



Havering

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HAVERING LOCAL PLAN
RETAIL AND COMMERCIAL LEISURE
NEEDS ASSESSMENT 2015

Havering Retail & Commercial Leisure Needs Assessment

Volume 1 - Main Report

On behalf of **The London Borough of Havering**



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Appendix A – Centre Health Checks

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Appendix D – Quantitative Need Methodology

Appendix E – Technical Inputs

Appendix F – Leisure Capacity Tables

Household Survey Results (bound separately as Volume 3)

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1 Introduction

1.1.1 The London Borough of Havering (LB Havering) commissioned Peter Brett Associates LLP (PBA) in 2014 to undertake an assessment of the retail and commercial leisure needs to 2031. The study comes at an important time in retailing and town centres, with town centres facing increasing challenges and customers becoming increasingly discerning about their shopping habits. There is a widespread consensus that many town centres will need to adapt to 'futureproof' their long-term vitality and viability.

1.2 Terms of Reference

1.2.1 The agreed terms of reference with the Council, in summary, are as follows:

- Undertake an assessment of the existing supply of retail and leisure floorspace for the existing identified centres within the Borough and review their performance
- Identify spending patterns across the Borough for both retail (food and non-food) and leisure activities
- Assess the need (both quantitative and qualitative) for new retail and leisure floorspace to 2031, and the potential growth in population and expenditure
- Provide a set of core recommendations in respect of the potential strategies to accommodate need, hierarchy of centres and an approach to defining key boundaries for centres in the Local Plan

1.2.2 The methodology used by PBA is robust and up to date. Furthermore, this study is undertaken in accordance with the NPPF and the PPG in determining our recommendations to the Council.

1.3 Structure of the Study

1.3.1 In response to the agreed terms of reference, our study is set out as follows:

- The remainder of this section briefly summarises the national and local policy context within which this study has been prepared;
- **Section 2** sets out our view on how town centres are changing, providing important context to the remainder of the study;
- **Section 3** sets out a summary assessment of existing retail and leisure provision in Romford metropolitan centre and each of the Borough's district centres — Hornchurch, Upminster, Collier Row, Elm Park, Harold Hill and Rainham, including a 'health check' assessment of their current performance, as well as a summary of out-of-centre retail and leisure development in the Borough;
- **Section 4** sets out a summary of where residents in the Borough are currently undertaking their spending on retail and leisure goods, informed by the findings of a household survey of spending patterns undertaken in support of the study;
- **Section 5** sets out the quantitative need for additional retail floorspace, split between convenience (food) goods and comparison (non-food) goods, and also discusses the qualitative need for additional retail floorspace in each of the main centres in the Borough;

- **Section 6** sets out a qualitative and quantitative assessment of the need for additional commercial leisure uses (such as cafes and restaurants, cinemas and health and fitness facilities); and
 - **Section 7** draws together the findings of the previous sections to set out a series of recommendations, both Borough-wide and specific to each centre.
- 1.3.2 This report is supported by **Volume 2** of the study, which contains appendices to the study as follows:
- **Appendix A** contains full 'health check' assessments of the town and district centres in the Borough (building on the summaries set out in Section 3 of Volume 1);
 - **Appendix B** provides a plan of the study area which we have used as the basis of our assessment;
 - **Appendix C** sets out quantitative retail capacity data tables;
 - **Appendix D** provides a summary of our methodology for calculating quantitative retail need;
 - **Appendix E** provides a summary of the technical inputs into our retail and leisure capacity forecasts; and
 - **Appendix F** sets out quantitative commercial leisure capacity data tables.
- 1.3.3 Finally, Volume 3 of the study sets out the detailed household survey tables which have been used to inform the recommendations and outputs of this study.

1.4 National Planning Policy

National Planning Policy Framework

- 1.4.1 The National Planning Policy Framework (NPPF) was published by the Government in March 2012 and replaces all previous Planning Policy Statements and Planning Policy Guidance Notes. At the heart of the National Planning Policy Framework is a presumption in favour of sustainable development, which for plan-making this means that:
- *"local planning authorities should positively seek opportunities to meet the development needs of their area;*
 - *Local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change, unless:*
 - *Any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as a whole; or*
 - *Specific policies in this Framework indicate development should be restricted."* (paragraph 14)
- 1.4.2 In order to be considered sound, Local Plans should be positively prepared (i.e. based on a strategy which seeks to meet objectively assessed development and infrastructure requirements), justified (i.e. the most appropriate strategy, when considered against the reasonable alternatives), effective (i.e. deliverable and based on joint working) and consistent with national policy (paragraph 182).

- 1.4.3 Paragraph 22 states that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres. This includes a requirement that *'needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability'*. This introduces a challenge for local authorities to maximise central opportunities.
- 1.4.4 The NPPF also requires Local Plans to be based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area. In terms of a retail evidence base, paragraph 161 states that they should assess:
- the needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development;
 - the role and function of town centres and the relationship between them, including any trends in the performance of the centres;
 - the capacity of existing centres to accommodate new town centre development;
 - locations of deprivation which may benefit from planned remedial action.

National Planning Policy Guidance

- 1.4.5 The Government recently published the Planning Practice Guidance (PPG) in order to provide further guidance on and support to the policies contained within the NPPF. The PPG is a web based resource, which will be actively managed by the DCLG in order to allow for any necessary updates to be issued as soon as possible. The guidance will continue to be subject to a regular review process.
- 1.4.6 The PPG is set out thematically. Matters associated with town centre uses are set out in the section 'Ensuring the vitality of town centres'. This section states that a positive vision or strategy for town centres, articulated through the Local Plan, is key to ensuring successful town centres, which enable sustainable economic growth and provide a wider range of social and environmental benefits. It also states that any strategy should be based on evidence of the current state of town centres and opportunities to meet development needs and support their viability and vitality. Strategies should also identify changes in the hierarchy of town centres, including where a town centre is in decline. In these cases, strategies should seek to manage decline positively to encourage economic activity and achieve an appropriate mix of uses commensurate with a realistic future for that town centre.
- 1.4.7 The PPG also provides further guidance in terms of the interpretation of the NPPF's sequential and impact tests (discussed above), including how they should be applied to both plan-making and decision-taking. A stage-by-stage guide to undertaking an impact test is also provided.

Changes to Permitted Development Rights

- 1.4.8 The Town and Country Planning (General Permitted Development) (Amendment) (England) Order 2013 came into force on 30 May 2013. This order amends the Town and Country Planning (General Permitted Development) Order 1995. The aim of the policy is to reform the planning system so as to support "sustainable development" by encouraging the reuse of vacant property and by allowing building owners to unlock the value of their assets through a change of use. This reform is intended to make the planning system less bureaucratic and more responsive to changing demand.
- 1.4.9 The revised permitted development Rights have significant implications for High Streets and town centres. The most significant aspect of the revised policy is that property owners no

longer need to apply for planning permission if the change of use is within the same class or, in some cases, the change of use is to dwellings. The Permitted Development Rights allows the change of use of retail units (A1) to professional and financial services (A2) without seeking planning consent or the conversion of office space (B1) to residential dwellings (C3). This kind of conversion requires prior approval from the Local Authority. New Permitted Development Rights that came into force in April 2014 permit the conversion of A1 and A2 space to C3 (Single residential Dwelling). Up to 150 square meters of A1/A2 space can be converted to residential use subject to prior approval. The amendment also introduced a new use class CA which permits the change of use of a retail unit to a bank or building society without applying for planning permission.

- 1.4.10 It is important to note that some areas are exempt from Permitted Development Rights. This includes Conservation Areas, World Heritage Sites and Areas of Outstanding Natural Beauty.

1.5 Regional Planning Context

London Plan and Revised Early Minor Alterations

- 1.5.1 LB Havering's location within Greater London means that the London Plan also forms part of the development plan, and guides the strategic development of individual London Boroughs. The London Plan was adopted in July 2011 and the Revised Early Minor Alterations were adopted in 2013.
- 1.5.2 The London Plan identifies five types of town centres; international, metropolitan, major, district, local and neighbourhood. Havering's town centres are classified as follows: Romford is a metropolitan centre, whilst Collier Row, Elm Park, Harold Hill, Hornchurch, Rainham and Upminster are all defined as district centres.
- 1.5.3 Policy 2.15 of the London Plan seeks to coordinate the development of a network of town centres across London. Town centres are designated as areas of commercial intensification and residential development. As such, development proposals in town centres should 'sustain and enhance the viability and vitality of town centres', accommodate economic and/ or housing growth, support and enhance the competitiveness, quality and diversity of town centre retail, leisure, arts, cultural and other consumer services and public services.
- 1.5.4 In preparing their LDF, Boroughs should identify town centre boundaries, primary and secondary shopping frontages. Furthermore, local authorities should, in co-ordination with neighbouring authorities, identify other smaller centres that cater to the day to day needs of residents and establish themselves as the focus of local neighbourhoods. Local authorities should also proactively manage declining town centres by encouraging a wider range of services, diversification and improving environmental quality.
- 1.5.5 Policy 4.6 focuses on the provision and enhancement of sports, cultural and entertainment uses. The mayor seeks to support London's arts, cultural, professional sporting and entertainment enterprises. In developing LDFs, local authorities should designate and develop cultural quarters and identify, manage and co-ordinate local and evening and night-time entertainment activities.
- 1.5.6 Policy 4.7 deals with retail and town centre development. The mayor supports a 'strong partnership approach' to assessing the retail, commercial, cultural and leisure capacity in town centres. In developing LDFs, local authorities should:
- Identify future levels of retail, leisure and other commercial floorspace need in light of integrated strategic and local assessments;
 - Undertake regular town centre health checks to inform strategic and local policy and implementation;

- Take a proactive partnership approach to identify capacity and bring forward development within or, where appropriate, on the edge of town centres; and
- Firmly resist inappropriate out of centre development; manage existing out of centre retail and leisure development in line with the sequential approach; seeking to reduce car dependency; improve public transport, cycling and walking access; and promote more sustainable forms of development.

1.5.7 Policy 4.8 seeks to develop successful and diverse retail centres. These centres should meet the needs of Londoners and should be easily accessible. This includes supporting additional comparison goods shopping in international, metropolitan and major centres and convenience retailing in smaller centres. The policy also provides a framework for maintaining and enhancing local shopping and specialist shops. Boroughs should also identify areas under served by convenience goods and support local markets.

Further Alterations to the London Plan

- 1.5.8 In March 2015, the Mayor published Further Alterations to the London Plan (FALP). The purpose of these alterations was to respond to housing and employment issues stemming from the projected increase in London's population since the publication of the 2011 London Plan. The scope of these alterations include: accommodating changes in national policy and making clear links to the National Planning Policy Framework, providing a robust short and medium term planning framework and making factual corrections. The alterations also take into considerations advice given to the Mayor by organisations such as the Outer London Commission.
- 1.5.9 The changes include the promotion of Stratford to an International centre and the designation of Elm Park as a District Centre subject to monitoring.

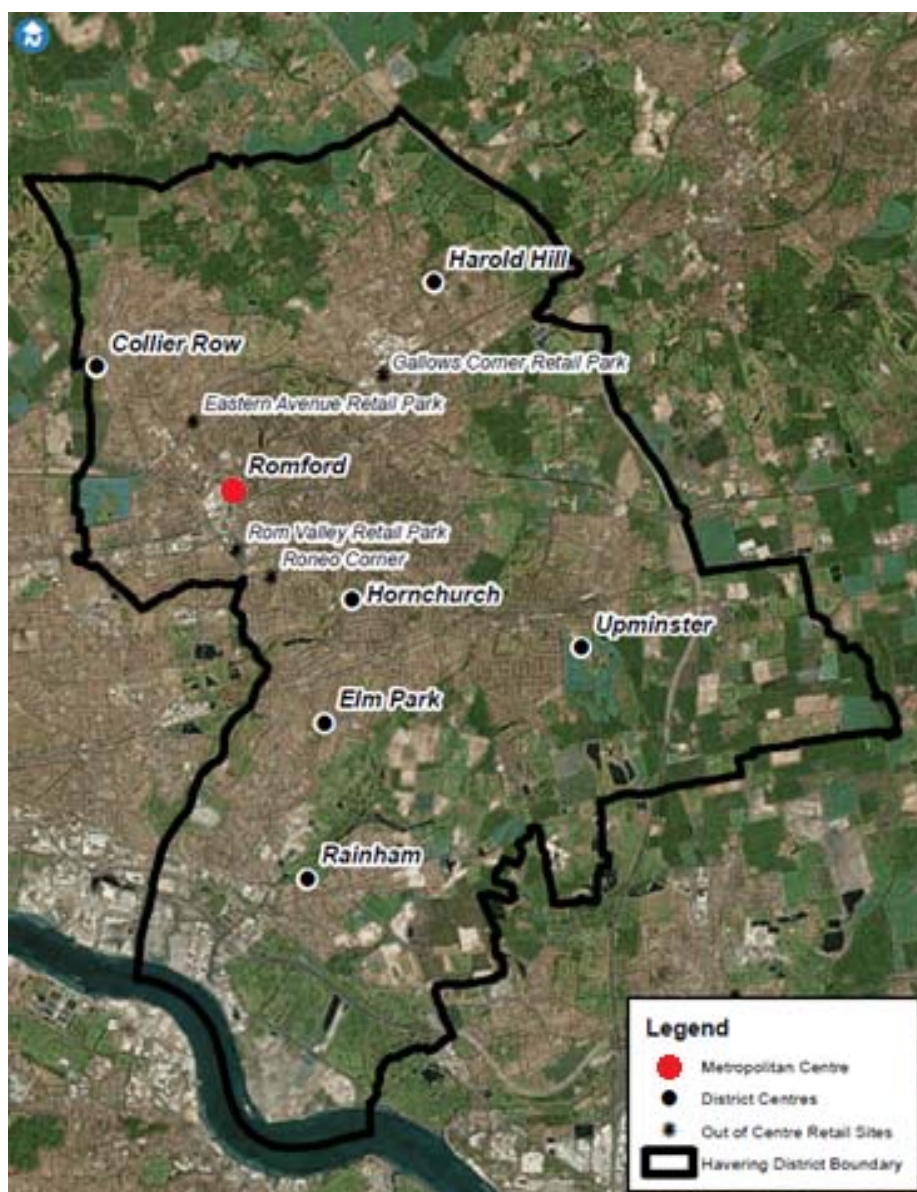
1.6 Local Planning Context

Local Development Framework Core Strategy

- 1.6.1 This section sets out the current local policy position, however the emerging Local Plan will replace the key documents in the in the Local Development Framework.
- 1.6.2 The Havering Core Strategy was adopted in July 2008 and forms part of the Borough's Local Development Framework. The Core Strategy sets out the Borough's development framework up to 2020. The objective of the Core Strategy is to balance economic growth and the provision of affordable housing in the Borough with the protection and improvement of the Borough's historic and natural environmental quality. .
- 1.6.3 Policy CP4 – Town Centres sets out Havering's town centre hierarchy. It is important to note that the Core Strategy does not directly align with the London Plan's classifications of centres as the London Plan does not distinguish between major and minor district centres. Romford is defined as a 'metropolitan centre' In both the Core Strategy and London Plan, Hornchurch and Upminster are designated as 'major district' centres, while Collier Row, Elm Park, Harold Hill and Rainham are 'minor district' centres. In addition, Havering has 11 major local centres and 68 minor local centres.
- 1.6.4 The Council aims to strengthen Romford's position as "East London's premier town Centre. Hornchurch's role is as the borough's cultural capital will be supplemented by the promotion of small to medium sized retail, culture, leisure and residential uses. Upminster functions as Havering's second retail destination after Romford. According to the policy, the strategy for Upminster will be one of consolidation with some small to medium retail and leisure developments permitted. The more significant development opportunities in the town are located in edge of centre sites.

- 1.6.5 Rainham is situated within the London Riverside Regeneration Area and part of the London Riverside Opportunity Area identified by the Mayor. The regeneration scheme aims to revitalise the area and enhancing its heritage through investments in transport links and mixed use developments. Although Rainham already includes a large Tesco and a number of small shops, the regeneration scheme might require the addition of small scale convenience retail within the regeneration area.
- 1.6.6 The Core Strategy states Elm Park will continue to function as a predominantly convenience goods focused retail centre. The strategy for Collier Row and Harold Hill is to continue to support the centres by consolidating their current retail offer.
- 1.6.7 The location of each of the centres in the Borough is shown at Figure 1. We have also added the principal out-of-centre retail locations, which are discussed further in Section 3.

Figure 1.1 - Hierarchy of Centres in LB Havering



1.7 Romford Area Action Plan

- 1.7.1 The Romford Area Action Plan was adopted in October 2008 and provides the planning framework for the future development and regeneration of Romford metropolitan centre up to 2020. The AAP forms part of the Borough's LDF. The AAP encapsulates a number of policies touching on various aspects including retail, leisure, heritage, accessibility and functionality.

2 Context for Town Centres

2.1 Introduction

- 2.1.1 This study is being prepared in the midst of a renewed focus on the role and function of the high street, in the context of the recent, sustained economic downturn, continued attraction of out-of-town facilities as alternative shopping destinations, and the increasing popularity of online shopping. A number of independent studies have recently been published considering the future role and function of the high street, most significantly The Portas Review, The Grimsey Review and Beyond Retail's 'Redefining the Shape and Purpose of Town Centres'; we briefly summarise each of these below. We then continue to review the key trends which are likely to influence the demand for new retail floorspace over the study period.

2.2 Published Research

The Portas Review (2011)

- 2.2.1 In May 2011, retail expert Mary Portas was appointed by the Government to lead an independent review into the future of the high street, largely in response to the stagnation and decline of town centres nationally, seen as a consequence of reduced spending on the high street. The report, published in December 2011, suggest a number of measures to tackle the further decline of the high street.
- 2.2.2 Amongst 27 separate recommendations in the report, there is a call to strengthen planning policy in favour of 'town centre first' following the publication of the draft NPPF. The core recommendations included:
- **Run town centres like businesses:** by strengthening the management of high streets through 'Town Teams', developing the 'Business Improvements Districts' (BID) model and encouraging new markets;
 - **Get the basics right:** by looking at how the business rate system could better support small businesses and independent retailers, encouraging affordable town centre car parking and looking at further opportunities to 'deregulate' the high street and relax local authority restrictions that hold local businesses back.
 - **Level the playing field:** by making explicit within the NPPF a presumption in favour to town centre development, introduce Secretary of State 'exceptional sign off'; and encouraging large retailers to show their support for high streets by mentoring local businesses;
 - **Define landlords' role and responsibilities:** by encouraging a 'contract of care' between landlords and their commercial tenants, looking at disincentives for landlords leaving properties vacant, and empowering local authorities where landlords are negligent and making proactive use of Compulsory Purchase Order powers; and
 - **Give communities greater say:** by including the high street in neighbourhood planning, directing more developer funding to supporting community groups, and, encouraging innovative community uses of empty high street spaces.

Government response to the Portas Review (2012)

- 2.2.3 The Government published its formal response to the Portas Review in March 2012, which accepted virtually all of Portas' recommendations. It announced that 24 'Portas Pilot' towns secured funding to set up Town Teams to create plans for the future of their high streets and

trail some of the recommendations made in the Portas Review. In addition, the Government will provide investment to help BIDs access loans for their set-up costs, as well as funding for a High Street Innovation Fund (to help bring entrepreneurs back to their communities) and also a 'Future High Street X Fund' (to reward towns which are delivering innovative plans to bring their town centres back to life).

- 2.2.4 The Government however did not support the call to introduce Secretary of State 'exceptional sign off' for all new out-of-town developments and require all large new developments to have an 'affordable shops' quota. The Government states that LPAs are best placed to understand local needs and 'exceptional sign off is contrary to the Government's ethos of devolution. As such, the Government will continue to use its call-in powers sparingly.

The Grimsey Review (2013)

- 2.2.5 Bill Grimsey, the former boss of DIY chain Wickes and food retailer Iceland published his report 'The Grimsey Review: An alternative future for the High Street' in September 2013. This report was developed as an 'alternative response' to the recommendations of the Portas Review. The report makes a total of 31 wide-ranging recommendations, including encouraging more people to live in town centres, appointing a High Streets Minister, and freezing car parking charges for a year.

Beyond Retail: Redefining the Shape & Purpose of Town Centres (2013)

- 2.2.6 Arising from the key recommendations in the Portas Review, the Government supported the establishment of an industry 'task force' to analyse retail property issues relating to town centres. The task force included representatives from the banking, property, retail and public sectors, and the findings of the task force's report were presented in the 'Beyond Retail' report published in November 2013.

- 2.2.7 The report outlines a 'future vision' of high streets, based on five key observations:

- Market polarisation, resulting in **three broad types of town centre offer** (strong centres with a wide retail and leisure offer; convenience food and service-based centres with an element of fashion and comparison goods; and localised convenience and everyday needs-focussed centres);
- A local authority will have a '**clear vision**' of the role and function of their town centres, and the position of their respective retail offers in the hierarchy of centres;
- **Active intervention** on the part of the local authority should be encouraged by a more flexible planning environment, including reduced regulation and a mix of public and private sector funding models;
- A '**re-basing**' of **occupational costs** (in terms of rents and rates), to encourage an improved retail and leisure mix of profitable multiple and independent operators, supported by local employment and residential development in close proximity to town centres, and providing a flexible approach to car park pricing to assist in completion with out-of-town developments.
- **Technology** as a critical enabler of future town centre relevance and vitality.

- 2.2.8 Based on this 'vision', the report makes a number of recommendations, and we consider those particularly pertinent to be:

- Develop **strong and dynamic leadership**, led at the local authority level but also including business and community involvement, to bring about long-term change in town centre functions;

- Undertake bold, **strategic land assembly**, to assemble redevelopment opportunities of scale and worth;
- Provide **greater flexibility** in the planning system to enable redundant retail premises to be converted to 'more economically productive uses';
- Consider the mechanisms to **address funding gaps** to encourage local authorities to commit to long-term planning for town centres; and
- Town centres must take advantage of **technology** to assist in marketing, driving footfall, and assisting independents and SMEs; and
- The **business rate system** should be reviewed, and new retail valuation guidance should be published.

2.3 Market Context

2.3.1 The market context for town centres, and retail in particular, is evolving. The role of the town centre is not as clearly defined as it has historically been, and indications are that the town centres which have weathered the recent economic downturn (discussed further below) are those which have a diverse range of uses. In this section we discuss the key changes in the retail market which are considered likely to have the biggest implications on centres in LB Havering over the study period. These include:

- Polarisation to higher-order centres
- Growth of the convenience goods centre
- Growth in commercial leisure provision.

Key trend: polarisation to higher-order centres

- 2.3.2 The 'polarisation trend' refers to the preference of retailers to concentrate trading activities in larger schemes, within larger centres. Retailers recognise that greater efficiency can be achieved by having a strategic network of large stores offering a full range of their products, rather than a network of smaller-format stores which are only able to offer a limited range of products. Other trends discussed in this section, in particular the economic downturn and the growth in online shopping, have further amplified the need for retailers to have fewer physical stores. The 'polarisation trend' is also driven by customers, who have become more discerning and are increasingly prepared to travel further afield. There is therefore a concentration of comparison goods expenditure in a smaller number of larger centres. CBRE estimated that by 2008 half the population shopped in just 70 or so major locations, down from 200 locations 30 years ago¹.
- 2.3.3 However, this trend does mean that smaller centres may be required to potentially refocus their role and function away from solely being shopping destinations to incorporate a much broader retail, leisure, culture and residential offer.
- 2.3.4 The result of this trend, according to Deloitte², is that retailers are beginning to reassess their store portfolios: *'The increasing costs of operating stores, changes in consumer behaviours, and the growing online opportunity, coupled with the rise of shopping centres with larger catchment areas and improvements in infrastructure facilitating travel suggest that retailers will need fewer stores in the future'*

¹ CBRE UK Retail Briefing, September 2008

² Deloitte, 'The Changing Face of Retail', 2011

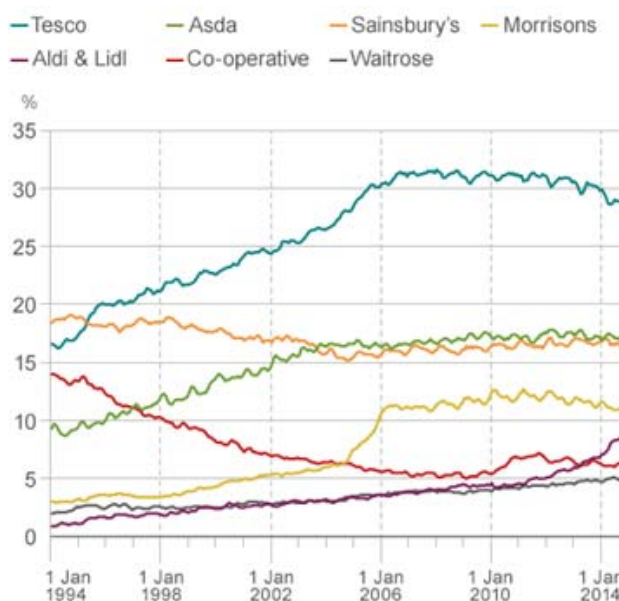
2.3.5 The implications for this on town centres is that many retailers will, in the medium to longer term, seek to downsize their portfolios, particularly in smaller centres. Deloitte consider that this will have three principal impacts on retail property:

- Firstly, **increased availability** of property as vacancy rates increase;
- Secondly, **decreasing prime retail rents** (with the exception of central London); and
- Thirdly, **increased flexibility in rental terms**, with retailers demanding better terms, including shorter leases, rent-free periods, earlier break clauses, and monthly rental arrangements.

Key trend: growth of the convenience goods sector

2.3.6 The convenience goods sector has, during the economic downturn, become a key driver of growth. The sector has traditionally been dominated by the 'big four' supermarket operators of Asda, Morrisons, Tesco and Sainsbury's, but increasingly both higher-quality operators (Waitrose, Marks & Spencer) and discount retailers (Aldi, Lidl) are making inroads into the market share of the 'big four'. The discount retailers have posted significant year-on-year growth in recent years and beginning to emerge as increasingly important forces in the convenience goods market. We expect these retailers to continue to take market share from the 'big four' supermarket operators in future years (see Figure 2.1).

Figure 2.1 - Leading Supermarkets' Market Share, 1994-2014



Source: Kantar Worldpanel

2.3.7 The sector has often been the beneficiary of floorspace becoming available in town and city centres as a result of comparison goods retailers entering administration. For example, Iceland acquired 57 former Woolworths stores in early 2009, and recently Morrisons acquired a number of stores formerly operated by Blockbuster as part of their 'M Local' network of smaller-format stores. Tesco Express, Sainsbury's Local, and Waitrose have significantly expanded store numbers in recent years.

2.3.8 Large foodstores (i.e. typically those with a net retail area of at least 25,000 sq.ft / 2,300 sqm) have historically been the primary driver of growth in the convenience goods sector. However, there is evidence of an increasing move by convenience goods operators away from opening

larger-format stores towards smaller supermarkets and establishing a network of 'top up' convenience goods shopping facilities (often referred to as 'c-stores'), often located in town centres, or district/ neighbourhood shopping parades. Both Sainsbury's and Tesco now have more c-stores than large supermarkets³ and the 'big four' operators appear to be favouring these formats over large supermarkets. In summer 2014, Tesco announced plans to develop 4,000 houses on land formerly earmarked by the company for supermarkets, mostly in the south-east of England⁴.

Figure 2.2 - Example 'C store' formats operated by Tesco, Sainsbury's and Morrisons



- 2.3.9 Verdict Research⁵ comment that: *'The second dip of the double-dip recession in 2012 has knocked consumer confidence and shoppers are sticking more tightly than ever to their budgets. They are shopping little and often and sticking more tightly than ever to their budgets... increasing fuel prices, deterring out-of-town trips, and the move towards online food shopping each feed into this trend towards top-up shopping. Out-of-town space is increasingly difficult for grocers to make profitable'*.
- 2.3.10 Verdict consider that the proportion of convenience goods floorspace which will be accounted for by 'smaller stores' will increase from 37.6% in 2007 to 41.6% by 2017. The majority of floorspace will continue to be accounted for by 'superstores' (53% of floorspace by 2017), with 'food specialists' and off-licences continuing to have their market share reduced. Industry body IGD predicts that the convenience goods market will grow by 29% between 2012 and 2017, from £33.9bn to £43.6bn, and the main retail operators are responding quickly by opening new stores.

Key trend: growth in commercial leisure

- 2.3.11 Most commentators predict that commercial leisure, such as cafes, bars, restaurants and cinemas, will constitute a growing share of town centre floorspace. This is partly a replacement activity for reduced demand for space for traditional retail, and partly driven by demand the shift to leisure expenditure as discretionary household expenditure rises.
- 2.3.12 When considering leisure expenditure available to households, spending on food and drink typically accounts for upwards of 50% of total leisure spending, compared to around 15% on 'cultural services' (e.g. going to the cinema, theatre, art galleries or live music) and under 10% on hotels, 'games of chance' (such as bingo) and recreation/sporting services.
- 2.3.13 There is scope for town centres to capitalise on this, redefining their function as 'destinations' in their own right. This, in turn, can have wider positive implications on the performance of the town centres in question: residents and visitors spend longer in the centre, undertake 'linked trips' between retail, leisure and other uses, and increase their dwell-time in the centre. The development of a strong commercial leisure offer can also help to increase footfall outside of

³ Daily Telegraph, 12 January 2014

⁴ Daily Telegraph, 18 July 2014

⁵ Verdict Research 'Food & Grocery Retailing in the UK' Market Report

retail hours, for example in early evenings, particularly if the leisure offer also includes facilities such as cinemas.

2.4 Economic Context

- 2.4.1 The recent downturn in the economy had a number of clear changes on the retail landscape in the UK, with a series of high-profile retailers entering administration, and a general trend towards discount retailers increasing their representation — both in the comparison goods sector (for example, Poundland, 99p Stores and Wilkinson) and the convenience goods sector (for example, the continued expansion, and strong trading performance of, ‘deep discount’ retailers such as Aldi and Lidl). The downturn also affected consumer spending, with a greater reluctance to spend amongst consumers on non-essential goods. As a result, forecast levels of growth in consumer spending remain generally subdued, particularly in the short term.
- 2.4.2 It has been widely documented that online shopping has increased at a rapid pace in recent years — particularly in the comparison goods sector. Online shopping is perceived to offer a number of significant advantages over ‘traditional’, high street-format shopping — including lower prices (as there are lower operating ‘overheads’ for online retailers compared with those in a town centre), a wider variety of choice, and the ability for customers to easily search out bargains — including second hand goods. While unfavourable economic conditions are forcing many retailers to scale back on physical retail space, their online operations allow them to reach a much wider customer base. However, the competition is not as straight forward as ‘online shopping versus the high street’; new technologies are promoting an integration between the two shopping channels, to the point where a town centre than embraces digital technologies can find itself in a strong position.
- 2.4.3 Returning to the bigger picture, Internet sales have been rising much more rapidly than general retail sales in recent years. The average value of weekly retail sales on the internet was forecast at £844m in December 2012. The ONS forecast that online sales accounted for 9.4% of all retail sales in October 2012, which increased to 10.5% in October 2013 (equivalent to a year-on-year increase of 1.1 percentage points). Experian consider that this pattern is likely to remain the case for the foreseeable future, commenting in their Retail Planner Briefing Note (October 2013) that:

‘We retain our assumption that non-store retailing will increase at a faster pace than total retail sales well into the long term. There were 52.7 million internet users in the UK (representing 84.1% of the population) in mid-year 2012... growth momentum will be sustained as new technology such as browsing and purchasing through mobile phones and the development of interactive TV shopping boost internet retailing’.

- 2.4.4 However, Experian consider that at the turn of the next decade, growth in online shopping is expected to begins to plateau, stating that they *expect ‘the SFT⁶ market share [to] continue to increase over the forecast period⁷ although the pace of e-commerce growth will moderate markedly after about 2020’.*
- 2.4.5 The outputs of this study specifically take into account this anticipated growth in online shopping — based on the most up-to-date Experian guidance we remove the proportion of total expenditure which is expected to be diverted towards online shopping, before presenting the final updated quantitative floorspace requirements for the Borough⁸. In Figure 2.3, we

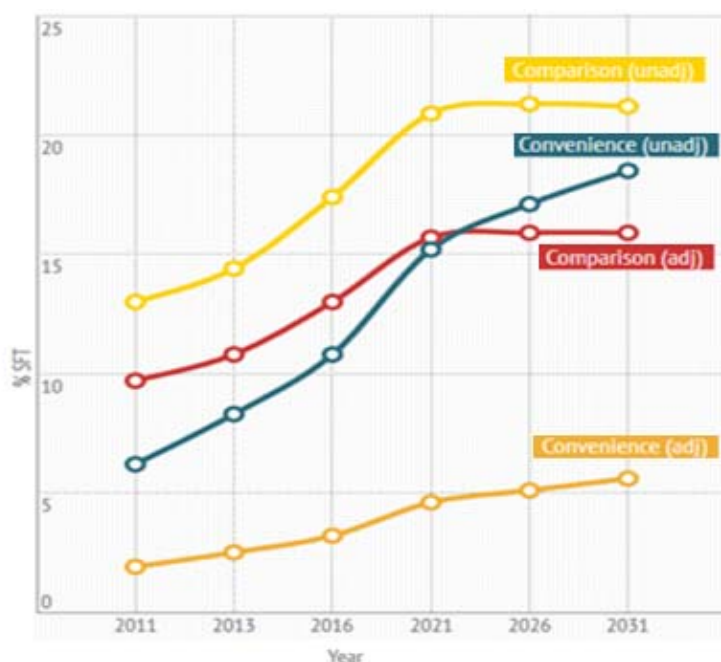
⁶ ‘Special Forms of Trading’, which includes online shopping as well as sales from markets and mail order.

⁷ Experian currently project up to 2030.

⁸ The figures which we use are Experian’s ‘adjusted’ comparison (non-food) and convenience (food) goods forecasts, which make a deduction on Experian’s ‘baseline’ figures in order to take account of internet goods sales from store space (such as through ‘Click & Collect’, as discussed below). For comparison goods, Experian apply a discount of 25% to calculate the ‘adjusted’ figure, and for convenience goods this figure is 70%. The latter figure is particularly high because many online food shopping transactions placed with Sainsbury’s, Tesco, Asda and Waitrose are ‘picked’ from the shelves of the nearest large store of the retailer. Convenience goods retailers

present the projected growth in online comparison and convenience goods shopping over the course of the study period to 2026, based on the forecasts provided by Experian. For reference, both the 'unadjusted' and the 'adjusted' figures are shown⁹, although for the purposes of our study we solely rely on the latter set of figures.

Figure 2.1 - Forecast of non-store retailing ('Special Forms of Trading') market share to 2030



Source: Experian Retail Planner Briefing Note 11, October 2013, Appendix 3. SFT includes spending on online shopping, mail order / catalogue shopping, and markets. 'Adjusted' figures include a reduction for store-picked online transactions.

- 2.4.6 This forecast growth in online spending does not equate to a redundant future for 'bricks and mortar' stores. There is a role for physical outlets to act as 'showrooms' for online retailers¹⁰. A physical presence on the high street improves the visibility of businesses; 12 out of the top 20 e-commerce businesses in the UK have a physical presence on the high street (Figure 2.4).

Figure 2.4 - Top 20 e-commerce websites in the UK, 2013



Source: IMRG Experian Hitwise Hot Shops List, 2013

are increasingly choosing to instead fulfil orders from warehouses known as 'dark stores' — although this trend remains in its infancy.

⁹ See footnote 8

¹⁰ This is where customers visit 'bricks and mortar' stores to look at / try on a product, before using technology such as smartphones to check whether the product is available elsewhere (in another store, or online) for a cheaper price.

- 2.4.7 The growth in the 'Click & Collect' method of online shopping is a further relatively new trend, but one which looks set to play an increasing role over future years. Like 'showrooming', it is also one where the physical outlet of the store can still be used to drive footfall. The 'click & collect' concept is such that a customer orders and pays for the desired product online, and then collects the product from the nearest large branch of the retailer in question. This approach is being rolled out by an increasing number of retailers. Recent research by the British Retail Consortium indicates that 60% of 'click & collect' transactions result in an additional purchase in the store.
- 2.4.8 Recent trends indicate that major retailers are becoming more willing to embrace the challenge posed by online and mobile technology, putting into place technology such as better mobile websites, offering free instore wi-fi, or in-store technology points where a customer can order a product online which may be sold out or not available within the store. This may be particularly applicable for smaller town centres where many retailers' stores are quite small and may not be able to carry the full range of products available.
- 2.4.9 There is, therefore, a role for 'bricks and mortar' stores, but there is an acute challenge for middle-order centres which will need to be embraced. The role and function of high streets — particularly those outside the higher-order shopping centres — are likely to need to consider uses beyond that of traditional retail activity in order to remain vital and viable.

2.5 Implications for LB Havering

- 2.5.1 There is little doubt that recent years have seen challenges to 'traditional' store-based shopping on a scale never previously witnessed. These challenges will continue to grow over the Council's Plan period, and in order for the centres in the Borough to perform strongly and meet local needs, they will need to adapt to, and embrace, these challenges. However, it is quite clear that there remains a role for store-based shopping — and for town centres. Experian forecast that store-based shopping is still expected to expand at an average of 1.9% per annum in capita terms to 2030, and online sales will begin to plateau.
- 2.5.2 In our view, the most successful town centres will be the ones that adapt to the changes in shopping habits, which move away from solely being shopping destinations to those which offer a broad range of retail, leisure, cultural and civic services to enable residents to have multiple reasons to visit a town centre, and to spend longer amounts of time in the centres. Successful town centres will need to embrace and work alongside multi-channelling retailing, through the availability of free wi-fi, promotional offers, 'click & collect' hubs, and so on. There will need to be a willingness for the higher-order centres in the Borough to embrace the wider changes in shopping and spending patterns, and capitalise on them rather than compete with them.
- 2.5.3 There will also be an important role for niche / curated retail destinations, which are able to compete with advances in online / mobile technology because they offer a different experience, one based around high standards of customer service, and a unique retail offer which cannot be matched online. Related to this, we therefore expect that place marketing and 'selling' the offer of a town centre will become of increasing importance.

3 Existing Performance of Network of Centres

3.1 Introduction

3.1.1 In this section we set out our assessment of the seven highest-order centres in the Borough, as follows:

- The Metropolitan Centre of **Romford**; and
- The District Centres of **Collier Row, Elm Park, Harold Hill, Hornchurch, Rainham and Upminster**.

3.1.2 Based on available evidence and our own analysis, the performance of each centre has been assessed against indicators of town centre vitality and viability set out in the Planning Practice Guidance, which can be summarised as follows:

Figure 3.1 - Extract from 'PPG'

Vitality and viability of town centres: key indicators
<ul style="list-style-type: none"> • Diversity of uses • Proportion of vacant street level property • Retailer representation and intentions to change representation • Pedestrian flows • Accessibility • Perception of safety and occurrence of crime • State of town centre environmental quality

Source: Planning Practice Guidance (section: 'Ensuring the vitality of town centres', para 005)

3.1.3 Further details of our approach, and a more detailed assessment, are set out at **Appendix A** of **Volume 2** of our Study. In our assessment below, we provide a brief summary of the performance of each centre against each of the PPG indicators, using a 'traffic light' system which is designed to identify areas where a centre is performing particularly strongly – or alternatively is considered to be underperforming.

3.2 Romford (Metropolitan Centre)

3.2.1 As a designated Metropolitan Centre, Romford is the principal shopping destination for residents within the Borough and visitors from further afield. The centre has a strong comparison and convenience offer alongside commercial leisure uses which include gyms, cafes, cinemas, amusement arcades and restaurants. The town centre is anchored by three main shopping centres (The Liberty, the Mercury and the Brewery) in addition to a popular market and high street retail units. The diversity of uses for the centre, as supplied by Experian Goad, is set out in Tables 3.1 and 3.2.

Table 3.1 - Diversity of Uses in Romford Metropolitan Centre (Number of Units)

	No. of Units	% of total	% UK average	% Difference to UK average
Convenience	50	9.1	9.0	0.1
Comparison	229	41.9	40.5	1.4
Service and Miscellaneous	212	38.8	36.9	1.9
Vacant	56	10.2	12.5	-2.3

Source: Experian Goad

Table 3.2 - Diversity of Uses in Romford Metropolitan Centre (Gross Floorspace)

	Gross Floorspace (sqm) ¹¹	% of total	% UK average	% Difference to UK average
Convenience	27,920	15.2	18.1	-2.9
Comparison	105,120	57.3	45.6	11.7
Services and Miscellaneous	36,080	19.7	24.8	-5.1
Vacant	14,200	7.7	10.5	-2.8

Source: Experian Goad

- 3.2.2 Romford enjoys good representation from national multiple retailers, as would be expected for a centre of its role and function. These include anchor stores Primark, Marks and Spencer, Next and Debenhams alongside younger fashion retailers H&M, Topman/Topshop and Superdry. Generally speaking the offer is firmly mid-market; there is an absence of upper-middle or higher end retailers. Primark and Marks & Spencer are both important anchors on South Street, which otherwise has a generally poor quality retail offer for what is such a prominent location in the town centre. There is also a good convenience offer in the town centre, with large branches of Asda (Mercury Gardens) and Sainsbury's (The Brewery), Iceland (Market Place) plus Aldi and Lidl supermarkets to the north and southern end of the centre respectively. In addition, both BHS and Marks & Spencer food offer.
- 3.2.3 The retail offer is further complemented by restaurant operators Nandos, Frankie & Benny's and Pizza Express. Fast food chains McDonalds, Subway, KFC also have representation within the centre, and there are a number of public houses such as Yates' and Wetherspoons located on South Street. The offer also includes a range of independent cafes. There is also a good range of supporting retail services, two cinemas and a theatre. The centre also has an important civic function.
- 3.2.4 While there is strong representation of national multiple retailers within the town centre, there are also significant presence of independent retailers – however for the most part this is consigned to the secondary areas of the town centre. Some parts of the centre have an over-concentration of low-grade retail uses, with the extensive number of hot-food takeaways on Victoria Road being the most noticeable example of this.

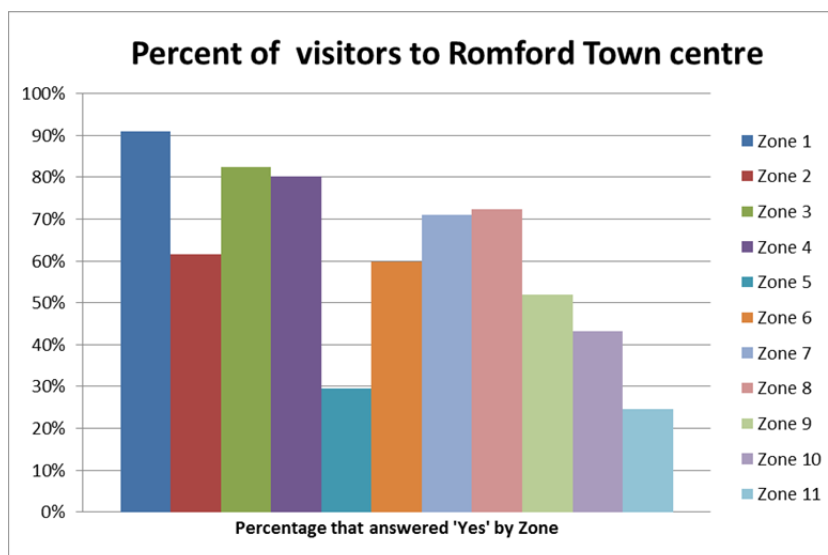
¹¹ Floorspace includes allowances for internal upper floors within shop units.

- 3.2.5 The vacancy rate at the time of our visit to the centre was 7%, some way below the UK average of 12.5%. It is positive to note that the vacancy rate has decreased slightly since the most recent Experian Goad centre survey was completed in 2013.
- 3.2.6 Pedestrian circulation within the primary retail frontage is generally good – a lot of retail activity takes place in pedestrianized streets or covered shopping centres. Market Place is also a vibrant and well used civic space especially on market days. The Liberty was particularly busy at the time of our visit, reflecting the generally good 'prime pitch' offer of the retailers in this location. As would be expected, secondary areas of the town centre do not benefit from such high levels of footfall, although no area was observed that was exceptionally quiet.
- 3.2.7 The centre has good access to the surrounding region and Central London. Romford's railway station is located on South Street, a short distance from the primary shopping area, and is served by services on the London Liverpool Street – Shenfield line with additional of-peak services to Southend and Colchester. Starting in 2018, Crossrail services will serve the station linking Romford to Reading via Central London. Numerous bus routes serve Romford connecting the town to the surrounding network of district centres. The centre also has good car parking provision which include eight Council owned car parks and five privately managed car parks. The centre feels generally safe during the daytime, although the fact that the much of the town centre is accessed by underpasses from the surrounding area due to the ring road that encircles the centre is not ideal. There is a small concentration of bars/nightclubs along South Street which contributes to the centre's night time economy.
- 3.2.8 The central retail core is generally of good quality, with the Liberty centre, the Brewery and the Mercury Mall in particular offering a high-quality shopping environment. Recent improvements in the public realm such as the pavement widening works along Victoria Road and South Street have also improved the appearance of the town centre. The Council secured funding for these improvements from TfL. Romford generally has good architectural diversity spanning historic buildings such as the Havering Museum and St Edward the Confessor Church to more contemporary buildings such as the Liberty Centre. The most notable shortcoming of the town centre is a lack of significant green space and sitting areas.

Customer Perceptions of Romford Metropolitan Centre

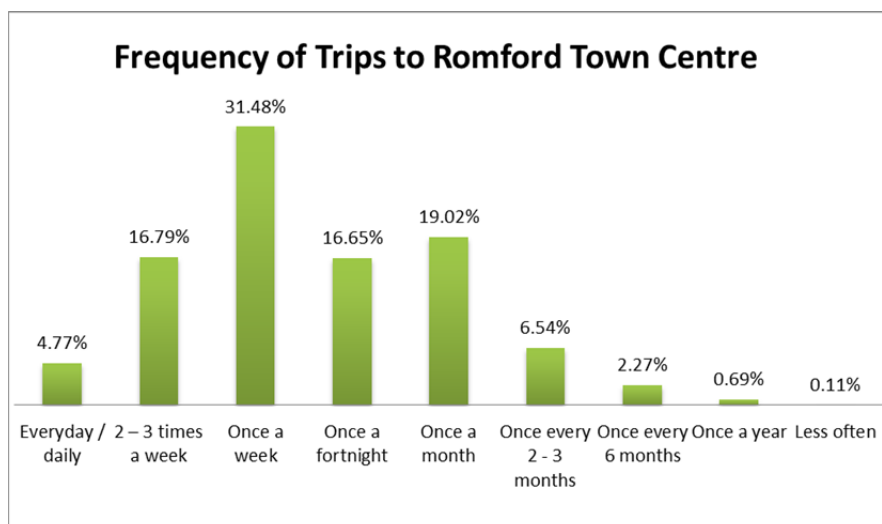
- 3.2.9 As part of the household survey of shopping patterns which was undertaken in support of this study (which we discuss further in Section 4), respondents were asked a number of questions in respect of their views whether they visited Romford metropolitan centre for shopping / leisure activities, what they liked about the town centre, and what could be improved. We set out a summary of these findings below; the full results are included within the household survey data at Volume 3 of the report.
- 3.2.10 When asked whether they visited Romford metropolitan centre regularly for shopping, leisure or work 59% of survey respondents stated they did. The proportion of residents who said they did visit the town centre regularly varied between the 11 survey zones (refer to Appendix B) which we have used for the purpose of our analysis (see **Figure 3.2**). This data shows that as a general trend Romford metropolitan centre draws high amounts of trade from those zones in the immediate vicinity (the town centre falls within zone 1), with numbers of visits decreasing as proximity to Lakeside increases. A low proportion of respondents from Zones 5 (30%) and 11 (25%) which are closest to Lakeside shopping centre said they visited Romford. Fewer residents from Zone 2 do visit the centre than the other surrounding Zones. This could possibly be attributed to the strong leisure offer in Hornchurch district centre.

Figure 3.2 - Visitors to Romford Metropolitan Centre by Zone



- 3.2.11 Out of those who stated that they did visit the centre, the majority of respondents (32%) said they visited Romford on a weekly basis. The frequency of visits to Romford undertaken by the total number of respondents is outlined below. This table shows that most people visit the centre on a regular basis once a week, 2-3 times a week or once a month.

Figure 3.3 - Frequency of trips to Romford Metropolitan Centre



- 3.2.12 When asked what they liked about Romford metropolitan centre the main reasons respondents gave were; close to home (39%), good range of chain stores (31%), good range of independent stores (18%) and nothing/very little (12%). A particularly high number of respondents (55%) from Zone 9 (Dagenham) commented that Romford contains a good range of chain stores. Other reasons that respondents gave included the following:

- Close to work/en-route to work

- Good or free car parking¹²
- Good bus service/accessible public transport
- Markets
- Restaurants/cafes
- Attractive environment
- Compact centre
- Undercover/sheltered areas

3.2.13 When asked what things could be improved about Romford metropolitan centre, 52% of respondents gave no answer, suggesting a reasonable level of satisfaction amongst users of the centre. Out of the remainder of the responses, the most popular improvements suggested by respondents included:

- Cheaper parking (12%)
- More parking (8%)
- Improvement to the market (6%)
- Cleaner Streets/removal of litter (5%)
- Better choice of shops in general (4%)
- Improve appearance/environment of centre (3%)
- More independent shops (3%)
- Better street furniture/floral displays (2%)
- More control on other anti-social behaviour (2%)

3.3 Collier Row (District Centre)

3.3.1 The district centre is located in the north west of the Borough. The centre generally caters to the day to day needs of local residents, with representation geared towards the provision of convenience goods, hot food and some services. Retail activity is centred around Collier Row Road, Clockhouse Lane and Chase Cross Road. The offering in the town centre is generally towards the lower end of the market, especially when the provision of hot food take aways and charity shops is taken into consideration.

3.3.2 The majority of retailers and food outlets are independently owned. The convenience offer within Collier Row is headed by a Tesco Metro (in an attractive art deco former cinema), alongside Costcutter and Londis. Other national multiples present include Boots, Lloyds Pharmacy, Lloyds Bank, Post Office, Greggs, Coral, a JD Wetherspoon operated pub, Domino's Pizza and Pizza Hut. There are 11 vacant units in the centre, equivalent to 15% of all units, above the UK average of 12.5%. The diversity of uses for the centre is set out at Table 3.3.

¹² Parking is also shown as where the centre could improve

Table 3.3 - Diversity of Uses in Collier Row (Number of Units)

	No. of Units	% of total	% UK average	% Difference to UK average
Convenience	8	11.4	9.0	2.4
Comparison	17	24.2	40.5	-16.3
Service and Miscellaneous	36	51.4	36.9	14.5
Vacant	9	12.9	12.5	0.4

Source: Experian Goad

Table 3.4 - Diversity of Uses in Collier Row (Floorspace)

	Gross Floorspace (m ²)	% of total	% UK average	% Difference to UK average
Convenience	2,180	22.2	18.1	4.1
Comparison	2,700	27.6	45.6	-18.0
Service and Miscellaneous	3,850	39.3	24.8	14.5
Vacant	1,070	10.9	10.5	0.4

Source: Experian Goad

- 3.3.3 Pedestrian flows were observed to be generally good, aided by the linear nature of the centre. The centre is served by six routes, and can thus be considered generally accessible. Environmental quality in the district centre is generally good and the Council has also invested in upgrading the public realm which has added to the centre's attractiveness.

3.4 Elm Park (District Centre)

- 3.4.1 Elm Park District Centre is located in the south western part of the Borough and is accessible by public transport via the London Underground district line and four bus routes. The centre is split into two distinctive areas located on either side of Elm Park underground station at each end of The Broadway. To the north the main shopping frontages include The Broadway and the junction of Elm Park Avenue/St. Nicholas Avenue/The Broadway. The environmental quality of this area is generally good as there has been extensive public realm investment — however the presence of vacant buildings does undermine environmental quality. To the south the main retail frontages are Station Parade and Tadworth Parade. The environmental quality and perception of safety in this area is quite poor due to a high number of vacant units and concentration of take-aways which remain closed during the day time.
- 3.4.2 The centre meets day to day shopping needs for residents and as a whole provides a good range of convenience stores including Co-operative Food, Tesco Express and Sainsbury's Local as well as an extensive range of local services. The comparison retail offer is at the lower end of the market and, since the local pub was recently converted to a supermarket the evening economy is now limited to a small number of restaurants and eleven take-aways. The centre had a vacancy rate of 14% at 1 October 2014 this is higher than the current National Average of 12.5%. Whilst the vacancy rate should be monitored, we consider that overall Elm Park is able to meet day-to-day shopping needs to a generally good extent, and, with some improvement to the visual appearance of the centre, will offer generally positive vitality and viability.

3.5 Harold Hill (District Centre)

- 3.5.1 Harold Hill is a small district centre, occupying the ground floor of a purpose-built 1950s council-owned residential estate to the north-east of the Borough. Most of the retail units are independently owned though a handful of familiar High Street names have established themselves in the centre. The main focus of the retail offer is the provision of convenience goods and some services such as banking and hairdressing. In addition the centre also offers a restaurant; café and hot food takeaways. National retailers/operators present in the centre include Iceland, Co-Operative Food and Sainsbury's Local supermarkets, plus Superdrug, Boots, Boots Opticians, Halifax, Santander, Natwest, William Hill and Ladbrokes.

Table 3.5 - Diversity of Uses in Harold Hill (Number of Units)

	No. of Units	% of total	% UK average	% Difference to UK average
Convenience	15	22.4	9.0	13.4
Comparison	20	29.9	40.5	-10.6
Service and Miscellaneous	21	31.4	36.9	-5.5
Vacant	11	16.4	12.5	3.9

Source: Experian Goad

Table 3.6 - Diversity of Uses in Harold Hill (Floorspace)

	Floorspace (m ²)	% of total	% UK average	% Difference to UK average
Convenience	2,990	32.6	18.1	14.5
Comparison	3,080	33.6	45.6	-12.0
Service and Miscellaneous	2,440	26.6	24.8	1.8
Vacant	650	7.1	10.5	-3.4

Source: Experian Goad

- 3.5.2 **The diversity of** uses for Harold Hill is presented at **Table 3.4**. At the time of our visit the vacancy rate was 20% and therefore considerably above the UK average, although this partly reflects the renovation works being undertaken to facilitate the creation of a new library within the centre. Once this is considered then the vacancy rate falls to 5.6%. Notwithstanding this, the vacancy rate should be carefully monitored by the Council.
- 3.5.3 The district centre is of good environmental quality. While the development of the new Harold Hill library is a welcome addition to the eastern arcade, the number of vacancies within the western arcade diminishes the overall quality of the district centre. The centre is served by four bus routes, which is considered to represent a good level of accessibility given the role and function of Harold Hill as a district centre.

3.6 Hornchurch (District Centre)

- 3.6.1 Hornchurch district centre is located in the centre of the Borough and is accessible by public transport via national rail services, London Underground's District Line and seven bus routes

though it is important to note that there are only half hourly services (Mon-Sat up to 8pm) to Emerson Park from Romford and Upminster and the tube station is not in the town centre. The focal point of the centre is the junction where the three main shopping Streets- the High Street, Station Lane and North Street intersect. The environmental quality of the centre is good, a number of key sites have been redeveloped to a high standard and there has been recent significant investment in the public realm including traffic calming measures using funds from Transport for London under its Major Schemes 'branding'. The current vacancy rate of 6% is less than half the UK average, and there are no particularly prominent vacant units within the primary shopping area (although we note that there has been a slight increase in the vacancy rate since the Experian Goad centre survey was completed in 2013).

Table 3.7 - Diversity of Uses in Hornchurch (Number of Units)

	No. of Units	%of total	% UK average	% Difference to UK average
Convenience	9	5.2	9.0	-3.8
Comparison	64	37.2	40.5	-3.3
Service and Miscellaneous	94	54.7	36.9	17.8
Vacant	5	2.9	12.5	-9.6

Source: Experian Goad

Table 3.8 - Diversity of Uses in Hornchurch (Gross Floorspace)

	Gross Floorspace (m ²)	% of total	% UK average	% Difference to UK average
Comparison	5,340	18.3	18.1	0.2
Convenience	10,060	34.4	45.6	11.2
Service and Miscellaneous	12,930	44.2	24.8	19.4
Vacant	920	3.1	10.5	7.4

Source: Experian Goad

3.6.2 The retail offer contains a good diversity of comparison, convenience and service retail uses as well as an impressive commercial leisure offer which makes the centre a borough-wide leisure destination for eating and drinking and lends it a stronger 'evening economy' than might typically be expected for a district centre. The convenience offer is rather limited and the fact that the prominently-sited former Little Waitrose store has stood vacant for over a year suggests a lack of demand from retailers. The offer is anchored by a Sainsbury's supermarket supplemented by Iceland food store and a range of small convenience stores. The comparison offer is at the mid-range of the market, there are a number of national multiple retailers however there is also a high proportion of charity shops and discount stores which account for 22% of the comparison offer. The centre's leisure offer is focused on eating and drinking out and as such there is a vibrant evening economy. There is a high number of independent restaurants and national multiple outlets including Nando's, Zizzi, Ask, Prezzo, Starbucks, Costa and a JD Wetherspoon pub. A consequence of this is that much of the centre does not benefit from strong levels of footfall during retail trading hours.

3.6.3 It is important to note that Hornchurch is widely regarded as Havering's culture centre. The cultural offer includes the Fairkytes Art Centre and the Queens Theatre.

3.7 Rainham (District Centre)

- 3.7.1 Rainham is a small district centre which is anchored by a large Tesco Extra supermarket. The size of the supermarket is such that it offers many of the services and facilities which one may associate with a 'typical' district centre, such as a pharmacy, opticians, photo processing, travel money etc, alongside an extensive food and non-food retail offer. The store is open 24 hours when trading regulations permit. Elsewhere in the centre (which benefits from a direct pedestrian link to/from the Tesco store), the offer of the centre includes two convenience shops, estate agents, betting shops, a bank, a footwear store, a second-hand furniture shop and takeaway restaurants with the majority of units operated by independent operators. There are a number of gaps in the retail and services offer, including café and restaurant provision and clothing retailers, and a number of vacant premises were observed on Upminster Road. A new library (pictured above) is a positive addition to the centre, which benefits from its setting within the Rainham conservation area.
- 3.7.2 At the time of the district centre visit pedestrian activity was generally low while Tesco appeared to be trading well at the time.
- 3.7.3 Rainham is served by four bus routes and a train station. The mainline service runs from Fenchurch Street to Southend. Pedestrian navigation has been enhanced by the provision of way finding directional signs. The town centre has two main car parks: the first at the train station and the second adjacent to the Tesco supermarket.
- 3.7.4 Rainham district centre is performing adequately: the Tesco store appears to be trading successfully and offers an extensive product range. The recently-completed Rainham Library is evidently a positive addition to the centre. There are no areas of significant concern in respect of the performance of the centre.

3.8 Upminster (District Centre)

- 3.8.1 Upminster District Centre is located in the south eastern part of the Borough and is accessible by public transport via National Rail services, the London Underground district line and four bus routes. The main retail frontage extends south along the B1421 (comprising Station Road and Corbets Tey Road) from Upminster rail and underground station at the northern end of the centre and two secondary retail frontages, St. Marys Lane and Springfield Gardens both run east off the B1421. The environmental quality is good in most of the centre which contains a mix of architectural styles reflecting both civic and commercial functions.
- 3.8.2 The vacancy rate in the centre is low, at 7%, although has increased since the most recent Experian Goad centre survey of the centre in 2013, which identified a vacancy rate of 5%.

Table 3.9 - Diversity of Uses in Upminster (Number of Units)

	No. of Units	%of total	% UK average	% Difference to UK average
Convenience	14	8.1	9.0	-0.9
Comparison	62	36.1	40.5	-4.4
Service and Miscellaneous	87	50.6	36.9	13.7
Vacant	9	5.2	12.5	-7.3

Source: Experian Goad

Table 3.10 - Diversity of Uses in Upminster (Gross Floorspace)

	Gross Floorspace (m ²)	% of total	% UK average	% Difference to UK average
Comparison	7,250	25.9	18.1	7.8
Convenience	11,000	39.3	45.6	-6.3
Service and Miscellaneous	8,980	32.1	24.8	7.3
Vacant	780	2.8	10.5	-7.7

Source: Experian Goad

- 3.8.3 The environmental quality is good in most of the centre which contains a mix of architectural styles reflecting both civic and commercial functions. The environmental quality of the junction where the B1421 intersects with St. Mary's Lane is poor however: the heavy traffic at the junction reduces safety and acts as a barrier to the flow of pedestrians; there is also a small concentration of vacant units.
- 3.8.4 Overall the centre contains a good mix of commercial, civic and residential uses which contribute to the centre's vitality. The retail offer is, as would be expected in a district centre, geared towards meeting day-to-day uses, with a range of comparison, convenience and service retail uses. The centre has a diverse convenience offer including both high-end (Waitrose, Marks and Spencer's Simply Food) and budget food stores (Aldi, Iceland) as well as a range of independent convenience shops. The comparison offer accounts for 24% of all units and is in the mid-range of the market however there are only a handful of national multiple comparison retailers (including Clarks, Superdrug and Boots). The Roomes department store (which principally sells fashion and homeware) acts as an anchor store to the northern end of the centre, whilst the foodstores anchor the central and eastern ends. The Waitrose store does not appear to be encouraging strong levels of pedestrian flow from the rest of the centre however, which is partly likely to reflect the fact that much of the rest of the retail offer along St Mary's Lane is of poorer quality, including a number of take-away units.
- 3.8.5 The leisure offer comprises the local leisure centre and a number of independent and national chain eating and drinking outlets which mostly are positioned in the middle of the market.
- 3.8.6 Whilst Upminster generally benefits from positive vitality and viability there is some scope for improvement in the quality of the retail offer and for the centre to be better integrated through upgrading of the public realm.

