34%	21%	14%
30-59 mins	33%	29%	36%	29%
1hr - 1hr 29mins	24%	17%	22%	19%
1hr 30mins - 1hr 59mins	11%	8%	9%	8%
2hrs - 2hrs 29mins	10%	7%	5%	19%
2hrs 30mins - 2hrs 59mins	5%	1%	0%	3%
3hrs - 3hrs 59mins	2%	1%	3%	3%
4hrs or more	1%	3%	1%	4%
Don't know	1%	0%	3%	1%

Source: Question 10 NEMS Town Centre Survey & Question 2 Freeport Survey, July / August 2012

Frequency of Visits

5.26 Respondents were asked how often they visit the town centres for a variety of activities, including for shopping and services, as shown in Tables 5.7 and 5.8. For shopping, in Braintree (38%) and Witham (37%) the greatest frequency of visit is 2-3 times a week, whilst in Halstead the greatest frequency of visit was everyday (36%).

5.27 Again Freeport is not included within the tables illustrating the responses to these questions as respondents at Freeport were asked a slightly different question to the town centre respondents and the answers cannot be directly compared.

Table 5.7 Frequency of Visit - Shopping

Frequency of Visit for Shopping	% Respondents in Each Centre		
	Braintree	Halstead	Witham
Every day	16%	36%	17%
2-3 times a week	38%	28%	37%
Once a week	29%	2%	27%
Once a fortnight	7%	4%	7%
Once a month	5%	5%	4%

Frequency of Visit for Shopping	% Respondents in Each Centre		
	Braintree	Halstead	Witham
Less than once a month	4%	5%	6%
Never	1%	2%	20%

Source: Q11 NEMS Town Centre Survey, July/August 2012

5.28 In Braintree Town Centre, these survey results indicate that since the last surveys were undertaken in 2006, the frequency of visits to the town centre has remained relatively constant, with around the same proportion of respondents visiting the centre twice a week or more (54.0% of respondents compared to 55.7%).

5.29 In terms of frequency of visit to the town centres to visit service uses (Table 5.8) respondents visit the centre less frequently to access service facilities than for shopping. The highest proportion of respondents in each centre uses services in the centre once a week, with only between 5%-7% of respondents visiting the centre every day to undertake service activities.

Table 5.8 Frequency of Visit - Services

Frequency of Visit for Services	% Respondents in Each Centre		
	Braintree	Halstead	Witham
Every day	7%	7%	5%
2-3 times a week	6%	13%	17%
Once a week	40%	34%	44%
Once a fortnight	13%	16%	13%
Once a month	14%	15%	5%
Less than once a month	8%	5%	9%
Never	12%	10%	7%

Source: Q11 NEMS Town Centre Survey, July/August 2012

5.30 For Freeport, given that this centre is predominately a comparison good shopping location, respondents were asked a general question of how frequently they visit the centre. The survey results show that Freeport is visited less frequently than the three town centres, with only 10% of respondents visiting once a week or more. The majority of respondents visit less than once a month (55%). Unlike the duration of visit, the frequency of visit to Freeport appears to have also increased since the 2006 surveys were carried out. In 2006, 8% of respondents visited the centre at least once a week, compared to 10% now.

Likes/Dislikes and Improvements to Centre

5.31 Respondents were asked what they liked and disliked about the town centre or Freeport Outlet Village. Tables 5.9 and 5.10 below set out the most popular responses given as to what people liked and disliked about the centre in which they were interviewed.