3.9 Out-of-Centre Representation

- 3.9.1 Not all of the retail provision in the Borough is concentrated in the network of town centres. In common with elsewhere in the country, the established town centres compete for expenditure with retail parks and freestanding retail warehouses, as well as a network of large format out-of-centre convenience goods floorspace. Typically this floorspace offers 'bulky goods' retailing, such as DIY goods and furniture – although there is increasing demand from 'high street' retailers to take space in such developments where planning restrictions allow (or can be relaxed). **Table 3.11** summarises the main out-of-centre retail and leisure floorspace provision in the Borough.

Table 3.11 - Main Out-of-Centre Retail Floorspace LB Haverling

Store / Retail or Leisure Park Name	Main retailers / Operators	Floor Area (Gross)
Gallows Corner Retail Park	Argos, Halfords, Harvey's, DFS, Furniture Village, Next	65,000sq.ft/ 6,039 sqm
Rom Valley Retail Park	Carpetright, Dreams Bed Superstores, Pets At Home, Mothercare World.	92,557sq.ft/ 8,5999 sqm
Eastern Avenue Retail Park	PC World, Curry's, Poundstretcher	110,000sq.ft/ 10,219sqm
Roneo Corner	B&Q (also an adjacent Tesco Extra supermarket)	72,000sq.ft/ 6,689sqm

Source: PBA desktop research (excluding standalone foodstores)

3.10 Surrounding Centres

- 3.10.1 Surrounding Haverling is a competing network of centres which can be expected to provide competition to centres within the Borough for expenditure. We expect the principal centres which compete with destinations in Haverling to be **Lakeside, Chelmsford, Brentwood, Stratford and Ilford**, whilst smaller centres may also play a more limited role in meeting some residents' day to day shopping needs. We consider the competing centres below. Some of these centres fall within the study area which we have used as the basis of our assessment, which we discuss further in the following section.

Lakeside

- 3.10.2 Lakeside is designated as a new regional centre in the Thurrock Core Strategy, which supports the transformation of the northern part of the Lakeside Basin into a new regional centre. Lakeside incorporates the Lakeside Shopping Centre (LSC) as well as Lakeside Retail Park and Junction Retail Park, and a number of large, freestanding stores including Ikea, Costco and Tesco Extra. There is a strong and established retail offer, which benefits from good levels of accessibility from the national road network.
- 3.10.3 The main role of Lakeside at present is as a comparison shopping destination; and LSC in particular is a fashion and department store-led established comparison goods shopping destination. The shopping centre is anchored by large branches of House of Fraser, Marks & Spencer and Debenhams, with an extensive range of supporting clothing & fashion retailers, ranging from budget to upmarket. The retail parks also have a good representation of national retailers, and whilst this is principally 'bulky goods' in nature there is a shift towards 'town centre'-format retailers establishing a trading presence here; for example Lakeside Retail Park includes representation from Next, Sports Direct and Costa Coffee, whilst Junction Retail Park has TK Maxx and 'outlet' stores from Marks & Spencer and Gap.
- 3.10.4 LSC has benefited from recent improvements to its food and drink offer in this respect through the creation of an exterior family dining destination overlooking the central lake. There are a number of coffee shops located in LSC, and drive-through restaurants in the vicinity of the retail parks. Lakeside offers extensive family entertainment and dining options (all of which are run by national multiple operators). This is designed to complement the retail offering and reinforce LSC's role as a comprehensive retail and entertainment venue. Restaurant operators within the shopping centre include Las Iguanas, Nandos, Strada, Café Rouge, Giraffe and

Wagamama. Elsewhere in the centre there are branches of Pizza Hut, Yo Sushi, Gourmet Burger Kitchen and Taco Bell.

- 3.10.5 However Lakeside scores poorly in terms of representation in other service sector categories, such as banks/building societies, hair & beauty salons, travel agents and dry cleaners. This reflects Lakeside's current role as a comparison goods shopping-led destination, rather than a 'traditional' town centre.

Chelmsford

- 3.10.6 Chelmsford is a strong regional shopping destination, with good representation from national retailers, and a significant civic, cultural and leisure destination. We expect Chelmsford to reinforce its position as a regional-level shopping centre with the recent commencement of construction of a new retail and leisure development in the city centre. The development will be anchored by a John Lewis department store, alongside 25 further retail outlets, a cinema and new restaurants. The scheme is expected to commence trading in 2015.
- 3.10.7 Chelmsford has a number of national hotel chains present within the town centre and the edge of centre. This includes the budget chain Travelodge as well as 2 hotels operated by Best Western. Chelmsford also has an 8-screen Odeon cinema with the independent Chelmsford City Theatres screening additional art house films as well as being the city's main live music and theatre venue. Additional family entertainment includes the 36 lane, Tenpin bowling alley. The facility includes a pool hall, a laser tag room and a café. Chelmsford has a strong representation of national multiple restaurant operators in the town centre. This includes representation from Pizza Express, Prezzo, Pizza Hut, Zizzi's, Café Rouge, Giraffe and Nandos.

Brentwood

- 3.10.8 Brentwood is the main town in the borough of Brentwood and is defined as a town centre in the Brentwood Local Plan. The centre has a good convenience goods provision, which includes a Sainsbury's, Co-op and Iceland as well as independent specialist retailers. The comparison goods offer is also adequate, with a reasonable provision of clothing and footwear retailers, including small branches of Marks & Spencer and Next. The retail provision in the centre is supported by a good provision of services uses, including a range of coffee shops and restaurants such as Starbucks and Zizzi. National restaurant operators in the town centre include Nandos, Pizza Express, Prezzo and Chimichanga.

Dagenham

- 3.10.9 Dagenham is classified as a district centre in both the London Plan (2011) and the Barking and Dagenham Core Strategy. The town centre appears to cater primarily for local needs especially day to day convenience shopping. The high street has a significant number of hot food take away units and convenience shops. The presence of national multiple retailers is generally low though there are a few exceptions such as Lidl's, Iceland and Tesco Express. The Heathway Shopping Centre contains additional retail outlets though they are general mid to down market. These outlets include Phones 4U, Boots, Peacocks, 99p Store and Wilko. There appear to be few leisure amenities available within the district centre.

Basildon

- 3.10.10 Basildon is defined as a regional town centre in the emerging Basildon Borough Local Plan. The centre has a good diversity of uses, with a mixture orientated towards comparison goods retailers. Clothing and fashion retailers are principally concentrated in the Eastgate Centre, with key department stores including Marks & Spencer and BHS in Town Square. There is also a large Asda supermarket and a popular market. While retail diversity is strong, the town centre offers very limited leisure and evening economy options – a fact that is noted in the

representations made to the council on its emerging Core Strategy consultation. The Towngate Theatre is the only cultural venue within the town centre and there is a noticeable absence of family dining options.

Stratford

- 3.10.11 Stratford is designated as a Major Centre in the Newham Core Strategy (2012) and in the 2011 London Plan (though the 2014 Further Alterations draft of the London plan promotes Stratford to a Metropolitan Centre with considerations in place to prompting it to an International Centre in future). The retail offer at Stratford is dominated by the Westfield Stratford City Development. The shopping centre is offers a wide, high quality mix of retail and leisure amenities in a modern, good quality environment. In all there are over 300 retail units – anchored by Marks and Spencer, Waitrose and John Lewis in addition to High Street brands such as Zara, Uniqlo, the Kooples, Topman/ Topshop and Hugo Boss. Stratford also features a high number of fast food and casual dining options and a cinema. There are also three low to mid-range hotels present within the development.

Ilford

- 3.10.12 Ilford is designated as a Metropolitan Centre in the London Plan (2011). Retailing in Ilford town centre is mainly focused around the High Road and the Exchange Shopping Centre. The retail offer in the shopping centre is generally mid to down market. Anchor tenants at the Exchange Shopping Centre include Debenhams, Marks and Spencer, Wilco and TK Maxx. Additional retailers include Peacocks, the 99p Store and Deichmann's. Elsewhere in the town centre there is retailer representation from Argos, Sainsbury's, and Primark. The town centre also has a modest restaurant offer and a cinema. Ilford High Street appears to benefit from a pleasant built environment.

4 Existing Shopping Patterns

Read this section alongside:

- Volume 2, Appendix B (Study Area plan)
- Volume 2, Appendix C (Quantitative retail need tables - Tables CM1 to CM5 and CV1 to CV5)
- Volume 3 (Household survey results)

4.1 Introduction

- 4.1.1 In this section we set out where residents in the Borough are currently undertaking their spending on convenience (food), comparison (non-food) and leisure goods, establishing how much is spent at centres in the Borough and how much 'leaks' to destinations further afield. We also set out the study area which has been used as the basis of our assessment, and assess the extent of growth in spending on retail and leisure goods which can be expected to come forward over the course of the study period.
- 4.1.2 The findings of this section are informed by a household telephone survey of shopping and leisure patterns, which was undertaken by NEMS Market Research during August / September 2014. The NEMS data is provided in full at **Volume 3** to this study. The approach to these studies is described in full below.

4.2 Definition of Study Area

- 4.2.1 In order to establish where residents in different parts of the Borough are currently undertaking their retail and leisure spending, it is necessary to firstly define a study area; and secondly split this study area into zones in order for a sufficiently fine-grain of analysis of spending patterns to be provided. The highest order centre in Havering, Romford, is identified as a Metropolitan Centre in the London Plan, and our health check assessment of the town centre has confirmed that it has a strong retail and leisure trade draw. Accordingly it can be expected that Romford can be expected to draw trade from an area wider than the administrative boundaries of the Borough. We have therefore adopted a study area which extends beyond these boundaries, reflecting what we consider to be a 'natural' catchment for Romford, having regard to competing surrounding centres. The study area thus extends into parts of LB Barking & Dagenham; LB Redbridge, as well as the Essex boroughs of Epping Forest and Brentwood. LB Havering is included in its entirety.
- 4.2.2 Figure 4.1¹³ shows the boundaries of the study area we have adopted for the purposes of our study; these are largely unchanged from the Council's previous study, although we have extended the study area eastwards to cover the Brentwood / Shenfield urban area (this forms a new zone, zone 11). Figure 4.1 also shows how the study area has been sub-divided in order to get an accurate indication of spending patterns for residents in different parts of the Borough, and shows a total of five survey zones, as follows:

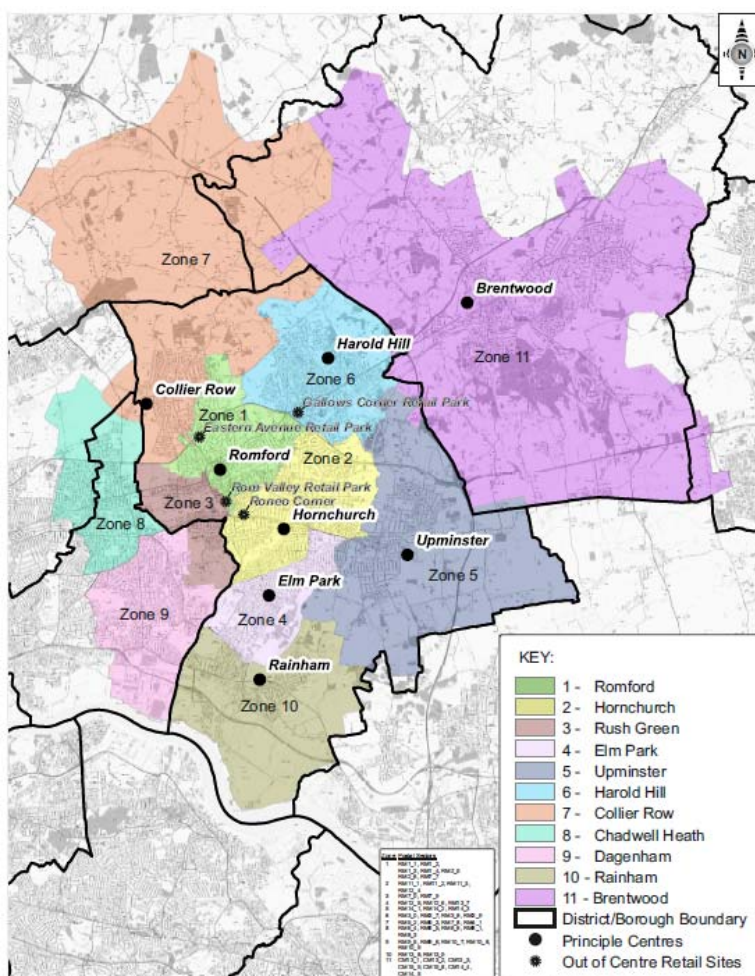
¹³ A larger version of the plan shown at Figure 4.1 is provided at **Appendix B**

Table 4.1 - List of Study Area Zones

Zone	Zone name	Zone	Zone name
Zone 1	Romford	Zone 7	Collier Row
Zone 2	Hornchurch	Zone 8	Chadwell Heath
Zone 3	Rush Green	Zone 9	Dagenham
Zone 4	Elm Park	Zone 10	Rainham
Zone 5	Upminster	Zone 11	Brentwood
Zone 6	Harold Hill		

4.2.3 We therefore use these study zones as the basis of our assessment in the remainder of this report. The zones which contain all or parts of the administrative area of LB Havering are zones 1 to 7 inclusive, and zone 10. Therefore, reflecting the nature of this study as an evidence base document for the Council – it is in these zones which we focus our attention.

Figure 4.1 - Study Area



4.3 Current and Future Spending in the Study Area

4.3.1 Appendix C (Volume 2) sets out the growth in population and expenditure on comparison and convenience goods in the study area, over the study period to 2031. Table CM1 (for comparison goods) and Table CV1 (for convenience goods) both show that:

- The study area population at 2014 is 442,231 persons
- This will increase to 462,169 persons by 2017; 488,678 persons by 2021; 520,315 persons by 2026, 563,975 persons by 2029, and 547,846 persons by 2031 (ONS Population Projections).
- This is equivalent to a growth in population of 105,615 persons.

4.3.2 **Table CM2** shows the per capita expenditure on comparison goods across the study area. Annual personal spending on comparison goods differentiates quite considerably across the study area, ranging from £1,925 in zone 9 (Dagenham), to £3,695 in zone 11 (Brentwood) at 2014. The average per capita expenditure on comparison goods for LB Havering zones is £2,987.

4.3.3 **Table CM3** multiplies the population forecasts in **Table CM1** to the per capita expenditure forecasts in **Table CM2**. It shows that, having made allowance for 'special forms of trading' (such as online shopping, and using SFT discount rates set out in Experian Retail Planner Briefing Note 12), there is currently £1,182.80m of comparison goods expenditure available to residents in the catchment area. This will increase over the course of the study period as shown in **Table 4.2**.

Table 4.2 - Comparison goods expenditure growth in study area

Interval	2014	2017	2021	2026	2029	2031
Total comparison goods expenditure, inc SFT deduction (£m)	1,191.69	1,375.51	1,603.71	2,005.09	2,285.28	2,493.22

Source: Table CM3, Appendix C

4.3.4 **Table CV3 of Appendix C** multiplies the population forecasts in **Table CV1** (which are identical to those presented in **Table CM1**) to the per capita spending on convenience goods shown in **Table CV2**. Per capita spending on convenience goods ranges from £1,569 in zone 9 (Dagenham) to £2,236 in zone 5 (Upminster) at 2014. The average per capita expenditure on convenience goods for LB Havering is £1,976. Having made allowance for SFT, **Table CV3** shows that total convenience goods expenditure will increase as shown in **Table 4.3**.

Table 4.3 - Convenience goods expenditure growth in study area

Interval	2014	2017	2021	2026	2029	2031
Total convenience goods expenditure, inc SFT deduction (£m)	808.18	840.80	899.19	979.38	1,025.53	1,055.39

Source: Table CV3, Appendix C

4.4 Patterns of Comparison Goods Spending

- 4.4.1 The household survey identifies where residents in the study are currently undertaking their shopping. **Table CM4 (Appendix C)** sets out where residents are undertaking their comparison goods shopping in percentage form, and **Table CM5** converts these percentages into monetary values, by applying the percentages in **Table CM4** to the total expenditure figures in **Table CM3**.
- 4.4.2 Of importance is the proportion of expenditure which is retained within the study area, as it is this proportion which is used to inform our estimates of future retail capacity. The row 'total for study area' in **Table CM5** shows that, of the total £1,191.69m which is available to residents in the study area, £780.22m is retained by centres and stores within the study area, with the remaining £411.47m 'leaking' to destinations outside the study area. In other words, the study area retains 65% of total comparison goods expenditure available. The results of the household survey confirm that most of the remaining expenditure 'leaks' to Lakeside, a short distance outside the boundaries of the study area; we return to discuss this further below.
- 4.4.3 Table CM5 identifies that within the study area:
- **Romford metropolitan centre** draws a total of £374m comparison goods turnover from the study area, equivalent to 31% of total comparison goods expenditure, and – as would be expected – is the most popular destination for comparison goods spending in the study area by some margin;
 - There are a number of **retail parks** in Romford which compete with the town centre for expenditure. In total these retail parks (Gallows Corner, Eastern Avenue and other smaller developments) account for £125m of spending;
 - **Brentwood** is the second most popular destination for comparison goods spending in the study area, drawing £86m of spending, although virtually all of this comes from residents in the Brentwood zone, with little evidence of expenditure flows from residents in LB Havering;
 - Similarly, **Dagenham** draws £40m of spending, but this is largely from residents outside Havering;
 - **Hornchurch** is the second most popular comparison goods shopping destination within LB Havering, drawing £32m of spending, and the centre draws trade from a number of zones across the study area.
 - **Upminster** attracts a slightly lower turnover of £28m, although proportionally more of its turnover comes from its local catchment, compared to the wider trade draw of Hornchurch;
 - The comparison goods turnover of **Rainham** of £15m is largely accounted for by the presence of a Tesco Extra supermarket;
 - **Elm Park** and **Harold Hill** do not act as significant comparison goods shopping destinations, drawing turnovers of £3m and £5m respectively.

Expenditure Leakage

- 4.4.4 The remaining £411.47m of comparison goods expenditure is spent at destinations outside the study area, with most popular destination by some margin being Lakeside, which accounts for £261m of spending, equivalent to 22% of total available comparison goods expenditure — therefore making Lakeside the second-most popular comparison goods shopping destination for residents in the study area. Trade is drawn to Lakeside from each of the 11 survey zones,

but it is noteworthy that for residents in parts of LB Havering, Lakeside is a closer or equidistant comparison goods shopping destination than Romford metropolitan centre.

- 4.4.5 Elsewhere, £23m of comparison goods expenditure is spent in central London, £27m in Basildon (mostly from residents outside LB Havering), £19m is spent in Stratford, East London (including at Westfield Stratford City), £19m at Bluewater, and £18m in Ilford.

Spending Patterns by Zone

- 4.4.6 Clearly, spending patterns are not uniform across the study area. **Table 4.4** summarises where residents in each part of the study area are undertaking their comparison goods spending. This helps to determine the extent of catchment areas of individual centres within the study area.

Table 4.4 - Summary of Comparison Goods Spending Patterns by Zone

Zone	Principal comparison goods shopping destinations	Summary of patterns of spending
Zone 1 Romford	Romford metropolitan centre (£67m); Lakeside (£11m); Gallows Corner Retail Park (£6m)	<ul style="list-style-type: none"> Of the £112m comparison goods expenditure available to residents in the zone, £81m is spent in Romford — split between £67m in the town centre, and the remainder in retail parks and other destinations. The town centre therefore attracts a good level of support from residents who live in the local area, and also appears to be withstanding pressure from competing retail park developments. Most of the remaining expenditure is accounted for by Lakeside (£11m) and the Tesco Extra store at Bryant Avenue, Romford (£5m). There are limited expenditure flows to Hornchurch and Upminster (£2m each).
Zone 2 Hornchurch	Romford metropolitan centre (£51m); Lakeside (£43m); Hornchurch (£13m)	<ul style="list-style-type: none"> Of the £163m comparison goods expenditure available to residents in the zone, £79m is spent in Romford, including £51m in the town centre. It is the most popular comparison goods shopping destination for residents in this zone. Romford faces stronger competition from Lakeside, which draws £43m of spending from residents in this zone. Hornchurch itself only attracts £13m of comparison goods spending, reflecting its limited function as a comparison goods shopping destination. £5m of spending goes to central London, the most from any individual zone.
Zone 3 Rush Green	Romford metropolitan centre (£24m); Lakeside (£4m); Eastern Avenue Retail Park (£3m)	<ul style="list-style-type: none"> Of the £42m comparison goods expenditure available to residents in the zone, £31m is spent at stores in Romford, including £24m in the town centre. There is no other centre competing for expenditure to any significant degree, although there are some modest flows to Lakeside (£4m). Romford therefore enjoys a dominant position over residents' spending patterns in this zone.
Zone 4 Elm Park	Lakeside (£25m); Romford metropolitan centre (£24m); Hornchurch (£8m)	<ul style="list-style-type: none"> There is £82m of comparison goods expenditure available to residents of this zone, which is largely split evenly between Romford metropolitan centre (£24m) and Lakeside (£25m). A further £8m is spent at retail parks in Romford. Hornchurch also attracts £8m of spending from residents in zone 4, the highest turnover it draws from any zone other than its 'local' zone (zone 2).
Zone 5 Upminster	Lakeside (£47m); Upminster (£14m); Romford	<ul style="list-style-type: none"> There is £95m of comparison goods expenditure available to residents in this zone. Romford does not draw significant amounts of trade in comparison to Lakeside, which draws £47m

	metropolitan centre (£10m)	<p>of spending.</p> <ul style="list-style-type: none"> By contrast Romford draws £15m, including £10m to the town centre. Upminster town centre draws £14m of spending, which is considered to represent a reasonable performance given the comparison goods offer of the centre is largely restricted to day-to-day uses. A further £4m of spending goes to Hornchurch, and £4m to Bluewater Shopping Centre.
Zone 6 Harold Hill	Romford metropolitan centre (£37m); Gallows Corner Retail Park (£15m); Lakeside (£15m)	<ul style="list-style-type: none"> Of the £95m comparison goods expenditure available, Romford accounts for £57m and is the most popular comparison goods shopping destination. The town centre draws £37m of spending, and Gallows Corner Retail Park also draws £15m of spending. Lakeside also draws £15m of spending from this zone. Harold Hill is the only centre in this zone. Our health check analysis has confirmed this is not a major comparison goods shopping destination but it nevertheless draws £3m of spending from residents in the zone. No other destinations draw significant amounts of comparison goods spending.
Zone 7 Collier Row	Romford metropolitan centre (£47m); Eastern Avenue Retail Park (£11m); Gallows Corner Retail Park (£9m)	<ul style="list-style-type: none"> There is £92m of comparison goods expenditure available to residents in this zone, and Romford accounts for the majority (£71m) of this spending, with £47m spent in the town centre. Gallows Corner and Eastern Avenue Retail Parks draw £9m and £11m of spending respectively.
Zone 8 Chadwell Heath	Romford metropolitan centre (£57m); Lakeside (£10m); Ilford (£10m)	<ul style="list-style-type: none"> There is £127m of comparison goods expenditure available to residents in this zone. Romford is again the most popular destination for comparison goods shopping, attracting £68m of turnover, with the vast majority of this (£57m) accounted for by the town centre. The remaining spending is split between a number of other destinations including Lakeside (£10m), Ilford (£10m), Goodmayes' retail parks (£8m), Dagenham (£6m) and central London (£5m).
Zone 9 Dagenham	Romford metropolitan centre (£35m); Dagenham town centre (£30m); Lakeside (£28m)	<ul style="list-style-type: none"> The £120m comparison goods expenditure available to this zone is relatively equally between three destinations: Romford metropolitan centre (£35m), Dagenham town centre (£30m) and Lakeside (£28m). There are also limited flows of expenditure to retail parks in Romford, and also in Beckton.
Zone 10 Rainham	Lakeside (£30m); Rainham (£9m); Romford metropolitan centre (£8m)	<ul style="list-style-type: none"> Of the £53m of comparison goods expenditure which is available to residents in this zone, the majority of spending is accounted for by Lakeside (£30m), which is geographically in closer proximity to many residents than shopping facilities in Romford. Reflecting this, Romford attracts only £9m of spending from this zone, of which £8m is spent in the town centre. £9m of expenditure also flows to Rainham, chiefly to the non-food offer in the Tesco Extra store.
Zone 11 Brentwood	Brentwood (£81m); Lakeside (£39m); Basildon (£27m)	<ul style="list-style-type: none"> Zone 11 covers an extensive geographical area, with £210m of comparison goods spending available to residents in the zone. Brentwood town centre accounts for the greatest proportion of spending (£81m), but there are also significant expenditure flows to Lakeside (£39m), Basildon (£27m) and Chelmsford (£10m). Centres in LB Havering attract some expenditure from this zone, with Romford drawing £24m of spending in total, including £14m to Romford metropolitan centre and £8m to Gallows Corner.

Source: Table CM5, Appendix C

- 4.4.7 From our analysis, it can be seen that Romford draws trade from across the study area. Using the household survey results we can define a 'core catchment' and 'secondary catchment' of Romford metropolitan centre, as shown in Table 4.5. From the 'core catchment' zones, Romford does not face any significant competition for expenditure and thus enjoys a dominant trading position. From the 'secondary catchment' zones, Romford metropolitan centre remains an important comparison goods shopping destination for many residents, but faces a greater degree of competition for expenditure from other locations in the surrounding network of centres.

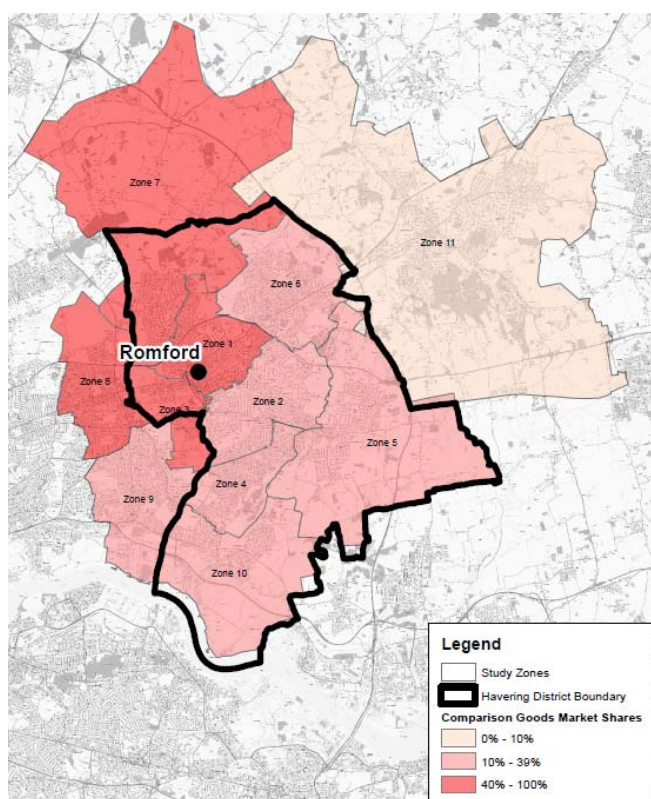
Table 4.5 - Romford Core and Secondary Catchment Area

Romford metropolitan centre core catchment area (market share 40%+)		Romford metropolitan centre secondary catchment area (market share 10-39%)	
Zone	Market share %	Zone	Market share %
Zone 1 (Romford)	60%	Zone 2 (Hornchurch)	31%
Zone 3 (Rush Green)	56%	Zone 4 (Elm Park)	28%
Zone 7 (Collier Row)	51%	Zone 5 (Upminster)	11%
Zone 8 (Chadwell Hth)	45%	Zone 6 (Harold Hill)	39%
		Zone 9 (Dagenham)	29%
		Zone 10 (Rainham)	16%

Source: Table CM4, Appendix C

- 4.4.8 The findings of Table 4.4 are shown visually in Figure 4.2.

Figure 4.2 - Comparison Goods Market Share of Romford Metropolitan Centre



Source: Table CM4, Appendix C

- 4.4.9 For the most part, the retail parks in Romford do not act as significant competition to the town centre. However their contribution to their spending patterns is not insubstantial – when aggregated, Romford's retail parks account for a 24% market share from zone 7, a 20% market share from zone 6, a 19% market share from zone 3, a 17% market share from zone 2, and a 12% market share from zone 1, enough for them to act as 'secondary' shopping locations in each of these zones.
- 4.4.10 The remaining centres in the Borough do not generate significant market shares as they are not higher-order comparison goods shopping destinations. Nevertheless Hornchurch acts as a secondary shopping destination for residents in zone 4 (market share 10%), and Upminster for residents in zone 5 (market share 15%). Rainham also attracts a 16% market share from its 'local' zone (zone 10), largely on account of the strong non-food offer within the large Tesco Extra store. Beyond their immediate zones, the trade draw attracted to each of the district centres is generally limited.

4.5 Patterns of Convenience Goods Spending

- 4.5.1 The household telephone survey also assessed patterns of convenience goods shopping across the study area. Convenience goods shopping is generally a more localised activity, although residents are sometimes prepared to travel further afield if they have preference for a particular supermarket brand. It is apparent that there is a good network of foodstores across the Borough, including provision in Romford metropolitan centre and the district centres.
- 4.5.2 **Table CV5 of Appendix C** shows that of the £808.18m convenience goods expenditure which is available to residents of the study area, the vast majority - £749.85m, or 93% - is retained within the study area. Clearly this represents a high level of expenditure retention and suggests that for the most part, residents' shopping needs are being provided for at the local level.
- 4.5.3 A more useful analysis is to look at 'local' retention rates – i.e. how much of the expenditure available to residents in each of the five survey zones is actually spent in those survey zones, or whether residents are travelling longer distances to undertake their convenience goods shopping. The 'localised' retention rate can be seen in Table CV4, by looking at the row 'sub-total' for each survey zone. Table CV4 shows that:
- **Zone 1 (Romford)** has a localised retention of 64%, and most of this is accounted for by the Asda and Sainsbury's stores in Romford metropolitan centre. The majority of the rest of the market share is directed to the large Tesco Extra stores at Hornchurch (Roneo Corner) and Romford (Bryant Avenue) which are a short distance outside the zone boundary. We do not therefore consider the retention rate for central Romford represents cause for concern.
 - **Zone 2 (Hornchurch)** has a localised retention of 69%, with the Tesco and Sainsbury's stores both attracting good levels of support from local residents. Other residents shop in nearby stores in Romford (Sainsbury's and Asda in the town centre, or the Tesco Extra store at Bryant Avenue), or Aldi in Upminster.
 - **Zone 3 (Rush Green)** has a localised retention rate of 7%, as there are no major centres or foodstores in this zone. Most residents travel the short distance to Romford or Hornchurch to meet their convenience goods shopping needs, although notwithstanding this there may be a deficiency of smaller-format convenience goods provision within this area.
 - **Zone 4 (Elm Park)** has a higher localised retention rate of 21% on account of the presence of the Tesco supermarket at Airfield Way, which, whilst relatively limited in size, does enable some residents' shopping needs to be met. The majority of residents prefer to travel to larger stores further afield however, chiefly to the Tesco Extra store in Rainham and the nearby Sainsbury's in Hornchurch. Zone 4 contains Elm Park district

centre, but as this is only served by small c-store format supermarkets, does not result in a particularly high localised retention rate.

- **Zone 5 (Upminster)** has a localised retention rate of 58%, with the majority of this accounted for by the Aldi and Waitrose supermarkets in Upminster district centre. Both of these supermarkets are relatively small in size. Outside the zone, the most popular destination for convenience goods shopping is Sainsbury's in Hornchurch.
- **Zone 6 (Harold Hill)** has a localised retention rate of 67%, largely accounted for by the presence of the Tesco Extra store at Bryant Avenue, which draws almost half of all convenience goods spending for this zone. Foodstores in Romford attract a market share of 18% from this zone.
- **Zone 7 (Collier Row)** has a localised retention rate of 26%, which is mostly accounted for by the Tesco Metro store within the district centre, and it is clear this store has a dominant influence over shopping patterns in the zone. Foodstores in zone 1 (Romford) attract a market share of just under 50% from this zone, with the Aldi supermarket at Marlborough Road attracting a 22% market share. The Tesco Extra store at Bryant Avenue (zone 6) also attracts a market share of 17%.
- **Zone 8 (Chadwell Heath)** has a localised retention rate of 48%, aided by the presence of two large supermarkets within the zone (Tesco Extra in Goodmayes, and Sainsbury's in Chadwell Heath). 15% of residents undertake their food shopping in Romford, and 20% travel to stores in Dagenham.
- **Zone 9 (Dagenham)** has a localised retention of 63%, of which approximately half is accounted for by the Asda store in Dagenham. Residents in this zone do not look towards stores in Havering to any significant extent, with the exception of some modest flows of expenditure to stores in Rainham and Hornchurch.
- **Zone 10 (Rainham)** retains 53% of convenience goods expenditure, chiefly on account of the Tesco Extra store in Rainham district centre. 17% of expenditure flows to Dagenham, 10% to Romford and 9% to Hornchurch.
- **Zone 11 (Brentwood)** is largely self-contained in terms of convenience shopping patterns but some residents travel to the Tesco Extra store at Bryant Avenue as this operator is not represented with a large-format store in Brentwood.

4.5.4 The fluctuations in the localised retention rates are not, in themselves, cause for concern, given the dense urban nature of much of the study area which means that many zones only cover a small geographic area and that, in practice, travelling to a foodstore in a neighbouring survey zone is not a lengthy trip. However, there are also instances where they may point to a local deficiency, and therefore we have regard to these localised retention rates in developing our strategic recommendations.

4.5.5 Drawing the above analysis together, **Table 4.6** summarises the most popular convenience goods shopping destinations by zone. The stores with attract a 'dominant' market share (over 30% from any one zone) and a 'secondary' market share (10 to 30%) are highlighted. It can be seen that in zones 1 to 5, residents benefit from the choice of a number of large supermarkets, and therefore all of the most popular destinations attract secondary levels of market share. In zones 6, 9, 10, and 11, one supermarket exerts a dominant influence over shopping patterns, indicating that in these areas consumer choice is more limited.

Table 4.6 - Most Popular Convenience Goods Destinations

	Most popular convenience shopping location	Second-most convenience location	popular shopping	Third-most convenience location	popular shopping
Zone 1	Tesco Extra, Bryant Avenue (17%)	Sainsbury's, The Brewery (16%)		Asda, Mercury Gardens (12%)	
Zone 2	Tesco Extra, Roneo Corner (29%)	Sainsbury's, Hornchurch (27%)		Asda, Mercury Gardens (9%)	
Zone 3	Tesco Extra, Roneo Corner (26%)	Sainsbury's, The Brewery (16%)		Asda, Mercury Gardens, (11%)	
Zone 4	Tesco, Airfield Way, Elm Park (21%)	Tesco Extra, Rainham (21%)		Sainsbury's, Hornchurch (15%)	
Zone 5	Aldi, Upminster (25%)	Waitrose, Upminster (15%)		Tesco Extra, Bryant Avenue (8%)	
Zone 6	Tesco Extra, Bryant Avenue (45%)	Iceland, Harold Hill (8%)		Asda, Mercury Gardens (6%)	
Zone 7	Tesco Metro, Collier Row (21%)	Tesco Extra, Bryant Avenue (17%)		Asda, Mercury Gardens (10%)	
Zone 8	Sainsbury's, Chadwell Heath (23%)	Tesco Extra, Goodmayes (16%)		Morrisons, Becontree Heath (11%)	
Zone 9	Asda, Dagenham (35%)	Morrisons, Becontree Heath (8%)		Tesco Extra, Rainham (5%)	
Zone 10	Tesco Extra, Rainham (44%)	Asda, Dagenham (8%)		Tesco Express, Rainham (8%)	
Zone 11	Sainsbury's, Brentwood (48%)	Other foodstores, Brentwood (20%)		Tesco Extra, Bryant Avenue (7%)	

Source: Table CV4, Appendix C

- 4.5.6 Having identified where residents in the study area are currently undertaking their shopping, the next step of the study is to assess the quantitative need for additional retail floorspace, and we consider this in the following section.

5 Need for Retail Floorspace

Read this section alongside:

- Volume 2, Appendix C (Quantitative retail need tables)
- Volume 2, Appendix D (Quantitative retail need methodology)
- Volume 2, Appendix E (Summary of technical inputs)

5.1 Introduction

- 5.1.1 In the previous section we set out the current patterns of retail spending in the study area, based on the findings of the household telephone survey of shopping patterns. Having considered this, in this section we set out the 'need' for additional retail floorspace over the course of the study period to 2031, having regard to both quantitative capacity forecasts (**sections 5.3 to 5.5**) and qualitative observations (**section 5.6**). At the outset we emphasise that capacity forecasts should be subject to regular review throughout the Council's Plan period, in order to ensure an up-to-date evidence base which is based on accurate economic and market trends. We also advise that longer-term quantitative forecasts set out in this assessment (post-2021) should be treated as indicative.
- 5.1.2 We therefore firstly consider the quantitative need for retail floorspace in the Borough over the study period. Our assessment is based on a standard methodology (see **Appendix D of Volume 2** for a summary of our approach), and is based on up-to-date empirical forecasts.
- 5.1.3 The quantitative need forecasts are derived from the total amount of comparison and convenience goods expenditure which is retained within the Borough. In the previous section we have identified the total amount of expenditure which is retained within the study area — but for the purposes of our quantitative forecasts this needs to be adjusted further to remove those parts of the study area which are outside the administrative boundaries of the Borough. Therefore, for the purposes of our quantitative need assessment, we adopt the total expenditure retained within zones 1 to 7 (inclusive) and zone 10 as these most closely align with the administrative boundaries of the Borough. **Table 5.1** summarises the expenditure retention from these zones, relative to that of the wider study area.

Table 5.1 - Summary of Expenditure Retention

	Expenditure retained within study area (£m)	Expenditure retained within study area (%)	Expenditure retained within LB Havering (Zones 1-7 & Zone 10)	Expenditure retained within LB Havering (Zones 1-7 & Zone 10)
Comparison goods	780.22	65%	624.01	52%
Convenience goods	749.85	93%	501.35	62%

Source: Table CM5, Table CM6, Table CV5, Table CV7, Appendix C

- 5.1.4 Therefore the purposes of our assessment we adopt the retention rates shown in the final column of **Table 5.1** – i.e. 52% for comparison goods and 62% for convenience goods. We assume that these retention rates will remain unchanged over the study period for the purposes of our 'baseline' assessment, but for the comparison goods capacity forecasts we also assume that there is scope for Romford to further improve its market share over the course of the study period, in line with its designation as a Metropolitan Centre. We return to discuss this below.

5.2 Claims on Expenditure

- 5.2.1 We have set out in the previous section that ‘special forms of trading’ such as online shopping is removed from our baseline expenditure forecasts, in line with current forecasts of growth in this sector set out in Experian’s Retail Planner Briefing Note 11. The total expenditure figures summarised in **Table 5.1** make allowance for this.
- 5.2.2 In addition to SFT there are two further claims on expenditure growth which need to be taken into account in our capacity projections: commitments to new retail floorspace (which are schemes under construction at the time of the household survey, or extant planning permissions which would result in additional retail floorspace); and sales density growth (which is the growth in turnover for existing retailers within the study area).

Commitments to New Retail Floorspace

- 5.2.3 From monitoring data provided to us by the Council, we have identified two schemes which benefit from planning permission for new retail floorspace — the redevelopment of the former Romford Ice Rink at Rom Valley Way, Romford, to form a Morrisons supermarket, and the mixed-use redevelopment of the former Decathlon store at Angel Way, Romford, which includes residential, food & drink and hotel uses, as well as both comparison and convenience goods floorspace. In **Table 5.2** we set out the floorspace and estimated turnover of these commitments, which informs our capacity forecasts.

Table 5.2 - Commitments to New Retail Floorspace

	Comparison goods floorspace		Convenience goods floorspace	
	Net sales area (sqm)	Turnover, 2017	Net sales area (sqm)	Turnover, 2017
Morrisons, Rom Valley Way, Romford	752	4.27	3,008	36.17
Former Decathlon, Angel Way, Romford	762	5.58	1,172	14.69
Total	1,514	9.84	4,180	50.86

Source: Table CM7, Table CV7, Appendix C

Sales Density Growth

- 5.2.4 Sales density growth (also known as floorspace productivity growth) is the amount of expenditure which is ‘ring fenced’ for existing floorspace to improve its turnover each year. Allowances for sales density growth are linked to expenditure growth; **Table 5.3** summarises the expenditure growth rates we have used for the purposes of our assessment. It should be noted that, owing to the low forecast levels of expenditure growth for the convenience goods sector, we do not forecast any sales density growth in this sector until 2016 onwards.

Table 5.3 - Sales Density Growth Rates

	Comparison goods sales density growth (% per annum)	Convenience goods sales density growth (% per annum)
To 2016	1.7%	0%
2016 onwards	1.7%	0.3%

Source: Table CM6, Table CV7, Appendix C

- 5.2.5 This is a blanket sales density growth for all floorspace across the Borough. Inevitably, different types of floorspace have different ability to absorb expenditure growth – relatively modern floorspace (for example much of that in Romford metropolitan centre, and to a lesser extent the larger district centres) is better equipped than older property stock (for example some of the stock in secondary areas of Romford metropolitan centre). Given this is a Borough-wide study, a blanket approach is considered robust.

5.3 Over-Trading of Floorspace

- 5.3.1 ‘Over-trading’ refers to the both the performance of centres and stores within a catchment when related to ‘benchmark’ (i.e. expected) turnovers, as well as more qualitative indicators such as overcrowding and congestion in stores. It is therefore both a quantitative and qualitative indicator of need.
- 5.3.2 Quantitatively, for comparison goods floorspace, we do not consider it appropriate to make allowance for the over-trading of town centre floorspace. For convenience goods floorspace, we have undertaken a detailed trading assessment of each of the principal foodstores across the Borough (principally foodstores with a net sales area upwards of 500 sqm, or those with a significant turnover from their local zones), and compared their trading performance with an expected ‘benchmark’ turnover (that is, the turnover the store would be expected to achieve if trading at company average turnover per sqm rates). Although this exercise is reliant on the use of operator average data in terms of the split between convenience and comparison goods floorspace within the stores (except in some stores where we have adjusted this based on our own estimate of sales mix from having visited the stores), and is based on national average sales densities, it nevertheless provides a robust, and industry-accepted, method of assessing current trading performance.
- 5.3.3 Our assessment of foodstore trading performance is set out at **Table CV6 of Appendix C**. This shows that, on aggregate, foodstores across the Borough are presently trading strongly, with a handful of foodstores trading significantly in excess of company average levels. **Table CV6** shows that:
- Foodstores in the Romford Central area are trading, on aggregate, at about £8m above average. Whilst it would appear that the Asda store at Mercury Gardens is trading strongly, this is counterbalanced by the Sainsbury’s store at The Brewery which appears to be under-trading by a similar amount; the two largely cancel each other out. The Aldi store at Marlborough Road is also trading strongly, at about £13m above company averages.
 - All foodstores in zone 2 (Hornchurch) are trading at above benchmark levels, with the Tesco Extra store at Roneo Corner trading at £17m above average, and Sainsbury’s in Hornchurch trading at £9m above average. In total foodstores in this zone are trading at £32m above average.
 - The Aldi store in Upminster (zone 3) appears to be trading very strongly, at three times the company average. The Waitrose and Marks & Spencer Simply Food stores within Upminster District Centre both appear to be trading at just below company average levels.
 - The Tesco Extra store at Bryant Avenue is another store which is trading very strongly, at above £26m above its benchmark level. The Tesco Metro store in Collier Row is also trading well, at about £11m above average.
 - The Tesco Extra store in Rainham appears to have a trading performance more aligned to company average levels, but nevertheless trades at £4m above benchmark.

- 5.3.4 **Table CV6** shows that on aggregate foodstores across the Borough are over-trading at approximately £97.6m above company average levels – we therefore factor this trading performance into our capacity assessment.

5.4 Comparison Goods Needs Assessment

- 5.4.1 Drawing the above inputs together, **Table CM6 of Appendix C** shows the quantitative need for additional comparison goods floorspace in the Borough over the study period to 2031, based on current shopping patterns, and making allowance for sales density growth as discussed above. The table is structured as follows:

- **Row A** shows the total population of the study area at the interval years of 2014, 2017, 2021, 2026, 2029 and 2031.
- **Row B** shows the total comparison goods expenditure available to the study area at the same interval years.
- **Row C** shows the proportion of comparison goods expenditure which is retained within centres within LB Haverling, which, as shown in Table 5.1, amounts to 52% of total comparison goods expenditure. This is shown in monetary terms in **Row D**, at the base year of 2014 and equivalent figures for each of the interval years under a 'no development' scenario (i.e. assuming that current shopping patterns remain unchanged over the duration of the study period);
- **Row E** shows the amount of expenditure which 'leaks' to destinations outside the District, and is the product of Row B minus Row D;
- **Row F** and **Row G** show in percentage terms (Row F) and monetary terms (Row G), the amount of inflow into the Borough. We have made no allowance for inflow of expenditure into our capacity forecasts and therefore these rows remain blank.
- **Row H** shows the total comparison goods turnover of destinations in the Borough (i.e., the retained expenditure, plus the inflow). This is held constant over the study period to 2031, and the growth in retained expenditure (the 'initial surplus') is shown in **Row I**. Row I therefore shows that by 2017 there will be £96.26m of surplus comparison goods expenditure in the SA, and by 2031 we forecast this figure to increase to £681.53m.
- **Rows J and K** summarise the 'claims' on comparison goods expenditure, as summarised in **Section 5.2** and **Section 5.3**. Row J shows that sales density growth accounts for £32.37m by 2017 and £207.08m by 2031. Row K shows that the comparison goods commitments discussed above amount to a 'claim' of £9.89m at 2017 and we increase the turnover of these in line with sales density growth rates. **Row L** is a summary of Rows J and K.
- **Rows M to R** finally summarise the surplus expenditure capacity available in the SA for new comparison goods floorspace, and convert this expenditure to physical floorspace requirements:
 - **Row M** shows the 'initial surplus' of comparison goods expenditure which is available to the District over the period to 2031 (as per Row I)
 - **Row N** then subtracts the total 'claims' on capacity (as per Row L)
 - **Row O** shows the residual expenditure, in monetary terms, which is available to support new comparison goods floorspace. There is a positive residual for each of the interval periods – so there is surplus capacity to support new floorspace for each interval period.

- **Row P** shows the sales density, i.e. the turnover per sqm, which is used to translate the residual expenditure to a floorspace requirement. For the purposes of our assessment we have used a turnover of £7,000 per sqm at 2014, which increases in line with our sales density growth estimates, to £9,323 per sqm by 2031. As the majority of the comparison goods floorspace in the Borough is accounted for by Romford metropolitan centre, which is a higher-order metropolitan centre and therefore likely to be the focus for future comparison goods development, it is appropriate to allow for a reasonably high sales density when calculating the scope for new floorspace.
- **Row Q** shows the net comparison goods floorspace for the Borough, by applying Row O to Row P. Finally, using a gross:net ratio of 70%, **Row R** translates the net requirements to a gross figure.

5.4.2 In **Table CM7 of Appendix C**, we test the comparison goods floorspace requirements which would arise if centres in the Borough were able to achieve an uplift in the amount of expenditure which is retained over the course of the study period, from the current retention rate of 52% to 57% by the end of the study period in 2031. Whilst a 5 percentage points uplift may not, on paper, seem a significant amount, Table CM7 shows that it delivers a significantly larger floorspace requirement than under the 'constant market share' scenario. Any uplift in floorspace will be related to the ability of Romford to deliver quality new comparison goods retail floorspace, reflective of its role as a Metropolitan centre. Given the aspirations of Lakeside for its own centre, we consider that any aggregate uplift over and beyond the 5 percentage points will be difficult to achieve.

5.4.3 For ease of reference, **Table 5.4** summarises the quantitative need for additional comparison goods as identified in **Table CM6** and **Table CM7 of Appendix C**. The requirements summarised in **Table 5.4** are cumulative, and are based on the assumption that current patterns of shopping will remain unchanged for the duration of the study period.

Table 5.4 - Summary of Comparison Goods Need to 2031

Interval	2017	2021	2026	2029	2031
Comparison goods floorspace req't (sqm net) – static retention	7,300	16,100	<i>32,000</i>	<i>42,300</i>	<i>49,500</i>
Comparison goods floorspace req't (sqm net) – increasing retention	7,300	21,500	<i>38,200</i>	<i>54,000</i>	<i>62,000</i>

Source: Table CM6, Appendix C. Figures are cumulative. Figures in italics are indicative.

5.4.4 Therefore, the Council should make provision for between 16,100 and 21,500 sqm net additional comparison goods floorspace in the period to 2021, and indicatively between 49,500 and 62,000 sqm net by 2031. These figures should be kept under regular review throughout the study period.

5.5 Convenience Goods Needs Assessment

5.5.1 **Table CV7 of Appendix C** sets out the quantitative requirements for additional convenience goods floorspace for the Borough over the study period to 2031. The structure of the table follows that of **Table CM6**, so we do not repeat our description of the steps here. There is an additional row in the table (Row O) which builds in the trading performance of existing foodstores into the capacity projections, in order to take into account the over-trading of the foodstores across the Borough which we have identified above.

- 5.5.2 **Table 5.5** summarises the quantitative convenience goods floorspace requirements, and identifies that, based on the current shopping patterns and trading performance of foodstores, there is a quantitative need for 7,500 sqm net additional convenience goods floorspace by 2021, increasing to an indicative requirement of 13,200 sqm net by 2031. This represents a quantitative need over the course of the study period, some of which should be developed in line with our qualitative recommendations (see below). On account of the strong Borough-wide retention rate, we do not test an 'increasing retention' requirement for convenience goods floorspace.
- 5.5.3 It should be noted that the requirement decreases between 2014 and 2017 as by 2017 the two extant planning commitments for new convenience goods floorspace have been taken into account in by 2017 (albeit it is appreciated that they might not be fully completed or occupied by 2017).

Table 5.5 - Summary of Convenience Goods Need to 2031

Interval	2014	2017	2021	2026	2029	2031
Convenience goods floorspace req't (sqm net)	7,300	5,200	7,500	<i>10,600</i>	<i>12,200</i>	<i>13,200</i>

Source: Table CV7, Appendix C. Figures are cumulative. Figures in italics are indicative.

5.6 Qualitative Need Assessment

- 5.6.1 Both the NPPF and the PPG are silent on the weight to be attached to qualitative retail floorspace needs, and how such needs should be assessed. We therefore revert back to the guidance in the preceding CLG Practice Guidance, which advises that qualitative factors to take into account include identifying gaps in local provision; consumer choice and competition; over-trading; 'location-specific issues', and quality of existing provision. Below we therefore present a discussion of these criteria, which largely overlap with one another, informed by our health check assessments of the town centres (**Section 3**) and our review of the current patterns of shopping (**Section 4**).

Qualitative Comparison Goods Needs

- 5.6.2 Gaps in provision are ultimately subjective; what one particular shopper may consider a gap in provision may not be of particular concern to another. Ultimately, centres need to be able to meet as many day-to-day shopping needs of local residents as possible, to help minimise expenditure leakage and promote sustainable patterns of shopping.
- 5.6.3 Our health check assessment and the results of the household survey indicate that Romford metropolitan centre generally does a good job of meeting residents' comparison goods shopping needs. It draws a strong market share from 10 of the 11 survey zones, and is the dominant comparison goods shopping destination for four of those zones. Its influence over shopping patterns lessens in the southern half of the study area as residents in these areas benefit from good proximity to Lakeside. As our study has identified, Lakeside has ambitious plans for further enhancement of its retail offer over the course of the Council's plan period, including the transformation of the shopping centre and adjacent developments into a fully-fledged 'town centre'. Each of the 11 survey zones loses market share to Lakeside, ranging from 8% (zones 7 and 8) to 58% (zone 10). Romford cannot be complacent therefore; ongoing upgrading of its retail offer – including the modernisation of existing floorspace – will need to take place throughout the Plan period to ensure it retains its popularity as a comparison goods shopping destination.
- 5.6.4 The Liberty Centre sets a good benchmark for the type of shopping development which modern retailers seek to locate in. The units are generally large, the shopping environment is welcoming, and the centre is well-connected with the surrounding retail offer and public

transport networks. The older parts of the Liberty Centre (such as Stewards Walk) appear dated however. Despite not being relatively old, Mercury Mall does not offer the same quality retail environment, and this is reflected by a weaker tenant mix (although the presence of Asda is an important 'anchor' store). There are a good number of 'anchor' stores located throughout the town centre which help to disperse footfall across a wide area.

- 5.6.5 South Street, whilst historically the main thoroughfare, is in need of investment and upgrading of many of its units, in order to remain competitive and an integral part of the town centre. Some of the units in this location are low-grade retail and other uses (such as amusement arcades, pawnbrokers and so on) which do not reflect the primary shopping frontage allocation of this area. Many units are on the small side. The improvement in the quality of the retail offer along the pedestrianised section of South Street is therefore considered to represent both a priority and an opportunity for the Council over the course of the study period in order to cement Romford's currently-strong trading position; whilst we have not assessed land ownership in this area, it is considered that amalgamation of units to increase their attractiveness to the retail market should be reviewed as an option.
- 5.6.6 The Brewery is a positive addition to the town centre through its provision of larger-format retail units, but does turn its back on the centre to a large extent. Better integration of this development would be beneficial – particularly because the extensive car parking which serves this site is likely to represent the principal opportunity for the town centre in the future (we return to discuss this later in the report).
- 5.6.7 The fashion offer of Romford metropolitan centre is good, with a healthy representation of mid-market retailers such as Gap, H&M, Next and so on. There is little to distinguish the retail offer from that of competing centres, and the attraction of a greater variety of mid-to-upper market retailers to the centre (examples might include Zara, Pull & Bear, Urban Outfitters and Lakeland) will help to 'shore up' the retention rate in the medium to long term and fend off the risk of further market share being lost to Lakeside. Generally speaking, retailer demand is linked to quality of provision; with the development of modern, larger-floorplan retail floorspace (which could involve the modernisation / amalgamation of existing retail premises), we would expect that there is scope for further retailers to be attracted to the town centre, particularly if opportunities are provided within/adjacent to the existing primary shopping area.
- 5.6.8 We have established that the district centres in Havering do not act as significant comparison goods shopping destinations in their own right. However, they play an important role in meeting local shopping needs and therefore their function as comparison goods shopping destinations should continue to be supported. Indeed, there is considerable difference in the offer of the larger district centres – Hornchurch and Upminster – with smaller centres such as Elm Park. Hornchurch seems to draw trade from a moderate catchment area. These centres do not compete with Romford (and Lakeside) per se, but rather offer a complementary role. There are gaps in the retail offer – none of the centres have particularly strong clothing & footwear provision for example — but unless the Council wishes for the centres to operate at a higher position in the District's retail hierarchy, we would not expect this situation to significantly change over the course of the study period.
- 5.6.9 The main opportunity for the district centres lies with the opportunity to create a more specialist retail offer which offers an alternative to the national multiples-focused offer in Romford metropolitan centre. There is scope for Hornchurch to further develop this role, building on its existing strengths as a leisure-based destination.
- 5.6.10 A further constraint to the district centres significantly altering their role and function is a lack of suitable sites for significant expansion of their retail offer. Whilst we are aware of potential opportunity sites in Hornchurch, other centres are generally quite constrained in terms of their ability to accommodate a substantial amount of retail floorspace (i.e. of the scale which would change their role and function as a district centre). We therefore expect these centres to operate with incremental improvements to their retail offer coming forward, which should be

supported by the Council providing they are of an appropriate scale in relation to the role and function of the centre in question.

- 5.6.11 For all centres, reflecting national planning guidance, any new development should be directed towards town centres in the first instance.

Qualitative Convenience Goods Needs

- 5.6.12 The household survey confirms that the Borough is served by a good network of foodstores, with Romford metropolitan centre and surrounding urban area particularly well served for. The household survey also confirms that the existing network of foodstores are, for the most part, trading strongly, with the majority of stores trading above company average levels – significantly so, in some cases. The identified over-trading in itself is an indication that there is pent-up demand for additional provision.
- 5.6.13 Romford metropolitan centre has two large foodstores anchoring the western and eastern ends of the town centre – Sainsbury's at The Brewery, M&S at the Liberty and Asda at Mercury Mall. There are also Aldi and Lidl discount supermarkets and smaller c-stores. The offer in this part of the study area will be further enhanced through the development of a Morrisons supermarket on the site of the former Romford Ice Rink, which will provide further consumer choice and competition. Having regard to this outstanding permission, we do not consider there to be a qualitative need for additional convenience goods provision in the vicinity of Romford metropolitan centre.
- 5.6.14 Upminster is served by three supermarkets within the district centre boundary (Waitrose, Aldi and Marks & Spencer Simply Food), and whilst none of the stores are especially large, they are considered to be of a scale which will enable many residents' top-up and larger shopping needs to be met. The Aldi store is trading very strongly, but the Waitrose and M&S stores – both of which are in slightly peripheral locations within the centre boundary – are performing less well. We do not consider there to be a pressing need for further provision in this area.
- 5.6.15 Similarly, Hornchurch district centre offers Sainsbury's and Iceland supermarkets, and whilst the former is the only large supermarket in the town centre (and is over-trading) and thus occupies a monopolistic position over shopping patterns in the town centre, realistically we are not aware of any opportunity sites which could accommodate comparable-sized provision. The out-of-centre Tesco Extra store is also trading strongly, but given the identified constraints, we would expect future provision in Hornchurch town centre to be smaller-sized c-store developments.
- 5.6.16 There are qualitative opportunities in some of the smaller district centres. Elm Park is only served by small convenience stores, and would benefit from some larger-format provision (in terms of a medium-format supermarket, up to 1,000 sqm net), ideally located within or adjacent to the district centre, to reduce expenditure leakage to Hornchurch and Rainham. Similarly, Harold Hill has limited provision at present – although we are aware that there is an undetermined planning application for a Lidl foodstore in this area. In Rainham, there is a lack of consumer choice and the household survey results confirm that the Tesco Extra store occupies a monopolistic position over shopping patterns in this part of the Borough. We do not consider there to be an urgent requirement for additional provision in Collier Row.

5.7 Summary of Retail Need

- 5.7.1 Our capacity assessment has identified a need for the following amounts of floorspace:
- **Comparison goods:** between 16,100 and 21,500 sqm net additional comparison goods floorspace by 2021, increasing to between 49,500 sqm net and 62,000 sqm net by 2031.

- **Convenience goods:** up to 7,500 sqm net by 2021, increasing to 13,200 sqm net by 2031.
- 5.7.2 Our qualitative assessment identifies that, for comparison goods shopping provision, there is a need to improve the quality of the retail stock in Romford metropolitan centre in order to 'future proof' the town centre and protect its role and function as a Metropolitan Centre, and in the first instance the focus for this improvement needs to be South Street, where modernisation and amalgamation of units to create larger-format developments should be considered a priority. Improvements to the quality of the retail provision should in turn assist in diversifying the quality of the retail offer, and a key aspiration of the Council should be to seek the attraction of more middle/upper-middle-order comparison goods retailers to the centre in the short-to-medium term.
- 5.7.3 We do not consider there to be a pressing qualitative need for additional provision elsewhere in the Borough. However there is scope for the diversity of uses in all of the smaller centres to be improved, and therefore in instances where applications come forward which seek to provide additional comparison goods floorspace, they should be supported provided they are suitably located and are of an appropriate scale.
- 5.7.4 Turning to qualitative convenience goods needs (which have no specific timescale), when assessing current provision within centres and the patterns of shopping identified in the household survey, we consider that:
 - There is no requirement for any additional large-format foodstore provision within or in the vicinity of Romford metropolitan centre, or Upminster district centre;
 - There is a requirement for additional provision within or on the edge of Hornchurch district centre (if a suitable site can be identified) to improve consumer choice and reduce the over-trading of the existing foodstores in the area;
 - There is a requirement for provision of a small to medium-sized foodstore in the Elm Park area (indicatively up to 1,000 sqm net), which should if possible be located within or adjacent to the district centre;
 - There is a requirement for an additional small to medium sized foodstore in the Harold Hill area which should be located within or adjacent to the district centre.
 - There is a requirement for additional foodstore provision in the Rainham area to improve consumer choice and assist in meeting the future growth needs of this area;
 - There is no qualitative requirement for additional provision in the Collier Row area.

6 Need for Commercial Leisure Floorspace

Read this section alongside:

- Volume 2, Appendix F (Summary of technical inputs)
- Volume 2, Appendix G (Quantitative leisure tables)

6.1 Introduction

- 6.1.1 In this section we provide a summary of the scope for additional commercial leisure and other town centre uses which can be supported in the study area. Our findings are informed by an assessment of the growth of expenditure on leisure goods spending which is expected to come forward in the study area over the period to 2031, supported by the findings of the household survey of shopping and leisure patterns, as discussed previously in the report. We have also taken into consideration of findings from the previous Retail and Commercial Leisure Study (2012). The comments set out in this section should be read in conjunction with the leisure capacity quantitative tables set out at **Appendix G to Volume 2**.

6.2 Expenditure Growth in the Leisure Services Sector

- 6.2.1 Experian provide 2012-based per capita spending on the following key commercial leisure sectors:
- Accommodation services (e.g. hotels, room hire);
 - Cultural services (e.g. cinema, theatre, museums, tv subscriptions);
 - Games of chance (.e.g. lottery, bingo, bookmakers);
 - Hairdressing salons and personal grooming / beauty establishments;
 - Recreational and sporting services; and
 - Restaurants and cafes
- 6.2.2 By applying the per capita figure to the projected population growth in the study area, the amount of total expenditure growth in each of these sectors can be identified. This is summarised in **Table 6.1**.

Table 6.1 - Growth in Commercial Leisure Sectors to 2031

	Spending, 2014 (£m)	Spending, 2021 (£m)	Spending, 2029 (£m)	Spending, 2031 (£m)	Growth in spending, 2014- 31 (£m)
Accommodation services	50.57	61.75	74.89	78.39	27.82
Cultural services	115.16	140.88	171.03	179.02	63.86
Games of chance	54.37	66.66	81.01	84.81	30.43
Hairdressing & beauty	35.19	42.90	51.99	54.41	19.22
Recreational & sporting services	55.00	67.14	81.43	85.23	30.23
Restaurants & cafes	423.75	518.07	628.77	658.14	234.39

Source: Table LC3, Appendix G.

- 6.2.3 Table 6.1 shows that the majority of growth in the commercial leisure sector will come forward in the restaurants and cafes category, which will experience growth of over £234m over the course of the study period. Spending in cultural services and games of chance will increase by £64m and £30m respectively. There is therefore significant opportunity for centres in Havering to capitalise on this growth of expenditure, building on and enhancing what is, in the Borough's largest centres, already a generally good level of representation from commercial leisure operators.
- 6.2.4 Whilst 60% of those surveyed do most of their household's fashion shopping in Romford, linked trips are uncommon, with only 38% of those surveyed combining shopping with other activities.
- 6.2.5 As with the retail sector, it is possible to assess patterns of commercial leisure spending through the household survey of spending patterns which was undertaken in support of this study. An estimate of the quantitative need for new food & drink floorspace can also be forecast.

6.3 Restaurants and Cafes

Existing Provision

- 6.3.1 The food and drink offer varies from centre to centre across the Borough. Generally, the smaller centres have a high provision of A5 (fast food and takeaways) and a smaller proportion of restaurants, cafes (A3) and drinking establishments (A4). Romford, as would be expected, has the highest number of café and restaurant uses as well as the highest diversity of these uses in terms of the range of options available.

Romford

- 6.3.2 As a metropolitan centre Romford has a good provision of A3 and A5 uses. In total there are 67 A3 and A5 units within the centre, with good representation from national restaurant and fast food chain operators. This includes fast food operators such as KFC, McDonalds, Burger King and Subway as well as a number of casual dining, family oriented options including Frankie & Bennie's, Toby Carvery, Pizza Express, Zizzi and Nandos. National multiple operators within Romford are principally located within the primary retail frontage and the Liberty (mostly cafes) and the Brewery (where there is a broader mix in the vicinity of the cinema). It was generally felt that the first floor leisure uses at The Brewery are poorly integrated with the rest of the shopping centre and the wider town centre. There is noticeably

high number of hot food take-aways within parts of the town centre – especially in the peripheral shopping areas i.e. along North Street, London Road, southern end of South Street and Victoria Road. In all, we assessed Romford's offer to be fairly basic as it mainly addressed the budget family and core youth markets. The centre could benefit from a higher quality of restaurants.

- 6.3.3 The branded coffee shop offer in Romford metropolitan centre includes two Starbucks outlets at the Brewery and The Liberty Shopping Centre and 3 Costa Coffee outlets located – one located within the Brewery and the remaining two located in the town centre.
- 6.3.4 Romford also has a good number of drinking (A4) establishments within the town centre, mostly concentrated around the South Street area, where there are also three nightclubs.
- 6.3.5 Reviewing the findings of the household survey, of those residents who stated they spend money on visiting restaurants, 34.1% of Zone 1 residents spend money on restaurants within Romford metropolitan centre. Romford's appeal extends beyond the immediate area however, with the town centre also drawing market share from 28.5% of Zone 3 residents, 28.2% of Zone 9 residents and 27.6% of Zone 7 residents. Indeed, the centre attracts a significant amount of spend from all zones except Zone 11 (where residents prefer to use facilities in Brentwood) – this largely reflects the trends seen in retail spending patterns. Expenditure on cafes and pubs is similarly consistent: 35.4% of Zone 1 residents spend their money on cafes and drinking establishments within Romford. As with restaurants, Romford attracts a significant amount of spend from neighbouring zones, including Zone 3 (28.1%), Zone 8 (23.3%) and Zone 6 (20.0%).

Hornchurch

- 6.3.6 The food and drink offer in Hornchurch is strong for a centre of its size and when considering its defined role and function as a district centre. In total there are 30 restaurants and take away facilities within the district centre, of which nine are A5 uses. National operators represented in the district centre include casual dining mid-range operators such as Zizzi, Ask, Chimichanga, Nandos and Prezzo. The fast food offer includes KFC, McDonalds, Wimpy and Subway. Café operators Starbucks and Costa Coffee complete the offer. There are seven pubs and bars within the centre.
- 6.3.7 49.5% of Zone 2 residents and 40.3% of Zone 4 residents spend money on restaurants within Hornchurch. Hornchurch also attracts expenditure from surrounding zones including 29.5% of Zone 3 residents and 19.6% of Zone 10 residents. The expenditure on cafes and drinking establishments in Hornchurch is broadly similar to the expenditure on restaurants. 44.9% of Zone 4 residents, 40.8% of Zone 2 residents and 19.7% of Zone 10 residents visit cafes and bars within Hornchurch. Given its role and function as a district centre we consider these to represent good levels of market share attraction and confirmation that Hornchurch plays an important role as an evening destination.

Upminster

- 6.3.8 Upminster has a total of 29 A3 and A5 units within the district centre. The number of hot food takeaways within the district centre is high. While the centre has a fairly high number of restaurants and cafes, the offer is narrow and mostly consists of Chinese, Indian and Italian restaurants. National restaurant operators present within the town centre include Prezzo and Pizza Express while the fast food offering is represented by Subway, Wimpy and Papa John's Pizza as well as an extensive number of independent operators. Finally café operators within Upminster include Costa Coffee and Café Nero. Upminster also has two pubs within the town centre. Restaurants in Upminster have a localised catchment area with 50.6% of Zone 5 residents spending the most amount of money within the district centre but limited trade is drawn from beyond this. 48.2% of Zone 5 residents spent money on cafes and bars within the centre but again results from other zones are negligible. Nevertheless the results indicate that Upminster is doing respectable job of meeting local commercial leisure needs.

Collier Row

- 6.3.9 Collier Row has 16 A3 and A5 units. The bulk of the food and drink offer is dominated by hot food takeaways. There are only two restaurants within the district centre. National operators present within the centre are Pizza Hut and Domino's Pizza, both of which are takeaways. The rest of the fast food and restaurant offer is given over to independent operators. Collier Row has no cafes but it does have a pub. Only 5.6% of Zone 7 residents spend money on restaurants in Collier Row. The centre does not attract any spending from residents of the surrounding zones. For expenditure on cafes and drinking establishments, only 12.3% of Zone 7 residents use facilities in the district centre. Again, Collier Row does not attract any spending from residents in the surrounding zones.

Harold Hill

- 6.3.10 Harold Hill has five A3 and A5 units within the centre. There are no national restaurant or café operators within the centre. The offer includes two takeaway restaurants, two cafes and a restaurant. The centre has no drinking establishments. The centre only attracts 1.6% of spending from residents in Zone 10, and small amounts from neighbouring zones. Cafes and drinking establishments within the centre attract 3.1% of the resident's expenditure in Zone 7 and 2.3% in Zone 6. Provision in the district centre can thus be considered to be limited.

Rainham

- 6.3.11 Rainham has a total of seven A3 and A5 units within the town centre, of these 4 are A5 units. The only national restaurant operator is Pizza Hut. The centre also has three pubs. In terms of expenditure on restaurants 12.7% of Zone 10 residents spend money within the centre. There is also limited spending from residents of Zone 4 (1.0%) and Zone 9 (1.4%). 12.4% of residents of Zone 10 spent money on pubs and cafes within Rainham followed by Zone 4 (1.2%) and Zone 3 (0.6%).

Elm Park

- 6.3.12 Elm Park has a total of 17 A3 and A5 units within the centre. The town centre is dominated by independent takeaways, the only national multiple operator is Dominos. According to the telephone household survey, there is very limited spending on A3 and A5 uses in Elm Park. However, 3.38% of Zone 10 residents spent money on bars and pubs in the centre.

Growth in Spending

- 6.3.13 Compared to retail, food and drink spending is much more mobile, due to the trend for people to travel longer distances to socialise, and since there are no constraints connected with transporting goods to the home. **Table 6.2** sets out the extent of expenditure retention of destinations in LB Havering.

Table 6.2 - Summary of Retention of Food and Drink Spending in Study area

	Spending, 2014 (£m)	Spending, 2014 (%)
Total spending in LB Havering	230.60	54%
Total spending at centres outside LB Havering	193.15	46%
Overall total	423.75	100%

Source: Table LC6, Appendix G

- 6.3.14 On aggregate therefore, centres in LB Havering retain 54% of the total food and drink spending which is available to the study area. The main competition for expenditure for the Borough is Lakeside, Dagenham, and Brentwood, with the latter exerting considerably more influence over spending patterns in the study area for food and drink spending than it does for retail spending. Reflecting the ease of access which much of the Borough benefits from into central London, and the strength of the offer in this location, it is not surprising to see many residents of the Borough choose to direct their spending to facilities here. The figures need to be considered in the context of the fact that people tend to spend more on food and drink when they are visiting destinations (for example, on a day trip). Therefore, we would not expect the study area to retain 100% of available expenditure — but nevertheless we consider there to be some scope for improvement in the level of expenditure retention over the course of the study period.
- 6.3.15 In **Appendix G**, we set out summaries of spending patterns on the two different types of food and drink spending:
- **Table LC4** shows the market shares for spending on restaurants (with and without survey responses for 'don't know / don't undertake this type of activity'); and
 - **Tables LC5** shows the market shares for spending in pubs, bars, cafes and coffee shops.

Indicative Need for Additional Provision

- 6.3.16 As set out above, there is a total of £423.75m of expenditure available to residents in the study area for spending on food and drink in 2014. Table LC3 of Appendix G shows that this will increase to £518.07m in 2021 and £658.14m in 2031. We have estimated that 54% of this expenditure is retained by facilities within LB Havering, and we therefore use this retention rate as the basis for calculating an indicative floorspace requirement for A3, A4 and A5 floorspace. As with the retail capacity forecasts, we advise that forecasts beyond 2021 are considered indicative. The capacity forecasts shown in Table 6.3 apply to development in use classes A3, A4 and A5.

Table 6.3 - Indicative A3, A4 and A5 Floorspace Need to 2031

Interval	2017	2021	2026	2029	2031
Food & drink floorspace req't (sqm gross)	3,200	6,400	<i>10,800</i>	<i>13,400</i>	<i>15,100</i>

Source: Table LC6, Appendix G. Figures are cumulative/rounded. Figures in italics are indicative.

- 6.3.17 Table 6.3 shows that there is a requirement for 6,400 sqm gross additional food & drink floorspace by 2021, increasing to an indicative requirement of 15,100 sqm gross by 2031. Reflecting the existing hierarchy of centres, we would expect identified requirements in the first instance to be directed towards Romford metropolitan centre where, whilst there an existing reasonable level of representation in the town centre, it is largely concentrated in one area (The Brewery and to a lesser extent South Street) and further diversification of the range and quality of restaurant uses in particular would benefit the wider vitality and viability of the town centre. The current offer largely focuses on the family market. Therefore, there is potential to support additional floorspace within the town centre, especially where outdoor seating is possible, for example at Market Place – which according to the Needs Assessment is “not currently fulfilling its potential as a large public space”.
- 6.3.18 Diversification of the commercial food & drink offer could be achieved in Upminster town centre, where there is a slight over-reliance on take-away restaurants at present. However, we appreciate that Hornchurch is likely to be meeting some of Upminster's needs due to the close proximity of the centres. Further provision in Hornchurch would help solidify what is

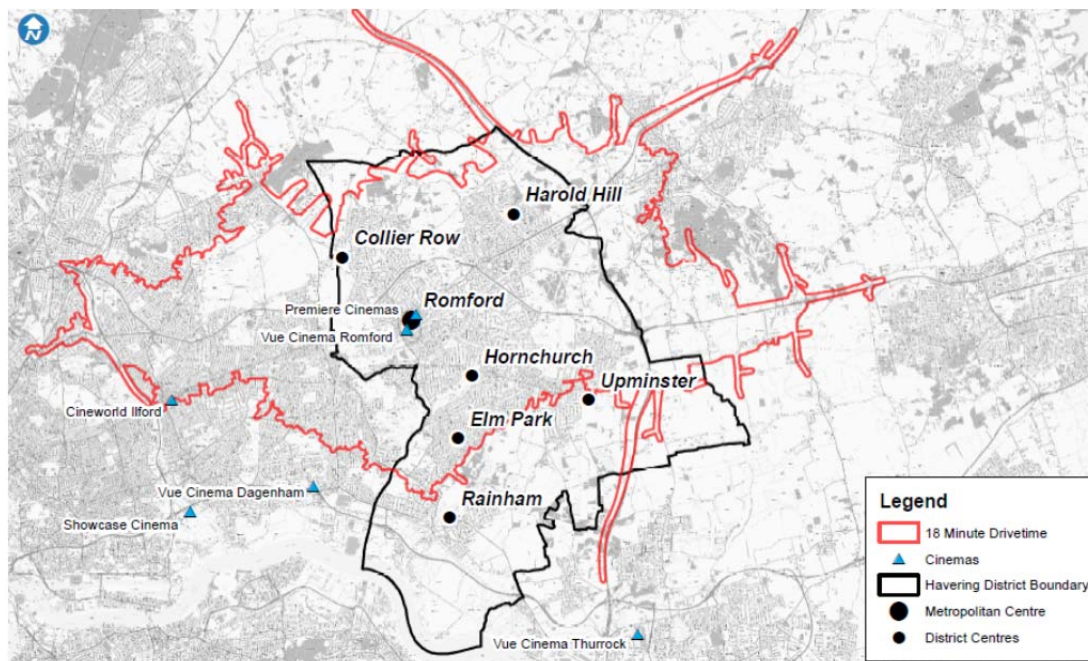
already a strong offer and this should be supported given Hornchurch's well-established role as an evening destination, although we are not aware of any sites within the district centre which could accommodate a significant amount of floorspace. Any additional provision should not undermine the more important requirement to deliver additional floorspace and qualitative improvements to Romford metropolitan centre.

- 6.3.19 Elsewhere, we would expect development to be more limited – but supportable, provided it was within or well-related to existing centres, and of an appropriate scale. The development of commercial leisure facilities at the Borough's network of out-of-town retail sites should be resisted.

6.4 Cinema and Theatre provision

- 6.4.1 The Borough has two cinema facilities which are both located within Romford metropolitan centre. The first is a 16 screen cinema operated by Vue Cinemas at The Brewery. The second is an eight screen facility operated by budget operator, Premier Cinemas at the Mercury Mall Shopping Centre.
- 6.4.2 According to the results of the household survey, both cinemas attract a good level of support from across all zones, although the significantly bigger Vue cinema attracts the highest proportion of visits on aggregate: 36.5% of Zone 2 residents, 30.3% of Zone 3 and 25.2% of Zone 1 residents visited Vue Cinema. The cinema also attracts good levels of support from residents in all other zones. The Premier Cinema, whilst smaller, attracts 24.0% of visits from Zone 1 residents, 23.2% of Zone 3, 18.0% of Zone 6 and 17.8% of Zone 4.
- 6.4.3 Key locations outside the Borough which residents look to include the Vue cinemas in Dagenham and Lakeside, as well as facilities in central London. Furthermore, there is a cinema planned at Brentwood which would impact on the cinema spending patterns.
- 6.4.4 Cinema operators make use of 'screen density' in order to make decisions on expansion or where to locate cinemas. In Havering the total number of screens from both cinema facilities is 24. Clearly, Havering's cinema trade is not restricted to the Borough's administrative boundaries. If we assess cinema provision within an 18-minute drive time (Figure 9), then the population within this catchment area is 454,292, representing a screen density of 5.3 screens per 100,000 people, compared to a UK average of 6.0 screens per 100,000.

Figure 6.1 - Cinema Provision within and surrounding LB Havering



- 6.4.5 This would suggest that – whilst not pressing – there is likely to be a need for additional cinema capacity over the course of the study period. When looking at the location of existing facilities within and surrounding the Borough, the qualitative gap in provision is in the vicinity of Hornchurch / Upminster, and the delivery of an appropriately-sized cinema facility one of these centres would help to further diversity uses and encourage patronage throughout the daytime and evening. We would envisage that should a cinema come forward in these locations, it would be of the specialist / independent operator nature (which would also address a qualitative deficiency of this type of facility in the Borough). Operators such as Curzon and Picturehouse are increasingly looking towards smaller centres to provide localised, small scale (two to three screen) developments, and there may be scope for such a development to be accommodated in this part of the Borough.
- 6.4.6 Over the longer-term, aligned with the growth agenda within and outside the Borough, consideration may also need to be given to provision to serve the Rainham area.
- 6.4.7 The Borough also has two theatres, Queens Theatre in Hornchurch and Brookside Theatre in Romford. Both theatres host a variety of shows including plays, pantomimes, musicals and music concerts. The Brookside Theatre attracts 2.5% of the market share from Zone 5 and 2.0% of Zone 7 residents. Queens Theatre however attracts a wider audience and as such is the Borough's main theatre provision. 5.1% of Zone 4 residents, 3.7% of Zone 7 and 3.0% of Zone 5 residents visited the Queens theatre. The Queens Theatre also attracts modest support from the surrounding zones except Zone 11. Patronage to theatre facilities is, as a rule, considerably more limited than to cinemas, and we consider that current provision in the Borough is sufficient.

6.5 Gym & Leisure Centres

- 6.5.1 There are 15 gyms and leisure facilities located within the Borough. The location and type of activity on offer is outlined in **Table 6.4**.

Table 6.4 - Gym & leisure centre provision in LB Havering

Gym/ Leisure Centre	Location	Type	Facilities
Central Park Leisure Centre	Harold Hill	Public	Swimming pool, fitness suite, spa, indoor courts, outdoor spots area, crèche, group exercise studios
Chafford Sports Complex	Rainham	Public	2 swimming pools, sports hall, fitness suites, outdoor playing fields, group exercise studios
Hornchurch Sports Centre	Hornchurch	Public	2 swimming pools, sports hall, fitness suite, group exercise studios, café, crèche, squash courts
Go30	Romford	Private	Fitness suite, beauty therapy, café, group exercise studios
Virgin Active Romford	Romford	Private	Fitness suite, swimming pool, café, crèche, spa, group exercise studio
Fitness First Romford	Romford	Private	Fitness suite, group exercise, spa, group exercise studio, sauna
LDG Fitness Centre	Romford	Private	Fitness suite, group exercise, martial arts/boxing
Better Gym Romford	Romford	Private	Fitness suite, group exercise studios
Ab Salute Gym Romford	Romford	Private	Fitness suite, group exercise studio
Abbs Cross Health and Fitness Centre	Elm Park	Private	Swimming Pool, fitness suite, group exercise studios, sports hall, playing fields
YMCA Romford	Romford	Private	Fitness suite, group exercise studios
Infitness Gym	Upminster	Private	Fitness suite
Girls Allowed Gym	Hornchurch	Private	Fitness suite, group exercise studios
Gymophobics	Hornchurch	Private	Fitness suite, group exercise studios
David Lloyd Gidea Park	Romford	Private	Indoor and outdoor swimming pools, group exercise studios, sports hall, café

Source: PBA desktop research, October 2014

- 6.5.2 Spending on health and fitness appears to be localized — i.e. residents visited the leisure or gym facility closest to them. Romford is a notable exception. The centre attracted visitors to its gym and leisure facilities from all zones, with visitors perhaps using health and fitness facilities in association with other uses in the centre. 25.1% of Zone 3 residents and 24.7% of Zone 1 residents spent money in health and fitness facilities in Romford. Due to the number of gyms present within Romford, the centre also attracts some expenditure from all other zones.
- 6.5.3 The Business in Sport and Leisure (BISL) handbook 2009) states that 12% of the UK population has a gym membership. The resident population of the borough is 242,000 (ONS Sub-National Projections, 2012). Assuming that gym memberships are in line with the national average, then there are a total of 29,040. As detailed in Table 6.4 above there are 15 major health and fitness facilities in Havering. This gives an average of 1,936 members per facility.
- 6.5.4 The BISL handbook states that in March 2008 there were 5,775 private facilities with a membership of 7.2 million members. This gives an average of 1,251 members per facility. In this regard the average number of members per facility in Havering is significantly higher than

the national average. This in turn indicates that there is a need in the short to medium-term for additional facilities.

- 6.5.5 From our headline assessment the current facilities are generally of good to high quality. The council-owned Chafford Sports Complex and Hornchurch Sports Centre offer a wide range of facilities and activities. While the majority of health and fitness facilities are privately-operated we are aware that the council intends to improve the sports and fitness offer in the Borough through the development of a new leisure centre in Romford. Currently Romford has no swimming pool. The new facility will include an ice rink (to replace the Romford Ice Arena), a swimming pool, a fitness suite and group exercise studios.
- 6.5.6 From our assessment it is apparent that there is a lack of private health and fitness facilities in the southernmost part of the Borough, particularly around Rainham. We would expect residents elsewhere to look towards the network of facilities in Romford, Hornchurch and Upminster.

6.6 Family Entertainment

- 6.6.1 'Family entertainment' (which includes facilities such as ten-pin bowling and ice-skating) provision in the Borough is mostly focused around the Romford area. There are two bowling facilities within the borough; the first is in Romford and the second on the outskirts of the Borough near Collier Row. The Namco Funscape facility is located within the Brewery, and offers ten pin bowling, a pool hall and dining facilities. The second bowling facility, Roller Bowl is located within the City Pavilion complex, a purpose-built leisure complex located between Chadwell Heath and Hainault, which includes a 34-lane bowling alley, a bar and restaurant.
- 6.6.2 Havering's sole ice rink the Romford Ice Arena closed in April 2014 to make way for a new Morrisons supermarket which is currently under construction. The granting of planning permission for the new Morrisons was aligned to the delivery of a modern replacement facility within Romford metropolitan centre, which is more centrally-located and will assist in bringing footfall into the town centre. The replacement facility will also include a competition-length swimming pool, gym and other facilities, and therefore will be a significant improvement on the offer which it is replacing.
- 6.6.3 The results of the household survey identify Romford as the most popular family entertainment destination. Romford attracted visits from residents in all zones most notably 39.4% of Zone 1 residents, 37.0% of Zone 3 residents and 33.0% of Zone 4 residents.

6.7 Games of Chance

- 6.7.1 Compared to other commercial leisure facilities discussed in this report, games of chance (such as bingo and gambling) are a fairly niche activity. Indeed, based on the results of the household survey, the vast majority of Borough residents do not participate in these activities.
- 6.7.2 There are two main bingo halls in the borough. Both facilities are operated by Mecca Bingo and are located in Romford and Hornchurch. Romford's facility attracts market share from a number of zones including Zone 3 (6.5%), Zone 2 (3.2%), Zone 1 (3.2%) and Zone 9 (4.9%). Hornchurch's facility attracts market share from a number of zones including Zone 4 (5.6%), Zone 2 (5.3%) and Zone 5 (2.9%). According to the household survey results, it was evident that Dagenham was the principal competing out-of-borough centre for games of chance particularly for residents located to the south of Havering. Dagenham has a large bingo hall, again operated by Mecca Bingo. Dagenham mainly attracted residents from Zone 9 (6.4%) and Zone 10 (5.7%).

6.8 Hotel Provision

- 6.8.1 Hotel provision in the borough varies from small inns and guesthouses to national hotel chains though the offer predominantly consists of independently owned and operated accommodation. The offer generally falls towards the budget end of the spectrum. The hotel operators present in Havering are budget hotel chains Travelodge and Premier Inn.
- 6.8.2 Romford has five hotels within and around the town centre including a Travelodge and two Premier Inn's. The Travelodge is located in Market Place, and has 242 rooms. In keeping with the "budget" business model, the hotel has comparatively few facilities. Premier Inn has two hotels in the Borough – Premier Inn Romford Central and Premier Inn Romford West. Premier Inn Romford West has 88 rooms and is located on Whalebone Lane North on the edge of the Borough, adjacent to the A12 at Chadwell Heath (and is thus some distance from any of the Borough's defined centres), while Premier Inn Romford Central has 196 rooms and is located in the town centre within Mercury Gardens. While similarly priced, Premier Inn's Romford hotels do have on site restaurants which distinguish them from Travelodge's offer.
- 6.8.3 A major mixed use hotel, retail and residential development was granted planning permission though appeal in November 2009. The development will be located at Angel Way Retail Park and includes a 63 bedroom hotel. This development is yet to commence, and we are not aware whether an operator has been secured. While planning permission for the development has lapsed, the developer has recently applied for an extension of time limit. The application is yet to be decided by the Council.
- 6.8.4 Rainham hosts the Borough's only other chain hotel. Premier Inn Rainham is located on New Road, some distance outside the urban area near the village of Wennington. The Premier Inn in Rainham is similar to the Romford hotels in that it offers an on-site restaurant in addition to free parking. The hotel has 230 rooms.
- 6.8.5 With the exception of the two hotels in Romford metropolitan centre, none of the other centres in the Borough benefit from hotel provision within or close to the rest of the retail and leisure offer. Whilst it is not within the remit of this study to undertake a full appraisal of the need for additional hotel facilities, the Council may wish to consider a fuller assessment of the market demand for additional hotel provision as these facilities, where well-located, play important roles in contributing to the wider vitality and viability of centres, through generating footfall and spin-off 'linked trips' to local retailers and café/restaurant facilities. In particular, we note the lack of mid/upmarket hotel chains in the Borough at present.

6.9 Summary of Commercial Leisure Needs

- 6.9.1 We have undertaken a quantitative and qualitative assessment of commercial leisure needs for LB Havering. This has identified the following:
- An indicative quantitative need of up to 6,400 sqm gross A3, A4 and A5 commercial leisure floorspace across the Borough over the period to 2021, increasing to 21,000 sqm by 2031
 - Scope for further enhancement of the A3 and A4 offer in Romford metropolitan centre, to further diversify the range and quality of the town centre offer and enhance cross-town centre footfall in the evening, and to diversify the market orientation of South Street away from the dominance of drinking establishments and nightclubs.
 - Scope for further enhancement of the food and drink offer in all of the district centres, with a particular emphasis on moving the offer in Upminster away from take-aways, and continuing to support Hornchurch's important role and function as an 'evening economy' destination, through additional development of an appropriate scale.

- A need for additional cinema provision, having regard to the qualitative deficiency of specialist / boutique operators in the Borough at present, which should be directed towards Hornchurch or Upminster as preference/
- A short-to-medium term need for additional gym/leisure facilities, although this need will partly be met by the opening of the new Council-operated facility in Romford metropolitan centre. There is a need for privately-run facilities in the southern part of the Borough, which should be aligned to a district centre if possible.
- From our headline assessment, it appears that there is a need for additional hotel provision, particularly in Romford metropolitan centre, although this may in part be met should the Angel Way site be developed. There is a lack of mid/upmarket hotels in the Borough at present, with existing provision concentrated in the budget market, and, in some cases, poorly-related to existing centres. It is recommended that a full assessment of the need for additional hotel provision is undertaken by the Council.
- We do not consider there to be a need for additional games of chance or family entertainment facilities.

7 Recommendations

- 7.1.1 In this Section, we set out our core recommendations considering quantitative need, how this need could be met within the LB Havering, provide advice on a network of centres and some initial strategy advice (considering qualitative factors). Finally, we provide policy advice on the approach that we recommend is adopted when considering boundaries within a development plan and provide our advice on monitoring.

7.2 Quantitative Need for New Floorspace

- 7.2.1 Our quantitative assessment has revealed that there is a comparison goods need for between 16,100 and 21,500 sqm net additional comparison goods floorspace by 2021, increasing to between 49,500 sqm net and 62,000 sqm net by 2031. The lower figure is based on a constant market share, with the higher figure based on a theoretical increase in market share. It is our advice that the lower constant market share need should be planned for, given the level of competition that exists in the area.
- 7.2.2 The convenience goods assessment has demonstrated a need for up to 7,500 sqm net by 2021, increasing to 13,200 sqm net by 2031. This is based on a constant market share, but allows for significant overtrading of existing floorspace. This effectively means that much of this floorspace need is generated by diverted 'pent up' demand from existing facilities, rather than through expenditure and population growth.
- 7.2.3 Our assessment has also revealed an indicative quantitative need of up to 6,400 sqm gross A3, A4 and A5 commercial leisure floorspace across the Borough over the period to 2021, increasing to 21,000 sqm gross by 2031.

7.3 Meeting Quantitative Needs in LB Havering

- 7.3.1 We have stated clearly the longer term figures should be treated indicatively, although the NPPF requires needs for town centre uses to be met in full. Furthermore, amongst other things, our review of market trends indicates a polarisation trend occurring in the comparison sector with spending gravitating towards those larger centres that have more choice. As such, the Council will need to carefully consider how it meets the needs that exist - particularly in a situation where central sites are scarce, or challenging to develop. Therefore, we think it is helpful to set out the practical implications of our need assessment for the Council under the three sectors we have assessed.

Comparison Goods Sector

- 7.3.2 A floorspace output from a quantitative need assessment is generated directly from a monetary value (i.e. expenditure growth) and is conventionally based on a constant market share of spending in a given catchment. Planning policy is not very effective at responding to monetary values and that is the reason why the monetary value is translated into a floorspace figure (which is our quantitative need output). Considering the monetary concept further within the comparison sector, if the empirical forecasts are correct then the additional money available will need to be spent somewhere (remembering we have already taken into account growth in spending through the Internet and an allowance for existing shops to improve their turnover). As such, if it isn't in existing shops and no new comparison floorspace comes forward, then will leave the catchment - which will have a consequential effect of reducing the market share of the area.
- 7.3.3 The primary need for additional floorspace is within the comparison goods sector, which is a function of Romford being a large centre and as such attracting a high market share of the expenditure growth that has been estimated. Irrespective of the quantitative outputs, in our

view, there are three realistic alternatives for a local authority to meet its comparison goods needs:

- **Meet its need through floorspace:** this is the development option and would result in the needs set out in our study being built in full during the plan period with sites being allocated using the sequential test, and taking into account impact where necessary. Given uncertainty over longer term forecasts, we consider that plans should consider the needs to Romford and the district centres first but then consider safeguarding areas in the designated centres for the longer term needs beyond 2021
- **Meet its needs (in part or full) through improved turnover performance of existing floorspace:** our assessment assumes existing floorspace will increase its comparison goods turnover year on year by 1.7% which is a blanket approach across all floorspace. We acknowledge that there is scope, under certain conditions, for existing floorspace to improve its turnover beyond this allowance. The ability to achieve this higher rate is dependent on two things:
 - Firstly, the quality and configuration of existing floorspace is important, with modern floorspace with larger footplates better equipped to improve their level of sales per sqm.
 - Secondly, whether there are qualitative interventions that could take place to make more customers visit a centre, have an increased dwell time and therefore spend more money in existing shops.

To measure the effect of this approach is particularly difficult, because it will depend on a number of factors. However, given that most town centres have a mix of modern and dated floorspace, we consider achieving an increased turnover per sqm beyond our allowance will only be possible with significant intervention under our second point above.

- **Accept a reducing market share:** in certain locations, it might be considered difficult, if not impossible, to keep the market share of a centre the same over the longer term given the polarisation trend being observed in the non-food sector and potentially the lack of available or suitable central sites. If out of centre is not appropriate (for example due to impact) or there is lack of demand, then under these circumstances, it might be acceptable to plan for a reducing market share (which may well reduce any quantitative need that exists, or even result in some uses coming out of retail altogether). Effectively this is a form of 'managed decline', which could in the longer term improve the vitality and viability of a centre.

7.3.4 Our study has set out an assessment of comparison goods need based on a constant market share across the whole Borough. In the interests in proper planning and ensuring self-containment where possible, we think this is an appropriate starting point. Furthermore, it can be measured in a straightforward manner (i.e. *build X sqm by Y*). However, the Council, through its Local Plan preparation, consultation and engagement with key stakeholders may wish to consider the second and third points above. This will require the Plan to monitor its performance against the need outputs that we have identified.

7.3.5 In respect of accommodating the comparison goods needs that we have identified, the sequential test should be applied and we would expect the largest proportion to be accommodated with Romford metropolitan centre with more modest allocations being directed to the district centres. It is also possible that some of the need that has been identified can be met through re-occupation of vacant floorspace.

Convenience Goods Sector

- 7.3.6 The above issue applies less to the convenience sector because the need is primarily generated through overtrading of existing floorspace. The sector is going through unprecedented change, with a shift towards smaller supermarkets and convenience stores. This means that to meet this need, we expect a number of smaller development will be needed in a range of locations. Furthermore, a proportion of this need is likely to be accommodated through conversion of existing premises rather than new developments and would not require any policy intervention. In terms of developments, we consider the Local Plan preparation should consider how convenience goods developments can be accommodated within mixed use developments in central locations, applying the sequential test.

A3, A4 and A5 Leisure Sector

- 7.3.7 The quantitative leisure outputs for A3, A4 and A5 uses and needs to be considered alongside qualitative factors (see below). However, again like the convenience sector, it is expected that this floorspace will be accommodated part through conversion of existing premises – or re-occupation of vacant floorspace – and part through new development. Again, we consider that the Local Plan preparation should consider how improved how an improved food and drink offer can form part of mixed use developments (typically ground floors of residential led developments), whilst applying the sequential test.

7.4 Network of Centres & Initial Vision/Strategy Advice

- 7.4.1 Based on our assessment, we consider that the network of centres within the Borough should remain as currently identified given that the centres largely fulfil the functions that they have been awarded within the development plan. Our assessment has identified a series of qualitative factors for each centre, which we consider could form the basis of a town centre vision or strategy and should be combined with a strategy to meet the Borough's retail and leisure needs. However, as advised by the PPG, a positive vision or strategy should be articulated through the Local Plan. Therefore, our advice below is based on the evidence collected and will need to be tested and assessed in further detail as the Local Plan is prepared. We address each of the designated centres in turn.

Romford

- 7.4.2 Romford is the largest centre in the Borough and benefits from a strong comparison goods retail function. Our initial review of the composition of the town centre is that outward expansion of retail and other town centre uses should be resisted, with the ring road forming a logical town centre boundary. Most of the retailing activity takes place north of the railway with the area to the south performing a secondary role.
- 7.4.3 There is a quantitative and qualitative need for additional and improved food and drink floorspace across the town centre. Much of the existing food and drink offer is concentrated in The Brewery development and is 'hidden' from the rest of the town centre. The southern section of South Street - in vicinity of the train station – could be a potential location for additional food and drink floorspace, capitalising on recent investment made by the Council in this area.
- 7.4.4 In our view, improvement and upgrading of the retail premises along South Street should be a priority for the Council early in the plan period. Improved configuration of units could be expected to account for some of the identified quantitative/qualitative needs that we have identified due to an improved turnover per sqm through better floorplates and a better mix of retailers. It will be necessary to consider how asset management could achieve this aim. Similarly the street market at Market Place could be gently nurtured towards providing a mix of

goods that is unique among competing markets in the area. This would further diversify the retail offer.

- 7.4.5 A potential site for additional comparison goods floorspace provision could be the intensification of The Brewery development given the large surface level car park that exists. But this will need to be undertaken as part of a programme of works to better integrate this development with the rest of town centre, such as shared public realm or directional signposting. We would expect any development would require a strong anchor store.
- 7.4.6 Finally, we expect that the footfall within the town centre may change when Morrison's opens and we recommend that the situation is monitored.

Upminster

- 7.4.7 Generally, Upminster is a vital and viable town centre and we recommend only limited intervention is necessary to maintain the centre's role and function. There are no obvious development sites for future expansion so we expect that the focus should be on supporting existing retailers through ensuring the collective 'identity' of the centre is strengthened. In terms of physical improvements, integration could be improved between the Waitrose store and the rest of the centre.

Hornchurch

- 7.4.8 Hornchurch provides the leisure and cultural focus of the Borough and this function is clearly important with a number of restaurants present within the town. In our view, the quality of the retail offer does not match that of the leisure and as such, some better quality retail operators within the town would improve its vitality and viability, although this aspiration will be subject to demand and availability of premises.
- 7.4.9 Sainsbury's has dominant trading position within the town and is overtrading. Therefore, if a second operator could be introduced into the centre this would be beneficial to consumer choice and would help claw back trade travelling to out of centre locations. This aspiration is subject to a suitable site in the town centre being available, given that edge and out of centre sites would not achieve the same outcome.
- 7.4.10 Based on our assessment, we are aware of underused sites on North Street – for example, Scottish Mutual House or the telephone exchange. As there is no cinema in Hornchurch, the potential for a mixed use scheme to include a small cinema (Curzon/Everyman) plus other supporting uses - would complement theatre further along the road. If this is an option, linkages with centre would need to be strengthened.

Elm Park

- 7.4.11 Elm Park will need to be monitored carefully by Council given its potential removal from London Plan 'district centre' level. We expect that the centre would benefit from a small supermarket, for example up to 1,000 sqm net, ideally towards the eastern side of the centre to help rebalance footfall and improve vitality and viability.

Collier Row

- 7.4.12 We have no specific recommendations in respect of Colliers Row, other than a suggestion that the Council continues to monitor its vitality and viability and seek to protect its convenience function from competition from out of centre developments that could draw significant amounts of footfall from centre.

Harold Hill

- 7.4.13 We are aware that the Council is investing significantly in this centre through the provision of new library within the centre itself. Two significant new residential developments to the north and east of the centre will deliver new footfall and support existing retailers. Vacancy rate appears high on face value but reduces significantly once the library works are factored in.

Rainham

- 7.4.14 Rainham is a functional centre that is dominated by Tesco. Improved linkages between Tesco and rest of the centre should be explored. We would expect the potential for further development in the area will be largely driven by the residential growth. However, there are qualitative needs to provide an improved consumer choice for retail and other services beyond the Tesco store.

7.5 Defining Boundaries

- 7.5.1 The NPPF requires local authorities to define the extent of town centres and primary shopping areas, based on a clear designation of primary and secondary frontages in designated centres. Based on the definitions in Annex 2 of the NPPF, the methodology for defining such boundaries and frontages ought to start centrally and work outwards. If we are considering the position now, the approach is as follows:

- Define first primary frontages as those frontages that include a high proportion of retail uses (including food, drinks, clothing and household goods). In our view, these ought to represent the frontages with most daytime footfall;
- Then define secondary frontages as those frontages that include town centre uses, but have a wider diversity of non-retail uses, such as restaurants, cinemas and businesses;
- Using the primary and second frontages, the primary shopping area should be defined as area where retail is concentrated by plotting the area around primary retail frontages and adjoining and closely-related secondary frontages. It does not necessary follow that secondary frontages fall within the primary shopping area, but often they do. This area typically represents the 'retail heart' of a town.
- Finally, the town centre boundary should be plotted that incorporates all of the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. So this means the area will incorporate any adjacent non-retail town centre uses, such as leisure uses, offices, arts, cultural and tourism uses.

- 7.5.2 It is possible for smaller centres that the primary shopping area will be identical to the town centre boundary.

- 7.5.3** It will always be necessary to consider whether there is a requirement to intervene in policy terms to change these areas from what is currently on the ground, for example to facilitate development by expanding a primary shopping area, or to encourage diversification of uses away from solely retail by reducing a primary frontage and converting it to secondary. In any event, the eventual boundaries will need to be tested and consulted upon as the Council's Local Plan is prepared.

7.6 Monitoring

- 7.6.1 This study provides the Council with its floorspace needs requirements to 2031. To establish whether the requirements for new floorspace (by type) are being met and more generally to monitor the performance, the Council should monitor:

- planning permissions for retail floorspace - by type, amount (sqm gross and net), location and retailer;
- completions of retail floorspace - by type, amount, location and retailer;
- mix of uses, including vacancies; and
- health checks of designated centres

7.6.2 The monitoring recommended above is relatively straightforward and should be conducted on a rolling basis for items (i) and (ii) and annually or every two years for items (iii) to (vi). Time series data can thus be produced and continually updated, starting with this study or possibly with earlier work undertaken by the Council. Contingent on the timetabling of the Council's Local Plan, such updating will prove to be valuable when this evidence is tested at examination in public.

7.6.3 This report provides a robust indication of the current position. The recommendations set out in this report may need to be adjusted, in the future, due to changing market conditions, demographic changes and the impact of developments elsewhere. They may also need to be adjusted if standard assumptions, in particular those relating to expenditure growth and e-tailing, change. The role of monitoring is crucial in highlighting changes in the assumptions that underpin this study and we recommend regular monitoring to the Council.

Havering Retail & Commercial Leisure Needs Assessment

Volume 2 - Appendices

On behalf of **The London Borough of Havering**






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Appendices

Appendix A	Centre Health Checks
Appendix B	Study Area Map
Appendix C	Retail Capacity Tables
Appendix D	Quantitative Need Methodology
Appendix E	Technical Inputs
Appendix F	Leisure Tables

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Appendix A Centre Health Checks

Appendix: Collier Row District Centre Health Check

PPG indicator	Summary for Collier Row District Centre	Traffic light score
Diversity of uses	<p>Collier Row is a district centre located in the North Western part of the Borough. The centre appears to have an adequate diversity of uses that mostly caters to the day to day needs of the residents. The main retail frontage is along Collier Row Road with some units fronting Clockhouse Lane and Chase Cross Road. Generally, representation is geared towards convenience and service operators. The provision of comparison goods by national multiple retailers is largely limited. There seems to be fairly high provision of hot food take-aways within the district centre. In addition there are a number of services offered within the centre including a funeral home, banks, a post office, solicitors, hair salons and estate agents. There commercial leisure space within the town centre with the exception of a pub and two restaurants. Key retailers in the town include Tesco Metro, Boots Costcutters and Londis. With the exception of the Tesco, the retail units within the town centre are mostly small in size.</p> <p>There seemed to be no significant cultural or leisure amenities within the town centre. Similarly, the evening economy appears to be limited to the pub and two restaurants.</p> <p>The offering in the town centre is generally on the lower end of the market especially when the provision of hot food take aways and charity shops is taken into consideration.</p>	
Proportion of vacant street level property	<p>The Experian Goad survey undertaken in January 2014 identified nine vacant units. This puts the proportion of vacant units at 12.2%. At the time of the town centre visits in October 2014 however the number of vacant units stood at 11. The proportion of vacant properties has therefore grown and currently stands at 14.8%. This figure is higher than the current national average of 12.5%.</p> <p>There are no particular concentrations of vacant properties within the town centre though there is some evidence of clustering along Clockhouse Lane. At the same time there appears to be small scale additions to the retail mix within the town centre with the development of two retail units along Collier Row Lane which have yet to be occupied.</p>	
Retailer representation and intentions to change representation	<p>The majority of retailers and food outlets are independently owned. The convenience offer within Collier Row is dominated by Tesco Metro alongside Costcutter and Londis. There are no national multiple clothing and footwear retailers within the town centre except for charity shops and some independent shops. Other national multiples present include Boots, Lloyds Pharmacy, Lloyds Bank, a Post Office, Greggs, Coral Betting, a JD Wetherspoon operated pub, Domino's Pizza and Pizza Hut.</p>	
Pedestrian flows	<p>The flow of pedestrians within the town centre is generally good. The town centre is largely linear in nature with most of the retail units located along Collier Row Road which makes pedestrian circulation easy. While vehicular traffic moves fairly fast along the road, it is not difficult to cross from one side of the street to another.</p> <p>Collier Row generally has the highest amount of footfall within the town centre.</p>	
Accessibility	<p>Collier Row is fairly accessible from the surrounding centres such as Romford and Dagenham. The centre does not have a train station but it is served by six bus routes.</p> <p>Parking within the town centre is limited to pay and display parking spaces along Collier Row Road though there is a large off-street parking along rex Close behind the Tesco</p>	

Appendix: Collier Row District Centre Health Check

PPG indicator	Summary for Collier Row District Centre	Traffic light score
	Supermarket.	
Perception of safety/ occurrence of crime	The perception crime within the district centre appears to be fairly low. There were no obvious signs of neglect or vandalism and the linear nature of the town centre increase instances of passive surveillance. The limited evening economy may perhaps make the town centre seem isolated at night. Particular areas of concern include the area at the corner of Chase Cross Road and Clockhouse Lane due to the vacant retail units.	
State of district centre environmental quality	The environmental quality of the district centre is generally good. The buildings within the district centre have a coherent architectural style which makes the town centre a pleasant place to visit. The public realm is generally clean and tidy. There seems to have been some investment within the district centre public realm with such improvements as new street lights, wide pavements and new benches along Collier Row Road.	

Appendix: Elm Park District Centre Health check

PPG indicator	Summary for Elm Park District Centre	Traffic light score
Diversity of uses	<p>Elm Park is located in the south western part of the Borough. The major retail frontages are located either side of Elm Park Underground Station. To the South the main retail frontages are Station Parade and Tadworth Parade. To the North the majority of retail units are located along the Broadway or front onto the junction of Elm Park Avenue/St. Nicholas Avenue/The Broadway.</p> <p>The centre has good diversity of convenience, comparison and service uses which cater for daily shopping needs. The convenience offer comprises national multiple retailers as well as a range of independent stores including general convenience stores, a bakery and butchers. National multiples present include Co-op food, Tesco Metro and Sainsbury's Local. The comparison offer is comprised of independent stores mainly selling hardware, homeware and gift ware, however there is also a jeweller, pet shop, and cycle shop. Elm Park offers a diverse range of local services including a bank, funeral directors, mortgage centre, laptop repair, shop mobility centre, tailors, dry cleaners, travel agents, betting office and hair/beauty salons. There is no cultural or commercial leisure offer in the centre however the centre comprises four independent cafes. The evening economy is limited to a few restaurants and a total of eleven take-aways which account for 10% of all units.</p>	
Proportion of vacant street level property	<p>The number of vacancies within Elm Park District Centre was 16 when we undertook the town centre survey in October 2014. This is equivalent to 14% of the total number of units which is above the national average of 12.5%.</p> <p>There are two main areas where concentrations of vacant units have accumulated. There is a noticeably high number of vacant units along Station Parade as well as a number of vacant units either side of Nicholas Avenue.</p>	
Retailer representation and intentions to change representation	<p>Elm Park provides a strong local independent retail offer of local services and a diverse convenience offer. The comparison offer however is towards the lower end of the market. A high proportion of the comparison units are charity shops and discount home ware stores. There are no national multiple comparison retailers. The only National Multiple retailers present in the centre are Greggs, Dominoes, Co-op, Tesco and Sainsbury's.</p>	
Pedestrian flows	<p>There was relatively weak pedestrian footfall along the main retail frontages both to the north and south of Elm Park Underground Station. The pedestrian footfall was however stronger to the north of the station along streets with cafes and restaurants which seemed to generate more activity.</p>	
Accessibility	<p>The flow of pedestrians through the town centre is constrained by the original layout of the centre. The roundabouts at either end of The Broadway act as a barriers to pedestrian accessibility although the pedestrian crossings do help address this. The provision of off-road car parking at each end of The Broadway make local shops and services more convenient to access for car users.</p> <p>The centre is well connected to the London transport system and the rest of the Borough via the District Line and four bus routes (165, 252, 365, 372) that serve the centre.</p>	

Appendix: Elm Park District Centre Health check

PPG indicator	Summary for Elm Park District Centre	Traffic light score
Perception of safety/ occurrence of crime	<p>The perception of safety is also markedly different either side of the rail station. There is almost no perception of crime along the main shopping frontages to the north of the station. Since most of the shops are located along main roads there is plenty of natural surveillance. The only area of concern is the car park located off St. Nicholas Avenue. The car park is highly enclosed with dead frontages on three out of four sides since the only non-domestic building fronting onto the car park is vacant.</p> <p>The two main shopping frontages to the south of the station, Station Parade and Tadworth Parade both show signs that create a higher perception of crime. Station Parade feels particularly unsafe since it is highly enclosed, set back from the main road behind a relatively high brick wall with very limited natural surveillance. This part of the centre appears neglected, on our visit nearly half of the shops fronts were covered with security shutters either because units were vacant or occupied by take-aways which only opened in the evening. Similarly along Tadworth Parade the concentration of take-away units covered with security shutters create an impression of neglect and reduce the perception of safety.</p>	
State of town centre environmental quality	<p>The properties fronting on to either side of The Broadway are uniform in architectural style and have sufficient architectural detailing to create visual interest. These frontages are of a consistent height which creates a good sense of enclosure. This part of the centre is relatively free from litter and there is evidence of recent investment in upgraded paving and new street furniture. Overall this part of the centre has a good environmental quality.</p> <p>At the southern end of The Broadway the frontages of buildings along Tadworth Parade and Station Parade contain very little detailing and create no visual interest. The properties either side of Station Parade appear to be in a state of decay which gives the area a very poor environmental quality.</p> <p>At the northern end of the Broadway the buildings fronting on to the roundabout represent a variety of architectural styles. This informality creates visual interest although the appearance of some key buildings could be dramatically improved with maintenance. Again there are signs of recent investment in the form of improved paving and new street furniture. Consistent elements including the street lights and new paving and street furniture help to create uniformity between different parts of the centre.</p>	

Appendix: Harold Hill District Centre Health Check

PPG indicator	Summary for Harold Hill District Centre	Traffic light score
Diversity of uses	<p>Harold Hill district centre is a district centre focusing primarily on the provision of convenience goods and some services such as banking and hairdressing. In addition the centre also offers a restaurant; café and hot food take aways. The centre largely serves local residents. The centre is mixed-use as it is located within a medium density housing scheme.</p> <p>The centre offers a Sainsbury's Local, Iceland, Co-Operative Food, a butchers, a news agents, a discount supermarket, a charity shop, a café and restaurant. Most of the retail units are independently owned though familiar High Street names have established themselves in the centre. Services offered within the town centre include Banking (Halifax, Santander, Lloyds and NatWest), as well as a barber shop, hairdressers, Boots Optician, a post office and a dry cleaners. The centre also contains the Council's housing office.</p> <p>The district centre is therefore suited to meeting the day to day needs of the local residents. However the town centre lacks significant clothing and footwear retailers although this would be expected for a centre of its size. Furthermore, leisure options are limited to the café, an American themed restaurant and a few take-away restaurants. The relocated Harold Hill Library that is currently under construction will improve the diversity of uses in the district centre.</p>	
Proportion of vacant street level property	<p>At the time the Experian Goad survey was done (September 2012) the proportion of vacant units stood at 11 units or 15.3% of the retail offer. It is important to note that since the survey was carried out two larger retail units have been subdivided into smaller shops. Furthermore, five shop units have been closed down or demolished in order to make way for the new Harold Hill library. At the time of the district centre health check in October 2014, the proportion of vacant properties was found to be 14 units or 19.7% of the retail offer. This is significantly higher than the national average of 12.5% and is an area of concern.</p>	
Retailer representation and intentions to change representation	<p>For a district centre of its size there appears to be good representation of national multiple retailers. Convenience goods retailers include Iceland, Co-Operative Food and Sainsbury's Local. The convenience offer is represented by Superdrug, Boots and Boots Opticians. Furthermore, there are a number of national multiples offering banking services (Halifax, Santander and Natwest) in addition to bookmakers William Hill and Ladbrokes. It is however clear that the bulk of the retail offer within the centre is made up of independent retailers.</p>	
Pedestrian flows	<p>Pedestrian circulation within the district centre is generally good. Most of the retail units front Hilldene Avenue and Franham Road – the concentration of pedestrians is also highest in here. The centre is generally well laid out making navigation easy. However, the two arcades on the eastern and western sides of the town centre appear to be relatively underused.</p>	
Accessibility	<p>Accessibility to the centre is fairly good. Currently, four bus routes (including a night bus) serve Harold Hill district centre. The district centre seems to have adequate on-street parking for car users. The centre also has bicycle racks though the surrounding streets lacked bicycle lanes. While it is assumed that a number of shoppers would visit the centre on foot or by bus, it is important to note that a significant number of people live in the flats above the shops.</p>	

Appendix: Harold Hill District Centre Health Check

PPG indicator	Summary for Harold Hill District Centre	Traffic light score
Perception of safety/ occurrence of crime	<p>Perception of crime within the district centre is low. During the time of the visit the centre appeared to have significant footfall. While the centre does not have much of an evening economy, the presence of a residential night time population indicates that there is some evening activity and that occurrence of crime may be low though we have not had access to any local crime statistics. The only area of concern would be the two arcades. While the eastern arcade will benefit from the addition of the new library, the western arcade could potentially attract criminal activity.</p>	
State of district centre environmental quality	<p>The district centre is of relatively good environmental quality. The centre itself appears to have been developed as a comprehensive mixed-use scheme. The layout therefore allows for easy circulation and navigation while maximising visibility from Hilldene Avenue. In general the retail units appear suited for modern requirements. Some of the larger units have been sub-divided into smaller units which are likely to better suit local demand.</p> <p>As mentioned earlier the arcades are the main area of concern. While the eastern Arcade will benefit from the new library, the western arcade seems to suffer from high vacancy rates which degrade the overall character and appearance of the district centre.</p>	

Appendix: Hornchurch District Centre Healthcheck

PPG indicator	Summary for Hornchurch District Centre	Traffic light score
Diversity of uses	<p>Hornchurch District Centre is located in the centre of the Borough. The main shopping frontage is the High Street which runs through the town centre east to west. The other key retail frontages include Station Lane and North Street which both intersect with the High Street forming a major junction and gateway into the town centre. The centre has a good diversity of comparison, convenience and service retail uses as well as an impressive commercial leisure offer. The centre caters for day to day shopping needs as well as being a leisure destination for eating and drinking.</p> <p>The convenience offer is anchored by Sainsbury's supermarket located on the High Street. Approximately 25% of the floorspace is dedicated to comparison goods including home ware, DVD's, books and cards. The convenience offer is supplemented by an Iceland food store and a range of independent shops including general convenience stores, a bakery and butchers. There is a substantial comparison offer which accounts for 24% off all units (51 units) and is comprised of both independent stores and national multiple retailers.</p> <p>The centre also contains a good variety of local services including a DVLA driving centre, gym, dentists, solicitors, banks, Post Office, estate agents, betting office, opticians, travel agents and numerous hair and beauty salons. The centre has a high proportion of estate agents which account for 5% of all units. Hornchurch is largely seen as Havering's cultural centre and includes the Fairkytes Art Centre and the Queens Theatre. Commercial leisure uses account for a quarter of all units. The leisure offer which is focused on eating out comprises a bingo hall, a number of traditional pubs, bars, cafes and both national multiple outlets and independent restaurants. As such, the centre has a relatively active evening economy.</p>	
Proportion of vacant street level property	<p>The vacancy rate in Hornchurch was remarkably low at just 2% (equivalent to 5 out of 207 units) when the last GOAD survey was undertaken in August 2013. The vacancy rate had increased to 6% with a total of 12 vacant units when we undertook the town centre survey in October 2014. Despite the vacancy rate more than doubling over 14 months it remains well under the national average of 12.5%. Three of the five units which were vacant as of August 2014 have been re-occupied suggesting a strong uptake of smaller retail units. The former Waitrose store has remained vacant for the last 14 months suggesting a lack of interest in the centre by supermarket operators.</p>	
Retailer representation and intentions to change representation	<p>Within the comparison category, independent stores account for the majority of the units. National multiple retailers present include Superdrug, Boots, Argos, Shoe Zone, Peacocks and Clinton Cards. There are a high proportion of discount stores and charity shops within the centre which account for 22% off all the comparison units.</p> <p>The eating and drinking out offer is at the middle-to-higher end of the market. There is a range of high quality independently owned cafés and restaurants as well as national chain outlets including: Zizi, Ask, Prezzo, Starbucks, Costa and a JD Wetherspoon pub.</p>	
Pedestrian flows	<p>The flow of pedestrians moving East to West along the High Street is supported by the linear layout of the centre. The flow of pedestrians North to South however is constrained by the high volume of traffic moving along the High Street through the centre. The junction in the centre of the High Street also acts as a significant barrier to pedestrian access. Despite the introduction of pedestrian crossings it is difficult to navigate and poses a risk to pedestrian safety.</p> <p>Pedestrian footfall was relatively strong along the High Street with the greatest</p>	

Appendix: Hornchurch District Centre Healthcheck

PPG indicator	Summary for Hornchurch District Centre	Traffic light score
	concentration of pedestrians around the junction of the High Street/North Street/Station Lane. Footfall along Station Lane was considerably weaker due to the low concentration of retail units and services.	
Accessibility	The centre is integrated into the wider London Transport Network via a range of public transport modes which connect Hornchurch to other centres and destinations in the Borough. Hornchurch underground station is a ten minute walk South of the centre and is served by the district line. Emerson Park rail station has fairly frequent services (every 30 minutes Monday to Saturday) to Romford and Upminster and is located an equal distance North of the centre. The centre is also served by seven bus routes (no's. 165, 193, 248, 252, 256, 370, 372) which connect the centre to Romford, Rainham, Thurrock, Lakeside shopping centre, Ockendon, Upminster, Elm Park and Harold Hill.	
Perception of safety/ occurrence of crime	There is generally a very low perception of crime within the centre. The majority of properties are occupied providing active frontages and appear well maintained. The high concentration of evening leisure uses ensure that the centre is well used throughout the evening and the associated natural surveillance reduces the perception of crime. The only areas of concern include the Mecca Bingo car park, this area has limited natural surveillance and the presence of CCTV cameras gives a reduced perception of safety. The other area of concern is the route from Hornchurch Station to the town centre. There is limited natural surveillance along much of this route since the frontage is made up of residential properties interspersed with retail units sets back from the main path which create inactive frontages.	
State of town centre environmental quality	<p>The environmental quality of the centre is generally very good. The buildings and shop fronts along the main retail frontages are well maintained and on the site visit there was very little litter. There is evidence of significant investment in new paving, street furniture and traffic calming measures funded by Transport for London in order to improve the environmental quality for pedestrians. There is also evidence of private sector investment. A number of key properties fronting onto the main junction have been redeveloped mainly for leisure uses with new residential use above.</p> <p>The centre contains a mix of architectural styles. The restaurant units on North Street occupy small thatch cottages which represent the oldest buildings in the centre.</p>	

Appendix: Rainham District Centre Health Check

PPG indicator	Summary for Rainham District Centre	Traffic light score
Diversity of uses	<p>Rainham is classified as a District centre. There is a low diversity of use at the centre. The Tesco Extra is the principal attraction in the centre. The large supermarket is open 24 hours a day 6 days a week. The services offered in the supermarket include a café, a pharmacy, photo shop, an optician, a filling station, a car wash and a bureau de change. In addition to selling a wide variety of convenience goods, the supermarket also contains extensive clothing, electronics and home goods section. Tesco's Click and Collect service is also available from this store. The supermarket effectively offers many of the services that would traditionally occupy the district centre.</p> <p>The district centre does not contain significant retail developments except for a small number of convenience shops, a footwear shop, and a second hand furniture store. The rest of the units are dedicated to service providers including Barclays Banks, bookmakers, a funeral home, letting agents and an optician. There are also a number of hot food take-aways and a handful of pubs and restaurants.</p> <p>The cultural offer in Rainham is restricted to the historic sites and museums around the town centre including Rainham Hall and the Church of St Helen and St Giles. There are no cinemas or theatres. Similarly, the evening economy is dominated by a handful of pubs.</p>	
Proportion of vacant street level property	There were no Experian Goad surveys produced for Rainham district centre. At the time of the survey in September, there were six vacant units, mostly along Upminster Road. This translates into a vacancy rate of 14.2%. The concentration of vacant units along Upminster Road is a source of concern as it is visibly affecting the rest of the town centre.	
Retailer representation and intentions to change representation	Tesco is the district's main national multiple retailer. Other national chains present are Pizza Hut, Barclays and Coral Betting. The rest of the retail offer is accounted for by independent retailers.	
Pedestrian flows	<p>The district centre is small and compact. Pedestrian circulation is therefore relatively easy and is aided by overhead directional signs. As the town has retained its historic character walking is fairly pleasant and is marked by various local landmarks such as Church of St Helen and St Giles, the Rainham War Memorial and the new Library.</p> <p>There is a direct pedestrian link between the main shopping frontage along Upminster Road the Tesco Extra which makes pedestrian circulation around the centre easier. At the time of the visit pedestrian activity within the town centre was generally low. The Tesco however seemed to have fairly high customer activity. This in part could be due to the relatively low retail diversity within the town centre compared to the Tesco. The presence of the Tesco may imply that a high proportion of visitors to the centre do so by car.</p>	

Appendix: Rainham District Centre Health Check

PPG indicator	Summary for Rainham District Centre	Traffic light score
Accessibility	<p>Rainham is on the mainline train service from London's Fenchurch Street Station to Southend. The town centre is in Zone Six of the London Travel Zone. The town is served by four bus routes. The train station is close to the town centre is opposite the new Rainham Library which marks the entry way to the district centre.</p> <p>While the district centre is small, there are way-finding directional signs that point out specific historic sites within the town centre.</p> <p>The bulk of the town centre's parking provision is at the Tesco supermarket with a small council owned parking facility next to it. Rainham Station also has a small NPC-managed car park. On street parking is available along Upminster Road.</p>	
Perception of safety/ occurrence of crime	<p>The perception of crime was assessed to be low during the day time. While some parts of the town centre such as Broadway Road may be active during the evenings due to the presence of two pubs, we envisage that the rest of the town centre with the exception of the Tesco has little night time activity. The lack of a significant evening economy therefore diminishes the perception of safety at night.</p>	
State of town centre environmental quality	<p>The district centre can broadly be considered to be of good quality. The historic setting of the town has been preserved and enhanced with such civic buildings as the new Rainham Library. There is comparatively little traffic congestion and noise levels are low.</p> <p>The architectural diversity in the centre has been well preserved. The Grade 1 listed Church of St Helen and St Giles and Rainham Hall define Rainham's townscape and act as strong focal points for the district centre. This is further enhanced by the open green space surrounding these buildings. More recently there have been public realm improvements at the corner of Broadway and Upminster roads resulting in a new public space centred on the Rainham War Memorial. These improvements include new paving and benches.</p> <p>While there are a number of well-preserved buildings in the district centre (specifically along Broadway), the empty shop units on Upminster Road diminish the attractiveness of the district centre.</p>	