Table 5.9 Likes about Centre

Characteristic	% of Visitors	Main Centres Where Mentioned
Easily accessible from home	37.3%	Witham (42%), Halstead (34%)
Nothing / very little	25.3%	Braintree (34%)
Good shops	23.7%	Freeport (25%), Braintree (19%), Halstead (17%)
Attractive environment /nice place	15.0%	Halstead (19%), Freeport (14%)
Easy to park	12.3%	Freeport (22%)
Good Value for money	10.3%	Freeport (29%)
Not too busy	10.3%	Freeport (14%), Witham (9%)
Particular shops / service	7.7%	Halstead (11%)
Friendly atmosphere	7.0%	Halstead (13%)
Good character / history	6.0%	Halstead (12%)
Flowers	6.0%	Halstead (17%)
Good range of services	4.7%	Halstead (6%)
Small / compact	4.0%	Halstead (6%)

Source: Question 13 NEMS Town Centre survey and Question 7 NEMS Freeport survey, July / August 2012

5.32 The most popular response across all the surveys was that the centre was easily accessible from home, with respondents in Witham and Halstead in particular highlighting this was a positive attribute of the centre. In Braintree meanwhile, the most popular response (34%) was that was nothing or very little about the centre which they liked. This is an increase from 2006 when 24% respondents declared there was nothing they liked about the centre, potentially suggesting higher levels of dissatisfaction in the town centre.

5.33 At Freeport, the most popular response was good value for money, which reflects the nature of this centre as an Outlet Village. The next most given positive attributes at Freeport were ‘good shops’ (25%) and easy to park (22%). Whilst the proportion of respondents stating each reason has varied slightly since 2006, there is no marked change in the factors that respondent like about the centre.

Table 5.10 Dislikes about centre

Characteristic	% of Visitors	Main Centres Where Mentioned
Nothing / very little	42.0%	Freeport (42%), Braintree (34%)
Poor range of non-food retail retailers	36.7%	Witham (41%), Braintree (33%)
Particular shops / services missing	15.7%	Braintree (15.0%), Halstead (12%), Witham (12%)
Too many empty shops	15.0%	Halstead (23%)
Too many charity shops	8.0%	Braintree (14%)
Traffic Congestion	6.7%	Halstead (15%)
Poor range of food retailers	5.3%	Witham (7%)
Lack of culture / atmosphere	4.7%	Witham (6%)

Source: Question 14 NEMS Town Centre survey and Question 8 NEMS Freeport survey, July / August 2012

5.34 In terms of characteristics that respondents did not like about the centres, again respondents stated a number of different reasons. The poor provision of shops / services in the centre was the main complaint of respondents in Braintree and Witham Town Centres, followed by respondents not identifying any areas of dissatisfaction. In Halstead meanwhile, respondents' greatest concerns also related to the number of empty shops and traffic congestion.

5.35 In respect of Freeport, whilst over 40% of all respondents (42%) considered there was nothing or very little that they didn't like about the centre, 19% of respondents did state that one of their dislikes was the poor of non-food retailers. This is a significant increase from the 2006 surveys, where just 6% commented about the poor range of retailers, and is notable given the focus of the Outlet Village on providing non-food retail provision.

Improvements

5.36 In all three town centres, respondents were asked what changes could they suggest which would improve the centre. Table 5.11 provides a summary of the most popular responses.

Table 5.11 Suggested Improvements

Town Centre Improvement	% of Visitors	Main Centres Where Mentioned
Improved range of independent / specialist shops	28.7%	Halstead (32%), Witham (30%), Braintree (24%)
More large retailers	21.7%	Witham (27%). Braintree (25%)
More stores / better choice of stores	17.3%	Braintree (19%), Witham (19%)
No change	13.7%	Braintree (20%)
More / better parking	7.0%	Halstead (11%)
Cheaper parking	6.7%	Halstead, Witham (both 9%)
Lower rents / fewer cheaper shops	6.0%	Halstead (7%). Witham (6%)
More / better cafes / restaurants	5.3%	Witham (14%)
Improved cleaner environment	4.3%	Braintree (8%)

Source: Question 15 NEMS Town Centre survey and Question 9 Freeport survey, July / August 2012

5.37 The most frequently suggested improvements to all the centres related to improvements to the shopping provision, through either the introduction of more large retailers or improved range of independent / specialist retailers.

5.38 It is worth noting that overall 14% of respondents considered there was no need for improvement / change, with a fifth of respondents in Braintree stating this. This is notable in the context that Braintree had the highest number of respondents who considered there was nothing about the centre which they specifically liked.