Appendix: Romford Town Centre Health Check

PPG indicator	Summary for Romford Town Centre	Traffic light score
Diversity of uses	<p>Romford is the principle shopping and leisure destination in the Borough of Havering. There is a strong comparison and convenience retail offer. Romford can therefore be considered to have a good diversity of uses. In many respects Romford can be considered to serve shopping needs of the Borough's residents and indeed residents from the surrounding area reflecting its designation as a Metropolitan Centre in the London Plan. While there is a strong comparison goods focus within the town centre, Romford also includes a number of convenience goods outlets as well. The town centre is hemmed in by a network of roads that include Waterloo Road, St Edwards Way, Mercury Gardens and Thurloe Gardens. Due to the network of ring roads around the centre and the size of the main retail area, Romford town centre seems to function as four distinct centres with the central retail core encompassing the primary retail frontage and, London Road, North Street and the area south of the railway viaduct (including South Street/ Victoria Road/ Atlanta Boulevard) acting as neighbourhood shopping centres. While the quality of retail in the town centre core is generally high, the quality begins to fall around the edge of centre sites. The council continues to try and improve on Romford's leisure provision. In general there is good retailer representation from most mid-level national multiple retailers. The town centre features two cinema complexes a number of restaurants, drinking establishments, gyms and a growing number of cafes.</p> <p>The central core area is anchored by a number of shopping centres namely the Brewery, the Mercury, and the Liberty. In addition the town centre also encompasses a shopping arcade – the Quadrant Arcade and the Romford Shopping Hall. The two shopping centres, the Mercury and the Liberty act as the town centre's primary retail pitch. The two shopping centres are connected to each other through a pedestrian subway underneath Mercury Gardens. The retail mix at the Liberty almost exclusively consists of comparison goods and is generally of higher quality than the Mercury. Generally, the retail offer at the Liberty consists of mid-range, national multiple retailers including BHS, Marks and Spencer, Topman/ Topshop, H&M and Swarovski. The Mercury has a strong emphasis on comparison goods but also includes a large Asda supermarket and Poundland as well as home goods retailers such as Tiger and Wilco. The Mercury also hosts a cinema complex and a bingo hall.</p> <p>The Brewery is a fairly recent development containing large format retail and leisure uses. The development is anchored by a large Sainsbury's supermarket offering a wide range of both convenience goods and comparison goods (TV's Toys, Clothing etc.), a large gym, restaurants and other shops including Mamas & Papas, Gap, Boots and Carphone Warehouse. The leisure offer includes a cinema and two children's amusement arcades.</p> <p>There is a marked change in the quality of retail in the peripheral areas surrounding the Brewery i.e. the North Western portion of the town centre. This area around the High Street is designated as a secondary retail frontage is dominated mainly by local retailers and includes, a Salvation Army charity shop, dry cleaners, an Afro-Caribbean convenience shop and hair salons. This is similarly mirrored in the area around London Road. In this shopping area in particular, the London Road effectively disconnects this area from the rest of the prime shopping pitch. The parade of shops along London Road which include a number of hot food take away establishments, car and motorcycle dealerships and a pub effectively function as a neighbourhood centre.</p> <p>The main convenience goods retailers in the town centre are Asda, Sainsbury's, Iceland, and Aldi with Lidl anchoring the Southern portion of the town centre boundary.</p> <p>Romford Market has historically played a significant part in the historical development of the town and continues to do so today. Currently the market operates three days a week within Market Place. Initial talks with market stall holders seem to suggest that the market is in decline. The number of stall holders seems to be falling partly due to competition from discount retailers (Aldi, Iceland and the 99p Store have a presence in Market Place) and changing consumer shopping habits. Presently, the market offers a fairly wide range of products including fresh fruit and vegetables, clothing, jewellery, toys and other specialty items.</p> <p>As mentioned earlier, the peripheral shopping areas tend to act as neighbourhood shopping zones. The area around North Street (towards the North East of the town centre boundary) is generally made up of a parade of small shops that include hot food take-aways and convenience shops. The</p>	

Appendix: Romford Town Centre Health Check

PPG indicator	Summary for Romford Town Centre	Traffic light score
	<p>street also includes a large Matalan and a recently opened Sainsbury's Local. In general there does North Street does seem to have an overprovision of take away establishments. This is similarly echoed in the shopping area along London Road where the quality of retail and eating establishments are generally of a lower quality. These areas therefore have a largely secondary role and function.</p> <p>The area south of the railway viaduct appears to function independently from the primary retail core. The area falls within the town centre boundary with much of it designated as a secondary retail frontage. Anchor stores in the area include a fairly large Lidl and a Fitness First. Unlike the retail core, the retail offer consists mainly of independent, locally owned shops with the offer consisting primarily of convenience shops, restaurants and a number of hot food take-aways. This is particularly apparent around Victoria Road.</p> <p>In general all Supermarkets with the exception of Iceland seemed fairly busy during the time of the town centre visit. The Asda and Sainsbury's in particular had a wide variety of comparison goods on sales which included clothing and televisions.</p> <p>The food and retail offer appears to adequately serve Romford's comparison and convenience needs. There is an under-provision of cultural amenities in the town centre with the exception of the Havering Museum. Fast links to Central London perhaps means that expenditure on cultural and leisure amenities (such as theatres) is spent in Central London. The proliferation of discount shopping chains (Poundland, 99p Stores) some of which have more than one town centre location is a source of concern which might need to be monitored.</p>	
Proportion of vacant street level property	<p>The most recent Experian Goad Survey undertaken in January 2014 identified a total of 41 vacant units which was the equivalent of 7.6% vacancy rate of the total retail offer. At the time of our visit in September 2014 this figure stood at 37 units or 6.9% of the retail offer. There is therefore a decrease in the number of vacant units within the town centre itself and the surrounding retail areas. It is important to note that a number of retail units along Swan Walk while vacant are currently under renovation. This is the only significant concentration of vacant retail units. At the same time individual retail units within the Romford Shopping Hall were not counted though at the time of the visit the shopping hall seemed to be trading quite well.</p> <p>New retailers within this area that took up vacant properties include Home Bargains in Market Place and Sainsbury's along North Street. Other units have become vacant on account of the national chains entering administration, a recent example of this being the fashion retailer La Senza. Other vacant units were taken up by independent retailers within the town centre. This level of churn is not uncommon in any centre.</p> <p>In general the vacant units within the town centre have varied in size from a large restaurant unit within the Brewery and a three story building within Market Place to smaller units around the town centre.</p>	

Appendix: Romford Town Centre Health Check

PPG indicator	Summary for Romford Town Centre	Traffic light score
Retailer representation and intentions to change representation	<p>Romford town centre enjoys good national multiple retailer representation. The central retail core includes several anchor stores offering a typical High Street mix of shops. At the Brewery key retailers present include a Sainsbury's Supermarket, The Range, Boots, 99p Store, Mamas and Papas, Gap and JD Sports. This is addition to commercial leisure brands such as Virgin Active, Vue Cinemas and Namco Funscape. Dining options at the Brewery also include Zizzi, Nandos, Pizza Express, McDonalds and Frankie & Benny's. The offer at the Brewery is therefore aimed at a mid-market clientele.</p> <p>At the Liberty Centre, there is an emphasis on a fashion-oriented shopping mix. Retailers present include River island, Primark, Marks and Spencer, BHS, Sports Direct, HMV, Debenhams, New Look, Topman/ Topshop, H&M, Anne Summers and Superdry. Other retailers include Office, Swarovski, Ernest Jones, Accessorize, the Carphone Warehouse, Holland and Barrett and GNC. In addition there is a travel agent (Flight Centre), newsagents (WH Smith) and a hair salon (Supercuts) within the centre.</p> <p>The Mercury Shopping Centre is directly connected to the Liberty via an underground tunnel. The Mercury appears to have a much greater representation of independent retailers than the other two shopping centres. The retail offer is also slightly more down market than the other two retailers. Retail floorspace is dominated by the large Asda supermarket. Other retailers present include Wilkinson, Poundland, Game, Superdrug, Peacock, Blue Inc, Tiger, Warren James Jeweller and Thompson Travel. The centre also has fast food representation from McDonalds and Subway and a Toni & Guy hair salon. Independent retailers include home furnishing shops, a pawn broker and cafes.</p> <p>Elsewhere within the primary shopping frontage, there appears to be greater proportion of independent retailers than the shopping centres. However, there are still a number of national multiples. Retailers located around Market Place include, Iceland, Argos, and the 99p Store.</p> <p>The area around South Street includes, Tesco Express, Thompson Travel, Ladbroke's, Coral Betting, McDonalds. South Street is also the location of a number of banks and financial service institutions including HSBC, Santander, NatWest, Halifax, Barclays, Nationwide, The Royal bank of Scotland and Lloyds.</p> <p>From our general observations, the retail units appeared to be flexible and cater for the different retail needs within Romford. This includes large stores for supermarket chains and department stores, to small shop units within the Romford Shopping Hall that catered to independent retailers.</p>	
Pedestrian flows	<p>Pedestrian circulation within the town centre is generally good. The majority of the primary retail frontage benefits from being located with a pedestrianized shopping area or a covered shopping centre/ arcade. The pedestrianized shopping zone is generally of good quality and provides an attractive setting for shopping activity. The market area in particular looked vibrant and appeared to have high pedestrian footfall. The Brewery, Parts of the Mercury and The Liberty appeared to all have a high volume of pedestrian activity moving through it. During market days, Market Place also seems to be a popular and well used civic space</p> <p>However, the network of ring roads surrounding the central retail core continues to act as a barrier, effectively cutting off the centre from the surrounding residential areas.</p>	
Accessibility	<p>Romford town centre is highly accessible from various locations within the borough as well as Central London and the surrounding region. Romford station is located within the town centre boundary and falls under Zone 6 of the London Travel Zone. The station is located on the Shenfield – London Liverpool Street railway line. There are frequent train services to Upminster, Southend and Colchester. Romford Station will also be served by Crossrail when services begin in 2018 and will connect the town to Shenfield to Reading via Central London.</p> <p>There are regular bus services linking Romford town centre to the surrounding areas. The town centre is collectively served by 24 bus routes (including night busses) linking Romford to the main</p>	

Appendix: Romford Town Centre Health Check

PPG indicator	Summary for Romford Town Centre	Traffic light score
	<p>town centres in the borough, East London and Central London. A bus interchange is located next to the train station in addition to several bus stops located around the town centre.</p> <p>The provision for car parking within the and around the town centre appears to be quite high. In total there are 13 public car parks within or on the edge of Romford town centre. The largest of these car parks is the Brewery car park with over 1,700 car parking spaces. The Mercury and the Liberty also offer large car parks. The council owns eight of the public car parks. On-street pay and display car parking is also provided in the surrounding streets.</p>	
Perception of safety/ occurrence of crime	<p>Generally, the perception of crime within the town centre is low. The town centre appeared to be clean and there was no evidence of graffiti or vandalism. The presence of cafes, bars, nightclubs and restaurants around the primary frontage suggests a fairly strong and active evening economy. This reduces the perception of crime and encourages night time visitors to the centre.</p> <p>However, some parts of the town centre are perhaps more vulnerable to crime than others. Such areas include the car park area adjacent to Angel Way and the northern part of North Street. The network of pedestrian underpasses while fairly well maintained were also a source of concern, especially at night.</p>	
State of town centre environmental quality	<p>The town centre is generally inward looking due to the high levels of traffic that flow along the perimeter of the town centre - most notably along St Edwards Way and Mercury Gardens. The town centre is generally of reasonable quality and appearance though the quality varies from one part of the town centre to another. The central retail core (including the Primary retail Frontage, the Brewery, the Mercury and the Liberty) are areas of fairly high architectural quality. The Council has undertaken a programme of public realm improvement works that have enhanced the appearance of certain parts of the town centre such as Market Place and more recently, Victoria Road and South Street. This has included new paving and street furniture. The town centre is generally inward looking due to the high levels of traffic that flow along the perimeter of the town centre - most notably along St Edwards Way and Mercury Gardens.</p> <p>As a historic market town, Romford has good architectural diversity. While some newer developments such as the Brewery could perhaps be better integrated with the urban fabric many historic buildings occupy prominent positions within the town centre. These include the Havering Museum and St Edward the Confessor Church within Market Place. This coupled with the pedestrianized nature of the main shopping streets makes the town centre an enjoyable place to visit for the most part.</p> <p>Some areas of concern include, the abandoned building site at the end of North Street generally brings down the quality of the town centre while perhaps encouraging anti-social behaviour. The same can be said of the car park behind the Salvation Army charity shop. While the car park is still in use, its location could potentially be redeveloped so as to introduce life and vitality into the north western part of the town centre.</p> <p>While improvements have been made to make the circulation of pedestrian easier and more pleasurable, there is a lack of significant green space within the centre. A comprehensive landscaping scheme may improve the town centre quality particularly around the South Street/ Victoria Road junction.</p>	

Appendix: Upminster District Centre Healthcheck

PPG indicator	Summary for Upminster District Centre	Traffic light score
Diversity of uses	<p>Upminster centre is located in the south east of the Borough. The main shopping frontage is Station Road/Corbets Tey Road (B1421). Other key retail frontages include St. Marys Lane and Springfield Gardens which both run East off the B1421. The centre has a good diversity of comparison, convenience and service retail uses which cater for the day to day shopping needs of residents. The centre also has good range of both public and commercial leisure uses.</p> <p>The centre has a diverse convenience offer including both high end and budget food stores. There are two supermarkets (Waitrose and Aldi) supplemented by an Iceland food store, Marks and Spencer simply food store and a range of independent shops including general convenience stores, a bakery and butchers. There is a range of local services and facilities including estate agents, dry cleaners, petrol station, opticians and numerous hair/beauty salons. There is a substantial comparison offer which accounts for 25% of all units. This is comprised of mainly local independent retailers with very few national multiple retailers. There is a concentration of charity shops and discount stores which represent 5% of all units. The centre has a good range of public and commercial leisure uses including a leisure centre, Upminster Park, numerous pubs, restaurants and cafes.</p>	
Proportion of vacant street level property	The vacancy rate in Upminster was low by national standards at just 5% when the last GOAD survey was undertaken in August 2013. The vacancy rate had increased to 7% with a total of 14 vacant units when we undertook the town centre survey in October 2014. Despite the increased vacancy rate it remains well under the national average of 12.5%.	
Retailer representation and intentions to change representation	Within the comparison retail category independent stores account for the majority of the units. The only National Multiple comparison retailers present include Clarks and Boots. The national multiple convenience retailers present include Marks and Spencer, Waitrose, Aldi and Iceland. The eating and drinking offer is positioned in the middle of the market and is comprised of a mix of independently owned cafés and restaurants as well as National chain outlets including Costa, Café Nero, Prezzo, Pizza Express, Subway and Greggs.	
Pedestrian flows	Pedestrian footfall was relatively weak along some sections of Station Road/Corbets Tey Road. Pedestrian footfall was strongest along the northern end of the B1421 around the station and along the section of the B1421 opposite Upminster Park where complimentary leisure/transport functions create increased lingering time. Pedestrian footfall was very weak along Marys Lane and Springfield Gardens, these streets have a low concentration of retail uses and are surrounded by primarily residential uses.	
Accessibility	<p>The flow of pedestrians moving north to south along the B1421 is supported by the linear layout of the centre. The flow of pedestrians moving between each side of the road is significantly constrained by heavy traffic. Although there are pedestrian crossings, these are controlled by traffic lights which prioritise the flow of vehicular traffic. The lower section of the B1421 opposite Upminster Park is more accessible and safer for pedestrians due to the presence of on street car parking and pedestrian priority crossings.</p> <p>Upminster centre is well integrated into the wider London transport network via a range of public transport modes which connect it to other centres and destinations in the Borough. Upminster train station is located along Station Road at the northern end of the centre. The station is served by the District Line and train services also run in to London Fenchurch Street Station approximately every 10 minutes. The centre is also served by four bus routes</p>	

Appendix: Upminster District Centre Healthcheck

PPG indicator	Summary for Upminster District Centre	Traffic light score
	(no's. 248, 346, 347, 370) which connect the centre to Romford, Lakeside shopping centre, Hornchurch, Cranham and Corbets Tay.	
Perception of safety/ occurrence of crime	There is generally a very low perception of crime within the centre. The majority of units along all three retail frontages are occupied providing active frontages which appear well maintained. There was little evidence to suggest the occurrence of crime when we undertook the site visit. We did not record any broken windows or similar vandalism and CCTV was not prominent throughout the centre.	
State of town centre environmental quality	<p>The environmental quality of the centre is generally good. The main shopping streets were relatively free of litter on our site visit. Corbets Tey Road (B1421) is an attractive shopping parade, with coordinated street furniture including and planting. Station Road (B1421) is also an attractive shopping parade and there is evidence of recent private sector investment in the centre. The retail units at the northern end of Station Road occupied by Marks and Spencer's simply food and M&Co fashion store are both examples of recent developments.</p> <p>The centre contains a broad mix of architectural styles and types of building which give the centre a unique character. Buildings of note include Trinity United Reform Church, the old Upminster school building, the Phancem Pharmacy building on St. Marys Lane and the building at the junction of Corbets Tey Road and St. Marys Road.</p>	

A.1 Experian Goad Town Centre Boundaries

Collier Row



Harold Hill



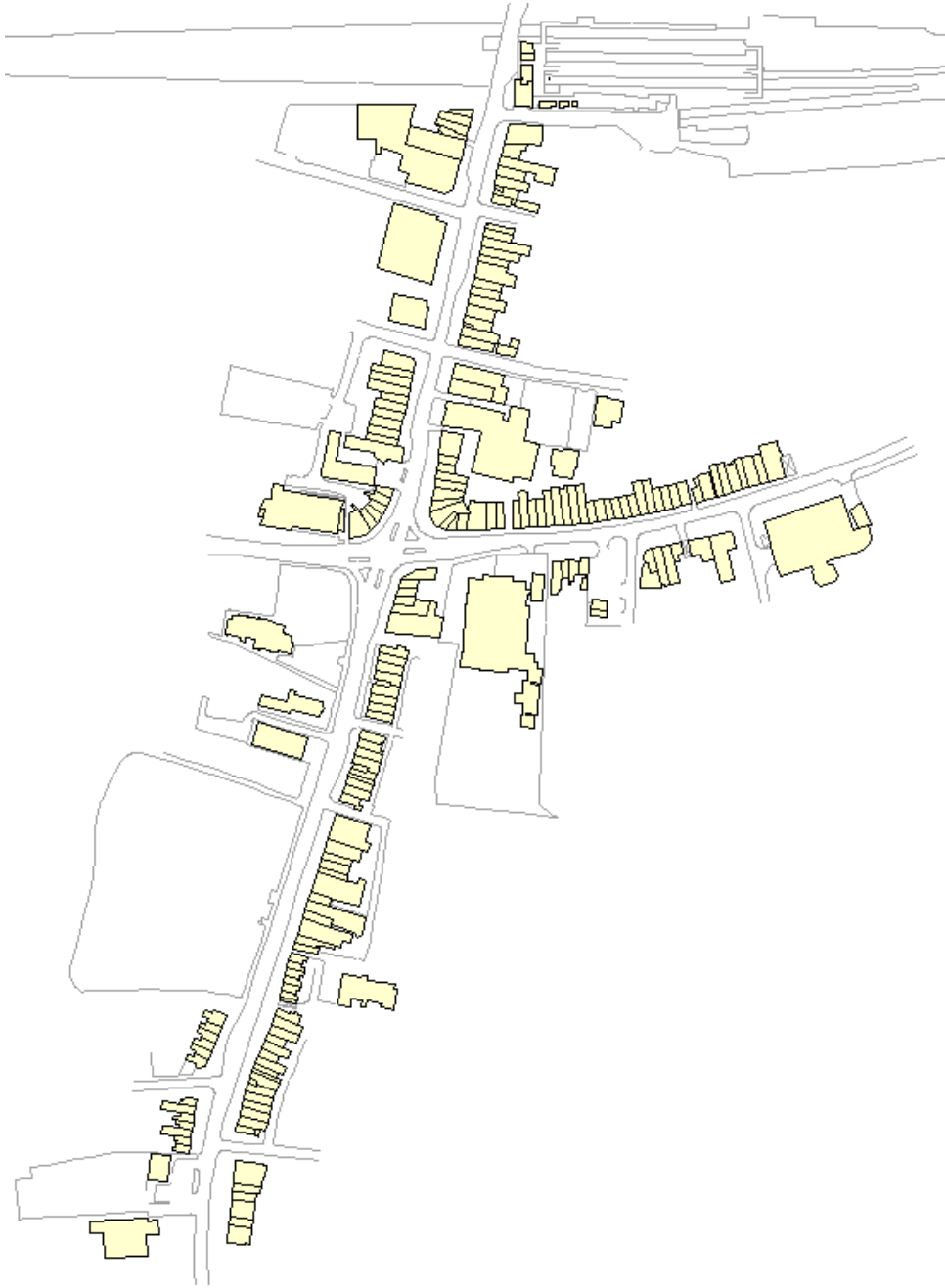
Hornchurch



Romford

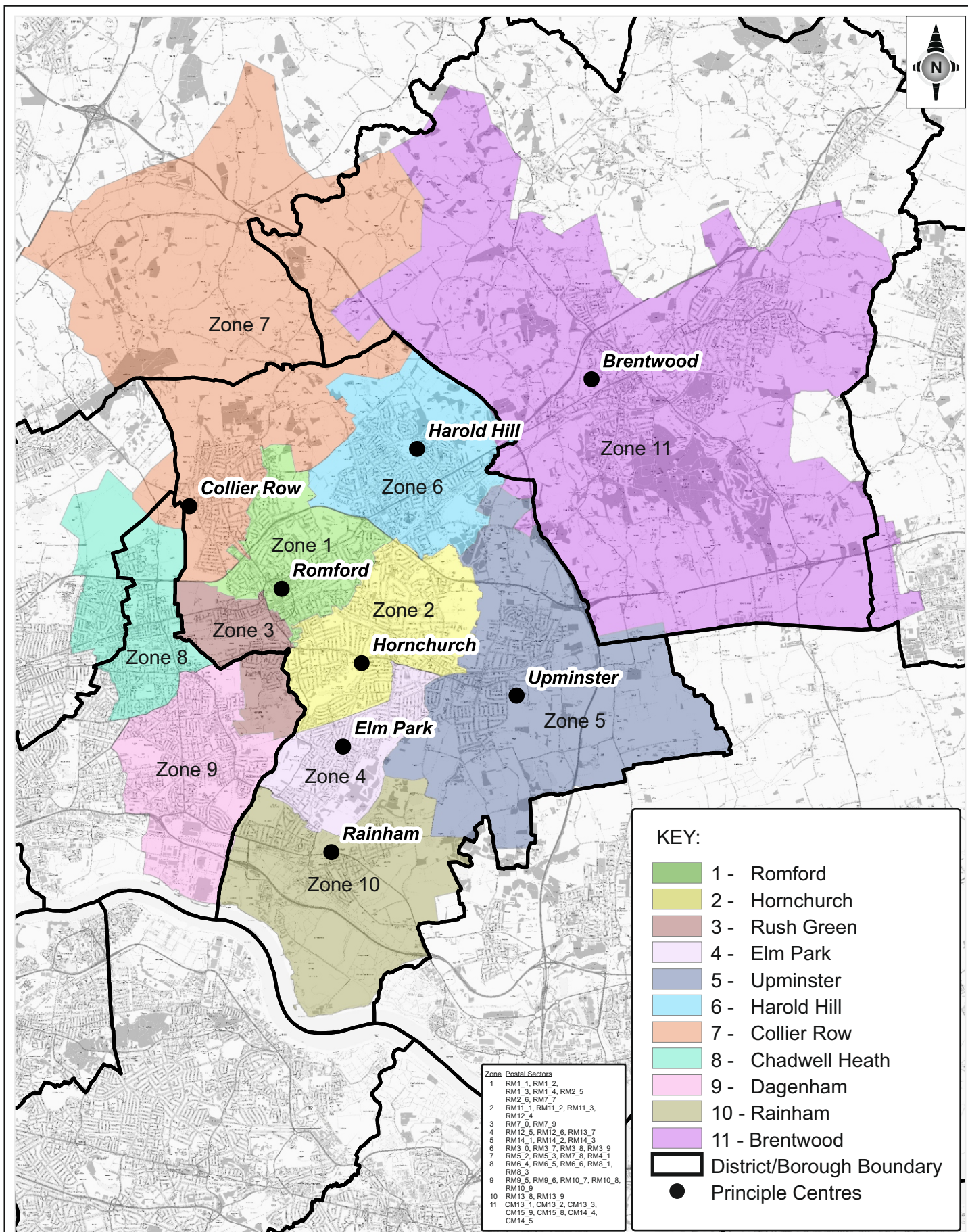


Upminster



Note: no Experian Goad plans are available for the centres of Elm Park or Rainham

Appendix B Study Area Map



Appendix C Retail Capacity Tables

Table CM1 —
Population projections

	2012	2014	2017	2021	2026	2029	2031	Change, 2014-31
Zone 1	38,085	39,032	40,556	42,695	45,335	46,780	47,744	8,712
Zone 2	48,039	49,232	51,141	53,833	57,148	58,942	60,140	10,908
Zone 3	16,695	17,234	18,062	19,160	20,461	21,137	21,577	4,343
Zone 4	27,964	28,646	29,727	31,256	33,139	34,159	34,838	6,192
Zone 5	27,281	27,964	29,072	30,614	32,521	33,541	34,217	6,253
Zone 6	40,732	41,756	43,413	45,737	48,597	50,159	51,199	9,443
Zone 7	30,614	31,363	32,583	34,287	36,389	37,539	38,306	6,943
Zone 8	57,533	60,162	63,983	68,649	73,947	76,549	78,202	18,040
Zone 9	63,137	66,104	70,368	75,552	81,376	84,214	86,022	19,918
Zone 10	20,111	20,623	21,447	22,593	24,011	24,796	25,319	4,696
Zone 11	59,097	60,115	61,817	64,302	67,391	69,159	70,282	10,167
Total	429,288	442,231	462,169	488,678	520,315	536,975	547,846	105,615

Notes
Source: Experian MMG3 (2012), for base year and population projections
Population forecasts 2014-31 are based on Office of National Statistics Sub-National Population Projections

Table CM2 —
Per capita expenditure on comparison goods

	2012	2014	2017	2021	2026	2029	2031
	£	£	£	£	£	£	£
Zone 1	3,015	3,236	3,678	4,156	4,889	5,389	5,750
Zone 2	3,487	3,742	4,253	4,806	5,653	6,231	6,649
Zone 3	2,590	2,779	3,159	3,569	4,198	4,628	4,938
Zone 4	3,010	3,231	3,672	4,149	4,880	5,380	5,741
Zone 5	3,595	3,858	4,395	4,954	5,828	6,424	6,855
Zone 6	2,399	2,574	2,926	3,306	3,888	4,286	4,574
Zone 7	3,094	3,320	3,774	4,264	5,016	5,529	5,900
Zone 8	2,231	2,394	2,721	3,075	3,617	3,987	4,254
Zone 9	1,927	2,068	2,351	2,656	3,124	3,444	3,675
Zone 10	2,710	2,908	3,306	3,735	4,393	4,843	5,168
Zone 11	3,695	3,965	4,507	5,093	5,990	6,603	7,046

Notes
The following expenditure growth rates are applied (source: Experian Retail Planne Briefing Note 12, October 2014, Figures 1a and 1b)
2012-13: 2.60%
2013-14: 4.60%
2014-15: 5.60%
2015-16: 4.40%
2016-17: 3.10%
2017-21: 3.10% (per annum)
2020-31: 3.30% (per annum)

Source: Experian MMG3 (2012 data in 2012 prices)
All monetary values held constant at 2012 prices

Table CM3 —
Total comparison goods expenditure

a. Total expenditure (Table CM1 x Table CM2)

	2014	2017	2021	2026	2029	2031
	£m	£m	£m	£m	£m	£m
Zone 1	126.31	149.18	177.44	221.63	252.09	274.54
Zone 2	184.22	217.52	258.71	323.04	367.27	399.87
Zone 3	47.89	57.05	68.38	85.90	97.81	106.55
Zone 4	92.55	109.16	129.68	161.73	183.76	199.99
Zone 5	107.88	127.48	151.68	189.52	215.46	234.55
Zone 6	107.48	127.02	151.20	188.97	214.99	234.18
Zone 7	104.13	122.96	146.20	182.51	207.54	225.99
Zone 8	144.03	174.11	211.07	267.44	305.17	332.67
Zone 9	136.72	165.43	200.68	254.25	290.04	316.19
Zone 10	59.98	70.90	84.39	105.49	120.09	130.84
Zone 11	238.38	278.63	327.47	403.70	456.67	495.22
Total	1,349.59	1,599.43	1,906.91	2,384.17	2,710.89	2,950.55

b. Spending on Special Forms of Trading, e.g. internet shopping

	2014	2017	2021	2026	2029	2031
SFT rate	11.70%	14.00%	15.90%	15.90%	15.70%	15.50%
	£m	£m	£m	£m	£m	£m
Zone 1	14.78	20.88	28.21	35.24	39.58	42.55
Zone 2	21.55	30.45	41.13	51.36	57.66	61.98
Zone 3	5.60	7.99	10.87	13.66	15.36	16.52
Zone 4	10.83	15.28	20.62	25.72	28.85	31.00
Zone 5	12.62	17.85	24.12	30.13	33.83	36.36
Zone 6	12.58	17.78	24.04	30.05	33.75	36.30
Zone 7	12.18	17.21	23.25	29.02	32.58	35.03
Zone 8	16.85	24.38	33.56	42.52	47.91	51.56
Zone 9	16.00	23.16	31.91	40.43	45.54	49.00
Zone 10	7.02	9.93	13.42	16.77	18.85	20.28
Zone 11	27.89	39.01	52.07	64.19	71.70	76.76
Total	157.90	223.92	303.20	379.08	425.61	457.34

c. Residual comparison goods expenditure (Table a less Table b)

	2014	2017	2021	2026	2029	2031
	£m	£m	£m	£m	£m	£m
Zone 1	111.53	128.29	149.23	186.39	212.51	231.99
Zone 2	162.67	187.06	217.57	271.68	309.61	337.89
Zone 3	42.29	49.07	57.51	72.24	82.46	90.03
Zone 4	81.72	93.88	109.06	136.02	154.91	168.99
Zone 5	95.26	109.63	127.56	159.39	181.64	198.20
Zone 6	94.91	109.23	127.16	158.92	181.24	197.88
Zone 7	91.95	105.75	122.96	153.49	174.96	190.96
Zone 8	127.18	149.74	177.51	224.91	257.26	281.11
Zone 9	120.72	142.27	168.77	213.82	244.50	267.14
Zone 10	52.96	60.97	70.97	88.72	101.23	110.56
Zone 11	210.49	239.62	275.40	339.51	384.97	418.46
Total	1,191.69	1,375.51	1,603.71	2,005.09	2,285.28	2,493.22

Notes
Source: Table CM1, Table CM2

Special forms of trading ('SFT') discount source: Experian Retail Planner Briefing Note 12, October 2014, Appendix 3 ('adjusted' percentage figures to take into account store-picked goods)

The main component of SFT is online shopping.

All monetary values are held constant at 2012 prices

Table CM4 —

Comparison goods market shares, 2014

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Zone 8 %	Zone 9 %	Zone 10 %	Zone 11 %
Zone 1											
Romford town centre	60.01%	31.22%	55.69%	28.47%	10.81%	39.27%	51.21%	44.86%	29.22%	15.69%	6.70%
Gallows Corner Retail Park, Romford	5.59%	5.33%	4.84%	1.87%	2.00%	16.04%	10.05%	1.73%	1.45%	0.34%	3.66%
Eastern Avenue Retail Park, Romford	3.91%	6.80%	6.71%	1.51%	0.66%	2.89%	11.48%	1.99%	0.87%	0.00%	0.36%
Other retail parks, Romford	2.01%	4.43%	7.04%	5.00%	1.28%	1.07%	2.15%	4.95%	1.09%	1.07%	0.63%
Other locations, zone 1	0.90%	0.71%	0.00%	0.85%	0.68%	0.78%	2.16%	0.00%	0.00%	0.18%	0.00%
Sub-total, survey zone 1	72.42%	48.48%	74.28%	37.70%	15.44%	60.04%	77.05%	53.52%	32.63%	17.28%	11.35%
Zone 2											
Hornchurch	1.86%	8.07%	1.12%	9.51%	4.20%	1.82%	0.82%	0.15%	0.10%	1.79%	0.48%
Other locations, zone 2	1.70%	2.33%	2.20%	1.60%	1.79%	2.67%	1.48%	0.82%	0.28%	0.34%	1.09%
Sub-total, survey zone 2	3.56%	10.40%	3.32%	11.12%	5.98%	4.49%	2.30%	0.98%	0.38%	2.13%	1.56%
Zone 3											
All locations, zone 3	0.00%	0.00%	0.31%	0.00%	0.00%	0.00%	0.00%	0.45%	0.67%	0.00%	0.00%
Sub-total, survey zone 3	0.00%	0.00%	0.31%	0.00%	0.00%	0.00%	0.00%	0.45%	0.67%	0.00%	0.00%
Zone 4											
Elm Park	0.00%	0.27%	0.00%	2.36%	0.12%	0.00%	0.00%	0.25%	0.00%	0.09%	0.00%
Other locations, zone 4	0.00%	0.04%	0.00%	0.96%	0.23%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Sub-total, survey zone 4	0.00%	0.31%	0.00%	3.32%	0.35%	0.00%	0.00%	0.25%	0.00%	0.09%	0.00%
Zone 5											
Upminster	1.89%	0.90%	0.56%	2.78%	15.08%	2.00%	1.17%	0.53%	0.11%	0.93%	1.37%
Other locations, zone 5	0.00%	0.00%	0.00%	0.00%	0.74%	0.17%	0.00%	0.00%	0.36%	0.00%	0.00%
Sub-total, survey zone 5	1.89%	0.90%	0.56%	2.78%	15.82%	2.17%	1.17%	0.53%	0.47%	0.93%	1.37%
Zone 6											
Harold Hill	0.05%	0.25%	0.06%	0.03%	0.35%	3.18%	1.16%	0.00%	0.23%	0.03%	0.03%
Tesco Extra, Bryant Avenue, Romford	4.73%	0.92%	0.63%	0.16%	0.13%	3.06%	3.12%	0.11%	0.00%	0.00%	0.17%
Other locations, zone 6	0.00%	0.00%	0.00%	0.00%	0.00%	0.93%	0.00%	0.00%	0.00%	0.00%	0.26%
Sub-total, survey zone 6	4.78%	1.16%	0.70%	0.19%	0.48%	7.18%	4.27%	0.11%	0.23%	0.03%	0.46%
Zone 7											
(No centres)											
Zone 8											
Goodmayes (incl Tesco Extra, retail parks)	0.02%	0.84%	0.37%	0.06%	0.00%	0.15%	0.12%	6.35%	0.72%	0.00%	0.00%
Other locations, zone 8	0.68%	0.55%	1.67%	0.25%	0.00%	0.00%	0.72%	6.67%	2.39%	0.00%	0.00%
Sub-total, survey zone 8	0.70%	1.39%	2.04%	0.31%	0.00%	0.15%	0.85%	13.02%	3.11%	0.00%	0.00%
Zone 9											
Dagenham	0.15%	0.05%	2.31%	2.25%	0.00%	0.28%	0.00%	4.95%	24.43%	2.03%	0.00%
Other locations, zone 9	0.00%	0.01%	0.01%	0.10%	0.00%	0.00%	0.00%	0.04%	0.68%	0.00%	0.00%
Sub-total, survey zone 9	0.15%	0.06%	2.32%	2.35%	0.00%	0.28%	0.00%	5.00%	25.12%	2.03%	0.00%
Zone 10											
Rainham (incl. Tesco Extra)	0.00%	0.07%	0.01%	3.97%	1.04%	0.49%	0.00%	0.16%	0.62%	16.20%	0.26%
Sub-total, survey zone 10	0.00%	0.07%	0.01%	3.97%	1.04%	0.49%	0.00%	0.16%	0.62%	16.20%	0.26%
Zone 11											
Brentwood	0.66%	0.03%	0.23%	0.11%	1.61%	1.88%	0.00%	0.51%	0.00%	0.08%	38.38%
Other locations, zone 11	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.84%
Sub-total, survey zone 11	0.66%	0.03%	0.23%	0.11%	1.61%	1.88%	0.00%	0.51%	0.00%	0.08%	40.22%
Total for survey area	84.16%	62.81%	83.76%	61.84%	40.73%	76.69%	85.65%	74.52%	63.24%	38.77%	55.22%
Outside survey area											
Lakeside	9.51%	26.63%	10.36%	30.09%	49.09%	15.93%	7.92%	8.23%	23.64%	57.58%	18.74%
Central London / West End	1.56%	3.26%	0.53%	3.02%	1.87%	1.50%	1.63%	3.92%	1.58%	0.82%	0.42%
Basildon	0.00%	0.00%	0.28%	0.87%	0.51%	0.05%	0.25%	0.33%	0.06%	0.00%	11.77%
Stratford (incl Westfield Stratford City)	1.31%	0.61%	0.67%	0.94%	1.12%	1.66%	0.41%	3.25%	1.43%	0.27%	2.98%
Bluewater	0.18%	2.65%	1.41%	0.71%	4.70%	1.38%	0.92%	0.00%	0.57%	0.14%	2.87%
Ilford	0.46%	1.28%	1.05%	0.48%	0.40%	0.12%	1.97%	7.86%	1.65%	0.51%	0.00%
Chelmsford	0.32%	0.00%	0.18%	0.00%	0.00%	1.71%	0.00%	0.00%	0.00%	0.00%	4.95%
Beckton (superstores/ retail parks)	0.00%	0.93%	0.27%	0.72%	0.00%	0.37%	0.00%	0.73%	3.03%	0.11%	0.00%
Barking	0.03%	0.00%	0.00%	1.07%	0.00%	0.05%	0.00%	0.16%	0.66%	0.26%	0.00%
Other locations outside survey area	2.48%	1.82%	1.50%	0.26%	1.59%	0.53%	1.25%	1.00%	4.15%	1.55%	3.07%
Total for outside survey area	15.84%	37.19%	16.24%	38.16%	59.27%	23.31%	14.35%	25.48%	36.76%	61.23%	44.78%
Overall total	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

Notes

Source: NEMS Market Research Household Survey, August 2014

Table CM5 —
Comparison goods spending patterns, 2014

	Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	Zone 11 £m	Total £m
<i>Total available comparison goods expenditure</i>	<i>111.53</i>	<i>162.67</i>	<i>42.29</i>	<i>81.72</i>	<i>95.26</i>	<i>94.91</i>	<i>91.95</i>	<i>127.18</i>	<i>120.72</i>	<i>52.96</i>	<i>210.49</i>	<i>1,191.69</i>
Zone 1												
Romford town centre	66.94	50.79	23.55	23.26	10.30	37.27	47.09	57.05	35.27	8.31	14.11	373.93
Gallows Corner Retail Park, Romford	6.23	8.67	2.05	1.53	1.91	15.22	9.24	2.20	1.76	0.18	7.70	56.69
Eastern Avenue Retail Park, Romford	4.36	11.07	2.84	1.24	0.63	2.74	10.55	2.52	1.05	0.00	0.76	37.76
Other retail parks, Romford	2.24	7.20	2.98	4.08	1.22	1.01	1.98	6.29	1.31	0.57	1.33	30.21
Other locations, zone 1	1.01	1.15	0.00	0.70	0.65	0.74	1.99	0.00	0.00	0.09	0.00	6.33
Sub-total, survey zone 1	80.78	78.87	31.41	30.81	14.71	56.99	70.85	68.06	39.40	9.15	23.90	504.91
Zone 2												
Hornchurch	2.07	13.13	0.47	7.78	4.00	1.73	0.76	0.20	0.12	0.95	1.00	32.21
Other locations, zone 2	1.90	3.79	0.93	1.31	1.70	2.53	1.36	1.05	0.34	0.18	2.29	17.38
Sub-total, survey zone 2	3.97	16.92	1.41	9.09	5.70	4.27	2.12	1.24	0.46	1.13	3.29	49.59
Zone 3												
All locations, zone 3	0.00	0.00	0.13	0.00	0.00	0.00	0.00	0.57	0.81	0.00	0.00	1.52
Sub-total, survey zone 3	0.00	0.00	0.13	0.00	0.00	0.00	0.00	0.57	0.81	0.00	0.00	1.52
Zone 4												
Elm Park	0.00	0.44	0.00	1.93	0.12	0.00	0.00	0.32	0.00	0.05	0.00	2.85
Other locations, zone 4	0.00	0.06	0.00	0.78	0.22	0.00	0.00	0.00	0.00	0.00	0.00	1.07
Sub-total, survey zone 4	0.00	0.50	0.00	2.71	0.34	0.00	0.00	0.32	0.00	0.05	0.00	3.92
Zone 5												
Uppminster	2.11	1.47	0.24	2.27	14.36	1.90	1.08	0.67	0.13	0.49	2.88	27.59
All locations, zone 5	0.00	0.00	0.00	0.00	0.70	0.16	0.00	0.00	0.44	0.00	0.00	1.30
Sub-total, survey zone 5	2.11	1.47	0.24	2.27	15.07	2.06	1.08	0.67	0.57	0.49	2.88	28.89
Zone 6												
Harold Hill	0.06	0.40	0.03	0.02	0.33	3.02	1.07	0.00	0.27	0.02	0.06	5.28
Tesco Extra, Bryant Avenue, Romford	5.27	1.49	0.27	0.13	0.13	2.91	2.87	0.14	0.00	0.00	0.36	13.56
Other locations, zone 6	0.00	0.00	0.00	0.00	0.00	0.88	0.00	0.00	0.00	0.00	0.55	1.44
Sub-total, survey zone 6	5.33	1.89	0.30	0.15	0.46	6.81	3.93	0.14	0.27	0.02	0.96	20.27
Zone 7 (No centres)												
Zone 8												
Goodmayes (incl Tesco Extra, retail parks)	0.02	1.36	0.16	0.05	0.00	0.14	0.11	8.08	0.87	0.00	0.00	10.79
Other locations, zone 8	0.76	0.90	0.71	0.21	0.00	0.00	0.67	8.48	2.89	0.00	0.00	14.60
Sub-total, survey zone 8	0.78	2.26	0.86	0.26	0.00	0.14	0.78	16.55	3.75	0.00	0.00	25.39
Zone 9												
Dagenham	0.17	0.07	0.98	1.84	0.00	0.27	0.00	6.30	29.50	1.07	0.00	40.20
Other locations, zone 9	0.00	0.02	0.00	0.08	0.00	0.00	0.00	0.06	0.83	0.00	0.00	0.99
Sub-total, survey zone 9	0.17	0.09	0.98	1.92	0.00	0.27	0.00	6.36	30.32	1.07	0.00	41.19
Zone 10												
Rainham (incl. Tesco Extra)	0.00	0.12	0.00	3.24	0.99	0.47	0.00	0.20	0.75	8.58	0.54	14.90
Sub-total, survey zone 10	0.00	0.12	0.00	3.24	0.99	0.47	0.00	0.20	0.75	8.58	0.54	14.90
Zone 11												
Brentwood	0.74	0.05	0.10	0.09	1.54	1.78	0.00	0.65	0.00	0.04	80.79	85.76
Other locations, zone 11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.87	3.87
Sub-total, survey zone 11	0.74	0.05	0.10	0.09	1.54	1.78	0.00	0.65	0.00	0.04	84.66	89.63
Total for survey area	93.87	102.18	35.42	50.54	38.79	72.79	78.75	94.78	76.34	20.53	116.22	780.22
Outside survey area												
Lakeside	10.60	43.32	4.38	24.59	46.76	15.12	7.29	10.47	28.54	30.49	39.44	261.01
Central London / West End	1.74	5.30	0.22	2.47	1.78	1.43	1.50	4.98	1.91	0.44	0.88	22.65
Basildon	0.00	0.00	0.12	0.71	0.49	0.04	0.23	0.42	0.07	0.00	24.77	26.85
Stratford (incl Westfield Stratford City)	1.46	1.00	0.28	0.77	1.06	1.57	0.38	4.14	1.72	0.14	6.27	18.80
Bluewater	0.20	4.31	0.60	0.58	4.47	1.31	0.84	0.00	0.68	0.08	6.03	19.11
Ilford	0.51	2.08	0.44	0.39	0.38	0.12	1.81	9.99	1.99	0.27	0.00	17.99
Chelmsford	0.35	0.00	0.08	0.00	0.00	1.63	0.00	0.00	0.00	0.00	10.42	12.47
Beckton (superstores/ retail parks)	0.00	1.52	0.11	0.59	0.00	0.35	0.00	0.93	3.66	0.06	0.00	7.22
Barking	0.03	0.00	0.00	0.87	0.00	0.04	0.00	0.21	0.79	0.14	0.00	2.08
Other locations outside survey area	2.77	2.97	0.63	0.21	1.51	0.50	1.15	1.27	5.01	0.82	6.46	23.30
Total for outside survey area	17.66	60.49	6.87	31.18	56.46	22.12	13.20	32.40	44.38	32.43	94.27	411.47
Overall total	111.53	162.67	42.29	81.72	95.26	94.91	91.95	127.18	120.72	52.96	210.49	1191.69

Notes
Source: Table CM3, CM4

Table CM6 —
Comparison goods floorspace requirements to 2031

Baseline requirement		2014	2017	2021	2026	2029	2031
Total population and expenditure							
A	Total population (persons)	442,231	462,169	488,678	520,315	536,975	547,846
B	Total comparison goods expenditure (£m)	1,191.69	1,375.51	1,603.71	2,005.09	2,285.28	2,493.22
Retained expenditure							
C	Retained comparison goods expenditure in LB Havering (%)	52%	52%	52%	52%	52%	52%
D	Retained comparison goods expenditure in LB Havering (£m)	624.01	720.27	839.76	1049.93	1196.65	1305.53
E	Comparison goods expenditure leakage (£m)	567.68	655.25	763.95	955.16	1,088.63	1,187.68
Inflow							
F	Inflow (%)	0%	0%	0%	0%	0%	0%
G	Inflow (£m)	0.00	0.00	0.00	0.00	0.00	0.00
Total turnover							
H	Baseline comparison goods turnover of stores (£m)	624.01	624.01	624.01	624.01	624.01	624.01
Initial surplus							
I	Growth in retained comparison goods expenditure (£m)	0.00	96.26	215.75	425.93	572.64	681.53
Claims on expenditure							
J	Sales efficiency growth in existing retailers (£m)	0.00	32.37	78.15	139.90	179.53	207.08
K	Comparison goods commitments (£m)	0.00	9.89	10.59	11.52	12.11	12.53
L	Total claims on capacity	0.00	42.26	88.74	151.42	191.64	219.61
Expenditure summary							
M	Initial surplus of comparison goods expenditure (£m)	0.00	96.26	215.75	425.93	572.64	681.53
N	Total claims on capacity (£m)	0.00	42.26	88.74	151.42	191.64	219.61
O	Residual comparison goods expenditure (£m)	0.00	53.99	127.01	274.51	381.01	461.92
Conversion to floorspace need							
P	Assumed turnover per sq.m (£ per sq.m)	7,000	7,363	7,877	8,569	9,014	9,323
Q	Comparison goods floorspace need (sq.m net)	0	7,333	16,125	32,034	42,269	49,546
R	Comparison goods floorspace need (sq.m gross)	0	10,476	23,036	45,763	60,384	70,780

Notes
Total comparison goods expenditure retained by stores in LB Havering (total for zones 1, 2, 3, 4, 5, 6, 7 and 10)
No inflow is applied.
Sales efficiency growth of 1.5% per annum applied.
Turnover per sq.m at 2014 PBA estimate. Turnover per sq.m increased to 2031 in line with sales efficiency growth rate
Total requirement shown is cumulative.
Gross: net ratio of 70% applied.
All monetary values held constant at 2012 prices.

Commitments (Row K)	2017	2021	2026	2029	2031
Morrisons, Romford	4.28	4.58	4.98	5.24	5.42
Angel Way, Romford	5.61	6.00	6.53	6.87	7.11
Total	9.89	10.59	11.52	12.11	12.53

*Base turnover is turnover at 2014, in 2012 prices. It is assumed the commitments will commence trading between 2015 and 2017.

Table CM7 —
Comparison goods floorspace requirements to 2031

Increasing retention requirement		2014	2017	2021	2026	2029	2031
Total population and expenditure							
A	Total population (persons)	442,231	462,169	488,678	520,315	536,975	547,846
B	Total comparison goods expenditure (£m)	1,191.69	1,375.51	1,603.71	2,005.09	2,285.28	2,493.22
Retained expenditure							
C	Retained comparison goods expenditure in LB Havering (%)	52%	52%	55%	55%	57%	57%
D	Retained comparison goods expenditure in LB Havering (£m)	624.01	720.26544	882.03995	1102.8	1302.6109	1421.1327
E	Comparison goods expenditure leakage (£m)	567.68	655.25	721.67	902.29	982.67	1,072.08
Inflow							
F	Inflow (%)	0%	0%	0%	0%	0%	0%
G	Inflow (£m)	0.00	0.00	0.00	0.00	0.00	0.00
Total turnover							
H	Baseline comparison goods turnover of stores (£m)	624.01	624.01	624.01	624.01	624.01	624.01
Initial surplus							
I	Growth in retained comparison goods expenditure (£m)	0.00	96.26	258.03	478.79	678.60	797.13
Claims on expenditure							
J	Sales efficiency growth in existing retailers (£m)	0.00	32.37	78.15	139.90	179.53	207.08
K	Comparison goods commitments (£m)	0.00	9.89	10.59	11.52	12.11	12.53
L	Total claims on capacity	0.00	42.26	88.74	151.42	191.64	219.61
Expenditure summary							
M	Initial surplus of comparison goods expenditure (£m)	0.00	96.26	258.03	478.79	678.60	797.13
N	Total claims on capacity (£m)	0.00	42.26	88.74	151.42	191.64	219.61
O	Residual comparison goods expenditure (£m)	0.00	53.99	169.29	327.38	486.96	577.52
Conversion to floorspace need							
P	Assumed turnover per sq.m (£ per sq.m)	7,000	7,363	7,877	8,569	9,014	9,323
Q	Comparison goods floorspace need (sq.m net)	0	7,333	21,493	38,203	54,024	61,946
R	Comparison goods floorspace need (sq.m gross)	0	10,476	30,704	54,576	77,177	88,494

Notes
Total comparison goods expenditure retained by stores in LB Havering (total for zones 1, 2, 3, 4, 5, 6, 7 and 10)
No inflow is applied.
Sales efficiency growth of 1.5% per annum applied.
Turnover per sq.m at 2014 PBA estimate. Turnover per sq.m increased to 2031 in line with sales efficiency growth rate
Total requirement shown is cumulative.
Gross: net ratio of 70% applied.
All monetary values held constant at 2012 prices.

Commitments (Row K)	2017	2021	2026	2029	2031
Morrisons, Romford	4.28	4.58	4.98	5.24	5.42
Angel Way, Romford	5.61	6.00	6.53	6.87	7.11
Total	9.89	10.59	11.52	12.11	12.53

*Base turnover is turnover at 2014, in 2012 prices. It is assumed the commitments will commence trading between 2015 and 2017.

Table CV1 — Population projections								
	2012	2014	2017	2021	2026	2029	2031	Change, 2014-31
Zone 1	38,085	39,032	40,556	42,695	45,335	46,780	47,744	8,712
Zone 2	48,039	49,232	51,141	53,833	57,148	58,942	60,140	10,908
Zone 3	16,695	17,234	18,062	19,160	20,461	21,137	21,577	4,343
Zone 4	27,964	28,646	29,727	31,256	33,139	34,159	34,838	6,192
Zone 5	27,281	27,964	29,072	30,614	32,521	33,541	34,217	6,253
Zone 6	40,732	41,756	43,413	45,737	48,597	50,159	51,199	9,443
Zone 7	30,614	31,363	32,583	34,287	36,389	37,539	38,306	6,943
Zone 8	57,533	60,162	63,983	68,649	73,947	76,549	78,202	18,040
Zone 9	63,137	66,104	70,368	75,552	81,376	84,214	86,022	19,918
Zone 10	20,111	20,623	21,447	22,593	24,011	24,796	25,319	4,696
Zone 11	59,097	60,115	61,817	64,302	67,391	69,159	70,282	10,167
Total	429,288	442,231	462,169	488,678	520,315	536,975	547,846	105,615

Notes
Source: Experian MMG3 (2012), for base year and population projections
Population forecasts 2014-31 are based on Office of National Statistics Sub-National Population Projections

Table CV2 — Per capita expenditure on convenience goods						
	2012	2014	2017	2021	2026	2031
Zone 1	1,933	1,898	1,906	1,952	2,011	2,048
Zone 2	2,178	2,139	2,147	2,199	2,266	2,307
Zone 3	1,750	1,718	1,725	1,767	1,820	1,853
Zone 4	2,034	1,997	2,005	2,054	2,116	2,154
Zone 5	2,236	2,196	2,205	2,258	2,327	2,369
Zone 6	1,766	1,734	1,741	1,783	1,837	1,870
Zone 7	2,053	2,016	2,024	2,073	2,136	2,174
Zone 8	1,670	1,640	1,646	1,686	1,737	1,769
Zone 9	1,569	1,541	1,547	1,585	1,633	1,663
Zone 10	1,860	1,827	1,834	1,878	1,935	1,970
Zone 11	2,173	2,134	2,143	2,195	2,261	2,302

Notes
The following expenditure growth rates are applied (source: Experian Retail Planner Briefing Note 12, October 2014, Figures 1a and 1b)
2012-13: -0.50%
2013-14: -1.30%
2014-15: -0.50%
2015-16: 0.50%
2016-17: 0.40%
2017-21: 0.60% (per annum)
2021-31: 0.60% (per annum)

Source: Experian MMG3 (2012 data in 2012 prices)
All monetary values held constant at 2012 prices

Table CV3 — Total convenience goods expenditure	
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a. Total expenditure (Table CM1 x Table CM2)

	2014	2017	2021	2026	2029	2031
	£m	£m	£m	£m	£m	£m
Zone 1	74.09	77.29	83.34	91.18	95.79	98.94
Zone 2	105.30	109.82	118.40	129.51	135.99	140.43
Zone 3	29.61	31.16	33.85	37.25	39.17	40.47
Zone 4	57.21	59.61	64.19	70.12	73.59	75.96
Zone 5	61.41	64.09	69.13	75.66	79.45	82.03
Zone 6	72.40	75.57	81.54	89.27	93.81	96.91
Zone 7	63.22	65.94	71.07	77.71	81.62	84.29
Zone 8	98.66	105.34	115.76	128.48	135.41	140.00
Zone 9	101.88	108.89	119.74	132.88	140.01	144.74
Zone 10	37.67	39.33	42.44	46.47	48.86	50.49
Zone 11	128.30	132.46	141.12	152.39	159.22	163.76
Total	829.75	869.49	940.57	1,030.93	1,082.92	1,118.00

b. Spending on Special Forms of Trading, e.g. internet shopping

	2014	2017	2021	2026	2029	2031
SFT rate	2.60%	3.30%	4.40%	5.00%	5.30%	5.60%
	£m	£m	£m	£m	£m	£m
Zone 1	1.93	2.55	3.67	4.56	5.08	5.54
Zone 2	2.74	3.62	5.21	6.48	7.21	7.86
Zone 3	0.77	1.03	1.49	1.86	2.08	2.27
Zone 4	1.49	1.97	2.82	3.51	3.90	4.25
Zone 5	1.60	2.12	3.04	3.78	4.21	4.59
Zone 6	1.88	2.49	3.59	4.46	4.97	5.43
Zone 7	1.64	2.18	3.13	3.89	4.33	4.72
Zone 8	2.57	3.48	5.09	6.42	7.18	7.84
Zone 9	2.65	3.59	5.27	6.64	7.42	8.11
Zone 10	0.98	1.30	1.87	2.32	2.59	2.83
Zone 11	3.34	4.37	6.21	7.62	8.44	9.17
Total	21.57	28.69	41.39	51.55	57.39	62.61

c. Residual comparison goods expenditure (Table a less Table b)

	2014	2017	2021	2026	2029	2031
	£m	£m	£m	£m	£m	£m
Zone 1	72.16	74.74	79.67	86.62	90.71	93.40
Zone 2	102.57	106.20	113.19	123.03	128.79	132.56
Zone 3	28.84	30.13	32.36	35.38	37.10	38.20
Zone 4	55.72	57.64	61.37	66.62	69.69	71.70
Zone 5	59.81	61.98	66.09	71.88	75.24	77.43
Zone 6	70.52	73.08	77.96	84.81	88.84	91.48
Zone 7	61.57	63.76	67.94	73.83	77.30	79.57
Zone 8	96.09	101.86	110.67	122.05	128.23	132.16
Zone 9	99.23	105.29	114.47	126.24	132.59	136.63
Zone 10	36.69	38.03	40.57	44.15	46.27	47.66
Zone 11	124.97	128.09	134.91	144.77	150.78	154.59
Total	808.18	840.80	899.19	979.38	1,025.53	1,055.39

Notes
Source: Table CV1, Table CV2

Special forms of trading ('SFT') discount source: Experian Retail Planner Briefing Note 12, October 2014, Appendix 3 ('adjusted' percentage figures to take into account store-picked goods)

The main component of SFT is online shopping.

All monetary values are held constant at 2012 prices

Table CV4 —
Convenience goods market shares, 2014

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Zone 8 %	Zone 9 %	Zone 10 %	Zone 11 %
Zone 1											
Romford town centre											
Asda, Dolphin Approach, Mercury Gardens	21.42%	8.78%	11.51%	3.47%	2.41%	5.90%	10.13%	4.24%	2.19%	1.92%	0.67%
Sainsbury's, The Brewery, Romford	15.60%	0.62%	16.47%	0.77%	1.29%	2.30%	7.87%	2.79%	0.00%	4.74%	0.00%
Marks & Spencer, South Street, Romford	6.61%	0.15%	2.73%	0.14%	0.00%	1.06%	2.42%	3.73%	0.31%	0.34%	0.00%
Aldi, Market Place, Romford	3.11%	0.59%	2.27%	0.15%	0.42%	3.54%	2.05%	1.76%	0.00%	0.68%	0.25%
Lidl, Atlanta Bvd, Romford	2.48%	0.39%	2.16%	0.58%	0.00%	0.27%	0.00%	0.08%	0.00%	0.00%	0.26%
Other stores, Romford town centre	2.42%	0.00%	0.87%	0.00%	0.00%	0.00%	0.66%	0.54%	0.00%	0.05%	0.00%
Sub-total, Romford town centre	51.63%	10.53%	36.00%	5.11%	4.12%	13.06%	23.14%	13.14%	2.50%	7.73%	1.18%
Other locations											
Aldi, Marlborough Road, Romford	4.46%	0.29%	1.67%	2.81%	0.00%	2.25%	22.22%	1.43%	0.00%	0.00%	1.99%
Gidea Park	0.72%	0.42%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Other foodstores, Romford / zone 1	7.65%	0.45%	3.83%	0.62%	0.00%	2.57%	3.16%	0.76%	0.90%	2.16%	0.00%
Sub-total, survey zone 1	64.47%	11.70%	41.50%	8.54%	4.12%	17.89%	48.52%	15.32%	3.39%	9.89%	3.17%
Zone 2											
Tesco Extra, Horchurch Road, Hornchurch	4.71%	29.22%	26.41%	5.07%	6.53%	0.11%	0.07%	1.68%	4.61%	4.33%	0.43%
Sainsbury's, High Street, Hornchurch	3.06%	26.97%	0.98%	14.80%	4.11%	0.82%	0.29%	0.00%	0.00%	2.90%	0.00%
Iceland, North Street, Hornchurch	0.00%	5.10%	0.00%	1.95%	0.00%	0.00%	0.00%	0.00%	0.00%	1.48%	0.00%
Other stores, Hornchurch	0.31%	4.34%	0.00%	3.91%	0.25%	0.00%	0.00%	0.00%	0.33%	0.26%	0.00%
Elm Park	0.00%	3.83%	0.00%	3.86%	1.67%	2.67%	0.00%	0.08%	0.00%	0.00%	0.00%
Other foodstores, zone 2	0.20%	0.25%	0.80%	0.84%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Sub-total, survey zone 2	8.29%	69.72%	28.19%	30.44%	12.56%	3.59%	0.37%	1.76%	4.94%	8.97%	0.43%
Zone 3											
Rush Green	0.00%	0.00%	4.53%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Other foodstores, zone 3	0.00%	0.00%	2.57%	0.00%	0.00%	0.00%	0.00%	0.00%	0.43%	0.00%	0.00%
Sub-total, survey zone 3	0.00%	0.00%	7.10%	0.00%	0.00%	0.00%	0.00%	0.00%	0.43%	0.00%	0.00%
Zone 4											
Tesco, Airfield Way, Elm Park	0.00%	1.46%	4.26%	20.88%	0.60%	0.00%	0.00%	0.00%	0.13%	0.00%	0.00%
Other foodstores, zone 4	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Sub-total, survey zone 4	0.00%	1.46%	4.26%	20.88%	0.60%	0.00%	0.00%	0.00%	0.13%	0.00%	0.00%
Zone 5											
Aldi, St Mary's Lane, Upminster	0.14%	4.09%	0.00%	5.54%	25.34%	2.01%	1.35%	0.00%	0.10%	0.83%	1.38%
Waitrose, St Mary's Lane, Upminster	0.69%	1.45%	0.49%	0.19%	14.81%	0.70%	0.00%	0.00%	0.29%	0.00%	0.65%
Marks & Spencer Simply Food, Station Road, Upminster	0.58%	0.51%	0.00%	0.44%	5.76%	1.44%	0.00%	0.00%	0.22%	0.39%	0.00%
Other foodstores, Upminster	0.00%	0.17%	0.00%	0.08%	6.59%	0.18%	0.00%	0.00%	0.00%	0.26%	0.08%
Other foodstores, zone 5	0.00%	0.00%	0.00%	0.00%	5.15%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Sub-total, survey zone 5	1.42%	6.21%	0.49%	6.25%	57.64%	4.34%	1.35%	0.00%	0.61%	1.48%	2.12%
Zone 6											
Tesco Extra, Bryant Avenue, Romford	17.20%	6.57%	6.38%	0.50%	8.49%	44.89%	17.00%	0.00%	0.00%	1.49%	7.29%
Iceland, Farnham Road, Harold Hill	1.68%	0.00%	0.00%	0.00%	0.00%	7.98%	0.37%	0.00%	0.00%	0.42%	0.00%
Sainsbury's Local, Farnham Road, Harold Hill	0.00%	0.00%	0.00%	0.00%	0.00%	3.52%	0.00%	0.00%	0.00%	0.00%	0.00%
Co-Operative, Station Road, Harold Wood	0.00%	0.00%	0.00%	0.00%	0.00%	3.29%	0.00%	0.00%	0.00%	0.00%	0.00%
Other foodstores, Harold Hill	0.00%	1.13%	0.00%	0.00%	0.00%	5.74%	0.43%	0.00%	0.00%	0.20%	0.00%
Other foodstores, zone 6	0.07%	0.00%	0.00%	0.00%	0.00%	1.38%	0.00%	0.00%	0.00%	0.00%	0.00%
Sub-total, survey zone 6	18.95%	7.70%	6.38%	0.50%	8.49%	66.79%	17.80%	0.00%	0.00%	2.11%	7.29%
Zone 7											
Tesco Metro, Collier Row Lane, Collier Row	2.41%	0.00%	0.56%	0.00%	0.00%	1.28%	20.99%	0.59%	0.00%	0.00%	0.34%
Other foodstores, zone 7	0.29%	0.00%	0.00%	0.00%	0.00%	0.00%	5.40%	0.00%	0.00%	0.00%	0.00%
Sub-total, survey zone 7	2.70%	0.00%	0.56%	0.00%	0.00%	1.28%	26.38%	0.59%	0.00%	0.00%	0.34%
Zone 8											
Sainsbury's, High Road, Chadwell Heath	1.17%	0.00%	3.47%	0.50%	0.00%	0.00%	1.57%	22.62%	1.13%	0.23%	0.00%
Tesco Extra, High Road, Goodmayes	0.36%	0.00%	0.94%	0.00%	0.00%	0.00%	0.29%	15.73%	3.14%	0.00%	0.00%
Tesco Express, High Road, Chadwell Heath	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	5.76%	0.00%	0.00%	0.00%
Asda, Whalebone Lane, Chadwell Heath	0.00%	0.00%	1.43%	0.00%	0.00%	0.00%	0.00%	2.61%	0.88%	0.00%	0.00%
Other foodstores, zone 8	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.02%	1.90%	0.00%	0.00%
Sub-total, survey zone 8	1.53%	0.00%	5.85%	0.50%	0.00%	0.00%	1.86%	47.73%	7.05%	0.23%	0.00%
Zone 9											
Asda, Merriellands Crescent, Dagenham	0.00%	0.05%	0.49%	5.23%	0.09%	0.00%	1.22%	6.70%	34.57%	8.41%	1.17%
Morrisons, Wood Lane, Becontree Heath	0.05%	0.00%	2.43%	0.36%	0.00%	0.00%	0.00%	10.60%	7.82%	3.03%	0.00%
Iceland, Heathway, Dagenham	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.41%	5.10%	0.00%	0.00%
Tesco Express, Heathway, Dagenham	0.00%	0.00%	0.00%	0.07%	0.00%	0.00%	0.00%	0.59%	4.58%	0.00%	0.00%
Lidl, Heathway, Dagenham	0.00%	0.00%	0.36%	0.46%	0.00%	0.00%	0.00%	0.41%	2.98%	0.35%	0.00%
Other foodstores, zone 9	0.00%	0.29%	0.75%	2.46%	0.08%	0.00%	0.00%	1.66%	7.29%	5.58%	0.00%
Sub-total, survey zone 9	0.05%	0.35%	4.03%	8.59%	0.16%	0.00%	1.22%	20.36%	62.35%	17.37%	1.17%
Zone 10											
Tesco Extra, Bridge Road, Rainham	0.00%	1.73%	0.64%	20.73%	2.89%	0.00%	0.00%	0.00%	5.45%	44.28%	0.00%
Tesco Express, Rainham Road, Rainham	0.00%	0.00%	0.00%	2.30%	0.81%	0.28%	0.00%	0.00%	0.89%	8.39%	0.00%
Other foodstores, zone 10	0.00%	0.00%	0.00%	0.28%	0.00%	0.00%	0.00%	0.00%	1.76%	0.00%	0.00%
Sub-total, survey zone 10	0.00%	1.73%	0.64%	23.30%	3.70%	0.28%	0.00%	0.00%	8.10%	52.67%	0.00%
Zone 11											
Sainsbury's, William Hunter Way, Brentwood	1.06%	0.00%	0.00%	0.00%	2.47%	1.58%	0.29%	0.00%	0.00%	0.00%	48.52%
Marks & Spencer, High Street, Brentwood	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.74%
Other foodstores, zone 11	0.41%	0.17%	0.00%	0.00%	0.00%	0.99%	0.00%	0.52%	0.00%	0.00%	19.50%
Sub-total, survey zone 11	1.47%	0.17%	0.00%	0.00%	2.47%	2.57%	0.29%	0.52%	0.00%	0.00%	71.76%
Total for study area	98.88%	99.03%	98.99%	99.00%	89.75%	96.74%	97.80%	86.29%	86.99%	92.71%	86.28%
Stores outside study area											
Ilford foodstores	0.00%	0.00%	0.00%	0.08%	0.08%	0.00%	0.78%	6.52%	0.99%	0.00%	0.00%
Lakeside / Grays / South Ockendon foodstores	0.00%	0.15%	0.00%	0.85%	7.40%	0.00%	0.00%	0.41%	0.30%	6.15%	0.40%
Barking foodstores	0.15%	0.00%	0.00%	0.00%	0.29%	0.00%	0.10%	0.00%	0.94%	0.00%	0.00%
Basildon foodstores	0.00%	0.00%	0.00%	0.00%	0.00%	0.28%	0.80%	0.00%	0.00%	0.00%	4.84%
Billericay foodstores	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.72%
Other foodstores outside study area	0.97%	0.82%	1.01%	0.07%	2.48%	2.98%	0.51%	6.78%	10.78%	1.14%	4.76%
Total for outside study area	1.12%	0.97%	1.01%	1.00%	10.25%	3.26%	2.20%	13.71%	13.01%	7.29%	13.72%
Overall total	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

Notes
Source: NEMS Market Research Household Survey, August 2014

Table CV5 –
Convenience goods spending patterns, 2014

	Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	Zone 9 £m	Zone 10 £m	Zone 11 £m	Total £m
<i>Total available convenience goods expenditure</i>	72.16	102.57	28.84	55.72	59.81	70.52	61.57	96.09	99.23	36.69	124.97	808.18
Zone 1												
Romford town centre												
Asda, Dolphin Approach, Mercury Gardens	15.45	9.01	3.32	1.93	1.44	4.16	6.24	4.08	2.17	0.71	0.84	49.35
Sainsbury's, The Brewery, Romford	11.26	0.63	4.75	0.43	0.77	1.62	4.85	2.68	0.00	1.74	0.00	28.72
Marks & Spencer, South Street, Romford	4.77	0.15	0.79	0.08	0.00	0.75	1.49	3.58	0.30	0.12	0.00	12.03
Aldi, Market Place, Romford	2.24	0.61	0.65	0.08	0.25	2.49	1.26	1.69	0.00	0.25	0.31	9.85
Lidl, Atlanta Bvd, Romford	1.79	0.40	0.62	0.32	0.00	0.19	0.00	0.08	0.00	0.00	0.32	3.73
Other stores, Romford town centre	1.75	0.00	0.25	0.00	0.00	0.00	0.41	0.52	0.00	0.02	0.00	2.95
Sub-total, Romford town centre	37.26	10.80	10.38	2.85	2.46	9.21	14.25	12.63	2.48	2.83	1.47	106.63
Other locations												
Aldi, Marlborough Road, Romford	3.22	0.30	0.48	1.56	0.00	1.59	13.68	1.37	0.00	0.00	2.49	24.70
Gidea Park	0.52	0.43	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.95
Other foodstores, Romford / zone 1	5.52	0.47	1.10	0.34	0.00	1.81	1.95	0.73	0.89	0.79	0.00	13.61
Sub-total, survey zone 1	46.53	12.00	11.97	4.76	2.46	12.61	29.88	14.72	3.37	3.63	3.96	145.89
Zone 2												
Tesco Extra, Horschurch Road, Hornchurch	3.40	29.97	7.62	2.83	3.91	0.07	0.04	1.61	4.58	1.59	0.54	56.16
Sainsbury's, High Street, Hornchurch	2.21	27.66	0.28	8.24	2.46	0.58	0.18	0.00	0.00	1.07	0.00	42.68
Iceland, North Street, Hornchurch	0.00	5.24	0.00	1.09	0.00	0.00	0.00	0.00	0.00	0.54	0.00	6.87
Other stores, Hornchurch	0.22	4.45	0.00	2.18	0.15	0.00	0.00	0.00	0.33	0.09	0.00	7.42
Elm Park	0.00	3.93	0.00	2.15	1.00	1.88	0.00	0.08	0.00	0.00	0.00	9.05
Other foodstores, zone 2	0.14	0.26	0.23	0.47	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.11
Sub-total, survey zone 2	5.98	71.51	8.13	16.97	7.51	2.53	0.23	1.69	4.90	3.29	0.54	123.29
Zone 3												
Rush Green	0.00	0.00	1.31	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.31
Other foodstores, zone 3	0.00	0.00	0.74	0.00	0.00	0.00	0.00	0.00	0.43	0.00	0.00	1.17
Sub-total, survey zone 3	0.00	0.00	2.05	0.00	0.00	0.00	0.00	0.00	0.43	0.00	0.00	2.48
Zone 4												
Tesco, Airfield Way, Elm Park	0.00	1.50	1.23	11.63	0.36	0.00	0.00	0.00	0.12	0.00	0.00	14.84
Other foodstores, zone 4	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Sub-total, survey zone 4	0.00	1.50	1.23	11.63	0.36	0.00	0.00	0.00	0.12	0.00	0.00	14.84
Zone 5												
Aldi, St Mary's Lane, Upminster	0.10	4.20	0.00	3.08	15.16	1.42	0.83	0.00	0.10	0.30	1.73	26.93
Waitrose, St Mary's Lane, Upminster	0.50	1.48	0.14	0.11	8.86	0.50	0.00	0.00	0.29	0.00	0.82	12.69
Marks & Spencer Simply Food, Station Road, Upminster	0.42	0.52	0.00	0.25	3.44	1.02	0.00	0.00	0.22	0.14	0.00	6.01
Other foodstores, Upminster	0.00	0.17	0.00	0.04	3.94	0.12	0.00	0.00	0.00	0.09	0.10	4.48
Other foodstores, zone 5	0.00	0.00	0.00	0.00	3.08	0.00	0.00	0.00	0.00	0.00	0.00	3.08
Sub-total, survey zone 5	1.03	6.37	0.14	3.48	34.48	3.06	0.83	0.00	0.60	0.54	2.65	53.19
Zone 6												
Tesco Extra, Bryant Avenue, Romford	12.41	6.74	1.84	0.28	5.08	31.65	10.47	0.00	0.00	0.55	9.11	78.12
Iceland, Farnham Road, Harold Hill	1.21	0.00	0.00	0.00	0.00	5.63	0.23	0.00	0.00	0.15	0.00	7.22
Sainsbury's Local, Farnham Road, Harold Hill	0.00	0.00	0.00	0.00	0.00	2.48	0.00	0.00	0.00	0.00	0.00	2.48
Co-Operative, Station Road, Harold Wood	0.00	0.00	0.00	0.00	0.00	2.32	0.00	0.00	0.00	0.00	0.00	2.32
Other foodstores, Harold Hill	0.00	1.16	0.00	0.00	0.00	4.05	0.27	0.00	0.00	0.07	0.00	5.54
Other foodstores, zone 6	0.05	0.00	0.00	0.00	0.00	0.97	0.00	0.00	0.00	0.00	0.00	1.02
Sub-total, survey zone 6	13.67	7.90	1.84	0.28	5.08	47.10	10.96	0.00	0.00	0.77	9.11	96.72
Zone 7												
Tesco Metro, Collier Row Lane, Collier Row	1.74	0.00	0.16	0.00	0.00	0.90	12.92	0.57	0.00	0.00	0.42	16.72
Other foodstores, zone 7	0.21	0.00	0.00	0.00	0.00	0.00	3.32	0.00	0.00	0.00	0.00	3.53
Sub-total, survey zone 7	1.95	0.00	0.16	0.00	0.00	0.90	16.25	0.57	0.00	0.00	0.42	20.25
Zone 8												
Sainsbury's, High Road, Chadwell Heath	0.84	0.00	1.00	0.28	0.00	0.00	0.97	21.73	1.13	0.08	0.00	26.03
Tesco Extra, High Road, Goodmayes	0.26	0.00	0.27	0.00	0.00	0.00	0.18	15.11	3.11	0.00	0.00	18.94
Tesco Express, High Road, Chadwell Heath	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.54	0.00	0.00	0.00	5.54
Asda, Whalebone Lane, Chadwell Heath	0.00	0.00	0.41	0.00	0.00	0.00	0.00	2.50	0.87	0.00	0.00	3.79
Other foodstores, zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.98	1.89	0.00	0.00	2.86
Sub-total, survey zone 8	1.10	0.00	1.69	0.28	0.00	0.00	1.15	45.87	6.99	0.08	0.00	57.16
Zone 9												
Asda, Merriellands Crescent, Dagenham	0.00	0.06	0.14	2.92	0.05	0.00	0.75	6.43	34.31	3.09	1.46	49.21
Morrisons, Wood Lane, Becontree Heath	0.04	0.00	0.70	0.20	0.00	0.00	0.00	10.18	7.76	1.11	0.00	20.00
Iceland, Heathway, Dagenham	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.39	5.06	0.00	0.00	5.45
Tesco Express, Heathway, Dagenham	0.00	0.00	0.00	0.04	0.00	0.00	0.00	0.57	4.55	0.00	0.00	5.16
Lidl, Heathway, Dagenham	0.00	0.00	0.10	0.26	0.00	0.00	0.00	0.39	2.96	0.13	0.00	3.84
Other foodstores, zone 9	0.00	0.30	0.22	1.37	0.05	0.00	0.00	1.60	7.23	2.05	0.00	12.81
Sub-total, survey zone 9	0.04	0.35	1.16	4.79	0.10	0.00	0.75	19.57	61.87	6.37	1.46	96.47
Zone 10												
Tesco Extra, Bridge Road, Rainham	0.00	1.77	0.18	11.55	1.73	0.00	0.00	0.00	5.41	16.25	0.00	36.89
Tesco Express, Rainham Road, Rainham	0.00	0.00	0.00	1.28	0.49	0.20	0.00	0.00	0.88	3.08	0.00	5.93
Other foodstores, zone 10	0.00	0.00	0.00	0.15	0.00	0.00	0.00	0.00	1.74	0.00	0.00	1.90
Sub-total, survey zone 10	0.00	1.77	0.18	12.99	2.21	0.20	0.00	0.00	8.03	19.33	0.00	44.71
Zone 11												
Sainsbury's, William Hunter Way, Brentwood	0.76	0.00	0.00	0.00	1.48	1.12	0.18	0.00	0.00	0.00	60.64	64.17
Marks & Spencer, High Street, Brentwood	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.68	4.68
Other foodstores, zone 11	0.29	0.17	0.00	0.00	0.00	0.69	0.00	0.50	0.00	0.00	24.36	26.02
Sub-total, survey zone 11	1.06	0.17	0.00	0.00	1.48	1.81	0.18	0.50	0.00	0.00	89.68	94.87
Total for study area	71.35	101.58	28.55	55.17	53.68	68.22	60.22	82.92	86.33	34.02	107.83	749.85
Stores outside study area												
Ilford foodstores	0.00	0.00	0.00	0.04	0.05	0.00	0.48	6.27	0.99	0.00	0.00	7.82
Lakeside / Grays / South Ockendon foodstores	0.00	0.15	0.00	0.47	4.43	0.00	0.00	0.39	0.30	2.26	0.50	8.49
Barking foodstores	0.11	0.00	0.00	0.00	0.17	0.00	0.06	0.00	0.93	0.00	0.00	1.27
Basildon foodstores	0.00	0.00	0.00	0.00	0.00	0.20	0.49	0.00	0.00	0.00	6.05	6.74
Billericay foodstores	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.64	4.64
Other foodstores outside study area	0.70	0.84	0.29	0.04	1.49	2.10	0.32	6.52	10.69	0.42	5.95	29.36
Total for outside study area	0.81	0.99	0.29	0.56	6.13	2.30	1.35	13.18	12.91	2.67	17.14	58.33
Overall total	72.16	102.57	28.84	55.72	59.81	70.52	61.57	96.09	99.23	36.69	124.97	808.18

Notes
Source: Table CV3, Table CV4. All monetary values held constant at 2012 prices.
All monetary values held constant at 2012 prices.

Table CV6 —
Foodstore trading assessment

	Survey-derived turnover from SA	Net floorspace	Convenience floorspace ⁽²⁾	Net convenience floorspace	Average sales density	Benchmark turnover	Under / over- trading
	£m	sq.m	%	sq.m	£ / sq.m net	£m	£m
Romford foodstores							
Asda, Dolphin Approach, Mercury Gardens	49.35	4,745	56.0%	2,657	12,905	34.29	15.06
Sainsbury's, The Brewery, Romford	28.72	5,667	60.0%	3,400	13,704	46.60	-17.87
Marks & Spencer, South Street, Romford	12.03	1,473	95.0%	1,399	11,261	15.76	-3.72
Aldi, Market Place, Romford	9.85	995	80.0%	796	11,200	8.92	0.93
Lidl, Atlanta Bvd, Romford	3.73	929	80.0%	743	3,469	2.58	1.15
Aldi, Marlborough Road, Romford	24.70	1,329	80.0%	1,063	11,200	11.91	12.79
Sub-total							8.33
Horchurch foodstores							
Tesco Extra, Horchurch Road, Hornchurch	56.16	6,120	55.0%	3,366	11,520	38.77	17.39
Sainsbury's, High Street, Hornchurch	42.68	3,046	80.0%	2,437	13,704	33.39	9.29
Iceland, North Street, Hornchurch	6.87	502	97.0%	487	7,395	3.60	3.26
Tesco, Airfield Way, Elm Park	14.84	1,228	90.0%	1,105	11,520	12.73	2.11
Sub-total							32.05
Upminster foodstores							
Aldi, St Mary's Lane, Upminster	26.93	995	80.0%	796	11,200	8.92	18.01
Waitrose, St Mary's Lane, Upminster	12.69	1,379	90.0%	1,241	11,810	14.66	-1.97
Marks & Spencer Simply Food, Station Road, Upminster	6.01	718	95.0%	682	11,261	7.68	-1.67
Sub-total							14.38
Harold Hill / Collier Row foodstores							
Tesco Extra, Bryant Avenue, Romford	78.12	8,253	55.0%	4,539	11,520	52.29	25.84
Sainsbury's Local, Farnham Road, Harold Hill	2.48	274	97.0%	266	13,704	3.64	-1.16
Co-Operative, Station Road, Harold Wood	2.32	254	100.0%	254	4,676	1.19	1.13
Tesco Metro, Collier Row Lane, Collier Row	16.72	560	95.0%	532	11,520	6.13	10.59
Sub-total							36.39
Rainham foodstores							
Tesco Extra, Bridge Road, Rainham	36.89	5,224	55.0%	2,873	11,520	33.10	3.79
Tesco Express, Rainham Road, Rainham	5.93	250	95.0%	238	13,704	3.25	2.67
Sub-total							6.46
Aggregate overtrading of foodstores in Borough							97.61

Notes
Foodstores listed are 'main' food shopping destinations with a meaningful market share, as listed in Table CV4 and Table CV5
No sales area data is available for Iceland in Harold Hill.
The proportion of convenience floorspace is informed by company average food / non-food splits in Verdict's 2010 UK Grocery Retailers document, updated by PBA through site visits where appropriate.
Average sales densities are goods based sales densities derived from Verdict's UK Grocery Retailers Report
A positive figure indicates that the store is overtrading compared to company averages
All monetary values held constant at 2012 prices.

Table CV7 —
Convenience goods floorspace requirements to 2031
Baseline requirement

		2014	2017	2021	2026	2029	2031
Total population and expenditure							
A	Total population (persons)	442,231	462,169	488,678	520,315	536,975	547,846
B	Total convenience goods expenditure (£m)	808.18	840.80	899.19	979.38	1,025.53	1,055.39
Retained expenditure							
C	Retained convenience goods expenditure in LB Havering (%)	62%	62%	62%	62%	62%	62%
D	Retained convenience goods expenditure in LB Havering (£m)	501.35	521.59	557.81	607.56	636.19	654.71
E	Convenience goods expenditure leakage (£m)	306.83	319.21	341.38	371.82	389.34	400.68
Inflow							
F	Inflow (%)	0%	0%	0%	0%	0%	0%
G	Inflow (£m)	0.00	0.00	0.00	0.00	0.00	0.00
Total turnover							
H	Baseline convenience goods turnover of stores (£m)	501.35	501.35	501.35	501.35	501.35	501.35
Initial surplus							
I	Growth in retained convenience goods expenditure (£m)	0.00	20.24	56.46	106.21	134.83	153.36
Claims on expenditure							
J	Sales efficiency growth in existing retailers (£m)	0.00	1.50	7.57	15.25	19.91	23.04
K	Convenience goods commitments (£m)	0.00	50.86	51.47	52.25	52.72	53.04
L	Total claims on capacity	0.00	52.37	59.04	67.50	72.63	76.08
Expenditure summary							
M	Initial surplus of convenience goods expenditure (£m)	0.00	20.24	56.46	106.21	134.83	153.36
N	Total claims on capacity (£m)	0.00	52.37	59.04	67.50	72.63	76.08
O	Foodstore trading performance allowance (£m)	97.61	97.61	97.61	97.61	97.61	97.61
P	Residual convenience goods expenditure (£m)	97.61	65.48	95.03	136.32	159.81	174.89
Conversion to floorspace need							
Q	Assumed turnover per sq.m (£ per sq.m)	12,500	12,538	12,689	12,880	13,074	13,272
R	Convenience goods floorspace need (sq.m net)	7,809	5,223	7,489	10,584	12,223	13,177
S	Convenience goods floorspace need (sq.m gross)	12,014	8,036	11,522	16,283	18,805	20,273

Notes
Total comparison goods expenditure retained by stores in LB Havering (total for zones 1, 2, 3, 4, 5, 6, 7 and 10)
No inflow is applied.
Sales efficiency growth of 0.3% per annum applied, 2016 onwards
Turnover per sq.m at 2014 PBA estimate. Turnover per sq.m increased to 2031 in line with sales efficiency growth rate.
Total requirement shown is cumulative.
Gross: net ratio of 65% applied.
All monetary values held constant at 2012 prices.

Commitments (Row K)	2017	2021	2026	2029	2031
Morrisons, Romford	36.17	36.60	37.16	37.49	37.72
Angel Way, Romford	14.69	14.87	15.09	15.23	15.32
Total	50.86	51.47	52.25	52.72	53.04

*Base turnover is turnover at 2014, in 2012 prices. It is assumed the commitments will commence trading between 2015 and 2017.

Appendix D Quantitative Need Methodology

Appendix: Quantitative Need Methodology

Summary of methodology

Our methodology for forecasting convenience (food) and comparison (non-food) retail needs follows a widely-adopted step-by-step methodology. The key steps of this are set out below, and should be read alongside the analysis in the main study report.

The technical inputs into each stage of the methodology which we have used for the purposes of this study are presented overleaf.

Step 1	Estimate the population growth over the course of the study period for each of the study area zones, using population projections agreed with the Council at the inception of the study. Define appropriate 'forecast years' at which to assess quantitative need.
Step 2	Establish the base year per capita (per head) spending on convenience (food) and comparison (non-food) goods, using published data sources. Apply appropriate growth rates to establish the expenditure per head in the forecast years.
Step 3	Calculate the 'pot' of expenditure within the study area at each of the forecast years by combining the population figures (calculated at Step 1) with the expenditure figures (calculated at Step 2), and making an allowance for Special Forms of Trading (SFT) such as internet / mobile shopping, catalogue shopping, and so on. SFT is increased in the forecast years to reflect the latest economic forecasts.
Step 4	Calculate the study area spending by applying the market share data from the household telephone survey to the overall 'pot' of expenditure (calculated at Step 3)
Step 5	Allow for any 'inflow' of expenditure from beyond the study area, if appropriate.
Step 6	Calculate the sales densities of existing retail floorspace, to assess turnover performance in the base year, and if appropriate make allowance for over or under-trading of this floorspace (i.e. the difference between the household survey-derived turnovers and the 'benchmark' turnovers)
Step 7	Project the spending forecasts forward to the forecast years.
Step 8	Make allowances for sales density growth (i.e. money ring-fenced to allow for the growth in productivity / turnover of existing retailers), and/or any commitments to new retail floorspace (i.e. extant planning permissions, or schemes under construction)
Step 9	Draw together steps 1 to 8 to assess whether there is any excess expenditure growth in the forecast years which can be translated into a quantitative need for new retail floorspace, by applying a typical sales density for new floorspace figure to the excess expenditure figure.
Step 10	Assess alternative policy scenarios, and / or the sensitivity testing of key assumptions.

Appendix E Technical Inputs

Appendix: Technical inputs into capacity forecasts

Data	Source	How we have used the data																																
Base Population	Experian	Experian’s MMG3 software provides 2012-based population forecasts at postcode sector level. The postcode sector populations are grouped together to form the study zones used for the purpose of our analysis.																																
Population Projections	NNJPU / Experian	The NNJPU have provided population projections at authority level for the study period to 2031. We have applied the growth rate derived from these population projections to each corresponding survey zone (e.g., zone 4, which covers Corby, uses the growth rate for Corby Borough). For zones within the NNCA but outside the administrative area of North Northamptonshire, Experian’s MMG software provides annual population projections over the period to 2031, and we use these forecasts where applicable.																																
Base Per Capita Expenditure	Experian	Experian’s MMG software provides per capita annual expenditure in each zone of the study area on convenience (food), comparison (non-food) and commercial leisure.																																
Retail and leisure expenditure growth forecasts	Experian	<p>We have adopted expenditure growth rates from Experian Retail Planner Briefing Note 12 (Figures 1a and 1b), as follows:</p> <table><thead><tr><th></th><th>Comparison goods</th><th>Convenience goods</th><th>Commercial leisure</th></tr></thead><tbody><tr><td>2012-13</td><td>2.60%</td><td>-0.50%</td><td>-0.60%</td></tr><tr><td>2013-14</td><td>4.60%</td><td>-1.30%</td><td>0.00%</td></tr><tr><td>2014-15</td><td>5.60%</td><td>-0.50%</td><td>2.10%</td></tr><tr><td>2015-16</td><td>4.40%</td><td>0.50%</td><td>2.80%</td></tr><tr><td>2016-17</td><td>3.10%</td><td>0.40%</td><td>1.30%</td></tr><tr><td>2017-21*</td><td>3.10%</td><td>0.60%</td><td>1.10%</td></tr><tr><td>2021-31*</td><td>3.30%</td><td>0.60%</td><td>1.30%</td></tr></tbody></table> <p>*per annum growth rates</p>		Comparison goods	Convenience goods	Commercial leisure	2012-13	2.60%	-0.50%	-0.60%	2013-14	4.60%	-1.30%	0.00%	2014-15	5.60%	-0.50%	2.10%	2015-16	4.40%	0.50%	2.80%	2016-17	3.10%	0.40%	1.30%	2017-21*	3.10%	0.60%	1.10%	2021-31*	3.30%	0.60%	1.30%
	Comparison goods	Convenience goods	Commercial leisure																															
2012-13	2.60%	-0.50%	-0.60%																															
2013-14	4.60%	-1.30%	0.00%																															
2014-15	5.60%	-0.50%	2.10%																															
2015-16	4.40%	0.50%	2.80%																															
2016-17	3.10%	0.40%	1.30%																															
2017-21*	3.10%	0.60%	1.10%																															
2021-31*	3.30%	0.60%	1.30%																															
Base Year Special Forms of Trading (SFT)	Experian / Household survey	<p>Special Forms of Trading refers to the amount of money <u>not</u> spent in bricks and mortar retail floorspace (includes internet, temporary markets etc...). Experian’s Retail Planner Briefing Note 12 (Appendix 3) advises the following SFT discounts at the base year of the study:</p> <p>Comparison goods (2014): 11.7% Convenience goods (2014): 2.6%</p> <p>For the purposes of our assessment we used the ‘adjusted’ figure presented by Experian, which makes allowance for store-picked online shopping transactions.</p>																																
Growth in SFT	Experian	<p>Experian’s Retail Planner Briefing Note 12 (Appendix 3) advises the following SFT discounts at the study forecast years:</p> <table><thead><tr><th></th><th>Comparison goods</th><th>Convenience goods</th></tr></thead><tbody><tr><td>2017</td><td>14.0%</td><td>3.3%</td></tr><tr><td>2021</td><td>15.9%</td><td>4.4%</td></tr><tr><td>2026</td><td>15.9%</td><td>5.0%</td></tr><tr><td>2031</td><td>15.5%</td><td>5.6%</td></tr></tbody></table> <p>For the purposes of our assessment we used the ‘adjusted’ figure presented by Experian, which makes allowance for store-picked online shopping transactions. Experian do not project SFT to 2031 and therefore the 2026 is held constant for the remainder of the study period.</p>		Comparison goods	Convenience goods	2017	14.0%	3.3%	2021	15.9%	4.4%	2026	15.9%	5.0%	2031	15.5%	5.6%																	
	Comparison goods	Convenience goods																																
2017	14.0%	3.3%																																
2021	15.9%	4.4%																																
2026	15.9%	5.0%																																
2031	15.5%	5.6%																																
Retailer productivity changes	Experian/PBBI	<p>Experian’s forecast of retailer productivity changes outstrips the per capita expenditure growth figures highlighted above. We have therefore assumed the following productivity changes for the purposes of our quantitative analysis:</p> <p>Comparison goods: 1.7% per annum, 2014-31 Convenience goods: 0% per annum, 2014-16; 0.3% per annum, 2016-31.</p>																																

Appendix F Leisure Tables

Table L1 — Population projections								
	2012	2014	2017	2021	2026	2029	2031	Change, 2014-31
Zone 1	38,085	39,032	40,556	42,695	45,335	46,780	47,744	8,712
Zone 2	48,039	49,232	51,141	53,833	57,148	58,942	60,140	10,908
Zone 3	16,695	17,234	18,062	19,160	20,461	21,137	21,577	4,343
Zone 4	27,964	28,646	29,727	31,256	33,139	34,159	34,838	6,192
Zone 5	27,281	27,964	29,072	30,614	32,521	33,541	34,217	6,253
Zone 6	40,732	41,756	43,413	45,737	48,597	50,159	51,199	9,443
Zone 7	30,614	31,363	32,583	34,287	36,389	37,539	38,306	6,943
Zone 8	57,533	60,162	63,983	68,649	73,947	76,549	78,202	18,040
Zone 9	63,137	66,104	70,368	75,552	81,376	84,214	86,022	19,918
Zone 10	20,111	20,623	21,447	22,593	24,011	24,796	25,319	4,696
Zone 11	59,097	60,115	61,817	64,302	67,391	69,159	70,282	10,167
Total	429,288	442,231	462,169	488,678	520,315	536,975	547,846	105,615

Notes
Source: Experian MMG3 (2012), for base year and population projections.
Population forecasts 2014-31 are based on Office of National Statistics Sub-National Population Projections.

Table LC2 —
Per capita expenditure on leisure services

	2012	2014	2017	2021	2026	2029	2031
	£	£	£	£	£	£	£
Accommodation services							
Zone 1	143	143	152	158	169	175	180
Zone 2	156	155	165	173	184	191	196
Zone 3	99	98	105	109	116	121	124
Zone 4	118	117	124	130	138	144	148
Zone 5	163	162	172	180	192	199	204
Zone 6	83	83	88	92	98	102	104
Zone 7	122	121	129	134	143	149	153
Zone 8	92	91	97	101	108	112	115
Zone 9	62	62	66	69	73	76	78
Zone 10	98	97	103	108	115	119	122
Zone 11	150	149	158	165	176	183	188
Cultural services							
Zone 1	272	271	288	301	320	333	342
Zone 2	301	299	318	333	354	368	378
Zone 3	253	251	267	279	297	309	317
Zone 4	275	273	291	304	323	336	345
Zone 5	308	306	326	340	362	376	386
Zone 6	240	238	253	264	282	293	300
Zone 7	287	285	303	316	337	350	359
Zone 8	213	212	225	235	250	260	267
Zone 9	200	198	211	220	235	244	250
Zone 10	258	256	272	284	303	315	323
Zone 11	320	318	338	353	376	391	401
Games of chance							
Zone 1	106	106	112	118	125	130	133
Zone 2	123	122	129	135	144	150	154
Zone 3	121	120	128	134	142	148	152
Zone 4	137	137	145	152	161	168	172
Zone 5	119	118	125	131	139	145	149
Zone 6	135	134	143	149	159	165	170
Zone 7	140	139	148	155	165	171	176
Zone 8	103	102	108	113	121	125	129
Zone 9	124	123	131	137	146	151	155
Zone 10	134	133	142	148	158	164	168
Zone 11	133	132	141	147	157	163	167
Hairdressing salons & personal grooming							
Zone 1	87	86	92	96	102	106	109
Zone 2	107	107	113	118	126	131	134
Zone 3	69	69	73	76	81	84	87
Zone 4	87	86	92	96	102	106	109
Zone 5	116	115	122	128	136	141	145
Zone 6	65	65	69	72	77	80	82
Zone 7	93	92	98	102	109	113	116
Zone 8	48	48	51	53	56	58	60
Zone 9	43	43	45	47	50	52	54
Zone 10	76	75	80	83	89	92	95
Zone 11	115	115	122	127	136	141	145
Recreational & sporting goods							
Zone 1	152	151	161	168	179	186	191
Zone 2	178	176	188	196	209	217	223
Zone 3	113	112	119	124	132	137	141
Zone 4	133	133	141	147	157	163	167
Zone 5	188	187	199	208	221	230	236
Zone 6	96	95	101	106	113	117	120
Zone 7	139	138	146	153	163	169	174
Zone 8	90	90	95	100	106	110	113
Zone 9	66	65	69	72	77	80	82
Zone 10	116	115	123	128	136	142	145
Zone 11	152	151	161	168	179	186	191
Restaurants & cafes							
Zone 1	1,084	1077	1146	1197	1274	1325	1,359
Zone 2	1,182	1175	1249	1305	1389	1444	1,482
Zone 3	907	902	959	1001	1066	1108	1,137
Zone 4	1,027	1021	1085	1134	1207	1254	1,287
Zone 5	1,208	1200	1276	1333	1420	1476	1,514
Zone 6	818	813	865	903	962	1000	1,026
Zone 7	1,015	1009	1072	1120	1193	1240	1,272
Zone 8	769	765	813	849	904	940	964
Zone 9	669	665	707	738	786	817	839
Zone 10	926	920	978	1022	1088	1131	1,160
Zone 11	1,188	1181	1256	1312	1397	1452	1,490

Notes
Source: Experian MMG for 2012 base data

The following expenditure growth rates are applied (source: Experian Retail Planner Briefing Note 12, October 2014, Figures 1a and 1b):

2012-13	-0.60%
2013-14	0.00%
2014-15	2.10%
2015-16	2.80%
2016-17	1.30%
2017-21	1.10%
2021-31	1.30% per annum

All monetary values are held constant at 2012 prices.

Table LC3 —
Total expenditure on leisure services

	2012	2014	2017	2021	2026	2029	2031	Change, 2014-31
	£m	£m	£m	£m	£m	£m	£m	£m

Accommodation services

Zone 1	5.46	5.56	6.15	6.76	7.64	8.20	8.59	3.02
Zone 2	7.51	7.65	8.45	9.29	10.50	11.25	11.78	4.14
Zone 3	1.65	1.70	1.89	2.09	2.38	2.56	2.68	0.98
Zone 4	3.29	3.35	3.70	4.06	4.58	4.91	5.14	1.79
Zone 5	4.45	4.53	5.01	5.51	6.23	6.68	6.99	2.46
Zone 6	3.39	3.46	3.82	4.20	4.76	5.10	5.34	1.89
Zone 7	3.73	3.80	4.19	4.61	5.21	5.58	5.85	2.05
Zone 8	5.27	5.48	6.19	6.94	7.96	8.57	8.98	3.50
Zone 9	3.94	4.10	4.64	5.21	5.97	6.42	6.73	2.63
Zone 10	1.96	2.00	2.21	2.43	2.75	2.95	3.10	1.10
Zone 11	8.86	8.95	9.79	10.64	11.87	12.66	13.21	4.25
Total	49.50	50.57	56.03	61.75	69.85	74.89	78.39	27.82

Cultural services

Zone 1	10.38	10.57	11.68	12.84	14.52	15.57	16.31	5.74
Zone 2	14.47	14.74	16.28	17.91	20.24	21.70	22.72	7.97
Zone 3	4.22	4.33	4.83	5.35	6.08	6.53	6.84	2.51
Zone 4	7.69	7.83	8.64	9.49	10.71	11.48	12.01	4.18
Zone 5	8.40	8.56	9.46	10.41	11.77	12.62	13.21	4.65
Zone 6	9.76	9.94	10.99	12.09	13.68	14.68	15.38	5.43
Zone 7	8.77	8.93	9.87	10.85	12.25	13.14	13.76	4.83
Zone 8	12.25	12.74	14.40	16.14	18.51	19.92	20.89	8.15
Zone 9	12.60	13.12	14.84	16.65	19.09	20.54	21.53	8.41
Zone 10	5.18	5.28	5.84	6.42	7.27	7.80	8.17	2.90
Zone 11	18.91	19.12	20.91	22.72	25.35	27.04	28.20	9.08
Total	112.64	115.16	127.74	140.88	159.48	171.03	179.02	63.86

Games of chance

Zone 1	4.05	4.13	4.56	5.02	5.67	6.08	6.37	2.24
Zone 2	5.88	5.99	6.62	7.28	8.23	8.82	9.24	3.24
Zone 3	2.02	2.07	2.31	2.56	2.91	3.13	3.27	1.20
Zone 4	3.84	3.91	4.31	4.74	5.35	5.73	6.00	2.09
Zone 5	3.24	3.30	3.65	4.01	4.54	4.86	5.09	1.79
Zone 6	5.51	5.61	6.21	6.83	7.73	8.29	8.68	3.07
Zone 7	4.29	4.37	4.83	5.31	6.00	6.43	6.74	2.36
Zone 8	5.90	6.14	6.94	7.78	8.92	9.60	10.06	3.92
Zone 9	7.82	8.13	9.21	10.33	11.84	12.74	13.35	5.22
Zone 10	2.69	2.75	3.04	3.34	3.78	4.06	4.25	1.51
Zone 11	7.88	7.96	8.71	9.46	10.56	11.26	11.75	3.78
Total	53.13	54.37	60.38	66.66	75.52	81.01	84.81	30.43

Hairdressing salons & personal grooming

Zone 1	3.31	3.37	3.72	4.09	4.63	4.96	5.20	1.59
Zone 2	5.15	5.25	5.80	6.37	7.20	7.72	8.09	2.48
Zone 3	1.15	1.18	1.32	1.46	1.66	1.78	1.87	0.60
Zone 4	2.43	2.48	2.73	3.00	3.39	3.63	3.80	1.15
Zone 5	3.16	3.22	3.55	3.91	4.42	4.74	4.96	1.53
Zone 6	2.66	2.71	2.99	3.30	3.73	4.00	4.19	1.29
Zone 7	2.83	2.88	3.19	3.50	3.96	4.24	4.44	1.36
Zone 8	2.75	2.86	3.23	3.62	4.15	4.47	4.69	1.61
Zone 9	2.70	2.81	3.18	3.57	4.09	4.40	4.62	1.59
Zone 10	1.52	1.55	1.71	1.88	2.13	2.29	2.40	0.74
Zone 11	6.81	6.89	7.53	8.19	9.13	9.74	10.16	2.85
Total	34.47	35.19	38.96	42.90	48.50	51.99	54.41	19.22

Recreational & sporting goods

Zone 1	5.80	5.91	6.53	7.18	8.12	8.70	9.12	3.21
Zone 2	8.53	8.69	9.59	10.55	11.92	12.78	13.38	4.70
Zone 3	1.88	1.93	2.15	2.38	2.71	2.91	3.04	1.12
Zone 4	3.73	3.80	4.19	4.60	5.19	5.57	5.82	2.03
Zone 5	5.13	5.23	5.78	6.35	7.19	7.70	8.07	2.84
Zone 6	3.90	3.97	4.39	4.84	5.47	5.87	6.15	2.17
Zone 7	4.24	4.32	4.77	5.24	5.92	6.35	6.65	2.33
Zone 8	5.19	5.39	6.10	6.84	7.84	8.44	8.84	3.45
Zone 9	4.14	4.31	4.88	5.47	6.27	6.75	7.08	2.77
Zone 10	2.33	2.38	2.63	2.89	3.27	3.51	3.68	1.30
Zone 11	8.98	9.08	9.93	10.79	12.04	12.84	13.40	4.31
Total	53.85	55.00	60.93	67.14	75.95	81.43	85.23	30.23

Restaurants & cafes

Zone 1	41.28	42.06	46.46	51.10	57.77	61.96	64.89	22.84
Zone 2	56.78	57.84	63.89	70.26	79.40	85.13	89.13	31.29
Zone 3	15.14	15.54	17.31	19.19	21.81	23.43	24.54	9.00
Zone 4	28.71	29.23	32.25	35.43	39.99	42.85	44.85	15.61
Zone 5	32.95	33.57	37.11	40.82	46.17	49.49	51.81	18.25
Zone 6	33.32	33.95	37.53	41.31	46.73	50.13	52.51	18.56
Zone 7	31.07	31.63	34.94	38.42	43.40	46.55	48.74	17.10
Zone 8	44.25	46.00	52.01	58.30	66.86	71.95	75.42	29.43
Zone 9	42.23	43.95	49.74	55.79	63.97	68.82	72.14	28.19
Zone 10	18.61	18.97	20.98	23.09	26.12	28.04	29.38	10.41
Zone 11	70.22	71.01	77.63	84.37	94.13	100.42	104.72	33.71
Total	414.57	423.75	469.86	518.07	586.36	628.77	658.14	234.39

Notes
Source: Table LC1, Table LC2
All monetary values are held constant at 2012 prices.

Table LC4 — Restaurants market shares, 2014											
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Main destinations in Havering Borough											
Romford	34.33%	17.20%	28.45%	9.49%	2.29%	19.73%	27.59%	23.79%	28.16%	11.25%	0.56%
Hornchurch	16.03%	49.52%	29.49%	40.33%	11.82%	3.02%	5.88%	1.85%	5.54%	19.63%	0.00%
Upminster	0.00%	1.92%	0.00%	7.55%	50.64%	1.25%	0.00%	0.00%	0.88%	1.21%	1.12%
Elm Park	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Collier Row	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	5.55%	0.00%	0.00%	0.00%	0.00%
Rainham	0.00%	0.00%	0.00%	1.01%	0.00%	0.00%	0.00%	0.00%	1.36%	12.66%	0.00%
Harold Hill	1.56%	0.00%	0.59%	0.00%	0.00%	1.15%	0.00%	0.00%	0.00%	0.00%	0.00%
Sub-total, LB Havering centres	51.92%	68.64%	58.52%	58.38%	64.75%	25.14%	39.01%	25.65%	35.94%	44.75%	1.68%
Other locations											
Brentwood	3.08%	1.79%	2.27%	3.00%	6.83%	19.49%	8.19%	0.00%	0.48%	0.00%	52.37%
Central London	6.69%	13.72%	5.79%	2.31%	6.96%	8.58%	4.28%	11.02%	7.42%	9.43%	6.72%
Dagenham	0.00%	0.00%	1.68%	0.00%	0.00%	0.00%	0.00%	6.37%	11.65%	0.70%	0.00%
Lakeside	1.09%	3.23%	4.26%	4.97%	0.86%	2.49%	6.24%	1.41%	5.05%	18.29%	3.68%
Other locations	4.42%	2.02%	6.92%	3.00%	6.72%	1.87%	4.72%	16.59%	12.63%	5.85%	16.78%
Sub-total, other locations	15.28%	20.76%	20.91%	13.27%	21.37%	32.43%	23.43%	35.39%	37.22%	34.27%	79.54%
Total	67.20%	89.40%	79.43%	71.65%	86.12%	57.57%	62.44%	61.04%	73.16%	79.01%	81.21%
(Don't know / varies)	13.17%	0.00%	5.44%	5.26%	3.95%	4.82%	7.18%	10.38%	11.45%	5.90%	13.22%
(Don't do this activity)	19.63%	10.60%	15.13%	23.09%	9.93%	37.61%	30.39%	28.59%	15.40%	15.09%	5.57%
Overall total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Excluding 'don't know / don't do this activity'											
Main destinations in Havering Borough											
Romford	51.09%	19.24%	35.81%	13.25%	2.66%	34.27%	44.19%	38.98%	38.49%	14.24%	0.69%
Hornchurch	23.85%	55.39%	37.12%	56.28%	13.73%	5.24%	9.41%	3.04%	7.58%	24.84%	0.00%
Upminster	0.00%	2.15%	0.00%	10.54%	58.80%	2.17%	0.00%	0.00%	1.20%	1.54%	1.37%
Elm Park	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Collier Row	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	8.89%	0.00%	0.00%	0.00%	0.00%
Rainham	0.00%	0.00%	0.00%	1.41%	0.00%	0.00%	0.00%	0.00%	1.85%	16.02%	0.00%
Harold Hill	2.32%	0.00%	0.75%	0.00%	0.00%	1.99%	0.00%	0.00%	0.00%	0.00%	0.00%
Sub-total, LB Havering centres	77.26%	76.78%	73.68%	81.48%	75.19%	43.67%	62.48%	42.02%	49.12%	56.63%	2.06%
Other locations											
Brentwood	4.58%	2.00%	2.86%	4.18%	7.93%	33.85%	13.12%	0.00%	0.65%	0.00%	64.48%
Central London	9.95%	15.35%	7.29%	3.22%	8.08%	14.90%	6.85%	18.05%	10.14%	11.93%	8.27%
Dagenham	0.00%	0.00%	2.11%	0.00%	0.00%	0.00%	0.00%	10.43%	15.92%	0.88%	0.00%
Lakeside	1.62%	3.61%	5.36%	6.93%	1.00%	4.32%	9.99%	2.31%	6.90%	23.15%	4.53%
Other locations	6.58%	2.26%	8.71%	4.19%	7.80%	3.25%	7.56%	27.19%	17.27%	7.40%	20.66%
Sub-total, other locations	22.74%	23.22%	26.32%	18.52%	24.81%	56.33%	37.52%	57.98%	50.88%	43.37%	97.94%
Total	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

Source: NEMS Household Survey results

Table LC5 —
Café, pubs & bars market shares, 2014

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Main destinations in Havering Borough											
Romford	35.37%	19.93%	28.07%	10.65%	1.66%	20.02%	11.13%	23.32%	8.23%	17.12%	0.56%
Hornchurch	5.50%	40.79%	19.48%	44.93%	6.69%	1.47%	3.23%	2.82%	2.56%	19.74%	0.00%
Upminster	0.00%	2.19%	0.81%	1.70%	48.16%	1.15%	0.00%	0.00%	0.00%	0.70%	0.56%
Elm Park	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.38%	0.00%
Collier Row	0.59%	0.00%	0.00%	0.00%	0.00%	0.00%	12.27%	0.00%	0.00%	0.00%	0.00%
Rainham	0.00%	0.00%	0.59%	1.20%	0.00%	0.00%	0.00%	0.00%	0.00%	12.43%	0.00%
Harold Hill	0.00%	0.00%	0.00%	0.00%	0.00%	2.29%	3.08%	0.00%	0.00%	0.00%	0.00%
Sub-total, LB Havering centres	41.46%	62.91%	48.95%	58.47%	56.51%	24.93%	29.72%	26.13%	10.78%	53.37%	1.12%
Other locations											
Brentwood	1.62%	1.92%	1.63%	1.62%	2.95%	9.54%	1.63%	0.00%	0.48%	1.46%	55.10%
Central London	8.54%	7.93%	1.09%	1.38%	3.51%	8.86%	4.54%	6.56%	7.59%	1.89%	2.23%
Dagenham	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.92%	12.95%	1.21%	0.00%
Chadwell Heath	1.56%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	9.70%	4.27%	0.00%	0.00%
Lakeside	0.00%	3.82%	0.00%	0.69%	0.63%	0.00%	0.69%	0.00%	0.65%	5.15%	0.00%
Other locations	4.89%	3.05%	7.19%	1.20%	5.00%	6.59%	2.32%	5.59%	8.77%	0.51%	6.16%
Sub-total, other locations	16.60%	16.72%	9.91%	4.88%	12.09%	24.99%	9.18%	23.77%	34.71%	10.22%	63.49%
Total	58.06%	79.63%	58.85%	63.36%	68.60%	49.92%	38.89%	49.90%	45.49%	63.58%	64.61%
(Don't know / varies)	8.54%	0.88%	3.95%	2.12%	6.93%	3.57%	2.32%	5.55%	7.22%	2.86%	6.57%
(Don't do this activity)	33.41%	19.49%	37.20%	34.52%	24.47%	46.52%	58.79%	44.54%	47.29%	33.56%	28.83%
Overall total	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
Excluding 'don't know / don't do this activity'											
Main destinations in Havering Borough											
Romford	60.92%	25.02%	47.70%	16.80%	2.42%	40.10%	28.63%	46.72%	18.08%	26.93%	0.87%
Hornchurch	9.48%	51.22%	33.09%	70.92%	9.76%	2.95%	8.30%	5.64%	5.62%	31.04%	0.00%
Upminster	0.00%	2.76%	1.37%	2.68%	70.20%	2.29%	0.00%	0.00%	0.00%	1.10%	0.87%
Elm Park	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	5.31%	0.00%
Collier Row	1.02%	0.00%	0.00%	0.00%	0.00%	0.00%	31.56%	0.00%	0.00%	0.00%	0.00%
Rainham	0.00%	0.00%	1.01%	1.89%	0.00%	0.00%	0.00%	0.00%	0.00%	19.55%	0.00%
Harold Hill	0.00%	0.00%	0.00%	0.00%	0.00%	4.59%	7.92%	0.00%	0.00%	0.00%	0.00%
Sub-total, LB Havering centres	71.41%	79.00%	83.16%	92.29%	82.37%	49.94%	76.41%	52.36%	23.70%	83.93%	1.73%
Other locations											
Brentwood	0.00%	2.78%	2.41%	2.77%	2.56%	4.30%	19.11%	4.19%	0.00%	2.29%	85.29%
Central London	14.70%	9.96%	1.85%	2.18%	5.12%	17.74%	11.66%	13.15%	16.68%	2.97%	3.45%
Dagenham	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.85%	28.47%	1.91%	0.00%
Chadwell Heath	2.68%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	19.44%	9.39%	0.00%	0.00%
Lakeside	0.00%	4.80%	0.00%	1.09%	0.92%	0.00%	1.77%	0.00%	1.43%	8.09%	0.00%
Other locations	8.42%	3.84%	12.22%	1.89%	7.29%	13.21%	5.97%	11.20%	19.28%	0.81%	9.53%
Sub-total, other locations	28.59%	21.00%	16.84%	7.71%	17.63%	50.06%	23.59%	47.64%	76.30%	16.07%	98.27%
Overall total	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

Source: NEMS Household Survey results

Table LC6 —

Summary of A3, A4 & A5 floorspace requirements

	2014	2017	2021	2026	2029	2031
Total population and expenditure						
A	Total population	442,231	462,169	488,678	520,315	547,846
B	Total study area expenditure on food & drink	423.75	469.86	518.07	586.36	628.77
Retained expenditure						
C	Retained food & drink expenditure ⁽¹⁾	54%	54%	54%	54%	54%
D	Retained food & drink expenditure	230.60	255.69	281.93	319.09	358.15
E	Expenditure leakage	193.15	214.17	236.14	267.27	299.99
Inflow						
F	Inflow ⁽²⁾	0%	0%	0%	0%	0%
G	Inflow	0.00	0.00	0.00	0.00	0.00
Total turnover of food & drink facilities						
H	Total turnover	230.60	230.60	230.60	230.60	230.60
Initial surplus						
I	Growth in retained expenditure	0.00	25.09	51.33	88.49	111.57
Claims on expenditure						
J	Sales efficiency growth in existing operators ⁽³⁾	0.00	3.48	8.19	14.22	17.91
K	Commitments for new floorspace	0	0	0	0	0
L	Total claims on capacity	0.00	3.48	8.19	14.22	17.91
Expenditure summary						
M	Initial surplus of expenditure	0.00	25.09	51.33	88.49	111.57
N	Total claims on capacity	0.00	3.48	8.19	14.22	17.91
O	Residual expenditure	0.00	28.57	59.52	102.71	129.48
Conversion to floorspace requirements						
P	Assumed turnover per sq.m ⁽⁴⁾	6,500	6,598	6,731	6,901	7,005
Q	Gross food & drink floorspace requirement⁽⁵⁾	0	4,330	8,843	14,884	20,913

Notes

All monetary values are held constant at 2012 prices.
Sales efficiency growth rate of 0.5% per annum applied.

Table LC7 —

Cinema & theatre market shares, 2014

Main destinations in Havering Borough

Vue, The Brewery, Romford	25.16%	36.54%	30.32%	16.50%	7.98%	16.02%	24.56%	22.89%	25.72%	15.03%	10.74%
Premiere Cinema, Mercury Mall, Romford	23.97%	14.86%	23.18%	17.79%	4.37%	17.93%	7.58%	3.78%	1.53%	9.05%	0.76%
Brookside Theatre, Eastern Road, Romford	0.00%	0.00%	0.00%	0.00%	2.52%	0.00%	2.21%	0.00%	0.00%	0.00%	0.00%
Queens Theatre, Billet Lane, Hornchurch	1.68%	2.22%	2.88%	5.10%	2.98%	1.87%	3.70%	1.41%	0.48%	3.00%	0.00%
Sub-total, LB Havering centres	50.81%	53.62%	56.38%	39.39%	17.85%	35.82%	38.05%	28.07%	27.73%	27.08%	11.50%

Other locations

Central London (West End)	14.91%	11.47%	3.17%	8.28%	16.99%	7.44%	3.84%	11.04%	6.98%	7.17%	24.63%
Vue, Dagenham Leisure Park, Dagenham	0.00%	0.66%	0.00%	1.62%	0.00%	0.00%	1.21%	3.52%	19.51%	19.65%	0.00%
Vue, Lakeside Shopping Centre, Thurrock	0.00%	5.74%	1.56%	8.10%	35.41%	2.26%	5.07%	0.00%	4.16%	17.19%	6.31%
Empire Cinemas, Festival Leisure Park, Basildon	0.00%	0.00%	0.00%	0.51%	0.86%	0.85%	0.00%	0.00%	0.00%	0.00%	25.63%
Other locations	0.00%	5.08%	4.49%	5.31%	4.90%	5.74%	1.27%	6.17%	4.19%	0.00%	1.52%
Sub-total, other locations	14.91%	22.95%	9.21%	23.82%	58.16%	16.29%	11.39%	20.73%	34.84%	44.01%	58.09%

Total	65.72%	76.57%	65.59%	63.20%	76.01%	52.10%	49.44%	48.80%	62.57%	71.08%	69.59%
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(Don't know / varies)	7.73%	0.48%	3.89%	0.51%	0.86%	5.38%	3.77%	3.30%	4.74%	2.10%	6.86%
(Don't do this activity)	26.55%	22.95%	30.52%	36.29%	23.13%	42.53%	46.79%	47.90%	32.69%	26.82%	23.56%

Overall total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
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Excluding 'don't know / don't do this activity'

Main destinations in Havering Borough

Vue, The Brewery, Romford	38.29%	47.72%	46.22%	26.10%	10.50%	30.75%	49.67%	46.89%	41.11%	21.15%	15.43%
Premiere Cinema, Mercury Mall, Romford	36.47%	19.41%	35.34%	28.14%	5.75%	34.40%	15.33%	7.74%	2.44%	12.73%	1.09%
Brookside Theatre, Eastern Road, Romford	0.00%	0.00%	0.00%	0.00%	3.31%	0.00%	4.47%	0.00%	0.00%	0.00%	0.00%
Queens Theatre, Billet Lane, Hornchurch	2.56%	2.90%	4.39%	8.07%	3.92%	3.59%	7.49%	2.89%	0.76%	4.21%	0.00%
Sub-total, LB Havering centres	77.31%	70.03%	85.95%	62.32%	23.48%	68.74%	76.96%	57.52%	44.31%	38.09%	16.53%

Other locations

Central London (West End)	22.69%	14.98%	4.84%	13.10%	22.35%	14.27%	7.77%	22.63%	11.16%	10.08%	35.39%
Vue, Dagenham Leisure Park, Dagenham	0.00%	0.86%	0.00%	2.56%	0.00%	0.00%	2.45%	7.21%	31.18%	27.64%	0.00%
Vue, Lakeside Shopping Centre, Thurrock	0.00%	7.49%	2.37%	12.82%	46.59%	4.34%	10.26%	0.00%	6.65%	24.18%	9.06%
Empire Cinemas, Festival Leisure Park, Basildon	0.00%	0.00%	0.00%	0.80%	1.13%	1.63%	0.00%	0.00%	0.00%	0.00%	36.84%
Other locations	0.00%	6.64%	6.84%	8.40%	6.45%	11.01%	2.57%	12.64%	6.69%	0.00%	2.19%
Sub-total, other locations	22.69%	29.97%	14.05%	37.68%	76.52%	31.26%	23.04%	42.48%	55.69%	61.91%	83.47%

Overall total	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
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Source: NEMS Household Survey results

Havering Retail & Commercial Leisure Needs Assessment

Volume 3 – Household Survey Results

On behalf of **The London Borough of Havering**



30904 | April 2015





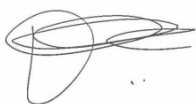


Document Control Sheet

Project Name: Havering Retail & Commercial Leisure Needs Assessment

Project Ref: 30904

Report Title: Final Report

Date: April 2015

	Name	Position	Signature	Date
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For and on behalf of Peter Brett Associates LLP				

Revision	Date	Description	Prepared	Reviewed	Approved
A	January 2015	Final Report	JN	PK	CQ
B	April 2015	Final Report	JN	PK	CQ

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1 Havering Retail and Leisure Study



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**Havering Retail & Leisure Study
for
Peter Brett Associates**

September 2014

Job Ref: 080914

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Introduction

1.1 Research Background & Objectives

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

1.2 Research Methodology

A total of 1,102 telephone interviews were conducted between Thursday 28th August 2014 and Saturday 6th September 2014. Interviews were conducted using NEMS in-house CATI (Computer Assisted Telephone Interviewing) Unit. Respondents were contacted during the day and in the evening. All respondents were the main shopper in the household, determined using a preliminary filter question.