5.39 Respondents in Freeport were also asked to suggest any changes which would improve the centre. Despite the different nature of this centre to the town centres, the most popular suggestions also related to improved shopping provision, through either more or better choice of shops (23%) or more variety / greater choice of goods sold (16%). 29% of respondents considered there was no need for improvement / change, which is a reduction from the 2006 surveys (38%).

Backing Braintree/Witham

5.40 Respondents in Braintree and Witham Town Centres were asked whether they were aware of the 'Backing Braintree [or Witham] 10p Parking Initiative. In both Witham and Braintree the majority of respondents had not heard of the initiative, with 59% of respondents being unaware.

5.41 Those respondents who were aware of the scheme were then asked whether it had influenced their decision to visit the centre. In both Witham and Braintree, the majority of respondents (80.5% in Braintree and 78.1% in Witham) indicated that this initiative has no influence on their decision to visit the centre. None of the respondents in Braintree states that the initiative made them more likely to visit the town centre, where as in Witham, 4.9% of respondents did state it made them more likely to visit the centre at any time.

Freeport Outlet Village Linked Trips

Linkages with Braintree Town Centre

5.42 Respondents in Freeport Outlet Village were asked questions about linked trips with Braintree Town Centre, in order to establish further information on the function of Freeport Outlet Village and its relationship with the town centre.

5.43 Firstly respondents were asked how frequently they also visit Braintree Town Centre when they visit Freeport. The majority of respondents (65.0%) never visit the town centre in association with a trip to Freeport, and this is similar to the position in 2006 when the surveys identified that 72% of respondents never visited the centre. Just 3% of respondents always visit the town centre and Freeport on the same day, whilst 26% of respondents stated that they visited the town centre on most, half or at least some visits to Freeport.

5.44 Of those respondents who did not visit Braintree Town centre, nearly half (47.1%) had no particular reason for not doing so. 11.8% chose not to visit the town centre due to the perceived poor choice of shops - this is a similar proportion to the 2006 surveys (12%). As with the 2006 surveys, other reasons given by respondents for not undertaking a linked trip with the town centre varied from parking matters to poor environment.

5.45 Of those that do visit the town centre as well as Freeport, a number of reasons were given for doing so. As with the 2006 surveys, the most popular reason was to visit a specific shop or service (41.9%), although going food shopping and passing it on the way were also highlighted in the most recent surveys.

Linkages with Other Destinations

5.46 Respondents were also asked whether the trip to Freeport would be linked with another destination such as the retail park or leisure / entertainment facility. Again the majority of respondents (76.0%) did not intend to link their trip to Freeport with going elsewhere - this is an increase of 5% from the 2006 surveys. Of those 24% of respondents who were intending to go to another destination, all but one were planning to go to facilities in Braintree, however there was no dominant end activity. The most popular activities stated were visiting the cinema, retail park and garden centre.

Conclusions

Braintree Town Centre

5.47 The in-centre survey results for Braintree identified the following key trends:

- Main purpose for visiting is to undertake food shopping;
- Braintree had the highest proportion of respondents visiting the centre for non-food shopping;

- When asked about what they liked about the town centre, 34% of respondents answered ‘nothing / very little’, the highest of all 3 town centres, however 34% of respondents also responded that there was ‘nothing / very little’ they disliked about the centre;
- Despite having the highest proportion of visitors to undertake non-food shopping, the poor range of non-food retailers was cited as a dislike by a third of respondents. Similarly, a quarter of respondents suggested more retailers as an improvement to the centre, whilst 19% suggested a better choice of stores and 24% sought improved range of independent / specialist stores;
- The number of charity shops was stated as a negative factor of Braintree Town Centre by 14% of respondents, the highest of any of the town centres;