1.3 Sampling

1.3.1 Survey Area

The survey area was segmented into 11 zones, defined using postcode sectors. The zone details were:

Zone	Postcode Sectors	Number of Interviews
01	RM1 1, RM1 2, RM1 3, RM1 4, RM2 5, RM2 6, RM7 7	100
02	RM11 1, RM11 2, RM11 3, RM12 4	100
03	RM7 0, RM7 9	100
04	RM12 5, RM12 6, RM13 7	100
05	RM14 1, RM14 2, RM14 3	101
06	RM3 0, RM3 7, RM3 8, RM3 9	100
07	RM4 1, RM5 2, RM5 3, RM7 8,	100
08	RM6 4, RM6 5, RM6 6, RM8 1, RM8 3	100
09	RM9 5, RM9 6, RM10 7, RM10 8, RM10 9	100
10	RM13 8, RM13 9	100
11	CM13 1, CM13 2, CM13 3, CM14 4, RM14 5, RM15 8, RM15 9	101
Total		1102

1.3.2 Telephone Numbers

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

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

1.3.3 Sample Profile

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

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

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

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

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

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

1.3.4 Time of Interviewing

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

1.3.5 Monitoring of Calls

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

1.4 Weightings

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

Age	Main Shopper Profile (%)	Interviews Achieved	Age Weightings
18-24	5.58%	23	2.6050
25-34	16.77%	48	3.7525
35-44	19.09%	137	1.4983
45-54	18.07%	250	0.7770
55-64	17.05%	175	1.0475
65+	23.44%	442	0.5701
(Refused)	n/a	27	1.0000
Total		1102	

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

Zone	Population *	Interviews Achieved	Interviews Achieved (Weighted by Age)	Zone Weightings
01	31008	100	96.251	1.0564
02	39635	100	118.616	1.0957
03	13093	100	96.383	0.4455
04	22327	100	112.76	0.6493
05	22432	101	90.386	0.8138
06	31872	100	91.435	1.1430
07	24230	100	82.597	0.9619
08	42004	100	80.832	1.7040
09	45565	100	119.389	1.2515
10	15962	100	111.074	0.4712
11	47887	101	102.125	1.5376
Total	336015	1102		

* Source: Census 2011

1.5 Statistical Accuracy

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

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

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

For example, if 50% of a sample of 1102 answers “Yes” to a question, we can be 95% sure that between 47.0% and 53.0% of the population holds the same opinion (i.e. +/- 3.0%). The following is a guide showing confidence intervals attached to various sample sizes from the study:

%ge Response	95% confidence interval
10%	±1.8%
20%	±2.4%
30%	±2.7%
40%	±2.9%
50%	±3.0%

1.6 Data Tables

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

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

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

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

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

Appendix 1:

Data Tabulations

By Zone

Havering Retail & Leisure Study
for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q01 Where did your household last undertake a main food and grocery purchase?																								
Aldi, High Road Seven Kings, Ilford, IG3 8RS	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Aldi, Market Place, Romford RM1, 3AB	1.5%	17	2.0%	2	1.0%	1	3.0%	3	0.0%	0	0.0%	0	3.0%	3	2.0%	2	3.0%	3	0.0%	0	2.0%	2	1.0%	1
Aldi, Marlborough Road, Romford, RM7 8AB	3.4%	37	4.0%	4	1.0%	1	2.0%	2	3.0%	3	0.0%	0	2.0%	2	23.0%	23	1.0%	1	0.0%	0	0.0%	0	1.0%	1
Aldi, Ripple Road, Dagenham, RM9 6SJ	0.7%	8	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	2.0%	2	0.0%	0
Aldi, St Mary's Lane, Upminster, RM14 2QB	3.8%	42	0.0%	0	6.0%	6	0.0%	0	7.0%	7	22.8%	23	4.0%	4	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1
Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE	6.1%	67	22.0%	22	7.0%	7	12.0%	12	2.0%	2	1.0%	1	6.0%	6	9.0%	9	4.0%	4	3.0%	3	1.0%	1	0.0%	0
Asda, Merriellands Crescent, Dagenham, RM9 6SJ	4.9%	54	0.0%	0	0.0%	0	1.0%	1	3.0%	3	0.0%	0	0.0%	0	0.0%	0	7.0%	7	39.0%	39	4.0%	4	0.0%	0
Asda, Vicarage Field Shopping Centre, Barking, IG11 8DJ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Whalebone Lane, Chadwell Heath, RM8 1BB	0.4%	4	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, 208-212 Hutton Road, Shenfield, CM15 8NR	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Co-op, 6/8-8A Harewood Road, Pilgrims Hatch, Brentwood, CM15 9PD	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Dagenham Road, Rush Green, Romford, RM7 0TJ	0.3%	3	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Porters Avenue, Dagenham, RM9 4ND	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Rose Lane, Marks Gate East, Chadwell Heath, RM6 5NR	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Station Road, Harold Wood, Romford, RM3 0BP	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, The Baytree Centre, Brentwood, CM14 4BX	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3
Iceland, 32 The High Street, Brentwood,CM14 4AJ	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Iceland, Farnham Road, Harold Hill, Romford, RM3 8DX	0.6%	7	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Iceland, Heathway, Dagenham, RM10 8QS	0.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	5.0%	5	0.0%	0	0.0%	0
Iceland, London Road, Romford, RM7 9NA	0.2%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Iceland, North Street, Hornchurch, RM11 1RL	0.5%	5	0.0%	0	1.0%	1	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Iceland, Whalebone Lane, Dagenham, RM8 1FB	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Lidl, Atlanta Boulevard, Romford, RM1 1TB	0.5%	6	1.0%	1	1.0%	1	2.0%	2	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Daiglen Drive, South Ockendon, RM15 5AE	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Lidl, Heathway, Dagenham, RM10 8QS	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0
Lidl, Longbridge Road, Dagenham, RM8 2DB	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, High Street, Brentwood, CM14 4RH	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Marks & Spencer, Lakeside, West Thurrock, RM20 2ZQ	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Marks & Spencer, South Street, Romford, RM1 1NT	1.3%	14	4.0%	4	0.0%	0	2.0%	2	0.0%	0	0.0%	0	1.0%	1	2.0%	2	5.0%	5	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Station Road, Upminster, RM14 2SU	0.5%	6	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, London Road, Grays, RM17 5XZ	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0
Morrisons, Wood Lane, Becontree Heath, Dagenham, RM10 7RA	2.3%	25	0.0%	0	0.0%	0	4.0%	4	1.0%	1	0.0%	0	0.0%	0	0.0%	0	12.0%	12	7.0%	7	1.0%	1	0.0%	0
Sainsbury's Local, Farnham Road, Harold Hill, Romford, RM3 8DX	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Elm Park Avenue, Hornchurch, RM12 4RX	1.0%	11	0.0%	0	4.0%	4	0.0%	0	2.0%	2	2.0%	2	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Road, Chadwell Heath, Romford, RM6 6PB	3.4%	38	1.0%	1	0.0%	0	5.0%	5	1.0%	1	0.0%	0	0.0%	0	3.0%	3	25.0%	25	3.0%	3	0.0%	0	0.0%	0
Sainsbury's, High Street, Hornchurch, RM11 1TX	5.0%	55	3.0%	3	24.0%	24	2.0%	2	15.0%	15	5.0%	5	2.0%	2	1.0%	1	0.0%	0	0.0%	0	3.0%	3	0.0%	0
Sainsbury's, Howard Road, Grays, RM16 6YJ	0.7%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0
Sainsbury's, King George	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Avenue, Ilford, IG2 7SH																								
Sainsbury's, The Brewery, Romford, RM1 1AU	5.1%	56	20.0%	20	1.0%	1	17.0%	17	1.0%	1	0.0%	0	3.0%	3	9.0%	9	3.0%	3	0.0%	0	2.0%	2	0.0%	0
Sainsbury's, William Hunter Way, Brentwood, CM14 4WQ	5.7%	63	2.0%	2	0.0%	0	0.0%	0	0.0%	0	3.0%	3	3.0%	3	1.0%	1	0.0%	0	0.0%	0	0.0%	0	53.5%	54
Tesco Express, Ardleigh Green Road, Hornchurch, RM11 2LG	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Dagenham Heathway, Dagenham, RM10 8QS	0.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	5.0%	5	0.0%	0	0.0%	0
Tesco Express, Front Lane, Cranham, Upminster, RM14 1XL	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, High Road, Chadwell Heath, RM6 6PR	0.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	6	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Rainham Road, Rainham, RM13 7QX	1.0%	11	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	7.0%	7	0.0%	0
Tesco Express, South Street, Romford, RM1 1RX	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	7.3%	80	0.0%	0	1.0%	1	1.0%	1	16.0%	16	2.0%	2	0.0%	0	0.0%	0	0.0%	0	6.0%	6	54.0%	54	0.0%	0
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	10.8%	119	21.0%	21	6.0%	6	4.0%	4	0.0%	0	12.9%	13	46.0%	46	21.0%	21	0.0%	0	0.0%	0	0.0%	0	7.9%	8
Tesco Extra, High Road, Goodmayes, Romford, RM6 4HY	1.2%	13	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	10.0%	10	1.0%	1	0.0%	0	0.0%	0
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	8.3%	92	7.0%	7	29.0%	29	29.0%	29	9.0%	9	5.0%	5	0.0%	0	0.0%	0	3.0%	3	7.0%	7	3.0%	3	0.0%	0
Tesco Extra, Lakeside, West Thurrock, Grays, RM20 1TX	0.5%	6	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	2.0%	2	0.0%	0
Tesco Metro, Collier Row Lane, Collier Row, Romford, RM5 3NL	2.5%	27	2.0%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	2.0%	2	20.0%	20	1.0%	1	0.0%	0	0.0%	0	1.0%	1
Tesco, Airfield Way, Hornchurch, RM12 5AF	2.4%	26	0.0%	0	2.0%	2	2.0%	2	21.0%	21	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose (Little), High Street, Hornchurch, RM11 1TP	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, St Mary's Lane, Upminster, RM14 3BT	2.0%	22	0.0%	0	2.0%	2	1.0%	1	0.0%	0	15.8%	16	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1
Internet / delivered	5.5%	61	6.0%	6	10.0%	10	2.0%	2	4.0%	4	7.9%	8	5.0%	5	1.0%	1	4.0%	4	6.0%	6	6.0%	6	8.9%	9

Havering Retail & Leisure Study for Peter Brett Associates

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
Other foodstore outside study area	1.7%	19	1.0%	1	0.0%	0	0.0%	0	0.0%	0	3.0%	3	1.0%	1	0.0%	0	2.0%	2	4.0%	4	2.0%	2	5.9%	6
Other, zone 1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 5	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 10	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Other foodstores, Basildon	0.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	5.0%	5
Other foodstores, Billericay	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3
(Don't know / can't remember)	1.4%	15	0.0%	0	1.0%	1	0.0%	0	1.0%	1	2.0%	2	2.0%	2	1.0%	1	1.0%	1	4.0%	4	0.0%	0	3.0%	3
(Don't do this kind of shopping)	1.5%	17	2.0%	2	2.0%	2	1.0%	1	2.0%	2	3.0%	3	0.0%	0	5.0%	5	1.0%	1	0.0%	0	1.0%	1	0.0%	0
Base:	1102		100		100		100		100		101		100		100		100		100		100		101	

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q02 And where did you shop the time before that (was it the same, or different, and if so, please specify)?																								
<i>Those who specified a location at Q01</i>																								
Aldi, High Road Seven Kings, Ilford, IG3 8RS	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	3	0.0%	0	0.0%	0	0.0%	0
Aldi, Market Place, Romford RM1, 3AB	1.6%	17	5.1%	5	1.0%	1	3.0%	3	0.0%	0	1.0%	1	3.1%	3	2.1%	2	1.0%	1	0.0%	0	1.0%	1	0.0%	0
Aldi, Marlborough Road, Romford, RM7 8AB	3.6%	38	6.1%	6	0.0%	0	2.0%	2	3.1%	3	0.0%	0	3.1%	3	21.3%	20	2.0%	2	0.0%	0	0.0%	0	2.0%	2
Aldi, Ripple Road, Dagenham, RM9 6SJ	1.0%	11	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.3%	6	3.0%	3	0.0%	0
Aldi, St Mary's Lane, Upminster, RM14 2QB	3.6%	38	0.0%	0	3.1%	3	0.0%	0	8.2%	8	20.8%	20	2.0%	2	1.1%	1	0.0%	0	0.0%	0	1.0%	1	3.1%	3
Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE	6.6%	71	19.4%	19	5.2%	5	12.1%	12	2.1%	2	4.2%	4	6.1%	6	12.8%	12	6.1%	6	3.1%	3	1.0%	1	1.0%	1
Asda, Merriellands Crescent, Dagenham, RM9 6SJ	4.7%	50	0.0%	0	0.0%	0	1.0%	1	3.1%	3	0.0%	0	0.0%	0	2.1%	2	3.1%	3	29.2%	28	12.1%	12	1.0%	1
Asda, Whalebone Lane, Chadwell Heath, RM8 1BB	0.7%	7	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	3	2.1%	2	0.0%	0	0.0%	0
Co-op (Somerfield), Farnham Road, Harold Hill, Romford, RM3 8DX	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, 208-212 Hutton Road, Shenfield, CM15 8NR	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Co-op, 6/8-8A Harewood Road, Pilgrims Hatch, Brentwood, CM15 9PD	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Dagenham Road, Rush Green, Romford, RM7 0TJ	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Porters Avenue, Dagenham, RM9 4ND	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Rose Lane, Marks Gate East, Chadwell Heath, RM6 5NR	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Station Road, Harold Wood, Romford, RM3 0BP	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, 32 The High Street, Brentwood,CM14 4AJ	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Iceland, Farnham Road, Harold Hill, Romford, RM3 8DX	0.7%	8	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	5	1.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Iceland, Heathway,	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.3%	7	0.0%	0	0.0%	0

Havering Retail & Leisure Study
for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Dagenham, RM10 8QS																								
Iceland, London Road, Romford, RM7 9NA	0.2%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Iceland, Market Place, Romford, RM1 3AB	0.5%	5	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	2.1%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Iceland, North Street, Hornchurch, RM11 1RL	0.5%	5	0.0%	0	4.1%	4	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Atlanta Boulevard, Romford, RM1 1TB	0.7%	7	2.0%	2	0.0%	0	3.0%	3	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Lidl, Daiglen Drive, South Ockendon, RM15 5AE	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Lidl, Heathway, Dagenham, RM10 8QS	0.4%	4	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0
Marks & Spencer, High Street, Brentwood, CM14 4RH	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	6
Marks & Spencer, Lakeside, West Thurrock, RM20 2ZQ	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0
Marks & Spencer, Ongar Road Pilgrims Hatch, Brentwood, CM15 9HZ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Marks & Spencer, South Street, Romford, RM1 1NT	1.9%	20	4.1%	4	0.0%	0	5.1%	5	0.0%	0	0.0%	0	2.0%	2	3.2%	3	5.1%	5	0.0%	0	1.0%	1	0.0%	0
Marks & Spencer, Southend Arterial Rd, Hornchurch, RM11 3UJ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Station Road, Upminster, RM14 2SU	1.0%	11	1.0%	1	1.0%	1	0.0%	0	0.0%	0	6.3%	6	1.0%	1	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0
Morrisons, London Road, Grays, RM17 5XZ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Morrisons, Wood Lane, Becontree Heath, Dagenham, RM10 7RA	2.4%	26	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.2%	12	9.4%	9	1.0%	1	0.0%	0
Sainsbury's Local, Farnham Road, Harold Hill, Romford, RM3 8DX	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Elm Park Avenue, Hornchurch, RM12 4RX	0.8%	9	0.0%	0	3.1%	3	0.0%	0	0.0%	0	2.1%	2	4.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Road, Chadwell Heath, Romford, RM6 6PB	3.2%	34	1.0%	1	0.0%	0	4.0%	4	1.0%	1	0.0%	0	0.0%	0	1.1%	1	25.5%	25	1.0%	1	1.0%	1	0.0%	0
Sainsbury's, High Street, Hornchurch, RM11 1TX	6.0%	64	5.1%	5	26.8%	26	2.0%	2	18.6%	18	6.3%	6	1.0%	1	0.0%	0	0.0%	0	0.0%	0	6.1%	6	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Sainsbury's, Howard Road, Grays, RM16 6YJ	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Sainsbury's, King George Avenue, Ilford, IG2 7SH	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	4.1%	4	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, The Brewery, Romford, RM1 1AU	5.0%	54	18.4%	18	1.0%	1	14.1%	14	1.0%	1	2.1%	2	2.0%	2	11.7%	11	4.1%	4	0.0%	0	1.0%	1	0.0%	0
Sainsbury's, William Hunter Way, Brentwood, CM14 4WQ	4.4%	47	2.0%	2	0.0%	0	0.0%	0	0.0%	0	3.1%	3	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	40.8%	40
Tesco Express, 225 Hanging Hill Lane, Brentwood, CM13 2QG	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Tesco Express, 405 Brentwood Road, Romford, RM2 5TJ	0.2%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 85-86 Viceroy Parade, Hutton Road, Shenfield, CM15 8JD	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Tesco Express, Ardleigh Green Road, Hornchurch, RM11 2LG	0.2%	2	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Butts Green Road, Hornchurch, RM11 2LD	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Dagenham Heathway, Dagenham, RM10 8QS	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	4.2%	4	0.0%	0	0.0%	0
Tesco Express, Front Lane, Cranham, Upminster, RM14 1XL	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, High Road, Chadwell Heath, RM6 6PR	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	4	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Main Road, Romford, RM1 3BT	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Tesco Express, Mawney Road, RM7 7HL	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Rainham Road, Rainham, RM13 7QX	1.3%	14	0.0%	0	0.0%	0	0.0%	0	3.1%	3	1.0%	1	1.0%	1	0.0%	0	0.0%	0	1.0%	1	8.1%	8	0.0%	0
Tesco Express, South Street, Romford, RM1 1RX	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Warley Hill, Brentwood, CM14 5HB	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	7.1%	76	0.0%	0	2.1%	2	0.0%	0	22.7%	22	2.1%	2	0.0%	0	0.0%	0	0.0%	0	10.4%	10	40.4%	40	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	9.1%	97	16.3%	16	6.2%	6	4.0%	4	2.1%	2	4.2%	4	43.9%	43	18.1%	17	0.0%	0	0.0%	0	1.0%	1	4.1%	4
Tesco Extra, High Road, Goodmayes, Romford, RM6 4HY	1.8%	19	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.3%	15	2.1%	2	0.0%	0	0.0%	0
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	7.9%	84	5.1%	5	28.9%	28	28.3%	28	8.2%	8	4.2%	4	0.0%	0	0.0%	0	1.0%	1	6.3%	6	3.0%	3	1.0%	1
Tesco Extra, Lakeside, West Thurrock, Grays, RM20 1TX	0.7%	7	0.0%	0	0.0%	0	0.0%	0	1.0%	1	3.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0
Tesco Metro, Collier Row Lane, Collier Row, Romford, RM5 3NL	1.9%	20	3.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	16.0%	15	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Tesco, Airfield Way, Hornchurch, RM12 5AF	1.6%	17	0.0%	0	2.1%	2	1.0%	1	13.4%	13	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, St Mary's Lane, Upminster, RM14 3BT	1.9%	20	1.0%	1	2.1%	2	1.0%	1	0.0%	0	14.6%	14	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Internet / delivered	5.7%	61	5.1%	5	9.3%	9	2.0%	2	3.1%	3	8.3%	8	5.1%	5	2.1%	2	4.1%	4	5.2%	5	6.1%	6	12.2%	12
Other foodstore outside study area	1.7%	18	1.0%	1	1.0%	1	1.0%	1	0.0%	0	2.1%	2	1.0%	1	1.1%	1	1.0%	1	4.2%	4	1.0%	1	5.1%	5
Other, zone 1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 5	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 6	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other foodstores, Basildon	0.8%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	7.1%	7
Other foodstores, Billericay	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	4
(Don't know / can't remember)	1.7%	18	0.0%	0	1.0%	1	2.0%	2	1.0%	1	6.3%	6	2.0%	2	0.0%	0	0.0%	0	2.1%	2	2.0%	2	2.0%	2
Base:	1070		98		97		99		97		96		98		94		98		96		99		98	

Havering Retail & Leisure Study for Peter Brett Associates

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
Q03AWhat form of transport do you use to visit your main food shopping destination?																								
Those who do main food shopping at Q01																								
Car - Driver	60.2%	653	50.0%	49	59.2%	58	54.5%	54	69.4%	68	69.4%	68	61.0%	61	64.2%	61	42.4%	42	58.0%	58	63.6%	63	70.3%	71
Car - Passenger	12.1%	131	15.3%	15	8.2%	8	17.2%	17	9.2%	9	8.2%	8	15.0%	15	13.7%	13	19.2%	19	9.0%	9	15.2%	15	3.0%	3
Bus	10.1%	110	8.2%	8	7.1%	7	11.1%	11	8.2%	8	4.1%	4	10.0%	10	16.8%	16	20.2%	20	14.0%	14	10.1%	10	2.0%	2
Cycle	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Disabled Vehicle (e.g. mobility scooter)	0.9%	10	5.1%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	2.0%	2	0.0%	0	1.0%	1	1.0%	1
Taxi	0.8%	9	0.0%	0	0.0%	0	2.0%	2	1.0%	1	0.0%	0	1.0%	1	3.2%	3	1.0%	1	0.0%	0	0.0%	0	1.0%	1
Train	0.5%	5	2.0%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Walk	7.7%	84	11.2%	11	13.3%	13	7.1%	7	7.1%	7	10.2%	10	3.0%	3	1.1%	1	10.1%	10	8.0%	8	3.0%	3	10.9%	11
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.9%	21	2.0%	2	1.0%	1	6.1%	6	0.0%	0	0.0%	0	3.0%	3	0.0%	0	1.0%	1	4.0%	4	1.0%	1	3.0%	3
(Don't travel - Goods delivered)	5.6%	61	6.1%	6	10.2%	10	2.0%	2	4.1%	4	8.2%	8	5.0%	5	1.1%	1	4.0%	4	6.0%	6	6.1%	6	8.9%	9
Base:	1085		98		98		99		98		98		100		95		99		100		99		101	

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q03BWhat is the MAIN reason that you visit (STORE MENTIONED AT Q01) in preference to any other?																								
Those who do main food shopping at Q01																								
Attractive environment	0.7%	8	1.0%	1	0.0%	0	1.0%	1	2.0%	2	0.0%	0	1.0%	1	1.1%	1	1.0%	1	0.0%	0	0.0%	0	1.0%	1
Cleanliness	0.2%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Close to home	39.9%	433	27.6%	27	45.9%	45	37.4%	37	43.9%	43	35.7%	35	39.0%	39	35.8%	34	39.4%	39	30.0%	30	60.6%	60	43.6%	44
Close to work / en route to work	1.4%	15	2.0%	2	2.0%	2	0.0%	0	3.1%	3	0.0%	0	0.0%	0	1.1%	1	1.0%	1	1.0%	1	3.0%	3	2.0%	2
Easily accessible by foot / cycle	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good and / or free parking	2.2%	24	6.1%	6	1.0%	1	7.1%	7	0.0%	0	3.1%	3	1.0%	1	2.1%	2	0.0%	0	1.0%	1	0.0%	0	3.0%	3
Good bus service / accessible public transport	0.5%	5	1.0%	1	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	1.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Good disabled access	0.3%	3	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Good prices	18.8%	204	20.4%	20	19.4%	19	14.1%	14	17.3%	17	21.4%	21	22.0%	22	23.2%	22	18.2%	18	29.0%	29	12.1%	12	9.9%	10
Good range of comparison goods	1.6%	17	2.0%	2	3.1%	3	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.1%	1	1.0%	1	6.0%	6	0.0%	0	3.0%	3
Good range of food offer	7.0%	76	5.1%	5	5.1%	5	7.1%	7	9.2%	9	4.1%	4	12.0%	12	12.6%	12	5.1%	5	7.0%	7	3.0%	3	6.9%	7
Good variety of goods on offer	2.9%	32	4.1%	4	1.0%	1	1.0%	1	5.1%	5	4.1%	4	2.0%	2	2.1%	2	9.1%	9	0.0%	0	1.0%	1	3.0%	3
Habit / familiarity	9.2%	100	11.2%	11	10.2%	10	9.1%	9	7.1%	7	8.2%	8	6.0%	6	8.4%	8	16.2%	16	7.0%	7	11.1%	11	6.9%	7
Has other facilities (e.g. pharmacy, optician, dry cleaners, cafes)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Links to the other shops / facilities in the town centre	1.1%	12	1.0%	1	2.0%	2	0.0%	0	2.0%	2	1.0%	1	0.0%	0	5.3%	5	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Good quality	2.2%	24	5.1%	5	0.0%	0	7.1%	7	1.0%	1	4.1%	4	0.0%	0	0.0%	0	1.0%	1	3.0%	3	2.0%	2	1.0%	1
Good loyalty scheme	0.8%	9	1.0%	1	0.0%	0	2.0%	2	0.0%	0	3.1%	3	0.0%	0	1.1%	1	0.0%	0	1.0%	1	0.0%	0	1.0%	1
Close to friends / family	0.6%	7	0.0%	0	2.0%	2	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	2.0%	2
Easy to get to	0.4%	4	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Convenience of Internet shopping	4.1%	45	4.1%	4	7.1%	7	2.0%	2	3.1%	3	8.2%	8	4.0%	4	1.1%	1	1.0%	1	4.0%	4	4.0%	4	6.9%	7
Helpful staff	0.2%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good opening hours	0.2%	2	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	5.3%	58	5.1%	5	1.0%	1	8.1%	8	4.1%	4	4.1%	4	7.0%	7	4.2%	4	6.1%	6	9.0%	9	2.0%	2	7.9%	8
Base:	1085			98		98		99		98		98		100		95		99		100		99		101

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q04 When your household undertakes its main food and grocery spend (STORE MENTIONED AT Q01) does it visit other shops, leisure or service outlets on the same shopping trips? And if so which ones? [MR]																								
<i>Those who do main food shopping at Q01</i>																								
Yes - other food shops	13.2%	143	15.3%	15	10.2%	10	14.1%	14	10.2%	10	10.2%	10	15.0%	15	14.7%	14	8.1%	8	19.0%	19	9.1%	9	18.8%	19
Yes - other non food shops (clothing, footwear, electrical etc)	16.0%	174	29.6%	29	22.4%	22	21.2%	21	10.2%	10	9.2%	9	12.0%	12	9.5%	9	11.1%	11	11.0%	11	6.1%	6	33.7%	34
Yes - pubs, restaurants or cafes	2.3%	25	2.0%	2	2.0%	2	5.1%	5	0.0%	0	2.0%	2	2.0%	2	2.1%	2	5.1%	5	1.0%	1	0.0%	0	4.0%	4
Yes - financial service (i.e. bank, building society)	4.3%	47	5.1%	5	6.1%	6	1.0%	1	5.1%	5	2.0%	2	4.0%	4	3.2%	3	6.1%	6	1.0%	1	9.1%	9	5.0%	5
Yes - other service (e.g. hairdresser, travel agent, estate agent)	0.6%	7	0.0%	0	1.0%	1	1.0%	1	1.0%	1	0.0%	0	1.0%	1	2.1%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Yes - leisure activity	3.0%	33	0.0%	0	4.1%	4	1.0%	1	2.0%	2	5.1%	5	4.0%	4	2.1%	2	4.0%	4	4.0%	4	4.0%	4	3.0%	3
Yes - other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - visit petrol station	1.2%	13	0.0%	0	4.1%	4	3.0%	3	0.0%	0	1.0%	1	2.0%	2	1.1%	1	0.0%	0	0.0%	0	1.0%	1	1.0%	1
No	64.9%	704	61.2%	60	58.2%	57	59.6%	59	74.5%	73	70.4%	69	65.0%	65	73.7%	70	68.7%	68	66.0%	66	73.7%	73	43.6%	44
(Don't know / varies)	2.3%	25	0.0%	0	2.0%	2	2.0%	2	2.0%	2	3.1%	3	4.0%	4	0.0%	0	1.0%	1	5.0%	5	0.0%	0	5.9%	6
Base:	1085		98		98		99		98		98		100		95		99		100		99		101	
Mean score: [£]																								
Q05 Approximately how much money does your household spend per week on its main food and groceries shop at (STORE MENTIONED AT Q01)?																								
<i>Those who do main food shopping at Q01</i>																								
£1-10	0.7%	8	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	1.1%	1	1.0%	1	1.0%	1	1.0%	1	1.0%	1
£11-20	3.1%	34	5.1%	5	2.0%	2	7.1%	7	2.0%	2	2.0%	2	2.0%	2	3.2%	3	5.1%	5	3.0%	3	2.0%	2	1.0%	1
£21-30	5.3%	58	6.1%	6	3.1%	3	7.1%	7	6.1%	6	3.1%	3	6.0%	6	6.3%	6	11.1%	11	3.0%	3	4.0%	4	3.0%	3
£31-40	7.4%	80	6.1%	6	8.2%	8	7.1%	7	6.1%	6	4.1%	4	15.0%	15	10.5%	10	9.1%	9	6.0%	6	7.1%	7	2.0%	2
£41-50	9.6%	104	11.2%	11	6.1%	6	12.1%	12	11.2%	11	7.1%	7	7.0%	7	13.7%	13	12.1%	12	8.0%	8	9.1%	9	7.9%	8
£51-60	8.4%	91	9.2%	9	5.1%	5	9.1%	9	7.1%	7	11.2%	11	11.0%	11	12.6%	12	8.1%	8	3.0%	3	10.1%	10	5.9%	6
£61-70	8.0%	87	6.1%	6	10.2%	10	11.1%	11	9.2%	9	5.1%	5	7.0%	7	3.2%	3	5.1%	5	12.0%	12	10.1%	10	8.9%	9
£71-80	8.0%	87	9.2%	9	8.2%	8	5.1%	5	9.2%	9	9.2%	9	8.0%	8	10.5%	10	8.1%	8	8.0%	8	7.1%	7	5.9%	6
£81-90	4.4%	48	3.1%	3	4.1%	4	4.0%	4	5.1%	5	4.1%	4	4.0%	4	4.2%	4	6.1%	6	5.0%	5	3.0%	3	5.9%	6
£91-100	13.3%	144	13.3%	13	16.3%	16	14.1%	14	16.3%	16	13.3%	13	8.0%	8	8.4%	8	9.1%	9	11.0%	11	14.1%	14	21.8%	22
£101-150	11.4%	124	12.2%	12	15.3%	15	5.1%	5	15.3%	15	19.4%	19	8.0%	8	6.3%	6	2.0%	2	16.0%	16	11.1%	11	14.9%	15
£151-200	2.7%	29	2.0%	2	3.1%	3	0.0%	0	3.1%	3	1.0%	1	1.0%	1	3.2%	3	1.0%	1	1.0%	1	5.1%	5	8.9%	9
£201+	1.2%	13	0.0%	0	2.0%	2	1.0%	1	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	2.0%	2	4.0%	4	2.0%	2
(Don't know / can't remember)	13.9%	151	13.3%	13	14.3%	14	12.1%	12	9.2%	9	14.3%	14	18.0%	18	13.7%	13	20.2%	20	20.0%	20	8.1%	8	9.9%	10
(Refused)	2.5%	27	3.1%	3	2.0%	2	2.0%	2	0.0%	0	5.1%	5	4.0%	4	3.2%	3	2.0%	2	1.0%	1	4.0%	4	1.0%	1
Mean:	79.83		75.73		89.76		65.95		81.66		88.05		69.01		69.18		60.58		86.32		90.22		98.06	
Base:	1085		98		98		99		98		98		100		95		99		100		99		101	

Havering Retail & Leisure Study for Peter Brett Associates

Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
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Mean score [Times a week]: Everyday = 7, 5 - 6 times a week = 5.5, 3 - 4 times a week = 3.5, Twice a week = 2, Once a week = 1, Once every two weeks = 0.5, Once a month = 0.25, Less often = 0.1

Q06 How often does your household normally visit its main food and grocery shopping destination (STORE MENTIONED AT Q01)?

Those who do main food shopping at Q01

Everyday	1.8%	20	1.0%	1	2.0%	2	6.1%	6	1.0%	1	3.1%	3	2.0%	2	1.1%	1	1.0%	1	0.0%	0	1.0%	1	2.0%	2
5 - 6 times a week	0.6%	7	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.1%	1	1.0%	1	1.0%	1	1.0%	1	1.0%	1
3 - 4 times a week	2.8%	30	2.0%	2	0.0%	0	5.1%	5	1.0%	1	7.1%	7	2.0%	2	3.2%	3	1.0%	1	5.0%	5	1.0%	1	3.0%	3
Twice a week	8.1%	88	11.2%	11	6.1%	6	12.1%	12	6.1%	6	8.2%	8	5.0%	5	9.5%	9	14.1%	14	10.0%	10	2.0%	2	5.0%	5
Once a week	67.8%	736	68.4%	67	72.4%	71	61.6%	61	77.6%	76	64.3%	63	62.0%	62	67.4%	64	65.7%	65	68.0%	68	75.8%	75	63.4%	64
Once every two weeks	11.5%	125	11.2%	11	12.2%	12	9.1%	9	8.2%	8	7.1%	7	18.0%	18	14.7%	14	10.1%	10	10.0%	10	11.1%	11	14.9%	15
Once a month	3.7%	40	2.0%	2	4.1%	4	2.0%	2	3.1%	3	6.1%	6	8.0%	8	0.0%	0	3.0%	3	2.0%	2	5.1%	5	5.0%	5
Less often	0.3%	3	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
(Don't know / varies)	3.3%	36	4.1%	4	1.0%	1	3.0%	3	2.0%	2	4.1%	4	3.0%	3	3.2%	3	4.0%	4	4.0%	4	2.0%	2	5.9%	6
Mean:	1.21		1.16		1.13		1.56		1.13		1.38		1.08		1.22		1.21		1.21		1.05		1.19	
Base:	1085		98		98		99		98		98		100		95		99		100		99		101	

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q07 Where did your household last undertake your 'top-up' food and grocery purchases? (i.e smaller/ 'basket' shopping purchases which are not part of your main food and groceries shop)																								
Aldi, High Road Seven Kings, Ilford, IG3 8RS	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Aldi, Market Place, Romford RM1, 3AB	1.0%	11	1.0%	1	0.0%	0	3.0%	3	2.0%	2	0.0%	0	2.0%	2	1.0%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Aldi, Marlborough Road, Romford, RM7 8AB	1.4%	15	3.0%	3	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	8.0%	8	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Aldi, Ripple Road, Dagenham, RM9 6SJ	1.0%	11	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	1.0%	1	3.0%	3	4.0%	4	0.0%	0
Aldi, St Mary's Lane, Upminster, RM14 2QB	1.4%	15	0.0%	0	1.0%	1	0.0%	0	0.0%	0	12.9%	13	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE	3.0%	33	12.0%	12	5.0%	5	2.0%	2	1.0%	1	0.0%	0	4.0%	4	4.0%	4	2.0%	2	1.0%	1	2.0%	2	0.0%	0
Asda, Merriellands Crescent, Dagenham, RM9 6SJ	1.5%	17	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	3.0%	3	9.0%	9	2.0%	2	0.0%	0
Asda, Whalebone Lane, Chadwell Heath, RM8 1BB	0.2%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Co-op (Somerfield), Farnham Road, Harold Hill, Romford, RM3 8DX	0.7%	8	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	5.0%	5	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, 201-207 Rayleigh Road, Hutton, Brentwood, CM13 1LZ	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3
Co-op, 208-212 Hutton Road, Shenfield, CM15 8NR	0.8%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.9%	9
Co-op, 6/8-8A Harewood Road, Pilgrims Hatch, Brentwood, CM15 9PD	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Co-op, Becontree Avenue, Becontree, Dagenham, RM8 2UU	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Dagenham Road, Rush Green, Romford, RM7 0TJ	1.4%	15	0.0%	0	0.0%	0	15.0%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Elm Park Avenue, Hornchurch, RM12 4SD	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Station Road, Harold Wood, Romford, RM3 0BP	0.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, The Baytree Centre, Brentwood, CM14 4BX	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Co-op, The Retail Unit, Turpin Avenue, Colliers	0.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Row, RM5 2PU																								
Costcutter, Farringdon Avenue, Romford, RM3 8SG	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costcutter, High Road, Romford, RM6 6PX	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Costcutter, Highfield Link, Romford, RM5 3DH	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, 32 The High Street, Brentwood,CM14 4AJ	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3
Iceland, Farnham Road, Harold Hill, Romford, RM3 8DX	1.1%	12	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.0%	10	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Heathway, Dagenham, RM10 8QS	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5	0.0%	0	0.0%	0
Iceland, London Road, Romford, RM7 9NA	0.7%	8	0.0%	0	0.0%	0	8.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Market Place, Romford, RM1 3AB	0.5%	6	4.0%	4	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Iceland, North Street, Hornchurch, RM11 1RL	0.3%	3	0.0%	0	2.0%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Whalebone Lane, Dagenham, RM8 1FB	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Lidl, Atlanta Boulevard, Romford, RM1 1TB	0.4%	4	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Heathway, Dagenham, RM10 8QS	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	1.0%	1	0.0%	0
Lidl, Longbridge Road, Dagenham, RM8 2DB	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0
Londis, Warley Hill, Brentwood, CM14 5HR	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Marks & Spencer, High Street, Brentwood, CM14 4RH	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4
Marks & Spencer, South Street, Romford, RM1 1NT	2.1%	23	8.0%	8	1.0%	1	4.0%	4	1.0%	1	0.0%	0	2.0%	2	2.0%	2	3.0%	3	1.0%	1	1.0%	1	0.0%	0
Marks & Spencer, Station Road, Upminster, RM14 2SU	0.8%	9	1.0%	1	0.0%	0	0.0%	0	1.0%	1	5.0%	5	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Morrisons M Local, Station Parade, Hornchurch, RM12 5AB	0.4%	4	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Wood Lane, Becontree Heath, Dagenham, RM10 7RA	1.8%	20	1.0%	1	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.0%	10	5.0%	5	1.0%	1	0.0%	0
Sainsbury's Local, Farnham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Road, Harold Hill, Romford, RM3 8DX																								
Sainsbury's Local, North Street, Romford, RM1 1ED	0.4%	4	4.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Elm Park Avenue, Hornchurch, RM12 4RX	0.4%	4	0.0%	0	1.0%	1	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Road, Chadwell Heath, Romford, RM6 6PB	1.6%	18	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	14.0%	14	2.0%	2	0.0%	0	0.0%	0
Sainsbury's, High Street, Hornchurch, RM11 1TX	2.7%	30	0.0%	0	26.0%	26	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Sainsbury's, Howard Road, Grays, RM16 6YJ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, King George Avenue, Ilford, IG2 7SH	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0
Sainsbury's, The Brewery, Romford, RM1 1AU	1.7%	19	7.0%	7	0.0%	0	6.0%	6	0.0%	0	1.0%	1	2.0%	2	1.0%	1	1.0%	1	0.0%	0	1.0%	1	0.0%	0
Sainsbury's, William Hunter Way, Brentwood, CM14 4WQ	1.7%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.8%	19
Tesco Express, 225 Hanging Hill Lane, Brentwood, CM13 2QG	0.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.9%	6
Tesco Express, 405 Brentwood Road, Romford, RM2 5TJ	0.4%	4	2.0%	2	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 85-86 Viceroy Parade, Hutton Road, Shenfield, CM15 8JD	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3
Tesco Express, Ardleigh Green Road, Hornchurch, RM11 2LG	0.3%	3	0.0%	0	2.0%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Butts Green Road, Hornchurch, RM11 2LD	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Dagenham Heathway, Dagenham, RM10 8QS	0.6%	7	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	6	0.0%	0	0.0%	0
Tesco Express, Elm Park Avenue, Elm Park, RM12 4SB	0.2%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Front Lane, Cranham, Upminster, RM14 1XL	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Tesco Express, High Road, Chadwell Heath, RM6 6PR	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5	0.0%	0	0.0%	0	0.0%	0
Tesco Express, London Road, Brentwood, CM14 4QG	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3
Tesco Express, Main Road, Romford, RM1 3BT	0.7%	8	5.0%	5	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Mawney Road, RM7 7HL	0.8%	9	4.0%	4	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, North Road, South Ockendon, Thurrock, RM15 6QA	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Rainham Road, Rainham, RM13 7QX	1.4%	15	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	9.0%	9	0.0%	0
Tesco Express, Warley Hill, Brentwood, CM14 5HB	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	4.7%	52	0.0%	0	0.0%	0	0.0%	0	8.0%	8	1.0%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	2	41.0%	41	0.0%	0
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	2.1%	23	5.0%	5	0.0%	0	2.0%	2	0.0%	0	1.0%	1	11.0%	11	4.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, High Road, Goodmayes, Romford, RM6 4HY	0.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	6	1.0%	1	0.0%	0	0.0%	0
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	3.1%	34	3.0%	3	15.0%	15	10.0%	10	2.0%	2	2.0%	2	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Tesco Metro, Collier Row Lane, Collier Row, Romford, RM5 3NL	3.3%	36	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	34.0%	34	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Airfield Way, Hornchurch, RM12 5AF	2.5%	27	0.0%	0	1.0%	1	1.0%	1	24.0%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Waitrose, St Mary's Lane, Upminster, RM14 3BT	1.2%	13	0.0%	0	2.0%	2	0.0%	0	1.0%	1	8.9%	9	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	1.2%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.9%	8	1.0%	1	1.0%	1	2.0%	2	0.0%	0	0.0%	0	1.0%	1
Other foodstore outside study area	2.2%	24	3.0%	3	2.0%	2	0.0%	0	1.0%	1	2.0%	2	2.0%	2	1.0%	1	6.0%	6	7.0%	7	0.0%	0	0.0%	0
Other, zone 1	2.0%	22	12.0%	12	1.0%	1	4.0%	4	0.0%	0	0.0%	0	3.0%	3	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Other, zone 2	0.5%	5	1.0%	1	1.0%	1	1.0%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 5	1.2%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.9%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 6	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 9	1.6%	18	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	9.0%	9	6.0%	6	0.0%	0
Other, zone 10	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Other, zone 11	0.7%	8	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.9%	7
Other foodstores, Basildon	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Other foodstores, Billericay	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1

Havering Retail & Leisure Study for Peter Brett Associates

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
Other, zone 8	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0	0.0%	0
(Don't know / can't remember)	2.4%	26	0.0%	0	4.0%	4	1.0%	1	3.0%	3	2.0%	2	2.0%	2	0.0%	0	4.0%	4	3.0%	3	4.0%	4	3.0%	3
(Don't do this kind of shopping)	29.1%	321	20.0%	20	27.0%	27	30.0%	30	29.0%	29	38.6%	39	39.0%	39	26.0%	26	30.0%	30	28.0%	28	24.0%	24	28.7%	29
Base:		1102		100		100		100		100		101		100		100		100		100		100		101

Havering Retail & Leisure Study
for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q08 And where did you shop for top-up food shopping the time before that?																								
<i>Those who specified a location at Q07</i>																								
Aldi, High Road Seven Kings, Ilford, IG3 8RS	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.6%	5	0.0%	0	0.0%	0	0.0%	0
Aldi, Market Place, Romford RM1, 3AB	1.1%	8	2.5%	2	0.0%	0	2.9%	2	0.0%	0	0.0%	0	1.7%	1	1.4%	1	3.0%	2	0.0%	0	0.0%	0	0.0%	0
Aldi, Marlborough Road, Romford, RM7 8AB	3.2%	24	7.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	2	17.6%	13	4.5%	3	0.0%	0	0.0%	0	0.0%	0
Aldi, Ripple Road, Dagenham, RM9 6SJ	1.3%	10	0.0%	0	0.0%	0	0.0%	0	2.9%	2	0.0%	0	0.0%	0	0.0%	0	1.5%	1	4.3%	3	5.6%	4	0.0%	0
Aldi, St Mary's Lane, Upminster, RM14 2QB	1.9%	14	1.3%	1	1.4%	1	0.0%	0	2.9%	2	13.3%	8	1.7%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE	4.0%	30	7.5%	6	4.3%	3	4.3%	3	1.5%	1	1.7%	1	3.4%	2	8.1%	6	6.1%	4	1.4%	1	4.2%	3	0.0%	0
Asda, Merriellands Crescent, Dagenham, RM9 6SJ	2.3%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	1.4%	1	3.0%	2	13.0%	9	5.6%	4	0.0%	0
Asda, Whalebone Lane, Chadwell Heath, RM8 1BB	0.7%	5	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	4	0.0%	0	0.0%	0	0.0%	0
Co-op (Somerfield), Farnham Road, Harold Hill, Romford, RM3 8DX	0.8%	6	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	5.1%	3	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, 201-207 Rayleigh Road, Hutton, Brentwood, CM13 1LZ	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	3
Co-op, 208-212 Hutton Road, Shenfield, CM15 8NR	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.7%	6
Co-op, 6/8-8A Harewood Road, Pilgrims Hatch, Brentwood, CM15 9PD	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	2
Co-op, Becontree Avenue, Becontree, Dagenham, RM8 2UU	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Dagenham Road, Rush Green, Romford, RM7 0TJ	1.5%	11	0.0%	0	0.0%	0	15.9%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Elm Park Avenue, Hornchurch, RM12 4SD	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Station Road, Harold Wood, Romford, RM3 0BP	1.2%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.3%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, The Baytree Centre, Brentwood, CM14 4BX	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	3
Co-op, The Retail Unit,	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Turpin Avenue, Colliers Row, RM5 2PU																								
Costcutter, Becontree Avenue, Dagenham, RM8 3UH	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Costcutter, Farringdon Avenue, Romford, RM3 8SG	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costcutter, Highfield Link, Romford, RM5 3DH	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costcutter, The Cardrome, Upper Rainham Road, Hornchurch, RM12 4ET	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Iceland, 32 The High Street, Brentwood,CM14 4AJ	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	3
Iceland, Farnham Road, Harold Hill, Romford, RM3 8DX	1.7%	13	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.3%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Heathway, Dagenham, RM10 8QS	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.1%	7	0.0%	0	0.0%	0
Iceland, London Road, Romford, RM7 9NA	0.8%	6	0.0%	0	0.0%	0	8.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Market Place, Romford, RM1 3AB	1.5%	11	7.5%	6	0.0%	0	5.8%	4	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, North Street, Hornchurch, RM11 1RL	0.8%	6	0.0%	0	5.8%	4	0.0%	0	2.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Whalebone Lane, Dagenham, RM8 1FB	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	2	0.0%	0	0.0%	0
Lidl, Atlanta Boulevard, Romford, RM1 1TB	0.7%	5	2.5%	2	0.0%	0	2.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Lidl, Heathway, Dagenham, RM10 8QS	0.8%	6	0.0%	0	0.0%	0	1.4%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	2	2.8%	2	0.0%	0
Lidl, Longbridge Road, Dagenham, RM8 2DB	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	1.4%	1	0.0%	0	0.0%	0
Londis, Rainham Road South, Dagenham, RM10 8AH	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Londis, Warley Hill, Brentwood, CM14 5HR	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Marks & Spencer, High Street, Brentwood, CM14 4RH	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	3
Marks & Spencer, Lakeside, West Thurrock, RM20 2ZQ	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	1.4%	1
Marks & Spencer, Ongar Road Pilgrims Hatch,	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	2

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Brentwood, CM15 9HZ																								
Marks & Spencer, South Street, Romford, RM1 1NT	3.2%	24	13.8%	11	1.4%	1	7.2%	5	1.5%	1	0.0%	0	1.7%	1	2.7%	2	0.0%	0	2.9%	2	1.4%	1	0.0%	0
Marks & Spencer, Station Road, Upminster, RM14 2SU	2.0%	15	0.0%	0	1.4%	1	0.0%	0	4.4%	3	13.3%	8	1.7%	1	0.0%	0	0.0%	0	0.0%	0	2.8%	2	0.0%	0
Morrisons M Local, Station Parade, Hornchurch, RM12 5AB	0.9%	7	0.0%	0	0.0%	0	0.0%	0	10.3%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, London Road, Grays, RM17 5XZ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Wood Lane, Becontree Heath, Dagenham, RM10 7RA	2.0%	15	0.0%	0	0.0%	0	5.8%	4	1.5%	1	0.0%	0	0.0%	0	0.0%	0	7.6%	5	7.2%	5	0.0%	0	0.0%	0
Sainsbury's Local, Farnham Road, Harold Hill, Romford, RM3 8DX	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Local, North Street, Romford, RM1 1ED	0.4%	3	3.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Elm Park Avenue, Hornchurch, RM12 4RX	0.7%	5	0.0%	0	2.9%	2	0.0%	0	2.9%	2	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Road, Chadwell Heath, Romford, RM6 6PB	2.4%	18	1.3%	1	0.0%	0	2.9%	2	0.0%	0	0.0%	0	0.0%	0	1.4%	1	18.2%	12	2.9%	2	0.0%	0	0.0%	0
Sainsbury's, High Street, Hornchurch, RM11 1TX	3.4%	26	1.3%	1	26.1%	18	0.0%	0	7.4%	5	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Sainsbury's, Howard Road, Grays, RM16 6YJ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, King George Avenue, Ilford, IG2 7SH	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	1.4%	1	0.0%	0	0.0%	0
Sainsbury's, The Brewery, Romford, RM1 1AU	3.0%	23	6.3%	5	0.0%	0	13.0%	9	1.5%	1	0.0%	0	0.0%	0	9.5%	7	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Sainsbury's, William Hunter Way, Brentwood, CM14 4WQ	1.7%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.8%	13
Tesco Express, 225 Hanging Hill Lane, Brentwood, CM13 2QG	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.1%	7
Tesco Express, 405 Brentwood Road, Romford, RM2 5TJ	0.4%	3	1.3%	1	2.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 85-86 Viceroy Parade, Hutton Road, Shenfield, CM15	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	4

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
8JD																								
Tesco Express, Ardleigh Green Road, Hornchurch, RM11 2LG	0.4%	3	0.0%	0	2.9%	2	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Butts Green Road, Hornchurch, RM11 2LD	0.3%	2	0.0%	0	2.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Dagenham Heathway, Dagenham, RM10 8QS	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	4	0.0%	0	0.0%	0
Tesco Express, Elm Park Avenue, Elm Park, RM12 4SB	0.4%	3	0.0%	0	4.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Front Lane, Cranham, Upminster, RM14 1XL	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, High Road, Chadwell Heath, RM6 6PR	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	3	0.0%	0	0.0%	0	0.0%	0
Tesco Express, London Road, Brentwood, CM14 4QG	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.2%	5
Tesco Express, Main Road, Romford, RM1 3BT	1.3%	10	8.8%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	1.4%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Tesco Express, Mawney Road, RM7 7HL	0.7%	5	2.5%	2	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, North Road, South Ockendon, Thurrock, RM15 6QA	0.1%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Rainham Road, Rainham, RM13 7QX	1.6%	12	0.0%	0	0.0%	0	0.0%	0	2.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	2	11.1%	8	0.0%	0
Tesco Express, South Street, Romford, RM1 1RX	0.3%	2	0.0%	0	0.0%	0	2.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Warley Hill, Brentwood, CM14 5HB	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	2
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	5.7%	43	0.0%	0	0.0%	0	0.0%	0	10.3%	7	1.7%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	47.2%	34	0.0%	0
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	2.3%	17	3.8%	3	2.9%	2	1.4%	1	0.0%	0	1.7%	1	13.6%	8	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, High Road, Goodmayes, Romford, RM6 4HY	0.7%	5	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	4	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	5.2%	39	3.8%	3	24.6%	17	13.0%	9	4.4%	3	5.0%	3	1.7%	1	0.0%	0	0.0%	0	2.9%	2	0.0%	0	1.4%	1
Tesco Metro, Collier Row	3.3%	25	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	31.1%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
Lane, Collier Row, Romford, RM5 3NL																								
Tesco, Airfield Way, Hornchurch, RM12 5AF	2.6%	20	0.0%	0	1.4%	1	1.4%	1	26.5%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, St Mary's Lane, Upminster, RM14 3BT	2.1%	16	0.0%	0	1.4%	1	0.0%	0	1.5%	1	20.0%	12	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Internet / delivered	1.5%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.7%	4	3.4%	2	1.4%	1	3.0%	2	1.4%	1	0.0%	0	1.4%	1
Other foodstore outside study area	3.0%	23	1.3%	1	4.3%	3	0.0%	0	0.0%	0	1.7%	1	1.7%	1	2.7%	2	12.1%	8	8.7%	6	1.4%	1	0.0%	0
Other, zone 1	2.6%	20	12.5%	10	0.0%	0	4.3%	3	1.5%	1	0.0%	0	6.8%	4	0.0%	0	1.5%	1	0.0%	0	1.4%	1	0.0%	0
Other, zone 2	0.8%	6	1.3%	1	2.9%	2	1.4%	1	2.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 5	1.9%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	23.3%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 6	0.7%	5	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 9	2.3%	17	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	3.0%	2	10.1%	7	9.7%	7	0.0%	0
Other, zone 10	0.4%	3	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	2	0.0%	0	0.0%	0
Other, zone 11	1.3%	10	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.0%	9
Other foodstores, Basildon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Other foodstores, Billericay	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Other, zone 7	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 8	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	2.9%	2	0.0%	0	0.0%	0
(Don't know / can't remember)	1.9%	14	2.5%	2	2.9%	2	1.4%	1	0.0%	0	1.7%	1	1.7%	1	0.0%	0	4.5%	3	4.3%	3	1.4%	1	0.0%	0
Base:		755		80		69		69		68		60		59		74		66		69		72		69

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Mean score: [£]																								
Q09 Approximately how much money does your household spend per week on top-up food and groceries shopping (STORE MENTIONED AT Q07)?																								
Those who specified a location at Q07																								
£1-10	25.0%	189	21.3%	17	23.2%	16	29.0%	20	22.1%	15	26.7%	16	25.4%	15	25.7%	19	25.8%	17	24.6%	17	20.8%	15	31.9%	22
£11-20	27.0%	204	28.8%	23	20.3%	14	30.4%	21	26.5%	18	30.0%	18	27.1%	16	27.0%	20	24.2%	16	27.5%	19	33.3%	24	21.7%	15
£21-30	14.8%	112	13.8%	11	21.7%	15	11.6%	8	22.1%	15	10.0%	6	11.9%	7	9.5%	7	21.2%	14	15.9%	11	12.5%	9	13.0%	9
£31-40	5.8%	44	6.3%	5	8.7%	6	1.4%	1	5.9%	4	1.7%	1	6.8%	4	8.1%	6	1.5%	1	7.2%	5	9.7%	7	5.8%	4
£41-50	3.6%	27	3.8%	3	2.9%	2	1.4%	1	1.5%	1	3.3%	2	5.1%	3	5.4%	4	4.5%	3	4.3%	3	0.0%	0	7.2%	5
£51-60	0.7%	5	1.3%	1	1.4%	1	0.0%	0	1.5%	1	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
£61-70	0.8%	6	2.5%	2	2.9%	2	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
£71-80	0.8%	6	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0	1.4%	1	2.8%	2	1.4%	1
£81-90	0.3%	2	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
£91-100	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£101-150	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£151-200	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
£201+	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	18.7%	141	21.3%	17	17.4%	12	24.6%	17	17.6%	12	16.7%	10	23.7%	14	18.9%	14	18.2%	12	17.4%	12	15.3%	11	14.5%	10
(Refused)	2.1%	16	1.3%	1	1.4%	1	0.0%	0	0.0%	0	6.7%	4	0.0%	0	4.1%	3	4.5%	3	0.0%	0	4.2%	3	1.4%	1
Mean:	21.71		22.85		23.66		17.12		22.64		21.98		19.42		20.98		19.22		22.21		22.19		25.28	
Base:	755		80		69		69		68		60		59		74		66		69		72		69	
Q10 Does your household also spend money on food and groceries in small shops? (i.e., not supermarkets)																								
Yes	35.3%	389	33.0%	33	38.0%	38	35.0%	35	43.0%	43	39.6%	40	28.0%	28	32.0%	32	36.0%	36	40.0%	40	27.0%	27	36.6%	37
No	64.7%	713	67.0%	67	62.0%	62	65.0%	65	57.0%	57	60.4%	61	72.0%	72	68.0%	68	64.0%	64	60.0%	60	73.0%	73	63.4%	64
Base:	1102		100		100		100		100		101		100		100		100		100		100		101	

Havering Retail & Leisure Study for Peter Brett Associates

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
Q11 Where are these small shops located?																								
<i>Those who use small shops at Q10</i>																								
Local Stores - Romford	18.5%	72	60.6%	20	2.6%	1	60.0%	21	4.7%	2	0.0%	0	25.0%	7	25.0%	8	16.7%	6	7.5%	3	14.8%	4	0.0%	0
Local Stores - Hornchurch	13.1%	51	6.1%	2	63.2%	24	0.0%	0	48.8%	21	5.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.4%	2	0.0%	0
Local Stores - Upminster	10.0%	39	0.0%	0	2.6%	1	0.0%	0	2.3%	1	82.5%	33	3.6%	1	0.0%	0	0.0%	0	0.0%	0	7.4%	2	2.7%	1
Local Stores - Collier Row	5.9%	23	3.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	68.8%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Stores - Elm Park	4.6%	18	0.0%	0	15.8%	6	0.0%	0	25.6%	11	0.0%	0	0.0%	0	0.0%	0	2.8%	1	0.0%	0	0.0%	0	0.0%	0
Local Stores - Harold Hill	5.4%	21	0.0%	0	2.6%	1	0.0%	0	0.0%	0	0.0%	0	64.3%	18	3.1%	1	0.0%	0	0.0%	0	3.7%	1	0.0%	0
Local Stores - Rainham	4.9%	19	0.0%	0	0.0%	0	2.9%	1	4.7%	2	2.5%	1	0.0%	0	0.0%	0	0.0%	0	2.5%	1	51.9%	14	0.0%	0
Local Stores - Chadwell Heath	4.4%	17	0.0%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	41.7%	15	2.5%	1	0.0%	0	0.0%	0
Local Stores - Dagenham	11.1%	43	0.0%	0	0.0%	0	5.7%	2	7.0%	3	0.0%	0	0.0%	0	0.0%	0	25.0%	9	67.5%	27	7.4%	2	0.0%	0
Local Stores - Ilford	1.5%	6	0.0%	0	0.0%	0	0.0%	0	2.3%	1	2.5%	1	0.0%	0	0.0%	0	8.3%	3	2.5%	1	0.0%	0	0.0%	0
Local Stores - Barking	1.5%	6	3.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	1	0.0%	0	10.0%	4	0.0%	0	0.0%	0
Local Stores - Brentwood	7.2%	28	6.1%	2	2.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	1	0.0%	0	0.0%	0	64.9%	24
Other, outside area	3.6%	14	3.0%	1	2.6%	1	2.9%	1	0.0%	0	7.5%	3	7.1%	2	0.0%	0	2.8%	1	2.5%	1	3.7%	1	8.1%	3
Gidea Park	2.1%	8	15.2%	5	7.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rush Green	2.3%	9	0.0%	0	0.0%	0	25.7%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shenfield	1.8%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.9%	7
(Don't know / varies)	2.1%	8	3.0%	1	0.0%	0	0.0%	0	4.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	2	3.7%	1	5.4%	2
Base:		389		33		38		35		43		40		28		32		36		40		27		37

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Mean score: [£]																								
Q12 Approximately how much money does your household spend per week on food and groceries in these small shops?																								
Those who use small shops at Q10																								
£1-10	45.2%	176	42.4%	14	63.2%	24	51.4%	18	30.2%	13	47.5%	19	39.3%	11	50.0%	16	55.6%	20	42.5%	17	40.7%	11	35.1%	13
£11-20	18.0%	70	21.2%	7	18.4%	7	14.3%	5	25.6%	11	12.5%	5	10.7%	3	28.1%	9	13.9%	5	10.0%	4	25.9%	7	18.9%	7
£21-30	6.9%	27	9.1%	3	0.0%	0	5.7%	2	7.0%	3	7.5%	3	7.1%	2	3.1%	1	11.1%	4	5.0%	2	11.1%	3	10.8%	4
£31-40	1.0%	4	3.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	1	0.0%	0	0.0%	0	3.7%	1	2.7%	1
£41-50	2.1%	8	0.0%	0	2.6%	1	0.0%	0	2.3%	1	0.0%	0	7.1%	2	0.0%	0	2.8%	1	2.5%	1	0.0%	0	5.4%	2
£51-60	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£61-70	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£71-80	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	1	0.0%	0
£81-90	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£91-100	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£101-150	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	1
£151-200	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£201+	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	24.4%	95	21.2%	7	15.8%	6	28.6%	10	34.9%	15	30.0%	12	28.6%	8	12.5%	4	13.9%	5	40.0%	16	14.8%	4	21.6%	8
(Refused)	1.5%	6	3.0%	1	0.0%	0	0.0%	0	0.0%	0	2.5%	1	3.6%	1	3.1%	1	2.8%	1	0.0%	0	0.0%	0	2.7%	1
Mean:	13.86		14.36		10.19		10.32		13.50		11.33		19.32		11.44		12.57		11.71		17.91		22.07	
Base:	389		33		38		35		43		40		28		32		36		40		27		37	
Mean score: [%]																								
Q13 Approximately what proportion of your household's total spending on all food and grocery goods is done using the Internet?																								
0%	70.3%	775	82.0%	82	73.0%	73	85.0%	85	76.0%	76	39.6%	40	69.0%	69	89.0%	89	75.0%	75	59.0%	59	66.0%	66	60.4%	61
1-5%	1.8%	20	2.0%	2	4.0%	4	1.0%	1	0.0%	0	5.0%	5	1.0%	1	1.0%	1	0.0%	0	0.0%	0	3.0%	3	3.0%	3
6-10%	1.3%	14	1.0%	1	3.0%	3	1.0%	1	1.0%	1	2.0%	2	0.0%	0	2.0%	2	1.0%	1	0.0%	0	1.0%	1	2.0%	2
11-20%	0.9%	10	2.0%	2	3.0%	3	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0
21-30%	0.9%	10	1.0%	1	0.0%	0	1.0%	1	0.0%	0	3.0%	3	0.0%	0	2.0%	2	1.0%	1	1.0%	1	0.0%	0	1.0%	1
31-40%	0.5%	5	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	1.0%	1	1.0%	1
41-50%	1.9%	21	2.0%	2	2.0%	2	3.0%	3	1.0%	1	1.0%	1	1.0%	1	2.0%	2	1.0%	1	3.0%	3	1.0%	1	4.0%	4
51-60%	0.3%	3	0.0%	0	2.0%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
61-70%	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1
71-80%	2.9%	32	5.0%	5	5.0%	5	2.0%	2	1.0%	1	5.0%	5	4.0%	4	0.0%	0	1.0%	1	2.0%	2	3.0%	3	4.0%	4
81-90%	2.2%	24	3.0%	3	5.0%	5	0.0%	0	2.0%	2	4.0%	4	1.0%	1	0.0%	0	0.0%	0	2.0%	2	1.0%	1	5.9%	6
91-99%	0.7%	8	1.0%	1	1.0%	1	1.0%	1	2.0%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1
100%	0.8%	9	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2	1.0%	1	2.0%	2	2.0%	2
(Don't know / varies)	14.5%	160	1.0%	1	0.0%	0	3.0%	3	17.0%	17	37.6%	38	21.0%	21	3.0%	3	16.0%	16	30.0%	30	16.0%	16	14.9%	15
(Refused)	0.5%	6	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	3.0%	3	0.0%	0
Mean:	9.39		9.49		13.97		5.26		6.14		17.59		7.85		2.86		5.36		10.36		9.32		17.62	
Base:	1102		100		100		100		100		101		100		100		100		100		100		101	

Havering Retail & Leisure Study for Peter Brett Associates

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
Q14 So, speaking as an individual, can you tell me where you last made a purchase of clothes or shoes?																								
Brentwood	2.5%	28	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	24.8%	25
Central London - West End (Oxford Street / Regent Street / Bond Street)	1.7%	19	0.0%	0	4.0%	4	2.0%	2	2.0%	2	1.0%	1	3.0%	3	0.0%	0	4.0%	4	1.0%	1	1.0%	1	1.0%	1
Dagenham	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5	0.0%	0	0.0%	0
Harold Hill	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hornchurch	1.2%	13	0.0%	0	3.0%	3	0.0%	0	7.0%	7	2.0%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ilford	0.6%	7	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	4.0%	4	1.0%	1	0.0%	0	0.0%	0
Rainham	0.6%	7	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5	1.0%	1
Romford (including The Liberty, The Mall and The Brewery)	44.2%	487	62.0%	62	48.0%	48	60.0%	60	40.0%	40	11.9%	12	52.0%	52	68.0%	68	64.0%	64	48.0%	48	25.0%	25	7.9%	8
Stratford (including Westfield Stratford City)	1.5%	16	4.0%	4	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	3.0%	3	2.0%	2	0.0%	0	4.0%	4
Upminster	1.5%	16	0.0%	0	0.0%	0	1.0%	1	0.0%	0	11.9%	12	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Bluewater	1.5%	16	0.0%	0	2.0%	2	3.0%	3	0.0%	0	3.0%	3	2.0%	2	0.0%	0	0.0%	0	1.0%	1	1.0%	1	4.0%	4
Lakeside	21.5%	237	10.0%	10	22.0%	22	9.0%	9	36.0%	36	53.5%	54	8.0%	8	7.0%	7	7.0%	7	17.0%	17	50.0%	50	16.8%	17
Gallows Corner Retail Park, Romford	0.6%	7	0.0%	0	1.0%	1	0.0%	0	2.0%	2	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Merrielands Retail Park, Dagenham	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
B&Q Roneo Corner Retail Park, Romford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Matalan, North Street, Romford	0.4%	4	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0
Asda Superstore, Whalebone Lane, Chadwell Heath, RM8 1BB	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Street, Hornchurch, RM11 1TX	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, King George Avenue, Ilford, IG2 7SH	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, The Brewery, Romford, RM1 1AU	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, William Hunter Way, Brentwood, CM14 4WQ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, High Road,	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Goodmayes, Romford, RM6 4HY																								
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	5.8%	64	3.0%	3	11.0%	11	2.0%	2	1.0%	1	5.9%	6	10.0%	10	8.0%	8	4.0%	4	8.0%	8	4.0%	4	6.9%	7
Home Catalogue	2.3%	25	2.0%	2	0.0%	0	4.0%	4	1.0%	1	0.0%	0	7.0%	7	2.0%	2	3.0%	3	2.0%	2	2.0%	2	2.0%	2
TV / Interactive Shopping	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1
Other location outside study area	1.6%	18	4.0%	4	1.0%	1	2.0%	2	0.0%	0	2.0%	2	1.0%	1	0.0%	0	0.0%	0	2.0%	2	4.0%	4	2.0%	2
Other, zone 8	0.3%	3	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
London (Other)	0.4%	4	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	1.0%	1
Southend	0.2%	2	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Goodmayes (including retail park)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Chelmsford	0.7%	8	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5
Billericay	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Beckton superstores and retail parks	0.2%	2	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Basildon	1.3%	14	0.0%	0	0.0%	0	1.0%	1	2.0%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.9%	10
(Don't know / can't remember)	2.9%	32	2.0%	2	1.0%	1	4.0%	4	0.0%	0	5.0%	5	4.0%	4	6.0%	6	2.0%	2	2.0%	2	2.0%	2	4.0%	4
(Don't do this type of shopping)	4.0%	44	9.0%	9	3.0%	3	6.0%	6	4.0%	4	2.0%	2	2.0%	2	4.0%	4	3.0%	3	6.0%	6	1.0%	1	4.0%	4
Base:	1102			100		100		100		100		101		100		100		100		100		100		101

Havering Retail & Leisure Study for Peter Brett Associates

Total Zone 1 Zone 2 Zone 3 Zone 4 Zone 5 Zone 6 Zone 7 Zone 8 Zone 9 Zone 10 Zone 11

Mean score [Times a week]: Everyday = 7, 5 - 6 times a week = 5.5, 3 - 4 times a week = 3.5, Twice a week = 2, Once a week = 1, Once every two weeks = 0.5, Once a month = 0.25, Once every two months = 0.125, 3 or 4 times a year = 0.067, Twice a year = 0.038, Once a year = 0.019, Less often = 0.01

Q15 How often do you visit (LOCATION MENTIONED AT Q14) for clothes or shoes shopping?

Those who specified a location at Q15

Everyday	0.7%	7	2.2%	2	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	3
5 - 6 times a week	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
3 - 4 times a week	0.6%	6	1.1%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	2.1%	2	0.0%	0	1.0%	1	1.1%	1
Twice a week	1.4%	14	1.1%	1	1.0%	1	1.1%	1	0.0%	0	1.1%	1	2.1%	2	1.1%	1	2.1%	2	3.3%	3	2.1%	2	0.0%	0
Once a week	7.8%	80	7.9%	7	7.3%	7	7.8%	7	9.4%	9	5.3%	5	9.6%	9	6.7%	6	10.5%	10	8.7%	8	6.2%	6	6.5%	6
Once every two weeks	10.6%	109	7.9%	7	10.4%	10	7.8%	7	17.7%	17	16.0%	15	8.5%	8	10.0%	9	14.7%	14	8.7%	8	12.4%	12	2.2%	2
Once a month	23.5%	241	28.1%	25	32.3%	31	20.0%	18	28.1%	27	21.3%	20	18.1%	17	16.7%	15	21.1%	20	19.6%	18	28.9%	28	23.7%	22
Once every two months	13.3%	136	14.6%	13	11.5%	11	6.7%	6	16.7%	16	10.6%	10	16.0%	15	10.0%	9	14.7%	14	12.0%	11	12.4%	12	20.4%	19
3 or 4 times a year	13.3%	136	14.6%	13	11.5%	11	14.4%	13	13.5%	13	12.8%	12	8.5%	8	18.9%	17	12.6%	12	9.8%	9	12.4%	12	17.2%	16
Twice a year	6.8%	70	5.6%	5	11.5%	11	10.0%	9	3.1%	3	5.3%	5	7.4%	7	10.0%	9	6.3%	6	1.1%	1	8.2%	8	6.5%	6
Once a year	3.9%	40	4.5%	4	5.2%	5	5.6%	5	0.0%	0	4.3%	4	4.3%	4	5.6%	5	3.2%	3	2.2%	2	6.2%	6	2.2%	2
Less often	3.1%	32	3.4%	3	4.2%	4	4.4%	4	4.2%	4	1.1%	1	3.2%	3	5.6%	5	2.1%	2	2.2%	2	3.1%	3	1.1%	1
(Don't know / varies)	15.0%	154	9.0%	8	5.2%	5	22.2%	20	6.3%	6	19.1%	18	22.3%	21	15.6%	14	10.5%	10	32.6%	30	7.2%	7	16.1%	15
Mean:	0.39		0.50		0.28		0.28		0.38		0.53		0.33		0.26		0.43		0.41		0.34		0.53	
Base:	1026		89		96		90		96		94		94		90		95		92		97		93	

Q16 How do you normally travel to (LOCATION MENTIONED AT Q14)?

Not those who shop via Internet / catalogue / TV at Q15

Car - Driver	55.0%	514	40.5%	34	62.4%	53	41.7%	35	61.7%	58	68.2%	60	47.4%	36	47.5%	38	40.9%	36	53.7%	44	71.1%	64	67.5%	56
Car - Passenger	9.0%	84	9.5%	8	4.7%	4	9.5%	8	8.5%	8	6.8%	6	13.2%	10	6.3%	5	13.6%	12	6.1%	5	13.3%	12	7.2%	6
Bus	21.7%	203	19.0%	16	17.6%	15	23.8%	20	21.3%	20	11.4%	10	25.0%	19	38.8%	31	35.2%	31	31.7%	26	13.3%	12	3.6%	3
Cycle	0.3%	3	1.2%	1	0.0%	0	0.0%	0	1.1%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Disabled vehicle (e.g. mobility scooter)	0.3%	3	3.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Taxi	0.5%	5	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	1.3%	1	2.5%	2	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Train	4.7%	44	7.1%	6	2.4%	2	6.0%	5	2.1%	2	1.1%	1	10.5%	8	0.0%	0	6.8%	6	2.4%	2	2.2%	2	12.0%	10
Walk	6.0%	56	14.3%	12	7.1%	6	15.5%	13	3.2%	3	9.1%	8	1.3%	1	2.5%	2	1.1%	1	2.4%	2	0.0%	0	9.6%	8
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tube	0.3%	3	0.0%	0	3.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aeroplane	0.1%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.9%	18	4.8%	4	1.2%	1	3.6%	3	1.1%	1	2.3%	2	1.3%	1	2.5%	2	1.1%	1	3.7%	3	0.0%	0	0.0%	0
Base:	934		84		85		84		94		88		76		80		88		82		90		83	

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q17 And the time before that, where did your household go to make a purchase of clothes or shoes?																								
<i>Those who specified a location at Q15</i>																								
Barking	0.4%	4	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.0%	0	0.0%	0
Brentwood	2.4%	25	3.4%	3	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.5%	20
Central London - West End (Oxford Street / Regent Street / Bond Street)	2.6%	27	3.4%	3	4.2%	4	1.1%	1	2.1%	2	2.1%	2	4.3%	4	2.2%	2	3.2%	3	2.2%	2	2.1%	2	2.2%	2
Collier Row	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dagenham	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.5%	6	1.0%	1	0.0%	0
Elm Park	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harold Hill	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hornchurch	1.1%	11	1.1%	1	1.0%	1	0.0%	0	6.3%	6	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0
Ilford	1.4%	14	1.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	9.5%	9	1.1%	1	1.0%	1	0.0%	0
Rainham	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.1%	1
Romford (including The Liberty, The Mall and The Brewery)	37.3%	383	50.6%	45	32.3%	31	58.9%	53	36.5%	35	16.0%	15	47.9%	45	57.8%	52	47.4%	45	34.8%	32	22.7%	22	8.6%	8
Stratford (including Westfield Stratford City)	2.9%	30	3.4%	3	3.1%	3	2.2%	2	2.1%	2	2.1%	2	2.1%	2	0.0%	0	8.4%	8	1.1%	1	2.1%	2	5.4%	5
Upminster	0.7%	7	1.1%	1	0.0%	0	0.0%	0	1.0%	1	4.3%	4	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bluewater	2.8%	29	0.0%	0	6.3%	6	1.1%	1	3.1%	3	9.6%	9	2.1%	2	1.1%	1	0.0%	0	1.1%	1	0.0%	0	6.5%	6
Lakeside	29.4%	302	15.7%	14	35.4%	34	23.3%	21	35.4%	34	52.1%	49	17.0%	16	18.9%	17	14.7%	14	26.1%	24	57.7%	56	24.7%	23
Gallows Corner Retail Park, Romford	0.6%	6	1.1%	1	2.1%	2	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	1.1%	1	1.1%	1	0.0%	0	0.0%	0
Ilford Retail Park	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Merrielands Retail Park, Dagenham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Matalan, North Street, Romford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Asda Superstore, Whalebone Lane, Chadwell Heath, RM8 1BB	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE	0.3%	3	0.0%	0	1.0%	1	1.1%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Road, Chadwell Heath, Romford, RM6 6PB	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Street, Hornchurch, RM11 1TX	0.4%	4	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.2%	2
Sainsbury's, The Brewery, Romford, RM1 1AU	0.2%	2	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	0.4%	4	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	3	0.0%	0
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	0.3%	3	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0

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	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Tesco Extra, High Road, Goodmayes, Romford, RM6 4HY	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	4.8%	49	7.9%	7	5.2%	5	2.2%	2	3.1%	3	8.5%	8
Home Catalogue	2.3%	24	1.1%	1	0.0%	0	3.3%	3	1.0%	1	0.0%	0
Other location outside study area	1.3%	13	3.4%	3	1.0%	1	0.0%	0	2.1%	2	2.1%	2
Other, zone 8	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 9	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
London (Other)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Southend	0.1%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chelmsford	0.8%	8	1.1%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Basildon	0.9%	9	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
(Don't know / can't remember)	3.9%	40	4.5%	4	5.2%	5	3.3%	3	3.1%	3	0.0%	0
Base:	1026	89	96	90	96	94	94	90	95	92	97	93

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q18 Now can you tell me where your household last made a purchase of furniture, carpets, or soft household furnishings?																								
Barking	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brentwood	0.7%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	5.0%	5
Central London - West End (Oxford Street / Regent Street / Bond Street)	0.5%	6	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	2.0%	2	0.0%	0
Dagenham	0.9%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	7.0%	7	0.0%	0	0.0%	0
Elm Park	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harold Hill	0.4%	4	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	2.0%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hornchurch	1.8%	20	3.0%	3	8.0%	8	1.0%	1	2.0%	2	4.0%	4	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Ilford	0.5%	5	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	2.0%	2	0.0%	0
Rainham	0.7%	8	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	7	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	11.7%	129	21.0%	21	17.0%	17	15.0%	15	9.0%	9	5.0%	5	14.0%	14	15.0%	15	15.0%	15	5.0%	5	7.0%	7	5.9%	6
South Ockendon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Stratford (including Westfield Stratford City)	0.5%	6	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	3.0%	3	0.0%	0	0.0%	0	0.0%	0
Upminster	7.7%	85	7.0%	7	7.0%	7	3.0%	3	6.0%	6	29.7%	30	8.0%	8	5.0%	5	3.0%	3	1.0%	1	7.0%	7	7.9%	8
Bluewater	0.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	3.0%	3
Lakeside	12.5%	138	6.0%	6	18.0%	18	8.0%	8	18.0%	18	12.9%	13	7.0%	7	4.0%	4	4.0%	4	9.0%	9	35.0%	35	15.8%	16
Chase Lane Retail Park, Ilford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Eastern Avenue West Retail Park, Romford	2.2%	24	1.0%	1	2.0%	2	4.0%	4	3.0%	3	1.0%	1	1.0%	1	10.0%	10	1.0%	1	0.0%	0	0.0%	0	1.0%	1
Gallows Corner Retail Park, Romford	6.9%	76	12.0%	12	11.0%	11	8.0%	8	6.0%	6	3.0%	3	15.0%	15	10.0%	10	4.0%	4	3.0%	3	0.0%	0	4.0%	4
Grove Farm Retail Park, Romford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ilford Retail Park	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Merriellands Retail Park, Dagenham	0.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	2.0%	2	0.0%	0
Newbury Retail Park, Horns Road, Ilford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rom Valley Way Retail Park, Romford	2.1%	23	2.0%	2	4.0%	4	4.0%	4	6.0%	6	1.0%	1	2.0%	2	3.0%	3	1.0%	1	0.0%	0	0.0%	0	0.0%	0
B&Q Roneo Corner Retail Park, Romford	0.9%	10	0.0%	0	1.0%	1	4.0%	4	1.0%	1	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	1.0%	1	1.0%	1
B&Q Tangent Link, Harold Hill, Romford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Homebase, High Road, Seven Kings, Ilford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Homebase, Rom Valley Way, Romford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Ikea, Lakeside	1.5%	17	3.0%	3	3.0%	3	1.0%	1	1.0%	1	0.0%	0	2.0%	2	3.0%	3	0.0%	0	2.0%	2	0.0%	0	2.0%	2
Tesco Extra, Bridge Road,	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Rainham, RM13 9YZ												
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	1
Internet / delivered	4.1%	45	3.0%	3	2.0%	2	1.0%	1	3.0%	3	8.9%	9
Home Catalogue	0.7%	8	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	3
TV / Interactive Shopping	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other location outside study area	0.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1
Other, zone 1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Other, zone 5	0.4%	4	0.0%	0	0.0%	0	0.0%	0	3.0%	3	1.0%	0
Other, zone 8	0.6%	7	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Other, zone 9	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 11	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	2
London (Other)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	0
Goodmayes (including retail park)	0.4%	4	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Chelmsford	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	4
Billerica	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Beckton superstores and retail parks	0.3%	3	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Basildon	1.0%	11	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	7
(Don't know / can't remember)	12.0%	132	7.0%	7	13.0%	13	11.0%	11	12.0%	12	13.9%	9
(Don't do this type of shopping)	24.8%	273	33.0%	33	11.0%	11	36.0%	36	25.0%	25	11.9%	17
Base:	1102	100	100	100	100	101	100	100	100	100	100	101

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q19 And the time before that, where did your household go to make a purchase of furniture, carpets, or soft household furnishings?																								
<i>Those who specified a location at Q18</i>																								
Barking	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brentwood	1.9%	13	0.0%	0	0.0%	0	0.0%	0	1.6%	1	1.3%	1	3.3%	2	0.0%	0	1.9%	1	0.0%	0	0.0%	0	10.7%	8
Central London - West End (Oxford Street / Regent Street / Bond Street)	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	1.7%	1	1.9%	1	0.0%	0	1.4%	1	0.0%	0
Dagenham	1.1%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	3	9.6%	5	0.0%	0	0.0%	0
Harold Hill	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	3.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hornchurch	2.9%	20	1.7%	1	14.5%	11	0.0%	0	3.2%	2	2.7%	2	0.0%	0	5.2%	3	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Ilford	0.6%	4	0.0%	0	0.0%	0	1.9%	1	0.0%	0	1.3%	1	1.7%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Rainham	1.6%	11	0.0%	0	1.3%	1	0.0%	0	1.6%	1	1.3%	1	0.0%	0	0.0%	0	1.9%	1	0.0%	0	9.7%	7	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	15.9%	111	36.7%	22	14.5%	11	17.0%	9	9.5%	6	6.7%	5	23.3%	14	22.4%	13	30.2%	16	7.7%	4	11.1%	8	4.0%	3
South Ockendon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0
Stratford (including Westfield Stratford City)	0.9%	6	1.7%	1	1.3%	1	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	1.4%	1	1.3%	1
Upminster	9.3%	65	8.3%	5	5.3%	4	1.9%	1	19.0%	12	32.0%	24	6.7%	4	6.9%	4	5.7%	3	0.0%	0	6.9%	5	4.0%	3
Bluewater	0.7%	5	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	1.9%	1	0.0%	0	2.7%	2
Lakeside	18.7%	130	8.3%	5	17.1%	13	20.8%	11	19.0%	12	18.7%	14	13.3%	8	5.2%	3	13.2%	7	15.4%	8	51.4%	37	16.0%	12
Chase Lane Retail Park, Ilford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0
Eastern Avenue West Retail Park, Romford	3.3%	23	6.7%	4	3.9%	3	9.4%	5	3.2%	2	1.3%	1	0.0%	0	12.1%	7	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Gallows Corner Retail Park, Romford	7.3%	51	11.7%	7	10.5%	8	11.3%	6	4.8%	3	2.7%	2	21.7%	13	13.8%	8	1.9%	1	3.8%	2	0.0%	0	1.3%	1
Grove Farm Retail Park, Romford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ilford Retail Park	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0
Merriellands Retail Park, Dagenham	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	3	2.8%	2	0.0%	0
Newbury Retail Park, Horns Road, Ilford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rom Valley Way Retail Park, Romford	2.0%	14	3.3%	2	1.3%	1	7.5%	4	3.2%	2	0.0%	0	1.7%	1	5.2%	3	1.9%	1	0.0%	0	0.0%	0	0.0%	0
B&Q Roneo Corner Retail Park, Romford	1.3%	9	0.0%	0	1.3%	1	9.4%	5	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	1.3%	1
Homebase, Rom Valley Way, Romford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ikea, Lakeside	2.9%	20	3.3%	2	3.9%	3	1.9%	1	7.9%	5	1.3%	1	3.3%	2	3.4%	2	0.0%	0	3.8%	2	1.4%	1	1.3%	1
Matalan, North Street, Romford	0.3%	2	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Street, Hornchurch, RM11 1TX	0.1%	1	0.0%	0	1.3%	1	0.0%	0	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0
Sainsbury's, The Brewery,	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Romford, RM1 1AU																								
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	5.9%	41	5.0%	3	3.9%	3	3.8%	2	4.8%	3	9.3%	7	5.0%	3	3.4%	2	3.8%	2	7.7%	4	2.8%	2	13.3%	10
Home Catalogue	1.3%	9	0.0%	0	0.0%	0	0.0%	0	3.2%	2	0.0%	0	3.3%	2	0.0%	0	1.9%	1	5.8%	3	0.0%	0	1.3%	1
Other location outside study area	0.9%	6	1.7%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	4.0%	3
Other, zone 1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 5	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	2	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 8	0.4%	3	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	2	0.0%	0	0.0%	0	0.0%	0
Other, zone 9	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.7%	4	0.0%	0	0.0%	0
Other, zone 11	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
London (Other)	0.6%	4	1.7%	1	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	2	0.0%	0	0.0%	0
Goodmayes (including retail park)	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	1.9%	1	0.0%	0	0.0%	0
Chelmsford	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	3
Beckton superstores and retail parks	0.9%	6	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	3	1.9%	1	1.4%	1	0.0%	0
Basildon	1.6%	11	0.0%	0	0.0%	0	1.9%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	10.7%	8
(Don't know / can't remember)	12.8%	89	10.0%	6	15.8%	12	7.5%	4	11.1%	7	14.7%	11	10.0%	6	10.3%	6	13.2%	7	19.2%	10	5.6%	4	21.3%	16
Base:		697		60		76		53		63		75		60		58		53		52		72		75

Havering Retail & Leisure Study for Peter Brett Associates

	Total		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11										
Q20 Now can you tell me where your household last made a purchase of DIY and decorating goods?																							
Brentwood	1.6%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.8%	18	
Collier Row	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	
Dagenham	1.4%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	11.0%	11	1.0%	1	0.0%	0	
Elm Park	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
Harold Hill	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	1.0%	1	0.0%	0	0.0%	0	0.0%	0	
Hornchurch	1.0%	11	0.0%	0	0.0%	0	1.0%	1	1.0%	1	4.0%	4	1.0%	1	1.0%	1	0.0%	0	2.0%	2	0.0%	0	
Ilford	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
Rainham	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	
Romford (including The Liberty, The Mall and The Brewery)	5.9%	65	9.0%	9	3.0%	3	10.0%	10	3.0%	3	4.0%	4	2.0%	2	3.0%	3	14.0%	14	4.0%	4	8.0%	8	5.0%
Upminster	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	
Lakeside	5.3%	58	0.0%	0	0.0%	0	1.0%	1	4.0%	4	13.9%	14	0.0%	0	0.0%	0	1.0%	1	5.0%	5	31.0%	31	2.0%
Abbey Retail Park, Barking	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	
Eastern Avenue West Retail Park, Romford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
Gallows Corner Retail Park, Romford	7.4%	82	8.0%	8	5.0%	5	0.0%	0	1.0%	1	8.9%	9	27.0%	27	15.0%	15	2.0%	2	0.0%	0	0.0%	0	14.9%
Grove Farm Retail Park, Romford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	
Ilford Retail Park	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	
Merrields Retail Park, Dagenham	2.5%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	15.0%	15	11.0%	11	0.0%
Rom Valley Way Retail Park, Romford	0.3%	3	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	
B&Q Roneo Corner Retail Park, Romford	28.5%	314	31.0%	31	63.0%	63	53.0%	53	67.0%	67	22.8%	23	4.0%	4	18.0%	18	14.0%	14	19.0%	19	16.0%	16	5.9%
B&Q Tangent Link, Harold Hill, Romford	11.2%	123	15.0%	15	5.0%	5	0.0%	0	1.0%	1	18.8%	19	38.0%	38	22.0%	22	1.0%	1	3.0%	3	5.0%	5	13.9%
Homebase, High Road, Seven Kings, Ilford	0.7%	8	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	7	0.0%	0	0.0%	0	
Homebase, Rom Valley Way, Romford	4.5%	50	8.0%	8	5.0%	5	11.0%	11	5.0%	5	2.0%	2	0.0%	0	10.0%	10	3.0%	3	3.0%	3	1.0%	1	2.0%
Ikea, Lakeside	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	
Wickes Extra, Hertford Road, Barking	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0	
Wickes, Brook Street, Brentwood	0.9%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	2.0%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	3.0%
Sainsbury's, High Street, Hornchurch, RM11 1TX	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%
Internet / delivered	0.8%	9	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	1.0%	1	3.0%	3	0.0%	0	2.0%	2	1.0%	1	0.0%
Home Catalogue	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	
Other location outside study area	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	
Other, zone 8	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5	0.0%	0	0.0%	0	

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Other, zone 9	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Other, zone 11	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
London (Other)	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Goodmayes (including retail park)	0.9%	10	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	6.0%	6	2.0%	2	0.0%	0	0.0%	0
Beckton superstores and retail parks	0.6%	7	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	3.0%	3	1.0%	1	0.0%	0
Basildon	1.1%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	9.9%	10
(Don't know / can't remember)	3.0%	33	4.0%	4	1.0%	1	3.0%	3	1.0%	1	4.0%	4	1.0%	1	3.0%	3	4.0%	4	6.0%	6	3.0%	3	3.0%	3
(Don't do this type of shopping)	19.5%	215	23.0%	23	15.0%	15	19.0%	19	14.0%	14	13.9%	14	21.0%	21	22.0%	22	28.0%	28	23.0%	23	17.0%	17	18.8%	19
Base:	1102		100		100		100		100		101		100		100		100		100		100		101	

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q21 And the time before that, where did your household go to make a purchase of DIY and decorating goods?																								
<i>Those who specified a location at Q20</i>																								
Barking	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Brentwood	1.9%	16	0.0%	0	0.0%	0	1.3%	1	0.0%	0	2.4%	2	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.2%	12
Collier Row	0.1%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dagenham	1.4%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	12.7%	9	2.5%	2	0.0%	0
Elm Park	0.2%	2	0.0%	0	1.2%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Grays	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Harold Hill	0.8%	7	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	3	1.3%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Hornchurch	1.4%	12	0.0%	0	0.0%	0	1.3%	1	1.2%	1	6.0%	5	1.3%	1	0.0%	0	1.5%	1	1.4%	1	2.5%	2	0.0%	0
Ilford	0.2%	2	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Rainham	0.6%	5	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	3.8%	3	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	7.6%	65	13.7%	10	2.4%	2	11.5%	9	2.4%	2	3.6%	3	5.1%	4	5.3%	4	19.1%	13	2.8%	2	13.8%	11	6.3%	5
Upminster	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Lakeside	6.7%	57	0.0%	0	1.2%	1	1.3%	1	5.9%	5	13.3%	11	0.0%	0	0.0%	0	2.9%	2	5.6%	4	38.8%	31	2.5%	2
Eastern Avenue West Retail Park, Romford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Gallows Corner Retail Park, Romford	8.5%	73	9.6%	7	8.3%	7	1.3%	1	1.2%	1	10.8%	9	25.6%	20	18.7%	14	4.4%	3	0.0%	0	0.0%	0	13.9%	11
Grove Farm Retail Park, Romford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Ilford Retail Park	0.2%	2	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Merrielands Retail Park, Dagenham	2.5%	21	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	15.5%	11	10.0%	8	0.0%	0
Rom Valley Way Retail Park, Romford	0.6%	5	0.0%	0	2.4%	2	0.0%	0	1.2%	1	0.0%	0	0.0%	0	1.3%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0
B&Q Roneo Corner Retail Park, Romford	28.8%	246	23.3%	17	58.3%	49	46.2%	36	67.1%	57	26.5%	22	3.8%	3	24.0%	18	20.6%	14	19.7%	14	13.8%	11	6.3%	5
B&Q Tangent Link, Harold Hill, Romford	12.4%	106	13.7%	10	4.8%	4	0.0%	0	2.4%	2	18.1%	15	42.3%	33	24.0%	18	0.0%	0	5.6%	4	6.3%	5	19.0%	15
Homebase, High Road, Seven Kings, Ilford	0.8%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.3%	7	0.0%	0	0.0%	0	0.0%	0
Homebase, Rom Valley Way, Romford	11.7%	100	28.8%	21	14.3%	12	30.8%	24	14.1%	12	3.6%	3	2.6%	2	20.0%	15	4.4%	3	5.6%	4	2.5%	2	2.5%	2
Wickes Extra, Hertford Road, Barking	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Wickes, Brook Street, Brentwood	2.0%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	4	9.0%	7	0.0%	0	1.5%	1	0.0%	0	0.0%	0	6.3%	5
Sainsbury's, High Street, Hornchurch, RM11 1TX	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Internet / delivered	0.8%	7	0.0%	0	0.0%	0	1.3%	1	1.2%	1	1.2%	1	1.3%	1	1.3%	1	0.0%	0	2.8%	2	0.0%	0	0.0%	0
Home Catalogue	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Other location outside study area	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	1.3%	1

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Other, zone 8	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.4%	5	0.0%	0	0.0%	0	0.0%	0
Other, zone 9	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Other, zone 11	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	3
London (Other)	0.4%	3	0.0%	0	0.0%	0	1.3%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Goodmayes (including retail park)	0.9%	8	0.0%	0	1.2%	1	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.4%	5	1.4%	1	0.0%	0	0.0%	0
Billericay	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Beckton superstores and retail parks	0.7%	6	0.0%	0	1.2%	1	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	4.2%	3	0.0%	0	0.0%	0
Basildon	1.5%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.5%	13
(Don't know / can't remember)	4.3%	37	5.5%	4	3.6%	3	0.0%	0	0.0%	0	6.0%	5	1.3%	1	4.0%	3	7.4%	5	16.9%	12	2.5%	2	2.5%	2
Base:	854		73		84		78		85		83		78		75		68		71		80		79	

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Q22 Can you tell me where you or your household last made a purchase of electrical items such as TVs, DVD players, digital cameras, MP3 players, mobile phones or computers?												
Barking	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brentwood	1.5%	17	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1
Central London - West End (Oxford Street / Regent Street / Bond Street)	0.5%	5	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	0
Dagenham	2.1%	23	0.0%	0	0.0%	0	2.0%	2	3.0%	3	0.0%	0
Elm Park	0.3%	3	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Harold Hill	0.5%	5	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1
Hornchurch	2.7%	30	3.0%	3	4.0%	4	1.0%	1	11.0%	11	4.0%	4
Ilford	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Rainham	0.7%	8	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	11.5%	127	28.0%	28	10.0%	10	23.0%	23	11.0%	11	7.9%	8
Stratford (including Westfield Stratford City)	0.5%	6	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Upminster	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Bluewater	1.1%	12	0.0%	0	2.0%	2	0.0%	0	0.0%	0	5.9%	6
Lakeside	10.8%	119	1.0%	1	10.0%	10	5.0%	5	16.0%	16	23.8%	24
Chase Lane Retail Park, Ilford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Eastern Avenue West Retail Park, Romford	6.8%	75	9.0%	9	16.0%	16	12.0%	12	2.0%	2	2.0%	2
Gallows Corner Retail Park, Romford	4.6%	51	3.0%	3	5.0%	5	6.0%	6	1.0%	1	1.0%	1
Grove Farm Retail Park, Romford	0.3%	3	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Merrilands Retail Park, Dagenham	0.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rom Valley Way Retail Park, Romford	0.3%	3	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0
B&Q Roneo Corner Retail Park, Romford	0.5%	5	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0
B&Q Tangent Link, Harold Hill, Romford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Homebase, Rom Valley Way, Romford	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Asda Superstore, Whalebone Lane, Chadwell Heath, RM8 1BB	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Morrisons, Wood Lane, Becontree Heath,	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Dagenham, RM10 7RA																								
Sainsbury's, Elm Park Avenue, Hornchurch, RM12 4RX	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Road, Chadwell Heath, Romford, RM6 6PB	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, William Hunter Way, Brentwood, CM14 4WQ	0.2%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	1.5%	16	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	12.0%	12	0.0%	0
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	1.3%	14	8.0%	8	0.0%	0	1.0%	1	1.0%	1	0.0%	0	2.0%	2	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, High Road, Goodmayes, Romford, RM6 4HY	0.5%	5	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	1.5%	16	0.0%	0	3.0%	3	4.0%	4	4.0%	4	3.0%	3	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Lakeside, West Thurrock, Grays, RM20 1TX	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Tesco, Airfield Way, Hornchurch, RM12 5AF	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	12.6%	139	10.0%	10	18.0%	18	9.0%	9	9.0%	9	15.8%	16	12.0%	12	10.0%	10	12.0%	12	13.0%	13	12.0%	12	17.8%	18
Home Catalogue	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0
Other location outside study area	0.4%	4	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1
Other, zone 1	1.0%	11	3.0%	3	3.0%	3	0.0%	0	1.0%	1	0.0%	0	2.0%	2	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Other, zone 6	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Other, zone 8	0.4%	4	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0	0.0%	0
Other, zone 11	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
London (Other)	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	1.0%	1	0.0%	0	1.0%	1
Goodmayes (including retail park)	0.8%	9	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	7	1.0%	1	0.0%	0	0.0%	0
Chelmsford	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3
Beckton superstores and retail parks	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Basildon	0.9%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.9%	10
(Don't know / can't remember)	9.8%	108	7.0%	7	12.0%	12	11.0%	11	6.0%	6	9.9%	10	11.0%	11	11.0%	11	8.0%	8	10.0%	10	7.0%	7	14.9%	15
(Don't do this type of shopping)	21.1%	232	26.0%	26	13.0%	13	19.0%	19	21.0%	21	19.8%	20	22.0%	22	28.0%	28	25.0%	25	22.0%	22	20.0%	20	15.8%	16
Base:		1102		100		100		100		100		101		100		100		100		100		100		101

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Q23 And the time before that, where you or your household last made a purchase of electrical items such as TVs, DVD players, digital cameras, MP3 players, mobile phones or computers?												
<i>Those who specified a location at Q22</i>												
Barking	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brentwood	1.4%	11	0.0%	0	0.0%	0	1.4%	1	0.0%	0	1.4%	1
Central London - West End (Oxford Street / Regent Street / Bond Street)	0.8%	6	1.5%	1	0.0%	0	0.0%	0	2.7%	2	0.0%	0
Collier Row	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dagenham	2.5%	19	0.0%	0	0.0%	0	1.4%	1	1.4%	1	0.0%	0
Elm Park	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Harold Hill	0.4%	3	0.0%	0	1.3%	1	0.0%	0	0.0%	0	1.4%	1
Hornchurch	2.9%	22	3.0%	2	2.7%	2	1.4%	1	13.7%	10	5.6%	4
Ilford	0.4%	3	0.0%	0	2.7%	2	0.0%	0	0.0%	0	0.0%	0
Rainham	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Romford (including The Liberty, The Mall and The Brewery)	13.8%	105	29.9%	20	10.7%	8	22.9%	16	9.6%	7	5.6%	4
Stratford (including Westfield Stratford City)	1.1%	8	0.0%	0	0.0%	0	0.0%	0	1.4%	1	1.4%	1
Upminster	0.3%	2	0.0%	0	0.0%	0	0.0%	0	2.8%	2	0.0%	0
Bluewater	1.1%	8	0.0%	0	1.3%	1	1.4%	1	0.0%	0	5.6%	4
Lakeside	14.8%	113	4.5%	3	16.0%	12	5.7%	4	24.7%	18	28.2%	20
Chase Lane Retail Park, Ilford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Eastern Avenue West Retail Park, Romford	8.8%	67	9.0%	6	16.0%	12	18.6%	13	5.5%	4	1.4%	1
Gallows Corner Retail Park, Romford	6.0%	46	3.0%	2	4.0%	3	10.0%	7	2.7%	2	4.2%	3
Grove Farm Retail Park, Romford	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ilford Retail Park	0.3%	2	0.0%	0	1.3%	1	0.0%	0	1.4%	1	0.0%	0
Merrielands Retail Park, Dagenham	1.3%	10	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Rom Valley Way Retail Park, Romford	0.3%	2	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
B&Q Roneo Corner Retail Park, Romford	0.8%	6	0.0%	0	0.0%	0	4.3%	3	2.7%	2	0.0%	0
B&Q Tangent Link, Harold Hill, Romford	0.4%	3	1.5%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Homebase, Rom Valley Way, Romford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1
Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	2
Sainsbury's, High Road, Chadwell Heath, Romford,	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
RM6 6PB																								
Sainsbury's, The Brewery, Romford, RM1 1AU	0.3%	2	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, William Hunter Way, Brentwood, CM14 4WQ	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	2
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	1.1%	8	0.0%	0	0.0%	0	0.0%	0	1.4%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.2%	6	0.0%	0
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	1.3%	10	9.0%	6	0.0%	0	2.9%	2	0.0%	0	0.0%	0	1.5%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, High Road, Goodmayes, Romford, RM6 4HY	0.4%	3	0.0%	0	1.3%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	1.7%	13	0.0%	0	2.7%	2	5.7%	4	2.7%	2	2.8%	2	0.0%	0	0.0%	0	4.5%	3	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Lakeside, West Thurrock, Grays, RM20 1TX	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Tesco, Airfield Way, Hornchurch, RM12 5AF	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	16.9%	129	19.4%	13	21.3%	16	7.1%	5	13.7%	10	22.5%	16	19.4%	13	14.8%	9	13.4%	9	11.8%	8	16.4%	12	25.7%	18
Home Catalogue	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	1.5%	1	1.5%	1	0.0%	0	0.0%	0
TV / Interactive Shopping	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	1.4%	1	0.0%	0
Other location outside study area	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	2	0.0%	0	0.0%	0	1.5%	1	2.9%	2	0.0%	0	1.4%	1
Other, zone 1	1.2%	9	3.0%	2	2.7%	2	0.0%	0	1.4%	1	1.4%	1	1.5%	1	1.6%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Other, zone 6	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Other, zone 8	0.4%	3	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	1.5%	1	0.0%	0	0.0%	0
London (Other)	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	3	0.0%	0	0.0%	0
Goodmayes (including retail park)	0.8%	6	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	4	1.5%	1	0.0%	0	0.0%	0
Chelmsford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Beckton superstores and retail parks	0.5%	4	0.0%	0	0.0%	0	0.0%	0	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	2	0.0%	0	0.0%	0
Basildon	1.7%	13	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.1%	12
(Don't know / can't remember)	11.4%	87	14.9%	10	12.0%	9	15.7%	11	6.8%	5	8.5%	6	13.4%	9	8.2%	5	14.9%	10	14.7%	10	5.5%	4	11.4%	8
Base:		762		67		75		70		73		71		67		61		67		68		73		70

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Q24 Can you tell me where you or your household last made a purchase of domestic appliances, such as washing machines, fridges or cookers?												
Barking	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brentwood	2.3%	25	0.0%	0	1.0%	1	0.0%	0	1.0%	1	2.0%	2
Central London - West End (Oxford Street / Regent Street / Bond Street)	0.5%	5	1.0%	1	1.0%	1	1.0%	1	0.0%	0	1.0%	1
Collier Row	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dagenham	2.1%	23	0.0%	0	1.0%	1	2.0%	2	0.0%	0	0.0%	0
Harold Hill	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Hornchurch	6.2%	68	7.0%	7	10.0%	10	4.0%	4	20.0%	20	11.9%	12
Ilford	0.4%	4	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1
Rainham	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	8.5%	94	19.0%	19	6.0%	6	14.0%	14	8.0%	8	5.9%	6
Stratford (including Westfield Stratford City)	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Upminster	0.6%	7	0.0%	0	0.0%	0	0.0%	0	2.0%	2	5.0%	5
Bluewater	1.3%	14	1.0%	1	3.0%	3	0.0%	0	1.0%	1	4.0%	4
Lakeside	8.0%	88	1.0%	1	6.0%	6	1.0%	1	11.0%	11	14.9%	15
Eastern Avenue West Retail Park, Romford	7.5%	83	13.0%	13	13.0%	13	21.0%	21	0.0%	0	0.0%	0
Gallows Corner Retail Park, Romford	4.6%	51	3.0%	3	1.0%	1	4.0%	4	2.0%	2	3.0%	3
Grove Farm Retail Park, Romford	0.2%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Ilford Retail Park	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Merriellands Retail Park, Dagenham	0.8%	9	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Rom Valley Way Retail Park, Romford	0.6%	7	0.0%	0	1.0%	1	1.0%	1	1.0%	1	0.0%	0
B&Q Roneo Corner Retail Park, Romford	0.5%	5	0.0%	0	2.0%	2	2.0%	2	1.0%	1	0.0%	0
B&Q Tangent Link, Harold Hill, Romford	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Homebase, High Road, Seven Kings, Ilford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE	0.2%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Lakeside Retail Park, Thurrock, RM20 3LP	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Street, Hornchurch, RM11 1TX	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Sainsbury's, Howard Road, Grays, RM16 6YJ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Sainsbury's, The Brewery, Romford, RM1 1AU	0.2%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	0.9%	10	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	8	0.0%	0
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	0.5%	5	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, High Road, Goodmayes, Romford, RM6 4HY	0.3%	3	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	0.3%	3	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Tesco, Airfield Way, Hornchurch, RM12 5AF	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	16.3%	180	13.0%	13	19.0%	19	11.0%	11	19.0%	19	25.7%	26	10.0%	10	12.0%	12	13.0%	13	15.0%	15	15.0%	15	26.7%	27
Home Catalogue	1.4%	15	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	2.0%	2	1.0%	1	2.0%	2	4.0%	4	1.0%	1	3.0%	3
Other, zone 6	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Other, zone 8	1.0%	11	0.0%	0	0.0%	0	2.0%	2	2.0%	2	0.0%	0	0.0%	0	0.0%	0	5.0%	5	2.0%	2	0.0%	0	0.0%	0
Other, zone 11	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
London (Other)	0.4%	4	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0
Goodmayes (including retail park)	1.2%	13	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	11.0%	11	1.0%	1	0.0%	0	0.0%	0
Chelmsford	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4
Billericay	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Beckton superstores and retail parks	0.4%	4	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0
Basildon	0.8%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.9%	8
(Don't know / can't remember)	8.1%	89	11.0%	11	13.0%	13	11.0%	11	5.0%	5	5.0%	5	13.0%	13	6.0%	6	6.0%	6	9.0%	9	5.0%	5	5.0%	5
(Don't do this type of shopping)	21.9%	241	28.0%	28	14.0%	14	21.0%	21	19.0%	19	20.8%	21	27.0%	27	31.0%	31	23.0%	23	25.0%	25	18.0%	18	13.9%	14
Base:	1102			100		100		100		100		101		100		100		100		100		100		101

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q25 And the time before that, where you or your household last made a purchase of domestic appliances, such as washing machines, fridges or cookers?																								
<i>Those who specified a location at Q24</i>																								
Barking	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	2	1.3%	1	0.0%	0
Brentwood	1.9%	15	0.0%	0	0.0%	0	0.0%	0	1.3%	1	1.3%	1	3.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.4%	11
Central London - West End (Oxford Street / Regent Street / Bond Street)	0.8%	6	1.6%	1	0.0%	0	1.5%	1	0.0%	0	1.3%	1	0.0%	0	3.2%	2	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Dagenham	3.0%	23	1.6%	1	0.0%	0	4.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	5	18.2%	12	2.6%	2	0.0%	0
Harold Hill	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hornchurch	7.5%	58	4.9%	3	13.7%	10	5.9%	4	23.7%	18	14.7%	11	3.3%	2	4.8%	3	1.4%	1	1.5%	1	6.5%	5	0.0%	0
Ilford	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	2	0.0%	0	0.0%	0	0.0%	0
Rainham	0.4%	3	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	2	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	10.4%	80	27.9%	17	6.8%	5	14.7%	10	10.5%	8	6.7%	5	10.0%	6	7.9%	5	15.5%	11	4.5%	3	9.1%	7	3.7%	3
Stratford (including Westfield Stratford City)	0.8%	6	0.0%	0	1.4%	1	0.0%	0	2.6%	2	0.0%	0	0.0%	0	1.6%	1	2.8%	2	0.0%	0	0.0%	0	0.0%	0
Upminster	0.6%	5	0.0%	0	0.0%	0	0.0%	0	1.3%	1	5.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bluewater	1.7%	13	1.6%	1	1.4%	1	1.5%	1	0.0%	0	4.0%	3	0.0%	0	1.6%	1	0.0%	0	1.5%	1	0.0%	0	6.1%	5
Lakeside	11.7%	90	4.9%	3	6.8%	5	1.5%	1	11.8%	9	21.3%	16	6.7%	4	3.2%	2	2.8%	2	10.6%	7	39.0%	30	13.4%	11
Eastern Avenue West Retail Park, Romford	9.3%	72	16.4%	10	13.7%	10	23.5%	16	1.3%	1	0.0%	0	13.3%	8	30.2%	19	7.0%	5	4.5%	3	0.0%	0	0.0%	0
Gallows Corner Retail Park, Romford	5.7%	44	1.6%	1	2.7%	2	2.9%	2	3.9%	3	1.3%	1	28.3%	17	19.0%	12	1.4%	1	1.5%	1	0.0%	0	4.9%	4
Grove Farm Retail Park, Romford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Ilford Retail Park	0.1%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Merriellands Retail Park, Dagenham	1.3%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	10.6%	7	2.6%	2	0.0%	0
Rom Valley Way Retail Park, Romford	0.6%	5	1.6%	1	1.4%	1	1.5%	1	1.3%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
B&Q Roneo Corner Retail Park, Romford	0.4%	3	0.0%	0	1.4%	1	0.0%	0	2.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q Tangent Link, Harold Hill, Romford	0.1%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Homebase, High Road, Seven Kings, Ilford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Street, Hornchurch, RM11 1TX	0.4%	3	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	0.8%	6	0.0%	0	0.0%	0	0.0%	0	2.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.2%	4	0.0%	0
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	3.3%	2	4.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, High Road, Goodmayes, Romford, RM6 4HY	0.4%	3	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	2	0.0%	0	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	0.4%	3	0.0%	0	1.4%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Tesco, Airfield Way, Hornchurch, RM12 5AF	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	20.7%	160	21.3%	13	26.0%	19	14.7%	10	18.4%	14	33.3%	25	15.0%	9	15.9%	10	14.1%	10	19.7%	13	18.2%	14	28.0%	23
Home Catalogue	1.6%	12	0.0%	0	0.0%	0	1.5%	1	2.6%	2	0.0%	0	3.3%	2	1.6%	1	1.4%	1	1.5%	1	1.3%	1	3.7%	3
Other location outside study area	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Other, zone 6	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Other, zone 8	1.3%	10	0.0%	0	0.0%	0	2.9%	2	1.3%	1	0.0%	0	0.0%	0	0.0%	0	8.5%	6	1.5%	1	0.0%	0	0.0%	0
Other, zone 11	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
London (Other)	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	1.5%	1	0.0%	0	0.0%	0
Goodmayes (including retail park)	1.0%	8	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	8.5%	6	1.5%	1	0.0%	0	0.0%	0
Chelmsford	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	2
Beckton superstores and retail parks	0.3%	2	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Basildon	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.3%	6
(Don't know / can't remember)	13.2%	102	14.8%	9	17.8%	13	22.1%	15	10.5%	8	9.3%	7	13.3%	8	3.2%	2	16.9%	12	15.2%	10	9.1%	7	13.4%	11
Base:		772		61		73		68		76		75		60		63		71		66		77		82

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q26 Can you tell me where you or your household last made a purchase of health, beauty or chemist items?																								
Barking	0.5%	6	1.0%	1	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0
Brentwood	6.4%	70	1.0%	1	0.0%	0	1.0%	1	0.0%	0	1.0%	1	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	63.4%	64
Central London - West End (Oxford Street / Regent Street / Bond Street)	1.3%	14	1.0%	1	3.0%	3	0.0%	0	1.0%	1	3.0%	3	1.0%	1	1.0%	1	3.0%	3	1.0%	1	0.0%	0	0.0%	0
Chigwell	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Collier Row	3.4%	38	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	38.0%	38	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dagenham	3.6%	40	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	8.0%	8	29.0%	29	1.0%	1	0.0%	0
Elm Park	1.6%	18	0.0%	0	5.0%	5	0.0%	0	12.0%	12	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Harold Hill	2.1%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.0%	18	3.0%	3	0.0%	0	0.0%	0	1.0%	1	1.0%	1
Hornchurch	7.4%	82	2.0%	2	45.0%	45	1.0%	1	27.0%	27	2.0%	2	3.0%	3	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Ilford	0.5%	6	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	1.0%	1	0.0%	0	0.0%	0
Rainham	3.4%	38	0.0%	0	0.0%	0	1.0%	1	4.0%	4	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	31.0%	31	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	27.8%	306	61.0%	61	13.0%	13	65.0%	65	20.0%	20	6.9%	7	25.0%	25	41.0%	41	41.0%	41	21.0%	21	11.0%	11	1.0%	1
Stratford (including Westfield Stratford City)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0
Upminster	5.4%	60	0.0%	0	2.0%	2	1.0%	1	2.0%	2	54.5%	55	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bluewater	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lakeside	4.1%	45	0.0%	0	1.0%	1	0.0%	0	5.0%	5	13.9%	14	1.0%	1	0.0%	0	2.0%	2	4.0%	4	13.0%	13	5.0%	5
Gallows Corner Retail Park, Romford	1.5%	16	1.0%	1	2.0%	2	0.0%	0	0.0%	0	1.0%	1	8.0%	8	4.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Merrielands Retail Park, Dagenham	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0
B&Q Roneo Corner Retail Park, Romford	0.2%	2	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda Superstore, Whalebone Lane, Chadwell Heath, RM8 1BB	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE	0.6%	7	3.0%	3	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Lakeside Retail Park, Thurrock, RM20 3LP	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Sainsbury's, Elm Park Avenue, Hornchurch, RM12 4RX	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Road, Chadwell Heath, Romford, RM6 6PB	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Street, Hornchurch, RM11 1TX	0.3%	3	1.0%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Howard Road, Grays, RM16 6YJ	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Sainsbury's, The Brewery, Romford, RM1 1AU	0.3%	3	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Sainsbury's, William Hunter Way, Brentwood, CM14 4WQ	0.5%	6	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	2.6%	29	0.0%	0	0.0%	0	0.0%	0	7.0%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	19.0%	19	0.0%	0
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	2.3%	25	4.0%	4	0.0%	0	0.0%	0	1.0%	1	2.0%	2	14.0%	14	3.0%	3	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Tesco Extra, High Road, Goodmayes, Romford, RM6 4HY	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	2.2%	24	2.0%	2	8.0%	8	7.0%	7	3.0%	3	1.0%	1	0.0%	0	0.0%	0	1.0%	1	1.0%	1	1.0%	1	0.0%	0
Tesco, Airfield Way, Hornchurch, RM12 5AF	0.3%	3	0.0%	0	1.0%	1	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	2.7%	30	2.0%	2	5.0%	5	0.0%	0	1.0%	1	5.0%	5	2.0%	2	2.0%	2	0.0%	0	3.0%	3	5.0%	5	5.0%	5
Home Catalogue	0.5%	6	1.0%	1	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	1.0%	1	0.0%	0
TV / Interactive Shopping	0.2%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Other location outside study area	0.5%	5	0.0%	0	1.0%	1	2.0%	2	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 1	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 3	0.9%	10	0.0%	0	0.0%	0	8.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0
Other, zone 5	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 6	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 8	1.0%	11	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.0%	10	0.0%	0	0.0%	0	0.0%	0
Other, zone 9	0.4%	4	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0
Other, zone 11	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4
London (Other)	0.4%	4	1.0%	1	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Chelmsford	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Billericay	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Basildon	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5
(Don't know / can't remember)	1.3%	14	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	1.0%	1	1.0%	1	6.0%	6	1.0%	1	0.0%	0
(Don't do this type of shopping)	10.2%	112	14.0%	14	5.0%	5	8.0%	8	8.0%	8	5.0%	5	17.0%	17	5.0%	5	14.0%	14	17.0%	17	10.0%	10	8.9%	9
Base:		1102		100		100		100		100		101		100		100		100		100		100		101

Havering Retail & Leisure Study for Peter Brett Associates

	Total		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11											
Q27 And the time before that, where did you or your household go to make a purchase of health, beauty or chemist items?																								
<i>Those who specified a location at Q26</i>																								
Barking	0.4%	4	1.2%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	2	0.0%	0	0.0%	0
Brentwood	6.6%	64	1.2%	1	0.0%	0	1.1%	1	0.0%	0	1.0%	1	6.3%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	60.9%	56
Central London - West End (Oxford Street / Regent Street / Bond Street)	1.5%	15	2.4%	2	3.2%	3	0.0%	0	1.1%	1	4.2%	4	0.0%	0	2.1%	2	1.2%	1	1.3%	1	0.0%	0	1.1%	1
Chigwell	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Collier Row	4.0%	39	2.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	39.4%	37	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dagenham	4.0%	39	0.0%	0	0.0%	0	2.2%	2	2.2%	2	0.0%	0	0.0%	0	0.0%	0	8.2%	7	33.8%	26	2.2%	2	0.0%	0
Elm Park	1.7%	17	0.0%	0	4.2%	4	0.0%	0	13.0%	12	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Grays	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Harold Hill	1.9%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.5%	17	1.1%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Hornchurch	7.8%	76	1.2%	1	34.7%	33	1.1%	1	33.7%	31	3.1%	3	3.8%	3	0.0%	0	1.2%	1	1.3%	1	2.2%	2	0.0%	0
Ilford	0.6%	6	1.2%	1	1.1%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	2.4%	2	1.3%	1	0.0%	0	0.0%	0
Rainham	3.0%	29	0.0%	0	0.0%	0	0.0%	0	3.3%	3	0.0%	0	0.0%	0	0.0%	0	1.2%	1	1.3%	1	27.0%	24	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	31.1%	304	67.1%	57	24.2%	23	67.4%	62	17.4%	16	4.2%	4	29.1%	23	41.5%	39	50.6%	43	28.6%	22	14.6%	13	2.2%	2
Stratford (including Westfield Stratford City)	0.5%	5	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	1.3%	1	1.1%	1	1.1%	1
Upminster	5.6%	55	0.0%	0	2.1%	2	1.1%	1	1.1%	1	50.0%	48	1.3%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	1.1%	1
Bluewater	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Lakeside	6.0%	59	1.2%	1	4.2%	4	3.3%	3	9.8%	9	16.7%	16	1.3%	1	0.0%	0	1.2%	1	6.5%	5	18.0%	16	3.3%	3
Gallows Corner Retail Park, Romford	2.3%	22	1.2%	1	3.2%	3	0.0%	0	0.0%	0	3.1%	3	11.4%	9	5.3%	5	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Merrielands Retail Park, Dagenham	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	3	1.1%	1	0.0%	0
Asda Superstore, Whalebone Lane, Chadwell Heath, RM8 1BB	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE	0.5%	5	1.2%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Elm Park Avenue, Hornchurch, RM12 4RX	0.1%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Road, Chadwell Heath, Romford, RM6 6PB	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.9%	5	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Street, Hornchurch, RM11 1TX	0.4%	4	1.2%	1	3.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Howard Road, Grays, RM16 6YJ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Sainsbury's, The Brewery, Romford, RM1 1AU	0.9%	9	1.2%	1	0.0%	0	2.2%	2	0.0%	0	0.0%	0	2.5%	2	1.1%	1	1.2%	1	1.3%	1	1.1%	1	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Sainsbury's, William Hunter Way, Brentwood, CM14 4WQ	0.5%	5	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	4
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	2.9%	28	0.0%	0	0.0%	0	0.0%	0	7.6%	7	1.0%	1	0.0%	0	0.0%	0	0.0%	0	3.9%	3	19.1%	17	0.0%	0
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	2.7%	26	5.9%	5	2.1%	2	0.0%	0	2.2%	2	3.1%	3	12.7%	10	3.2%	3	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Tesco Extra, High Road, Goodmayes, Romford, RM6 4HY	0.4%	4	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	3	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	1.6%	16	1.2%	1	7.4%	7	7.6%	7	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Airfield Way, Hornchurch, RM12 5AF	0.5%	5	0.0%	0	2.1%	2	0.0%	0	3.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	2.6%	25	2.4%	2	4.2%	4	0.0%	0	0.0%	0	4.2%	4	5.1%	4	2.1%	2	0.0%	0	2.6%	2	3.4%	3	4.3%	4
Home Catalogue	0.5%	5	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	1.2%	1	1.3%	1	1.1%	1	0.0%	0
TV / Interactive Shopping	0.2%	2	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Other location outside study area	0.3%	3	0.0%	0	1.1%	1	1.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 1	0.2%	2	2.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 3	1.0%	10	0.0%	0	0.0%	0	8.7%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	1.3%	1	0.0%	0	0.0%	0
Other, zone 5	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 6	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 8	1.1%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.8%	10	1.3%	1	0.0%	0	0.0%	0
Other, zone 9	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Other, zone 11	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	4
London (Other)	0.4%	4	1.2%	1	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0
Chelmsford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2
Billericay	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Beckton superstores and retail parks	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Basildon	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.7%	8
(Don't know / can't remember)	1.9%	19	0.0%	0	0.0%	0	2.2%	2	0.0%	0	3.1%	3	2.5%	2	0.0%	0	2.4%	2	5.2%	4	3.4%	3	3.3%	3
Base:		976		85		95		92		92		96		79		94		85		77		89		92

Havering Retail & Leisure Study for Peter Brett Associates

	Total		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11											
Q28 Can you tell me where you or your household last made a purchase of recreational goods such as sports equipment, bicycles, musical instruments or toys?																								
Brentwood	1.6%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.8%	17
Central London - West End (Oxford Street / Regent Street / Bond Street)	0.5%	6	1.0%	1	1.0%	1	0.0%	0	0.0%	0	2.0%	2	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Collier Row	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dagenham	0.8%	9	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	1.0%	1	6.0%	6	0.0%	0	0.0%	0
Elm Park	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hornchurch	0.8%	9	1.0%	1	3.0%	3	0.0%	0	2.0%	2	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ilford	0.4%	4	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Rainham	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	10.3%	113	20.0%	20	18.0%	18	15.0%	15	11.0%	11	5.0%	5	10.0%	10	9.0%	9	10.0%	10	8.0%	8	6.0%	6	1.0%	1
Stratford (including Westfield Stratford City)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Upminster	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bluewater	0.3%	3	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lakeside	9.8%	108	2.0%	2	12.0%	12	0.0%	0	16.0%	16	26.7%	27	4.0%	4	2.0%	2	1.0%	1	7.0%	7	36.0%	36	1.0%	1
Gallows Corner Retail Park, Romford	1.5%	16	1.0%	1	3.0%	3	1.0%	1	1.0%	1	0.0%	0	4.0%	4	4.0%	4	1.0%	1	0.0%	0	0.0%	0	1.0%	1
Grove Farm Retail Park, Romford	0.4%	4	0.0%	0	1.0%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Merrielands Retail Park, Dagenham	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	2.0%	2	0.0%	0
Rom Valley Way Retail Park, Romford	0.2%	2	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Homebase, Rom Valley Way, Romford	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Matalan, North Street, Romford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Road, Chadwell Heath, Romford, RM6 6PB	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, The Brewery, Romford, RM1 1AU	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	0.5%	5	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	0.5%	5	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Internet / delivered	6.4%	71	3.0%	3	14.0%	14	3.0%	3	6.0%	6	7.9%	8	5.0%	5	3.0%	3	5.0%	5	5.0%	5	3.0%	3	15.8%	16
Home Catalogue	0.4%	4	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
TV / Interactive Shopping	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0
Other location outside study area	0.5%	6	0.0%	0	2.0%	2	1.0%	1	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Other, zone 1	0.2%	2	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 8	1.1%	12	1.0%	1	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	1.0%	1	5.0%	5	2.0%	2	0.0%	0	0.0%	0
Other, zone 11	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
London (Other)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Beckton superstores and retail parks	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Basildon	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	2.7%	30	7.0%	7	3.0%	3	3.0%	3	0.0%	0	0.0%	0	2.0%	2	0.0%	0	5.0%	5	2.0%	2	3.0%	3	5.0%	5
(Don't do this type of shopping)	58.9%	649	59.0%	59	40.0%	40	68.0%	68	59.0%	59	48.5%	49	69.0%	69	72.0%	72	68.0%	68	63.0%	63	44.0%	44	57.4%	58
Base:	1102		100		100		100		100		101		100		100		100		100		100		101	

Havering Retail & Leisure Study for Peter Brett Associates

	Total		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	
Q29 And the time before that, where did you or your household go to make a purchase of recreational goods such as sports equipment, bicycles, musical instruments or toys?														
<i>Those who specified a location at Q28</i>														
Brentwood	4.3%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	44.7%	17
Central London - West End (Oxford Street / Regent Street / Bond Street)	0.9%	4	0.0%	0	1.8%	1	0.0%	0	0.0%	0	3.8%	2	0.0%	0
Chigwell	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0
Collier Row	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1	0.0%	0
Dagenham	1.7%	7	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	3.7%	0
Elm Park	0.5%	2	0.0%	0	0.0%	0	0.0%	0	4.9%	2	0.0%	0	0.0%	0
Grays	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0
Hornchurch	2.1%	9	0.0%	0	8.8%	5	0.0%	0	4.9%	2	3.8%	2	0.0%	0
Ilford	0.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.1%	0
Rainham	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	0
Romford (including The Liberty, The Mall and The Brewery)	25.3%	107	52.9%	18	28.1%	16	41.4%	12	22.0%	9	11.5%	6	27.6%	0
Stratford (including Westfield Stratford City)	0.5%	2	2.9%	1	0.0%	0	0.0%	0	0.0%	0	3.4%	1	0.0%	0
Upminster	0.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	3	3.4%	0
Bluewater	0.2%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lakeside	27.0%	114	14.7%	5	21.1%	12	6.9%	2	43.9%	18	51.9%	27	17.2%	4
Gallows Corner Retail Park, Romford	2.4%	10	0.0%	0	1.8%	1	0.0%	0	2.4%	1	0.0%	0	13.8%	0
Grove Farm Retail Park, Romford	0.5%	2	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	3.7%	0
Merrielands Retail Park, Dagenham	0.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	0
Newbury Retail Park, Horns Road, Ilford	0.9%	4	0.0%	0	0.0%	0	3.4%	1	0.0%	0	0.0%	0	3.6%	0
Rom Valley Way Retail Park, Romford	0.2%	1	2.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q Tangent Link, Harold Hill, Romford	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1	0.0%	0
Homebase, Rom Valley Way, Romford	0.2%	1	0.0%	0	0.0%	0	3.4%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	0.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	0.7%	3	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	7.1%	0
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	0.7%	3	0.0%	0	3.5%	2	3.4%	1	0.0%	0	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Internet / delivered	15.1%	64	8.8%	3	21.1%	12	10.3%	3	2.4%	1	17.3%	9	17.2%	5	17.9%	5	22.2%	6	8.6%	3	9.4%	5	31.6%	12
Home Catalogue	0.9%	4	0.0%	0	0.0%	0	3.4%	1	0.0%	0	1.9%	1	3.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1
TV / Interactive Shopping	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1	1.9%	1	0.0%	0
Other location outside study area	1.2%	5	0.0%	0	5.3%	3	3.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0
Other, zone 1	0.5%	2	2.9%	1	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 8	3.1%	13	5.9%	2	0.0%	0	17.2%	5	0.0%	0	0.0%	0	0.0%	0	3.6%	1	11.1%	3	5.7%	2	0.0%	0	0.0%	0
Other, zone 11	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1
London (Other)	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	1	0.0%	0	0.0%	0	0.0%	0
Goodmayes (including retail park)	0.2%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chelmsford	0.5%	2	2.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1
Beckton superstores and retail parks	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0
Basildon	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	4.0%	17	5.9%	2	1.8%	1	6.9%	2	12.2%	5	1.9%	1	0.0%	0	7.1%	2	0.0%	0	5.7%	2	0.0%	0	5.3%	2
Base:		423		34		57		29		41		52		29		28		27		35		53		38