Halstead Town Centre

5.48 In Halstead Town Centre, the following trends have been identified from the in-centre surveys:

- Main reasons for visiting the centre was also to undertake food shopping;
- Halstead had the highest proportion of respondents travelling to the centre by foot, suggesting a more localised catchment area for the town centre;
- Whilst respondents on average spend the least amount of time per visit in Halstead town centre than the other town centres, the frequency of visit was higher with 36% of respondents visiting the centre daily;
- Environmental factors such as attractive environment, flowers and good character / history were among the more frequently stated responses given in Halstead in respect of what they liked about the centre;
- Halstead had the highest proportion of respondents stating a dislike for the number of vacant shops (23%), despite Halstead currently having the lowest vacancy rate of all 3 town centres;

Witham Town Centre

5.49 Conclusions reached from the analysis of the survey results include:

- Main reasons for visit was also to undertake food shopping;
- Witham has the highest proportion of respondents visiting the centre to browse, and nearly a quarter of respondents did not intend to purchase any goods whilst in the town centre;
- Witham did, however, have the highest average spend on both food / grocery items and non-food goods for the 3 town centres;
- The poor range of non-food retailers was stated by 41% of respondents in Witham as a dislike of the centre, with a high number of respondents suggesting more / improved retailers and stores as a suggested improvement to the centre.

- The poor range of food retailers was identified by 7% of respondents as a negative factor of Witham, the highest of any of the town centres.

Freeport Outlet Village

5.50 The following key conclusions have been identified from analysis of the Freeport surveys:

- The vast majority of respondents travel to the centre by car, with limited patronage of public transport;
- The prevalence of linked trips between Freeport and Braintree Town Centre is limited with just a third of respondents combining trips to both centres at any time, and just 3% of respondents always visiting both destinations on the same day;
- Respondents spend on average longer in Freeport than the town centres with an average of 89mins per visit;
- Visitor satisfaction appears highest at Freeport with 42% of respondents stating there was 'nothing / very little' they disliked about the Outlet Village. This is higher than any of the town centres; and
- The most popular suggested improvements to the Outlet Village by respondents was more/better choice of shops (23%) and more variety / greater choice of goods sold (16%), whilst 19% of respondents stated a dislike of the centre was the poor range of non-food retailers. This is notable given the focus of the Outlet Village in non-food retail provision.

Key changes

5.51 Notable conclusions identified from a review of the Braintree Town Centre and Freeport in-centre surveys undertaken in 2006 and for this study update are:

- The proportion of respondents visiting Braintree town centre for food and non-food shopping has increased, however this has been offset by a significant reduction in people visiting the centre to access financial services;
- Expenditure per visit has decreased, with just 7% of respondents in Braintree Town Centre intending on spending over £50 on food /groceries, compared to 11% in 2006.
- The proportion of respondents stating there was 'nothing / very little' they liked about the town centre has increased from 24% to 34% since 2006 suggesting increased dissatisfaction with the centre.
- The proportion of respondents at Freeport not intending to purchase anything has increased by 50% since 2006, however the proportion of respondents intending to purchase leisure goods has increased significantly.
- The proportion of respondents stating that one of their dislikes was the poor range of non-food retailers has increased significantly since 2006 from 6% to 19% of respondents.

- The proportion of respondents travelling by car to both the town centre and Freeport has decreased since 2006.

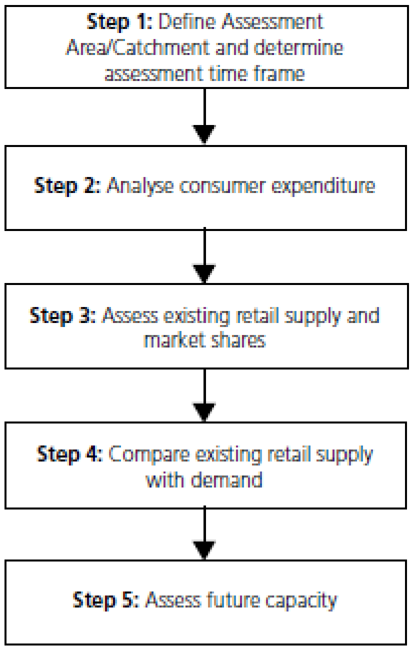
Appendix 6 Retail Capacity Methodology, Data and Commentary

6.0 Retail Capacity Methodology, Data and Commentary

Methodology

6.1 This section sets out the methodology adopted for the quantitative retail capacity analysis. The convenience and comparison assessment are set out in Appendices 7 and 8 respectively. The methodology adopted has regard to guidance in the CLG Practice Guidance (2009), and the key steps set out in Figure 6.1 below.

Figure 6.1 Key Steps to Quantitative Need Assessments



Source: Figure B1, Practice Guidance

Study Area

6.2 The quantitative analysis is based on a defined study area that covers the catchment areas of the main shopping destinations in the District. The study area is sub-divided into ten zones as shown in Appendix 1. The zones are based on the zones used in the North Essex Authorities Retail Study (2006) and the Retail Study Update 2010. However having review the results of the previous studies, we have updated the zones to more accurately capture the catchment areas of the centres within Braintree district, and we have split the Braintree zone in order to allow more detailed analysis of shopping patterns (than undertaken in the North Essex study). It is considered these survey zones broadly reflect the extent of the catchment area of Braintree, Witham and Halstead Town Centres, as well as the proximity of competing shopping destinations. For ease of comparison with the previous studies, we have retained the zone numbering.

Consumer Expenditure

Population

6.3 Population estimates for each of the survey zones at 2010 have been provided by Braintree District Council (BDC). For the BDC area these have been projected forward between 2010 and 2026 using population estimates from BDC, based on housing completion levels and forecast population density ratios. For household survey zone areas outside the Braintree local authority area the population estimates have been projected forward using 2010 based ONS sub-national population projections.

Retail Expenditure

6.4 Table 2A in Appendix 7 sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2026. Forecasts of comparison goods spending per capita are shown in Table 2B in Appendix 8.

6.5 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2010 have been obtained.

6.6 Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 9, September 2011) has been used to forecast expenditure within the study area in the short term (2010 to 2013). Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.

6.7 For longer term projections Experian provide forecast growth rates and trend line projections. Experian's average annual growth forecast for the period 2014 to 2018 is 0.5% for convenience goods and 3% for comparison goods. The ultra long term trend line annual growth rates are 0.6% for convenience goods and 5.9% for comparison goods.

6.8 We believe the Experian's lower EBS growth forecast rates for 2010 to 2013 reflect the current economic circumstances and provide an appropriate growth rate for the short term (for convenience goods: -0.3% for 2010-2011, -0.4% for 2011-2012 and 0.5% for 2012 to 2013; for comparison goods: 0.5% for 2010-2011, 1.6% for 2011-2012 and 2.1% for 2012-2013). In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's longer term growth forecasts (0.5% for convenience goods and 3% for comparison goods) are relatively cautious based on past growth rates and these have been adopted after 2013 in this assessment. These growth figures relate to real growth and exclude inflation.

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

6.10 This Experian information suggests that non-store retail sales in 2010 is:

- 7.4% of convenience goods expenditure; and
- 11.7% of comparison goods expenditure.

6.11 Experian predicts that these figures will increase in the future.

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

6.13 The adjusted figures suggest that SFT sales in 2010 are:

- 3.7% of convenience goods expenditure; and
- 8.8% of comparison goods expenditure.

6.14 The projections provided by Experian suggest that these percentages could increase to 5.9% and 12.7% by 2016, and estimated at 7.0% and 12.8% by 2028.

6.15 The levels of available spending are derived by combining the population with per capita spending figures in Tables 3A and 3B (Appendices 5 and 6).

Existing Retail Supply and Market Shares

Existing Retail Supply

6.16 The quantum of existing retail floorspace within the district has been sourced from a number of sources, where possible seeking to be consistent with the 2006 North Essex Study and 2010 Braintree Retail Study Update. The floorspace for the 3 town centres has been obtained from the latest GOAD plans for the centre which are as follows:

- Braintree: December 2011
- Witham: June 2011
- Halstead: July 2011

6.17 The GOAD plans provide gross floorspace for units within the centre. A net to gross ratio of between 60%-70% has been applied to these figures, with 70% for modern purpose built units in shopping parades and precincts, and 60% for retail floorspace within older traditional shop units.

6.18 Net retail floorspace data for food stores within the district has been gathered through data sources including IGD and planning application information, where the store has opened recently or been subject to development proposals. This data has been corroborated by site visits, where the amount of floorspace dedicated to the sale of convenience and comparison goods in stores selling both these goods types was estimated, in order to undertake a 'goods-based' quantitative analysis.

6.19 Net floorspace data for Freeport Outlet Village and Braintree Retail Park has been sourced from the 2010 Braintree Retail Study Update in order to be consistent.

6.20 The main differences between the floorspace figures used in the 2010 Retail Study Update and this assessment are as follows:

- Tesco stores, Great Notley and Marks Farm - the floorspace figure includes the implemented extensions at these stores;
- Asda, Highfields Road, Witham - this former Netto store has now been reoccupied by Asda and on the basis of site visits comprises a greater sales floorspace than previously assumed;
- Braintree, Witham and Halstead Town Centres - floorspace data sourced from 2011 GOAD plans rather than 2009 GOAD surveys.

Market Shares/Penetration Rates

6.21 To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors but primarily information gathered through the 2012 household survey.

6.22 The total turnover of shops within the Braintree district is estimated based on penetration rates. For convenience goods shopping turnover estimates are then compared to average company benchmark or average sales floorspace densities derived from Verdict (UK Food and Grocery retailers 2011) and Mintel (Retail Rankings 2010) information, which provide an indication of how individual retail stores and centres are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.

Benchmark Turnover Levels

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

6.24 The estimated convenience goods sales areas have been derived from a combination of the Council's floorspace surveys, Institute of Grocery Distribution (IGD) and NLP estimates based on site visits. Estimates for comparison sales floorspace within large food stores has been deducted from the figures in Table 1A in Appendix 2, for consistency with the use of goods based expenditure figures.

6.25 Average sales densities are not widely available for small convenience shops, particularly independent retailers. Based on the mix of shops present in each town in Braintree and our experience of trading levels of small independent shops informed by household shopper surveys elsewhere, we have adopted an average sales density of £4,000 per sq.m for small convenience shops in the study area. This is consistent with NLP's experience of retail studies across the country and available turnover information within Mintel's Retailing Rankings 2010.

6.26 Mintel's Retail Rankings 2010 provides company average sales density information for a selection of national comparison retailers. This data suggests a notional average sales density for national high street comparison retailers of £5,500 per sq.m. The average for bulky good retail warehouses is generally lower than this average. Based on our recent experience across the country average sales densities for comparison floorspace can range from £2,000 to £8,000 per sq.m net. The higher end of this range is usually only achieved by successful shopping centres, which reflects the higher proportion of quality multiple retailers.

Data & Commentary

6.27 This section sets out the key data and figures identified from the implementation of the methodology set out above.

Price Base

6.28 All monetary values expressed in this study are at 2010 prices, consistent with Experian's base year expenditure figures for 2010 (Retail Planner Briefing Note 9), which is the most up to date information available.

Consumer Expenditure

- The study area population for 2012 to 2026 is set out in Table 1A in Appendix 7. Population within the study area is expected to increase between 2012 and 2026 by 7.6% (20,875 persons);
- As a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 12.8% from £514.6 million in 2012 to £580.5 million in 2026, as shown in Table 3A (Appendix 7). Population growth accounts for about 4.6% of this increase, and 8.6 relates to growth in expenditure per capita;
- Comparison goods spending is forecast to increase by nearly 60% between 2012 and 2026, increasing from £803.6 million in 2012 to £1,260.2 million in 2026, as shown in Table 3B (Appendix 8). These figures relate to real growth and exclude inflation.

Existing Retail Supply 2012

- Existing convenience goods retail sales floorspace within Braintree District is 18,592 sq.m net as set out in Table 2.1, Appendix 2. This floorspace figures excludes comparison sales floorspace within food stores/shops (5,298 sq.m net);
- Comparison goods retail floorspace within Braintree District is estimated as 47,626 sq.m net as shown in Table 2.2, Appendix 2.

Existing Spending Patterns 2012

6.29 The results of the household shopper questionnaire survey undertaken by NEMS in July 2012 have been used to estimate existing shopping patterns within the study area shown in Figure 3.1 above. A summary of the methodology and results is shown in Appendix 4.

6.30 For both convenience and comparison expenditure flows, account has been taken of inflow to facilities within the Braintree district from outside the household survey zones. The level of inflow has been calculated from the results of the household surveys undertaken for the 2006 North Essex Retail Study, as these household surveys covering a more extensive area. The proportion of expenditure flowing to facilities in the district from those survey areas not included in the study area for this 2012 study update is considered to represent inflow. No account has been taken of inflow of expenditure from beyond these areas.

Convenience Shopping

6.31 The results of the household shopper survey have been used to estimate existing convenience goods shopping patterns. The estimates of market share or penetration within each study area zone are shown in Table 5A, Appendix 7.

6.32 Table 5A (Appendix 7) indicates that the majority of residents within zones 11 (Halstead), 12a (Braintree West), 12b (Braintree East), 12c (Great Notley), 12d (Braintree Other) and 14 (Witham) carry out their convenience retail shopping within the Braintree district (ranging from 75% to 98%). Zone 1/2 (Haverhill/Sudbury) recorded stores within Braintree District attracting less than 2% of market share.

6.33 The level of convenience goods expenditure attracted to shops/stores in Braintree District in 2012 is estimated to be £231.4 million as shown in Table 6A, Appendix 7. This includes estimates of inflow from beyond the study area, applying the market shares, identified in Table 5A, Appendix 7. The market share of total convenience expenditure generated within the study area that is retained by shops/stores in Braintree (ie. excluding any inflow to these shops/ stores from beyond the study area) is estimated to be about 45% (£230.1 million of £514.5 million, derived from Tables 6A and 3A, Appendix 7). Consequently, 55% of available expenditure in the study area is leaking to facilities beyond Braintree District.

6.34 The total benchmark turnover of the existing convenience sales floorspace within Braintree District is £213.6 million at 2012 (Table 2.1, Appendix 2). The actual turnover of the convenience floorspace at facilities within the District is £231.4 million (Table 6A, Appendix 7).

6.35 These figures suggest that collectively convenience retail facilities in the District are trading reasonably well, about 8% above average, with a surplus of available convenience expenditure of £17.8 million.

Comparison Shopping

6.36 The estimated comparison goods expenditure currently attracted by shopping facilities within Braintree District is £314.7 million in 2012, as shown in Table 6B, Appendix 8. This includes estimates of inflow from beyond the study area. The market share of total comparison goods expenditure generated within the study area that is retained by centres/facilities in Braintree (ie. excluding any inflow to these shops/stores from beyond the study area) is 35% (£284.4 million out of £803.7 million, derived from Tables 3B and 6B, Appendix 8). This reflects the influence of higher order centres outside Braintree District, such as Chelmsford and Colchester.

6.37 Based on this expenditure estimate, the average sales density for existing comparison sales floorspace (47,626 sq.m net) is £6,606 per sq.m net. Trading levels amongst comparison facilities in the District vary significantly, with Freeport Outlet Village and Braintree Town Centre trading at a significantly higher level than any other destination in the District. The average sales density figures should be viewed in the context of the type of floorspace in each centre. Braintree achieves a sales density around triple Witham and Halstead, reflecting Braintree town centre's role as the main comparison shopping destination in the District. Witham and Halstead are trading at significantly lower levels, although our healthchecks and observations suggest that the gap between the trading performances of these town centres and Braintree is smaller than the sales densities suggest.

Existing Retail Supply vs Demand

Convenience Goods Expenditure

6.38 The level of available convenience goods expenditure in 2012, 2016, 2021 and 2026 is shown at Tables 6A, 7A, 8A and 9A, in Appendix 7. These tables are based on constant market shares, established through the household survey results (Table 5A, Appendix 7).

6.39 The total level of convenience goods expenditure available for shops in the District between 2012 and 2026 is summarised in Table 10A (Appendix 7). Convenience expenditure available to shopping facilities in the District is expected to increase from £231.4 million in 2012 to £255.4 million in 2026.

6.40 Table 10A (Appendix 7) subtracts the benchmark turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further new development. Within the District, there is a surplus of £17.9 million convenience goods expenditure in 2012, despite some of the stores trading at below benchmark levels. Future expenditure growth will generate an expenditure surplus of £22.2 million in 2016, increasing to £32.1 million in 2021 and £40.4 million in 2026.

Comparison Goods Expenditure

6.41 The household survey suggests that the District's retention of comparison goods expenditure is lower than for convenience goods. The lower level of comparison expenditure retention is due to the strength of competing comparison goods facilities in neighbouring authorities, particularly Chelmsford and Colchester.

6.42 The retail capacity projections in this report assume centres within Braintree District can maintain their market share of comparison expenditure in the future.

6.43 Available comparison goods expenditure has been projected forward to 2016, 2021 and 2026 based on 2012 penetration rates (ie. assuming that comparison retail facilities will maintain their current market share) in Tables 6B, 7B, 8B and 9B in Appendix 8, and summarised in Table 10B. Available comparison expenditure to facilities within the District is expected to increase from £314.7 million in 2012 to £486.1 million in 2026.

6.44 Future available expenditure is compared with the projected turnover of existing comparison retail is shown in Table 10B (Appendix 8). Table 10B assumes that the benchmark turnover of comparison floorspace will not increase between 2012 to 2013 due to the recession and limited projected expenditure growth. In the longer term existing floorspace within the District is expected to increase its benchmark turnover in real terms. A growth rate of 1.7% per annum is adopted, which we believe is realistic if an expenditure growth rate of 3% per annum is achieved. Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio.

6.45 Population and expenditure growth will result in a comparison goods expenditure surplus of £15.2 million in 2016, increasing to £51.7 million in 2021 and £94.3 million in 2026. Taking account of the committed development in Witham of a DIY unit to be operated by Homebase, there is forecast to be an expenditure surplus of £12,2 million in 2016, £48.3m in 2021 and £90.8m in 2026.

Future Capacity

6.46 The surplus convenience goods expenditure projections have been converted into potential new floorspace estimates in Table 10A (Appendix 7). Surplus expenditure is converted into floorspace estimates based on an assumed average sales density figure, based on the average turnover of the main food supermarket operators. An average sales density of £12,500 per sq.m net has been adopted.

6.47 Surplus comparison expenditure has been converted into net comparison sales floorspace projections in Table 10B in Appendix 8 using an average sales density of £5,000 per sq.m in 2012.

Adjusted Market Shares

6.48 As set out in Section 5.0, the household survey results have identified that Halstead retains just 44% of convenience goods expenditure from the Halstead zone. As such, significant levels of convenience expenditure are currently leaking outside the Halstead zone, including to facilities outside the Braintree district. Consideration has been given to the potential to the levels of convenience goods expenditure capacity in Halstead should the market share of the town centre increase to around 75%.

6.49 This level of expenditure retention is considered to be aspirational for a town of the scale and nature of Halstead, and would result in more sustainable shopping patterns within Halstead by reducing leakage to stores further afield. Increasing expenditure retention to around 75% would also bring Halstead more in line with Braintree and Witham, which are at the same level in the District's retail hierarchy. Convenience facilities within Braintree currently retain 91% of convenience goods expenditure generated within the Braintree household survey zones, whilst Witham facilities retain 76% of expenditure.