Havering Retail & Leisure Study for Peter Brett Associates

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
Q30 And where was the last purchase of other non-food items such as books, CDs, jewellery or china and glass items?																								
Barking	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brentwood	2.2%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	22.8%	23
Central London - West End (Oxford Street / Regent Street / Bond Street)	0.5%	6	2.0%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Collier Row	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dagenham	1.0%	11	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	3.0%	3	6.0%	6	0.0%	0	0.0%	0
Elm Park	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harold Hill	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hornchurch	0.6%	7	0.0%	0	1.0%	1	0.0%	0	4.0%	4	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Ilford	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	1.0%	1	0.0%	0
Rainham	0.6%	7	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	6	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	18.2%	201	33.0%	33	24.0%	24	36.0%	36	18.0%	18	3.0%	3	12.0%	12	26.0%	26	25.0%	25	17.0%	17	6.0%	6	1.0%	1
Upminster	1.4%	15	1.0%	1	0.0%	0	0.0%	0	0.0%	0	12.9%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Bluewater	0.3%	3	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Lakeside	5.1%	56	0.0%	0	3.0%	3	2.0%	2	9.0%	9	19.8%	20	1.0%	1	0.0%	0	0.0%	0	3.0%	3	17.0%	17	1.0%	1
Eastern Avenue West Retail Park, Romford	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gallows Corner Retail Park, Romford	0.5%	5	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Merrielands Retail Park, Dagenham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE	0.3%	3	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Road, Chadwell Heath, Romford, RM6 6PB	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Street, Hornchurch, RM11 1TX	0.3%	3	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Sainsbury's, The Brewery, Romford, RM1 1AU	0.3%	3	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	0.9%	10	0.0%	0	0.0%	0	0.0%	0	5.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5	0.0%	0
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	0.4%	4	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, High Road, Goodmayes, Romford, RM6 4HY	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	0.4%	4	1.0%	1	2.0%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Airfield Way,	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Hornchurch, RM12 5AF																								
Internet / delivered	28.2%	311	26.0%	26	42.0%	42	17.0%	17	21.0%	21	37.6%	38	25.0%	25	26.0%	26	22.0%	22	27.0%	27	25.0%	25	41.6%	42
Home Catalogue	0.2%	2	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
TV / Interactive Shopping	0.5%	5	1.0%	1	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Other location outside study area	0.2%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Other, zone 6	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 9	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 11	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
London (Other)	0.2%	2	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Southend	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chelmsford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Basildon	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
(Don't know / can't remember)	3.1%	34	0.0%	0	3.0%	3	5.0%	5	1.0%	1	6.9%	7	4.0%	4	3.0%	3	4.0%	4	4.0%	4	0.0%	0	3.0%	3
(Don't do this type of shopping)	32.5%	358	30.0%	30	20.0%	20	34.0%	34	33.0%	33	16.8%	17	46.0%	46	39.0%	39	40.0%	40	42.0%	42	35.0%	35	21.8%	22
Base:	1102		100		100		100		100		101		100		100		100		100		100		101	

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q31 And the time before that, where did you or your household go to make a purchase of other non-food items such as books, CDs, jewellery or china and glass items?																								
<i>Those who specified a location at Q30</i>																								
Barking	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brentwood	3.5%	25	1.4%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	28.9%	22
Central London - West End (Oxford Street / Regent Street / Bond Street)	1.1%	8	2.9%	2	1.3%	1	0.0%	0	1.5%	1	1.3%	1	0.0%	0	0.0%	0	5.4%	3	0.0%	0	0.0%	0	0.0%	0
Collier Row	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dagenham	1.7%	12	1.4%	1	0.0%	0	1.6%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0	5.4%	3	11.1%	6	0.0%	0	0.0%	0
Harold Hill	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hornchurch	1.0%	7	0.0%	0	2.6%	2	0.0%	0	3.0%	2	1.3%	1	2.0%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0
Ilford	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0
Rainham	1.1%	8	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.8%	7	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	27.7%	197	50.0%	35	24.7%	19	57.4%	35	22.7%	15	3.9%	3	22.0%	11	51.7%	30	42.9%	24	27.8%	15	10.8%	7	3.9%	3
Stratford (including Westfield Stratford City)	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0
Upminster	2.3%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.2%	14	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Bluewater	0.3%	2	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Lakeside	11.5%	82	2.9%	2	11.7%	9	3.3%	2	21.2%	14	31.2%	24	8.0%	4	1.7%	1	1.8%	1	7.4%	4	29.2%	19	2.6%	2
Eastern Avenue West Retail Park, Romford	0.3%	2	1.4%	1	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gallows Corner Retail Park, Romford	0.8%	6	0.0%	0	3.9%	3	0.0%	0	0.0%	0	0.0%	0	2.0%	1	1.7%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Asda Superstore, Whalebone Lane, Chadwell Heath, RM8 1BB	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE	0.3%	2	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Street, Hornchurch, RM11 1TX	0.3%	2	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0
Sainsbury's, The Brewery, Romford, RM1 1AU	0.4%	3	1.4%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	1.7%	12	0.0%	0	0.0%	0	0.0%	0	9.1%	6	0.0%	0	2.0%	1	0.0%	0	0.0%	0	1.9%	1	6.2%	4	0.0%	0
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	0.7%	5	1.4%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0	4.0%	2	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, High Road, Goodmayes, Romford, RM6 4HY	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	0.6%	4	1.4%	1	2.6%	2	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Airfield Way,	0.4%	3	0.0%	0	0.0%	0	0.0%	0	3.0%	2	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Hornchurch, RM12 5AF																								
Internet / delivered	38.0%	270	28.6%	20	45.5%	35	26.2%	16	28.8%	19	40.3%	31	44.0%	22	36.2%	21	37.5%	21	46.3%	25	30.8%	20	52.6%	40
Home Catalogue	0.6%	4	2.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0
TV / Interactive Shopping	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	3	0.0%	0
Other location outside study area	0.4%	3	1.4%	1	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 6	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 11	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	2
Southend	0.1%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chelmsford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Basildon	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
(Don't know / can't remember)	2.3%	16	2.9%	2	2.6%	2	4.9%	3	1.5%	1	0.0%	0	2.0%	1	0.0%	0	1.8%	1	1.9%	1	4.6%	3	2.6%	2
Base:		710		70		77		61		66		77		50		58		56		54		65		76
Q32 Do you visit Romford town centre regularly for shopping, leisure or work?																								
Yes	60.7%	669	87.0%	87	64.0%	64	81.0%	81	76.0%	76	28.7%	29	62.0%	62	75.0%	75	72.0%	72	53.0%	53	49.0%	49	20.8%	21
No	39.3%	433	13.0%	13	36.0%	36	19.0%	19	24.0%	24	71.3%	72	38.0%	38	25.0%	25	28.0%	28	47.0%	47	51.0%	51	79.2%	80
Base:		1102		100		100		100		100		101		100		100		100		100		100		101
Mean score [Times a week]: Everyday / daily = 7, 2 - 3 times a week = 2.5, Once a week = 1, Once a fortnight = 0.5, Once a month = 0.25, Once every 2 - 3 months = 0.1, Once every 6 months = 0.038, Once a year = 0.019, Less often = 0.01																								
Q32AHow often do you visit Romford town centre?																								
Those who visit Romford town centre at Q32																								
Everyday / daily	4.8%	32	11.5%	10	3.1%	2	9.9%	8	0.0%	0	3.4%	1	4.8%	3	2.7%	2	4.2%	3	1.9%	1	0.0%	0	9.5%	2
2 – 3 times a week	18.1%	121	35.6%	31	10.9%	7	21.0%	17	7.9%	6	6.9%	2	14.5%	9	25.3%	19	18.1%	13	26.4%	14	6.1%	3	0.0%	0
Once a week	32.7%	219	33.3%	29	26.6%	17	44.4%	36	30.3%	23	10.3%	3	33.9%	21	37.3%	28	40.3%	29	22.6%	12	32.7%	16	23.8%	5
Once a fortnight	14.8%	99	5.7%	5	18.8%	12	9.9%	8	17.1%	13	13.8%	4	11.3%	7	21.3%	16	16.7%	12	18.9%	10	18.4%	9	14.3%	3
Once a month	17.9%	120	9.2%	8	29.7%	19	7.4%	6	26.3%	20	44.8%	13	27.4%	17	9.3%	7	15.3%	11	11.3%	6	16.3%	8	23.8%	5
Once every 2 - 3 months	6.3%	42	2.3%	2	7.8%	5	1.2%	1	9.2%	7	13.8%	4	6.5%	4	1.3%	1	4.2%	3	7.5%	4	16.3%	8	14.3%	3
Once every 6 months	2.1%	14	1.1%	1	1.6%	1	0.0%	0	3.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	3	8.2%	4	9.5%	2
Once a year	0.7%	5	0.0%	0	0.0%	0	1.2%	1	1.3%	1	3.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	4.8%	1
Less often	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	2.4%	16	1.1%	1	1.6%	1	4.9%	4	2.6%	2	3.4%	1	1.6%	1	2.7%	2	1.4%	1	5.7%	3	0.0%	0	0.0%	0
Mean:		1.28		2.11		0.96		1.82		0.69		0.76		1.20		1.37		1.30		1.22		0.64		1.06
Base:		669		87		64		81		76		29		62		75		72		53		49		21

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q32BWhat do you like about Romford town centre? [MR]																								
<i>Those who visit Romford town centre at Q32</i>																								
Close to home	36.9%	247	56.3%	49	37.5%	24	35.8%	29	27.6%	21	27.6%	8	50.0%	31	48.0%	36	43.1%	31	13.2%	7	18.4%	9	9.5%	2
Close to work / en route to work	2.1%	14	4.6%	4	0.0%	0	0.0%	0	1.3%	1	10.3%	3	0.0%	0	0.0%	0	0.0%	0	9.4%	5	0.0%	0	4.8%	1
Easily accessible by foot / cycle	1.8%	12	1.1%	1	3.1%	2	6.2%	5	1.3%	1	0.0%	0	1.6%	1	1.3%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Good and / or free car parking	3.1%	21	2.3%	2	3.1%	2	3.7%	3	5.3%	4	3.4%	1	1.6%	1	2.7%	2	1.4%	1	5.7%	3	2.0%	1	4.8%	1
Good bus service / accessible public transport	6.4%	43	3.4%	3	1.6%	1	6.2%	5	6.6%	5	6.9%	2	12.9%	8	8.0%	6	8.3%	6	1.9%	1	12.2%	6	0.0%	0
Markets	7.5%	50	3.4%	3	6.3%	4	6.2%	5	13.2%	10	13.8%	4	3.2%	2	6.7%	5	6.9%	5	7.5%	4	12.2%	6	9.5%	2
Good range of chain / well known stores	28.4%	190	14.9%	13	43.8%	28	32.1%	26	26.3%	20	20.7%	6	24.2%	15	22.7%	17	36.1%	26	47.2%	25	20.4%	10	19.0%	4
Good range of independent stores	16.4%	110	18.4%	16	28.1%	18	11.1%	9	14.5%	11	6.9%	2	16.1%	10	9.3%	7	20.8%	15	20.8%	11	14.3%	7	19.0%	4
Restaurants / cafes	4.3%	29	3.4%	3	9.4%	6	0.0%	0	2.6%	2	3.4%	1	1.6%	1	1.3%	1	8.3%	6	9.4%	5	6.1%	3	4.8%	1
Bars / pubs / clubs	0.9%	6	1.1%	1	3.1%	2	0.0%	0	1.3%	1	0.0%	0	1.6%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Leisure facilities	0.7%	5	0.0%	0	3.1%	2	1.2%	1	0.0%	0	3.4%	1	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0
Good range of services (bank, library, hairdresser etc.)	1.5%	10	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1	1.3%	1	2.8%	2	3.8%	2	6.1%	3	0.0%	0
Good prices	0.9%	6	0.0%	0	1.6%	1	1.2%	1	1.3%	1	3.4%	1	1.6%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Good disabled access	0.1%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Attractive environment	7.2%	48	6.9%	6	7.8%	5	2.5%	2	6.6%	5	10.3%	3	6.5%	4	12.0%	9	12.5%	9	1.9%	1	6.1%	3	4.8%	1
Cleanliness	0.9%	6	0.0%	0	0.0%	0	1.2%	1	1.3%	1	0.0%	0	1.6%	1	1.3%	1	0.0%	0	3.8%	2	0.0%	0	0.0%	0
Interesting activities / promotional events	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Safe and secure	0.6%	4	0.0%	0	0.0%	0	0.0%	0	3.9%	3	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Compact centre	3.7%	25	3.4%	3	4.7%	3	1.2%	1	6.6%	5	0.0%	0	6.5%	4	1.3%	1	2.8%	2	3.8%	2	6.1%	3	4.8%	1
Undercover / sheltered areas	2.8%	19	1.1%	1	0.0%	0	3.7%	3	2.6%	2	6.9%	2	1.6%	1	1.3%	1	4.2%	3	5.7%	3	0.0%	0	14.3%	3
Familiarity	1.9%	13	0.0%	0	0.0%	0	7.4%	6	1.3%	1	3.4%	1	3.2%	2	2.7%	2	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Easy to get to	0.9%	6	0.0%	0	1.6%	1	3.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	4.8%	1
Friendly people	1.0%	7	1.1%	1	1.6%	1	1.2%	1	1.3%	1	0.0%	0	1.6%	1	1.3%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Close to family	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	1
Not too busy	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0
Nothing / very little (Don't know)	14.8%	99	14.9%	13	10.9%	7	18.5%	15	22.4%	17	24.1%	7	12.9%	8	13.3%	10	2.8%	2	9.4%	5	20.4%	10	23.8%	5
	0.9%	6	1.1%	1	1.6%	1	0.0%	0	1.3%	1	0.0%	0	1.6%	1	1.3%	1	0.0%	0	0.0%	0	2.0%	1	0.0%	0
Base:		669		87		64		81		76		29		62		75		72		53		49		21

Havering Retail & Leisure Study for Peter Brett Associates

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
Q32C Can I ask, what things could be improved about Romford town centre? [MR]																								
Those who visit Romford town centre at Q32																								
More parking	7.3%	49	6.9%	6	9.4%	6	6.2%	5	6.6%	5	10.3%	3	4.8%	3	9.3%	7	8.3%	6	3.8%	2	10.2%	5	4.8%	1
More secure parking	0.4%	3	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	2.0%	1	0.0%	0
Cheaper parking	12.9%	86	11.5%	10	26.6%	17	6.2%	5	21.1%	16	17.2%	5	8.1%	5	6.7%	5	9.7%	7	7.5%	4	22.4%	11	4.8%	1
More accessible car parking	3.1%	21	3.4%	3	4.7%	3	1.2%	1	3.9%	3	3.4%	1	3.2%	2	2.7%	2	2.8%	2	0.0%	0	6.1%	3	4.8%	1
More frequent bus services to the centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
More reliable / comfortable bus services	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0
New / relocated bus stops	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Better signposting within the Centre	0.1%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More priority for pedestrians	0.3%	2	0.0%	0	1.6%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improved access for wheelchair and pushchair users	1.0%	7	2.3%	2	1.6%	1	2.5%	2	0.0%	0	0.0%	0	1.6%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Cleaner Streets / removal of litter	4.0%	27	9.2%	8	4.7%	3	1.2%	1	3.9%	3	3.4%	1	3.2%	2	8.0%	6	0.0%	0	0.0%	0	0.0%	0	14.3%	3
More shelter from wind / rain	1.0%	7	1.1%	1	3.1%	2	2.5%	2	1.3%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Improve appearance / environment of centre	3.0%	20	3.4%	3	6.3%	4	2.5%	2	3.9%	3	0.0%	0	3.2%	2	0.0%	0	1.4%	1	5.7%	3	0.0%	0	9.5%	2
Improved security measures / more CCTV / more police	1.5%	10	1.1%	1	0.0%	0	1.2%	1	1.3%	1	0.0%	0	6.5%	4	0.0%	0	1.4%	1	1.9%	1	2.0%	1	0.0%	0
More control on alcohol / drinkers / drug users	1.2%	8	2.3%	2	1.6%	1	2.5%	2	1.3%	1	0.0%	0	1.6%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
More control on other anti-social behaviour	1.6%	11	3.4%	3	0.0%	0	2.5%	2	1.3%	1	0.0%	0	6.5%	4	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Better street furniture / floral displays	2.2%	15	2.3%	2	0.0%	0	1.2%	1	1.3%	1	0.0%	0	3.2%	2	6.7%	5	1.4%	1	1.9%	1	2.0%	1	4.8%	1
More green spaces / areas	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More national multiple (high street chain) retailers	2.2%	15	3.4%	3	0.0%	0	4.9%	4	0.0%	0	3.4%	1	1.6%	1	1.3%	1	6.9%	5	0.0%	0	0.0%	0	0.0%	0
Bigger / better supermarket	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	3	0.0%	0	1.9%	1	0.0%	0	0.0%	0
More independent shops	2.4%	16	2.3%	2	4.7%	3	0.0%	0	1.3%	1	0.0%	0	3.2%	2	4.0%	3	6.9%	5	0.0%	0	0.0%	0	0.0%	0
Better choice of shops in general	3.6%	24	0.0%	0	3.1%	2	4.9%	4	6.6%	5	0.0%	0	0.0%	0	2.7%	2	11.1%	8	5.7%	3	0.0%	0	0.0%	0
Better quality of shops	2.4%	16	2.3%	2	1.6%	1	2.5%	2	2.6%	2	0.0%	0	0.0%	0	4.0%	3	6.9%	5	1.9%	1	0.0%	0	0.0%	0
Improvement to the market	7.6%	51	9.2%	8	6.3%	4	8.6%	7	11.8%	9	0.0%	0	8.1%	5	5.3%	4	6.9%	5	5.7%	3	10.2%	5	4.8%	1
More / better eating places	0.9%	6	3.4%	3	1.6%	1	0.0%	0	1.3%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fewer bars / nightclubs	0.4%	3	1.1%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better leisure facilities	1.0%	7	3.4%	3	0.0%	0	0.0%	0	3.9%	3	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More family oriented facilities	0.4%	3	1.1%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
More secure children`s play	0.3%	2	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Haverling Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
areas																								
Fewer closed shops	0.7%	5	3.4%	3	0.0%	0	1.2%	1	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More public toilets	0.7%	5	0.0%	0	1.6%	1	2.5%	2	1.3%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better range of services	0.9%	6	3.4%	3	0.0%	0	1.2%	1	1.3%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fewer people / too busy	0.6%	4	1.1%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	1.9%	1	0.0%	0	0.0%	0
Make it more compact / shops are too spread out	1.2%	8	3.4%	3	0.0%	0	1.2%	1	0.0%	0	3.4%	1	1.6%	1	1.3%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0
(Don't know)	4.8%	32	3.4%	3	1.6%	1	8.6%	7	1.3%	1	10.3%	3	1.6%	1	6.7%	5	1.4%	1	9.4%	5	8.2%	4	4.8%	1
(None mentioned)	46.3%	310	36.8%	32	40.6%	26	45.7%	37	40.8%	31	44.8%	13	51.6%	32	45.3%	34	50.0%	36	56.6%	30	51.0%	25	66.7%	14
Base:		669		87		64		81		76		29		62		75		72		53		49		21

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Q33 In which town, village or out-of-town location does your household spend most money on restaurants?												
Barking	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bluewater	0.2%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	1
Brentwood	9.3%	102	4.0%	4	3.0%	3	3.0%	3	4.0%	4	7.9%	53
Central London - West End (Oxford Street / Regent Street / Bond Street)	6.2%	68	9.0%	9	9.0%	9	3.0%	3	3.0%	3	6.9%	5
Chigwell	0.7%	8	1.0%	1	0.0%	0	1.0%	1	0.0%	0	1.0%	0
Collier Row	0.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	0
Dagenham	1.7%	19	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Grays	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harold Hill	0.3%	3	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Hornchurch	15.7%	173	16.0%	16	49.0%	49	24.0%	24	40.0%	40	11.9%	0
Ilford	0.6%	7	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Lakeside	3.4%	38	1.0%	1	4.0%	4	2.0%	2	5.0%	5	1.0%	1
Rainham	1.7%	19	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	17.3%	191	29.0%	29	15.0%	15	29.0%	29	10.0%	10	2.0%	1
Stratford (including Westfield Stratford City)	0.3%	3	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	1
Upminster	6.1%	67	0.0%	0	2.0%	2	0.0%	0	7.0%	7	50.5%	2
Abroad	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0
Barkingside	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Basildon	0.6%	7	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	5
Beckton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Billericay	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	3
Blackmore	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Canterbury	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chadwell Heath	0.9%	10	1.0%	1	0.0%	0	2.0%	2	0.0%	0	5.0%	0
Chelmsford	0.2%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	1
Clacton-on-Sea	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cranham	0.2%	2	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Dartford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
East Ham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Edmonton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0
Epping	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Gidea Park	0.2%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Great Warley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0
Greenwich	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Guildford	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Hatfield Peverel	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	1
Heathrow Airport	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Hutton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	1
Laindon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0
Navestock	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Newbury Park	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Ongar	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Shenfield	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Shoeburyness	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	1	0.0%	1	0.0%	0	0.0%	0
Southend-on-Sea	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stanford Rivers	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waltham Cross	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Woodford Green	0.3%	3	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0
(Don't know / varies)	8.5%	94	11.0%	11	0.0%	0	8.0%	8	8.0%	8	3.0%	3	7.0%	7	8.0%	8	11.0%	11	14.0%	14	7.0%	7	16.8%	17
(Don't do this activity)	22.1%	244	24.0%	24	15.0%	15	21.0%	21	19.0%	19	10.9%	11	39.0%	39	32.0%	32	32.0%	32	22.0%	22	23.0%	23	5.9%	6
Base:	1102		100		100		100		100		101		100		100		100		100		100		101	

Havering Retail & Leisure Study for Peter Brett Associates

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
Q34 In which town, village or out-of-town location does your household spend most money on cafes / pubs / bars?																								
Barking	0.5%	5	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0	0.0%	0
Bluewater	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Brentwood	6.7%	74	2.0%	2	2.0%	2	2.0%	2	2.0%	2	3.0%	3	7.0%	7	2.0%	2	0.0%	0	1.0%	1	2.0%	2	50.5%	51
Central London - West End (Oxford Street / Regent Street / Bond Street)	3.6%	40	6.0%	6	5.0%	5	1.0%	1	2.0%	2	4.0%	4	5.0%	5	3.0%	3	6.0%	6	4.0%	4	2.0%	2	2.0%	2
Chigwell	0.2%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Collier Row	1.3%	14	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.0%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dagenham	1.4%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	11.0%	11	2.0%	2	0.0%	0
Elm Park	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Harold Hill	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hornchurch	11.4%	126	7.0%	7	38.0%	38	11.0%	11	41.0%	41	5.0%	5	2.0%	2	3.0%	3	2.0%	2	3.0%	3	14.0%	14	0.0%	0
Ilford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Lakeside	1.1%	12	0.0%	0	2.0%	2	0.0%	0	1.0%	1	1.0%	1	0.0%	0	1.0%	1	0.0%	0	1.0%	1	6.0%	6	0.0%	0
Rainham	1.5%	16	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.0%	13	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	15.1%	166	34.0%	34	19.0%	19	25.0%	25	10.0%	10	1.0%	1	18.0%	18	10.0%	10	25.0%	25	12.0%	12	11.0%	11	1.0%	1
Stratford (including Westfield Stratford City)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0
Upminster	5.2%	57	0.0%	0	3.0%	3	1.0%	1	3.0%	3	46.5%	47	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1
Abroad	0.2%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Basildon	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bath	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Becontree	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Chadwell Heath	1.2%	13	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.0%	9	3.0%	3	0.0%	0	0.0%	0
Chelmsford	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Clacton-on-Sea	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
East Ham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Forest Gate	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Gidea Park	0.5%	6	2.0%	2	2.0%	2	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Great Warley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Greenwich	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harold Wood	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Havering-atte-Bower	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Heacham, King's Lynn	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hutton	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Ingatestone	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Margaretting Tye	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Navestock	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rush Green	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shenfield	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3
Stock	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
West Hanningfield	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Woodford Green	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
(Don't know / varies)	5.1%	56	6.0%	6	1.0%	1	5.0%	5	3.0%	3	6.9%	7	5.0%	5	3.0%	3	5.0%	5	8.0%	8	4.0%	4	8.9%	9
(Don't do this activity)	41.7%	460	38.0%	38	26.0%	26	51.0%	51	34.0%	34	28.7%	29	53.0%	53	60.0%	60	45.0%	45	51.0%	51	43.0%	43	29.7%	30
Base:		1102		100		100		100		100		101		100		100		100		100		100		101

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q35 In which town, village or out-of-town location does your household spend most money on the cinema / theatre?																								
Brookside Theatre, Eastern Road, Romford	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central London (West End)	10.7%	118	14.0%	14	10.0%	10	5.0%	5	10.0%	10	15.8%	16	9.0%	9	4.0%	4	9.0%	9	7.0%	7	10.0%	10	23.8%	24
Cineworld, Ilford	0.4%	4	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0
Kenneth More Theatre, Oakfield Road, Ilford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Odeon, West Thurrock	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Premiere Cinema, Mercury Mall, Romford	8.5%	94	20.0%	20	15.0%	15	16.0%	16	10.0%	10	5.0%	5	11.0%	11	7.0%	7	3.0%	3	2.0%	2	4.0%	4	1.0%	1
Queens Theatre, Billet Lane, Hornchurch	3.1%	34	2.0%	2	3.0%	3	3.0%	3	6.0%	6	4.0%	4	3.0%	3	5.0%	5	2.0%	2	1.0%	1	5.0%	5	0.0%	0
Showcase Cinema, Bluewater	0.3%	3	0.0%	0	1.0%	1	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stratford Picture House, Stratford	0.2%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Theatre Royal, Stratford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Vue, Dagenham Leisure Park, Dagenham	3.2%	35	0.0%	0	1.0%	1	0.0%	0	2.0%	2	0.0%	0	0.0%	0	1.0%	1	3.0%	3	14.0%	14	14.0%	14	0.0%	0
Vue, Lakeside Shopping Centre, Thurrock	6.8%	75	0.0%	0	4.0%	4	1.0%	1	7.0%	7	31.7%	32	2.0%	2	4.0%	4	0.0%	0	6.0%	6	13.0%	13	5.9%	6
Vue, The Brewery, Romford	19.3%	213	25.0%	25	36.0%	36	27.0%	27	20.0%	20	9.9%	10	14.0%	14	23.0%	23	20.0%	20	19.0%	19	11.0%	11	7.9%	8
Vue, Westfield Stratford City	0.2%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Abroad	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Apollo, Piccadilly Circus, Regent Street, London	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
BFI IMAX, Charlie Chaplin Walk, Southwark	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Empire Cinemas, Festival Leisure Park, Basildon	2.5%	27	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	23.8%	24
New Barbican Cinemas, Silk Street, Barbican Centre, London	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Odeon, Head Street, Colchester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Odeon, High Road, South Woodford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Odeon, Kings Head Walk, Chelmsford	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Odeon, London Road, Southend-on-Sea	0.2%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Odeon, Parkway, Camden Town	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Showcase Cinemas, Jenkins Lane, Barking	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0
(Don't know / varies)	3.0%	33	5.0%	5	1.0%	1	1.0%	1	1.0%	1	1.0%	1	5.0%	5	3.0%	3	3.0%	3	4.0%	4	3.0%	3	5.9%	6

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
(Don't do this activity)	39.6%	436	34.0%	34	26.0%	26	45.0%	45	40.0%	40	24.8%	25	50.0%	50	50.0%	50	53.0%	53	43.0%	43	40.0%	40	29.7%	30
Base:	1102		100		100		100		100		101		100		100		100		100		101			
Q36 In which town, village or out-of-town location does your household spend most money on art galleries & museums?																								
Central London - West End (Oxford Street / Regent Street / Bond Street)	43.0%	474	49.0%	49	54.0%	54	43.0%	43	35.0%	35	65.3%	66	29.0%	29	29.0%	29	40.0%	40	32.0%	32	44.0%	44	52.5%	53
Dagenham	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Hornchurch	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	0.8%	9	2.0%	2	0.0%	0	1.0%	1	0.0%	0	1.0%	1	1.0%	1	2.0%	2	1.0%	1	1.0%	1	0.0%	0	0.0%	0
Abroad	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Dulwich	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Duxford	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Greenwich	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lambeth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Margate	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rochester	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Southend-on-Sea	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
York	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.5%	17	5.0%	5	0.0%	0	1.0%	1	1.0%	1	0.0%	0	1.0%	1	1.0%	1	0.0%	0	4.0%	4	1.0%	1	3.0%	3
(Don't do this activity)	53.3%	587	43.0%	43	45.0%	45	54.0%	54	61.0%	61	30.7%	31	67.0%	67	67.0%	67	56.0%	56	63.0%	63	55.0%	55	44.6%	45
Base:	1102		100		100		100		100		101		100		100		100		100		101			

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q37 In which town, village or out-of-town location does your household spend most money on bingo / casino / bookmakers?																								
Brentwood	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Central London - West End (Oxford Street / Regent Street / Bond Street)	0.5%	5	0.0%	0	1.0%	1	1.0%	1	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Collier Row	0.5%	5	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dagenham	1.7%	19	1.0%	1	0.0%	0	2.0%	2	2.0%	2	1.0%	1	0.0%	0	0.0%	0	1.0%	1	8.0%	8	4.0%	4	0.0%	0
Elm Park	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Hornchurch	1.9%	21	2.0%	2	5.0%	5	1.0%	1	5.0%	5	3.0%	3	3.0%	3	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Rainham	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	3.0%	3	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	1.9%	21	3.0%	3	1.0%	1	5.0%	5	0.0%	0	0.0%	0	1.0%	1	2.0%	2	3.0%	3	3.0%	3	3.0%	3	0.0%	0
Stratford (including Westfield Stratford City)	0.7%	8	1.0%	1	2.0%	2	2.0%	2	1.0%	1	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Upminster	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Barkingside	0.1%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chadwell Heath	0.4%	4	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	1.0%	1	0.0%	0	0.0%	0
Southend-on-Sea	0.7%	8	0.0%	0	2.0%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0	1.0%	1	0.0%	0	1.0%	1	1.0%	1	1.0%	1
Westcliffe-on-Sea	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	0.5%	5	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	1.0%	1	1.0%	1
(Don't do this activity)	90.2%	994	92.0%	92	89.0%	89	87.0%	87	90.0%	90	90.1%	91	93.0%	93	92.0%	92	91.0%	91	85.0%	85	87.0%	87	96.0%	97
Base:	1102			100		100		100		100		101		100		100		100		100		100		101

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q38 In which town, village or out-of-town location does your household spend most money on health & fitness?																								
Barking	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Brentwood	3.9%	43	0.0%	0	1.0%	1	0.0%	0	0.0%	0	9.9%	10	2.0%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	28.7%	29
Central London - West End (Oxford Street / Regent Street / Bond Street)	0.5%	6	0.0%	0	1.0%	1	1.0%	1	0.0%	0	1.0%	1	2.0%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Chigwell	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Collier Row	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dagenham	2.9%	32	0.0%	0	0.0%	0	4.0%	4	2.0%	2	0.0%	0	0.0%	0	0.0%	0	9.0%	9	13.0%	13	4.0%	4	0.0%	0
Elm Park	0.2%	2	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Grays	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Harold Hill	2.1%	23	3.0%	3	0.0%	0	0.0%	0	1.0%	1	3.0%	3	11.0%	11	5.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hornchurch	5.6%	62	3.0%	3	25.0%	25	3.0%	3	20.0%	20	5.0%	5	1.0%	1	2.0%	2	0.0%	0	0.0%	0	3.0%	3	0.0%	0
Ilford	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	2.0%	2	1.0%	1	0.0%	0	0.0%	0
Lakeside	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Rainham	0.7%	8	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	7	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	5.5%	61	20.0%	20	1.0%	1	16.0%	16	1.0%	1	2.0%	2	1.0%	1	7.0%	7	5.0%	5	1.0%	1	6.0%	6	1.0%	1
South Ockendon	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Upminster	1.2%	13	0.0%	0	2.0%	2	0.0%	0	0.0%	0	8.9%	9	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Ashford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Aveley	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Barkingside	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0
Basildon	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Becontree	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0
Billericay	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2
Chadwell Heath	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0
Chafford Hundred	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Cranham	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dartford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Gidea Park	0.4%	4	1.0%	1	1.0%	1	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harlow	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harold Wood	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hutton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Loughton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Rush Green	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Thurrock	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Warley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
(Don't know / varies)	0.5%	5	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0
(Don't do this activity)	72.5%	799	73.0%	73	64.0%	64	75.0%	75	72.0%	72	61.4%	62	79.0%	79	82.0%	82	76.0%	76	80.0%	80	73.0%	73	62.4%	63
Base:	1102		100		100		100		100		101		100		100		100		100		100		101	

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q39 In which town, village or out-of-town location does your household spend most money on family entertainment centres (i.e. ten pin bowling; skating rinks etc.)?																								
Brentwood	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Central London - West End (Oxford Street / Regent Street / Bond Street)	0.5%	6	3.0%	3	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Chigwell	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Collier Row	2.1%	23	3.0%	3	1.0%	1	1.0%	1	3.0%	3	1.0%	1	2.0%	2	9.0%	9	2.0%	2	1.0%	1	0.0%	0	0.0%	0
Dagenham	3.5%	39	0.0%	0	3.0%	3	0.0%	0	3.0%	3	2.0%	2	0.0%	0	1.0%	1	1.0%	1	12.0%	12	17.0%	17	0.0%	0
Hornchurch	0.2%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ilford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lakeside	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	14.9%	164	22.0%	22	27.0%	27	23.0%	23	24.0%	24	20.8%	21	11.0%	11	5.0%	5	11.0%	11	7.0%	7	9.0%	9	4.0%	4
Stratford (including Westfield Stratford City)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Upminster	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Basildon	2.2%	24	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	1.0%	1	1.0%	1	18.8%	19
Billericay	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Chelmsford	0.8%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	5.9%	6
Hainault	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hutton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Loughton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Maldon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Marks Gate	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.1%	12	1.0%	1	1.0%	1	1.0%	1	1.0%	1	0.0%	0	1.0%	1	0.0%	0	1.0%	1	1.0%	1	2.0%	2	3.0%	3
(Don't do this activity)	73.4%	809	71.0%	71	65.0%	65	75.0%	75	65.0%	65	70.3%	71	82.0%	82	84.0%	84	85.0%	85	75.0%	75	71.0%	71	64.4%	65
Base:	1102			100		100		100		100		101		100		100		100		100		100		101

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q40 Are there any leisure facilities that you think are lacking within a reasonable distance of your home? [MR]																								
Yes, bingo	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	1.0%	1	0.0%	0	1.0%	1
Yes, bowling	1.7%	19	1.0%	1	1.0%	1	2.0%	2	1.0%	1	3.0%	3	2.0%	2	0.0%	0	0.0%	0	1.0%	1	4.0%	4	4.0%	4
Yes, cinema	3.6%	40	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	36.6%	37
Yes, leisure / fitness centre	3.8%	42	3.0%	3	2.0%	2	1.0%	1	3.0%	3	8.9%	9	1.0%	1	4.0%	4	3.0%	3	5.0%	5	8.0%	8	3.0%	3
Yes, museum / art gallery	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes, pubs / clubs / bars	0.5%	5	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	3.0%	3	0.0%	0	0.0%	0
Yes, restaurants / cafes	0.7%	8	1.0%	1	1.0%	1	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.0%	1	2.0%	2	0.0%	0
Yes, shops	0.5%	6	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	1.0%	1	2.0%	2
Yes, swimming pool	14.5%	160	32.0%	32	13.0%	13	21.0%	21	12.0%	12	12.9%	13	2.0%	2	27.0%	27	12.0%	12	4.0%	4	22.0%	22	2.0%	2
Yes, theatre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Yes, other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes, more things for older people to do	0.5%	5	0.0%	0	1.0%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1
Yes, more things for younger people to do	1.3%	14	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2	1.0%	1	4.0%	4	0.0%	0	1.0%	1	2.0%	2	3.0%	3
Yes, cycling facilities	0.4%	4	0.0%	0	2.0%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Yes, ice rink	6.7%	74	11.0%	11	15.0%	15	9.0%	9	12.0%	12	5.0%	5	4.0%	4	5.0%	5	0.0%	0	4.0%	4	8.0%	8	1.0%	1
Yes, more green spaces	0.4%	4	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0	0.0%	0
Yes, athletics stadium	0.2%	2	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes, football pitches	0.2%	2	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes, live music venue	0.2%	2	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Yes, ski centre	0.2%	2	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes, tennis courts	0.2%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
No	65.2%	719	51.0%	51	62.0%	62	66.0%	66	70.0%	70	71.3%	72	77.0%	77	56.0%	56	79.0%	79	71.0%	71	60.0%	60	54.5%	55
(Don't know)	5.4%	59	5.0%	5	5.0%	5	3.0%	3	2.0%	2	5.0%	5	14.0%	14	10.0%	10	3.0%	3	6.0%	6	5.0%	5	1.0%	1
Base:	1102		100		100		100		100		101		100		100		100		100		100		100	101
GEN Gender of respondent:																								
Male	29.9%	330	31.0%	31	23.0%	23	33.0%	33	32.0%	32	31.7%	32	41.0%	41	25.0%	25	29.0%	29	31.0%	31	25.0%	25	27.7%	28
Female	70.1%	772	69.0%	69	77.0%	77	67.0%	67	68.0%	68	68.3%	69	59.0%	59	75.0%	75	71.0%	71	69.0%	69	75.0%	75	72.3%	73
Base:	1102		100		100		100		100		101		100		100		100		100		100		100	101
AGE Could I ask how old are you please?																								
18 to 24	2.1%	23	0.0%	0	4.0%	4	4.0%	4	4.0%	4	1.0%	1	3.0%	3	1.0%	1	0.0%	0	2.0%	2	1.0%	1	3.0%	3
25 to 34	4.4%	48	5.0%	5	6.0%	6	4.0%	4	7.0%	7	0.0%	0	3.0%	3	0.0%	0	1.0%	1	10.0%	10	9.0%	9	3.0%	3
35 to 44	12.4%	137	12.0%	12	24.0%	24	5.0%	5	12.0%	12	16.8%	17	8.0%	8	9.0%	9	9.0%	9	16.0%	16	8.0%	8	16.8%	17
45 to 54	22.7%	250	16.0%	16	31.0%	31	13.0%	13	34.0%	34	35.6%	36	14.0%	14	10.0%	10	16.0%	16	20.0%	20	22.0%	22	37.6%	38
55 to 64	15.9%	175	15.0%	15	11.0%	11	18.0%	18	15.0%	15	13.9%	14	15.0%	15	23.0%	23	17.0%	17	13.0%	13	23.0%	23	10.9%	11
65 +	40.1%	442	48.0%	48	23.0%	23	50.0%	50	28.0%	28	30.7%	31	54.0%	54	52.0%	52	55.0%	55	36.0%	36	36.0%	36	28.7%	29
(Refused)	2.5%	27	4.0%	4	1.0%	1	6.0%	6	0.0%	0	2.0%	2	3.0%	3	5.0%	5	2.0%	2	3.0%	3	1.0%	1	0.0%	0
Base:	1102		100		100		100		100		101		100		100		100		100		100		100	101

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
CAR How many cars does your household own or have the use of?																								
None	18.5%	204	17.0%	17	13.0%	13	20.0%	20	15.0%	15	5.9%	6	21.0%	21	20.0%	20	39.0%	39	28.0%	28	16.0%	16	8.9%	9
One	44.1%	486	41.0%	41	48.0%	48	46.0%	46	48.0%	48	47.5%	48	50.0%	50	48.0%	48	43.0%	43	48.0%	48	38.0%	38	27.7%	28
Two	24.1%	266	27.0%	27	24.0%	24	23.0%	23	27.0%	27	28.7%	29	17.0%	17	22.0%	22	11.0%	11	18.0%	18	29.0%	29	38.6%	39
Three or more	9.1%	100	11.0%	11	12.0%	12	3.0%	3	8.0%	8	11.9%	12	7.0%	7	5.0%	5	6.0%	6	2.0%	2	14.0%	14	19.8%	20
(Refused)	4.2%	46	4.0%	4	3.0%	3	8.0%	8	2.0%	2	5.9%	6	5.0%	5	5.0%	5	1.0%	1	4.0%	4	3.0%	3	5.0%	5
Base:	1102		100		100		100		100		101		100		100		100		100		100		101	
WOR Which of the following best describes the chief wage earner of your household's current employment situation? [PR]																								
Working full time	42.1%	464	43.0%	43	66.0%	66	25.0%	25	53.0%	53	53.5%	54	28.0%	28	24.0%	24	25.0%	25	47.0%	47	47.0%	47	51.5%	52
Working part time	6.6%	73	5.0%	5	4.0%	4	8.0%	8	5.0%	5	5.0%	5	6.0%	6	9.0%	9	5.0%	5	7.0%	7	9.0%	9	9.9%	10
Unemployed	2.3%	25	0.0%	0	3.0%	3	3.0%	3	5.0%	5	1.0%	1	1.0%	1	3.0%	3	4.0%	4	2.0%	2	2.0%	2	1.0%	1
Retired	44.4%	489	49.0%	49	26.0%	26	54.0%	54	32.0%	32	36.6%	37	60.0%	60	60.0%	60	64.0%	64	38.0%	38	39.0%	39	29.7%	30
A housewife	0.3%	3	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
A student	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Refused)	4.3%	47	3.0%	3	1.0%	1	10.0%	10	3.0%	3	4.0%	4	5.0%	5	4.0%	4	2.0%	2	6.0%	6	3.0%	3	5.9%	6
Base:	1102		100		100		100		100		101		100		100		100		100		100		101	
QUOTA Zone:																								
Zone 01	9.1%	100	100.0%	100	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 02	9.1%	100	0.0%	0	100.0%	100	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 03	9.1%	100	0.0%	0	0.0%	0	100.0%	100	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 04	9.1%	100	0.0%	0	0.0%	0	0.0%	0	100.0%	100	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 05	9.2%	101	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	101	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 06	9.1%	100	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	100	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 07	9.1%	100	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	100	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 08	9.1%	100	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	100	0.0%	0	0.0%	0	0.0%	0
Zone 09	9.1%	100	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	100	0.0%	0	0.0%	0
Zone 10	9.1%	100	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	100	0.0%	0
Zone 11	9.2%	101	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	101
Base:	1102		100		100		100		100		101		100		100		100		100		100		101	

Havering Retail & Leisure Study
for Peter Brett Associates

		Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
PC	Postcode sector:																							
	CM13 1	1.7%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.8%	19	
	CM13 2	2.5%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	26.7%	27	
	CM13 3	0.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.9%	7	
	CM14 4	1.6%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.8%	18	
	CM14 5	0.8%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.9%	9	
	CM15 8	0.7%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.9%	8	
	CM15 9	1.2%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.9%	13	
	RM1 1	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM1 2	0.9%	10	10.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM1 3	0.3%	3	3.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM1 4	3.4%	38	38.0%	38	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM10 7	2.5%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	27.0%	27	0.0%	0	0.0%	0	
	RM10 8	2.8%	31	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	31.0%	31	0.0%	0	0.0%	0	
	RM10 9	3.0%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	33.0%	33	0.0%	0	0.0%	0	
	RM11 1	2.8%	31	0.0%	0	31.0%	31	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM11 2	1.5%	16	0.0%	0	16.0%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM11 3	1.7%	19	0.0%	0	19.0%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM12 4	3.1%	34	0.0%	0	34.0%	34	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM12 5	2.9%	32	0.0%	0	0.0%	0	0.0%	0	32.0%	32	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM12 6	2.9%	32	0.0%	0	0.0%	0	0.0%	0	32.0%	32	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM13 7	3.3%	36	0.0%	0	0.0%	0	0.0%	0	36.0%	36	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM13 8	3.3%	36	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	36.0%	36	0.0%	0	
	RM13 9	5.8%	64	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	64.0%	64	0.0%	0	
	RM14 1	4.8%	53	0.0%	0	0.0%	0	0.0%	0	0.0%	0	52.5%	53	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM14 2	2.1%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	22.8%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM14 3	2.3%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	24.8%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM2 5	1.9%	21	21.0%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM2 6	1.3%	14	14.0%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM3 0	3.8%	42	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	42.0%	42	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM3 7	1.5%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.0%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM3 8	1.6%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.0%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM3 9	2.2%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	24.0%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM4 1	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5	0.0%	0	0.0%	0	0.0%	0	
	RM5 2	2.6%	29	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	29.0%	29	0.0%	0	0.0%	0	0.0%	0	
	RM5 3	3.6%	40	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	40.0%	40	0.0%	0	0.0%	0	0.0%	0	
	RM6 4	2.3%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	25.0%	25	0.0%	0	0.0%	0	
	RM6 5	2.4%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	26.0%	26	0.0%	0	0.0%	0	
	RM6 6	1.5%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.0%	17	0.0%	0	0.0%	0	
	RM7 0	6.0%	66	0.0%	0	0.0%	0	66.0%	66	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM7 7	1.2%	13	13.0%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM7 8	2.4%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	26.0%	26	0.0%	0	0.0%	0	0.0%	0	
	RM7 9	3.1%	34	0.0%	0	0.0%	0	34.0%	34	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM8 1	1.2%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.0%	13	0.0%	0	0.0%	0	
	RM8 3	1.7%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	19.0%	19	0.0%	0	0.0%	0	
	RM9 5	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	4	0.0%	0	0.0%	0	

Haverling Retail & Leisure Study
for Peter Brett Associates

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
RM9 6	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5	0.0%	0	0.0%	0
Base:		1102		100		100		100		100		101		100		100		100		100		100		101

Appendix 2:

Data Tabulations

By Zone (Weighted)

Havering Retail & Leisure Study
for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q01 Where did your household last undertake a main food and grocery purchase?																								
Aldi, High Road Seven Kings, Ilford, IG3 8RS	0.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	4	0.0%	0	0.0%	0	0.0%	0
Aldi, Market Place, Romford RM1, 3AB	1.5%	16	2.2%	2	0.7%	1	2.5%	1	0.0%	0	0.0%	0	4.6%	5	2.5%	2	2.7%	4	0.0%	0	1.0%	1	0.6%	1
Aldi, Marlborough Road, Romford, RM7 8AB	2.9%	32	4.0%	4	0.7%	1	1.7%	1	3.2%	2	0.0%	0	1.2%	1	24.2%	19	0.7%	1	0.0%	0	0.0%	0	1.5%	2
Aldi, Ripple Road, Dagenham, RM9 6SJ	0.5%	6	0.0%	0	0.7%	1	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	3	1.2%	1	0.0%	0
Aldi, St Mary's Lane, Upminster, RM14 2QB	3.3%	36	0.0%	0	6.2%	8	0.0%	0	5.5%	4	25.9%	19	3.2%	3	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.8%	1
Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE	6.3%	69	22.3%	23	10.9%	14	14.7%	6	4.0%	3	1.2%	1	5.0%	5	10.2%	8	3.4%	5	2.6%	4	0.9%	0	0.0%	0
Asda, Merriellands Crescent, Dagenham, RM9 6SJ	7.6%	84	0.0%	0	0.0%	0	0.6%	0	5.3%	4	0.0%	0	0.0%	0	0.0%	0	9.5%	13	43.2%	65	4.1%	2	0.0%	0
Asda, Vicarage Field Shopping Centre, Barking, IG11 8DJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Whalebone Lane, Chadwell Heath, RM8 1BB	0.3%	3	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	3	0.0%	0	0.0%	0	0.0%	0
Co-op, 208-212 Hutton Road, Shenfield, CM15 8NR	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Co-op, 6/8-8A Harewood Road, Pilgrims Hatch, Brentwood, CM15 9PD	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Dagenham Road, Rush Green, Romford, RM7 0TJ	0.1%	1	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Porters Avenue, Dagenham, RM9 4ND	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Rose Lane, Marks Gate East, Chadwell Heath, RM6 5NR	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Station Road, Harold Wood, Romford, RM3 0BP	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, The Baytree Centre, Brentwood, CM14 4BX	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	3
Iceland, 32 The High Street, Brentwood,CM14 4AJ	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2
Iceland, Farnham Road, Harold Hill, Romford, RM3 8DX	0.6%	7	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11									
Iceland, Heathway, Dagenham, RM10 8QS	0.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	3.5%	5	0.0%	0	0.0%	0
Iceland, London Road, Romford, RM7 9NA	0.1%	1	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
Iceland, North Street, Hornchurch, RM11 1RL	0.7%	8	0.0%	0	3.2%	4	0.0%	0	2.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	2	0.0%	0
Iceland, Whalebone Lane, Dagenham, RM8 1FB	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Lidl, Atlanta Boulevard, Romford, RM1 1TB	0.6%	7	3.9%	4	0.9%	1	1.7%	1	0.7%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Daiglen Drive, South Ockendon, RM15 5AE	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Lidl, Heathway, Dagenham, RM10 8QS	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.5%	1	0.0%	0	0.0%	0
Lidl, Longbridge Road, Dagenham, RM8 2DB	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, High Street, Brentwood, CM14 4RH	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Marks & Spencer, Lakeside, West Thurrock, RM20 2ZQ	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Marks & Spencer, South Street, Romford, RM1 1NT	1.2%	14	5.7%	6	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.6%	1	1.4%	1	4.1%	6	0.0%	0	0.0%	0
Marks & Spencer, Station Road, Upminster, RM14 2SU	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.5%	0	1.8%	1	2.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, London Road, Grays, RM17 5XZ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0
Morrisons, Wood Lane, Becontree Heath, Dagenham, RM10 7RA	2.4%	27	0.0%	0	0.0%	0	2.4%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	9.5%	13	6.9%	10	3.4%	2
Sainsbury's Local, Farnham Road, Harold Hill, Romford, RM3 8DX	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Elm Park Avenue, Hornchurch, RM12 4RX	0.8%	9	0.0%	0	3.3%	4	0.0%	0	1.0%	1	1.5%	1	2.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Road, Chadwell Heath, Romford, RM6 6PB	3.6%	39	1.0%	1	0.0%	0	3.9%	2	0.5%	0	0.0%	0	0.0%	0	2.6%	2	23.3%	32	1.4%	2	0.0%	0
Sainsbury's, High Street, Hornchurch, RM11 1TX	4.7%	51	2.3%	2	23.8%	31	1.2%	1	16.9%	12	3.2%	2	1.2%	1	0.7%	1	0.0%	0	0.0%	0	2.0%	1
Sainsbury's, Howard Road, Grays, RM16 6YJ	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	4	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0
Sainsbury's, King George	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	3	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Avenue, Ilford, IG2 7SH												
Sainsbury's, The Brewery, Romford, RM1 1AU	4.2%	46	18.2%	19	0.9%	1	19.9%	9	0.9%	1	0.0%	0
Sainsbury's, William Hunter Way, Brentwood, CM14 4WQ	8.5%	94	1.2%	1	0.0%	0	0.0%	0	0.0%	0	2.9%	2
Tesco Express, Ardleigh Green Road, Hornchurch, RM11 2LG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0
Tesco Express, Dagenham Heathway, Dagenham, RM10 8QS	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Front Lane, Cranham, Upminster, RM14 1XL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0
Tesco Express, High Road, Chadwell Heath, RM6 6PR	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Rainham Road, Rainham, RM13 7QX	0.5%	5	0.0%	0	0.0%	0	0.0%	0	2.4%	2	0.0%	0
Tesco Express, South Street, Romford, RM1 1RX	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	4.3%	48	0.0%	0	1.3%	2	1.6%	1	15.9%	12	3.3%	2
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	11.1%	122	18.1%	18	6.1%	8	5.9%	3	0.0%	0	13.6%	10
Tesco Extra, High Road, Goodmayes, Romford, RM6 4HY	2.3%	25	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	7.2%	79	5.8%	6	28.2%	37	28.7%	12	5.8%	4	6.2%	5
Tesco Extra, Lakeside, West Thurrock, Grays, RM20 1TX	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.5%	0	2.5%	2
Tesco Metro, Collier Row Lane, Collier Row, Romford, RM5 3NL	1.9%	21	1.2%	1	0.0%	0	1.1%	0	0.0%	0	0.0%	0
Tesco, Airfield Way, Hornchurch, RM12 5AF	2.1%	23	0.0%	0	1.1%	1	4.5%	2	26.6%	19	0.6%	0
Waitrose (Little), High Street, Hornchurch, RM11 1TP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0
Waitrose, St Mary's Lane, Upminster, RM14 3BT	1.3%	14	0.0%	0	1.4%	2	0.6%	0	0.0%	0	13.0%	10
Internet / delivered	6.1%	67	5.9%	6	9.0%	12	2.1%	1	2.8%	2	8.2%	6

Haverling Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
Other foodstore outside study area	2.9%	32	0.6%	1	0.0%	0	0.0%	0	0.0%	0	2.4%	2	4.1%	4	0.0%	0	2.0%	3	8.4%	13	1.2%	1	6.0%	9
Other, zone 1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 5	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 10	0.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	5	0.0%	0	0.0%	0
Other foodstores, Basildon	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	4.1%	6
Other foodstores, Billericay	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	6
(Don't know / can't remember)	1.5%	17	0.0%	0	0.7%	1	0.0%	0	0.7%	1	2.0%	1	1.2%	1	1.3%	1	0.7%	1	4.0%	6	0.0%	0	2.8%	4
(Don't do this kind of shopping)	1.3%	15	5.5%	6	1.1%	1	0.6%	0	1.4%	1	2.7%	2	0.0%	0	4.0%	3	0.7%	1	0.0%	0	0.5%	0	0.0%	0
Weighted base:		1102		102		130		43		73		74		105		79		138		149		52		157
Sample:		1102		100		100		100		100		101		100		100		100		100		100		101

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q02 And where did you shop the time before that (was it the same, or different, and if so, please specify)?																								
<i>Those who specified a location at Q01</i>																								
Aldi, High Road Seven Kings, Ilford, IG3 8RS	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	5	0.0%	0	0.0%	0	0.0%	0
Aldi, Market Place, Romford RM1, 3AB	1.1%	12	4.4%	4	0.7%	1	2.2%	1	0.0%	0	0.9%	1	2.7%	3	2.1%	2	0.7%	1	0.0%	0	0.5%	0	0.0%	0
Aldi, Marlborough Road, Romford, RM7 8AB	3.3%	35	5.0%	5	0.0%	0	2.4%	1	3.3%	2	0.0%	0	2.9%	3	23.0%	17	1.4%	2	0.0%	0	0.0%	0	3.0%	5
Aldi, Ripple Road, Dagenham, RM9 6SJ	0.7%	7	0.0%	0	0.0%	0	1.1%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	5	1.5%	1	0.0%	0
Aldi, St Mary's Lane, Upminster, RM14 2QB	3.0%	32	0.0%	0	2.4%	3	0.0%	0	7.4%	5	22.7%	16	1.3%	1	3.3%	3	0.0%	0	0.0%	0	0.9%	0	2.3%	4
Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE	6.5%	69	21.6%	21	6.7%	9	12.4%	5	4.1%	3	3.7%	3	7.3%	8	12.3%	9	5.2%	7	1.9%	3	0.5%	0	1.5%	2
Asda, Merriellands Crescent, Dagenham, RM9 6SJ	6.4%	69	0.0%	0	0.0%	0	0.6%	0	6.5%	5	0.0%	0	0.0%	0	2.6%	2	4.7%	6	30.8%	44	14.0%	7	2.6%	4
Asda, Whalebone Lane, Chadwell Heath, RM8 1BB	0.7%	7	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	4	2.0%	3	0.0%	0	0.0%	0
Co-op (Somerfield), Farnham Road, Harold Hill, Romford, RM3 8DX	0.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, 208-212 Hutton Road, Shenfield, CM15 8NR	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Co-op, 6/8-8A Harewood Road, Pilgrims Hatch, Brentwood, CM15 9PD	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Dagenham Road, Rush Green, Romford, RM7 0TJ	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Porters Avenue, Dagenham, RM9 4ND	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Rose Lane, Marks Gate East, Chadwell Heath, RM6 5NR	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Station Road, Harold Wood, Romford, RM3 0BP	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, 32 The High Street, Brentwood,CM14 4AJ	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2
Iceland, Farnham Road, Harold Hill, Romford, RM3 8DX	0.7%	7	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	5	0.7%	1	0.0%	0	0.0%	0	0.9%	0	0.0%	0
Iceland, Heathway,	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	8	0.0%	0	0.0%	0

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	Total		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Dagenham, RM10 8QS													
Iceland, London Road, Romford, RM7 9NA	0.1%	1	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%
Iceland, Market Place, Romford, RM1 3AB	0.3%	4	0.6%	1	0.0%	0	0.6%	0	0.0%	0	0.0%	0	1.5%
Iceland, North Street, Hornchurch, RM11 1RL	0.7%	8	0.0%	0	5.3%	7	0.0%	0	1.4%	1	0.0%	0	0.0%
Lidl, Atlanta Boulevard, Romford, RM1 1TB	0.3%	4	1.3%	1	0.0%	0	2.3%	1	0.7%	1	0.0%	0	0.0%
Lidl, Daiglen Drive, South Ockendon, RM15 5AE	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%
Lidl, Heathway, Dagenham, RM10 8QS	0.6%	6	0.0%	0	0.0%	0	0.6%	0	0.9%	1	0.0%	0	0.0%
Marks & Spencer, High Street, Brentwood, CM14 4RH	0.9%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Marks & Spencer, Lakeside, West Thurrock, RM20 2ZQ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Marks & Spencer, Ongar Road Pilgrims Hatch, Brentwood, CM15 9HZ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Marks & Spencer, South Street, Romford, RM1 1NT	1.6%	17	6.0%	6	0.0%	0	3.5%	1	0.0%	0	0.0%	0	1.3%
Marks & Spencer, Southend Arterial Rd, Hornchurch, RM11 3UJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%
Marks & Spencer, Station Road, Upminster, RM14 2SU	0.8%	9	1.2%	1	0.9%	1	0.0%	0	0.0%	0	6.6%	5	0.6%
Morrisons, London Road, Grays, RM17 5XZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Morrisons, Wood Lane, Becontree Heath, Dagenham, RM10 7RA	2.9%	31	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0	0.0%
Sainsbury's Local, Farnham Road, Harold Hill, Romford, RM3 8DX	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	6	0.0%
Sainsbury's, Elm Park Avenue, Hornchurch, RM12 4RX	0.7%	7	0.0%	0	2.1%	3	0.0%	0	0.0%	0	2.1%	1	3.3%
Sainsbury's, High Road, Chadwell Heath, Romford, RM6 6PB	3.5%	38	1.1%	1	0.0%	0	3.4%	1	0.7%	1	0.0%	0	0.7%
Sainsbury's, High Street, Hornchurch, RM11 1TX	5.2%	55	4.7%	4	24.9%	32	1.2%	1	16.2%	12	5.5%	4	0.6%

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	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Sainsbury's, Howard Road, Grays, RM16 6YJ	0.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0
Sainsbury's, King George Avenue, Ilford, IG2 7SH	0.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	3.1%	4	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, The Brewery, Romford, RM1 1AU	3.6%	39	14.8%	14	0.5%	1	16.3%	7	0.7%	1	2.4%	2	1.8%	2	8.6%	6	3.5%	5	0.0%	0	3.4%	2	0.0%	0
Sainsbury's, William Hunter Way, Brentwood, CM14 4WQ	6.9%	74	1.3%	1	0.0%	0	0.0%	0	0.0%	0	2.5%	2	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	45.2%	69
Tesco Express, 225 Hanging Hill Lane, Brentwood, CM13 2QG	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	3
Tesco Express, 405 Brentwood Road, Romford, RM2 5TJ	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 85-86 Viceroy Parade, Hutton Road, Shenfield, CM15 8JD	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2
Tesco Express, Ardleigh Green Road, Hornchurch, RM11 2LG	0.1%	2	0.0%	0	0.9%	1	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Butts Green Road, Hornchurch, RM11 2LD	0.2%	2	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Dagenham Heathway, Dagenham, RM10 8QS	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	5.2%	7	0.0%	0	0.0%	0
Tesco Express, Front Lane, Cranham, Upminster, RM14 1XL	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, High Road, Chadwell Heath, RM6 6PR	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	6	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Main Road, Romford, RM1 3BT	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Tesco Express, Mawney Road, RM7 7HL	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Rainham Road, Rainham, RM13 7QX	0.8%	9	0.0%	0	0.0%	0	0.0%	0	2.4%	2	1.7%	1	0.6%	1	0.0%	0	0.0%	0	0.5%	1	8.9%	5	0.0%	0
Tesco Express, South Street, Romford, RM1 1RX	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Warley Hill, Brentwood, CM14 5HB	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	5.1%	55	0.0%	0	2.6%	3	0.0%	0	28.8%	21	2.4%	2	0.0%	0	0.0%	0	0.0%	0	8.2%	12	33.2%	17	0.0%	0

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	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	10.2%	109	19.8%	19	8.0%	10	8.3%	4	1.2%	1	4.4%	3	46.5%	48	16.9%	13	0.0%	0	0.0%	0	3.4%	2	6.6%	10
Tesco Extra, High Road, Goodmayes, Romford, RM6 4HY	3.1%	33	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.0%	27	3.8%	5	0.0%	0	0.0%	0
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	6.6%	71	4.1%	4	28.2%	36	28.5%	12	5.3%	4	5.5%	4	0.0%	0	0.0%	0	0.7%	1	4.4%	6	5.0%	3	0.8%	1
Tesco Extra, Lakeside, West Thurrock, Grays, RM20 1TX	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.5%	0	3.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	2	0.0%	0
Tesco Metro, Collier Row Lane, Collier Row, Romford, RM5 3NL	1.7%	18	3.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	16.6%	12	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Tesco, Airfield Way, Hornchurch, RM12 5AF	1.3%	14	0.0%	0	1.8%	2	3.9%	2	13.6%	10	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, St Mary's Lane, Upminster, RM14 3BT	1.3%	14	1.6%	2	1.2%	1	0.6%	0	0.0%	0	12.6%	9	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Internet / delivered	6.2%	67	5.4%	5	8.7%	11	2.2%	1	2.1%	2	8.9%	6	8.2%	9	2.1%	2	3.4%	5	5.7%	8	8.5%	4	9.6%	15
Other foodstore outside study area	2.3%	24	0.6%	1	0.7%	1	0.6%	0	0.0%	0	1.6%	1	0.6%	1	0.7%	1	1.3%	2	8.8%	13	0.7%	0	3.8%	6
Other, zone 1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 5	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 6	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other foodstores, Basildon	1.0%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	6.3%	10
Other foodstores, Billericay	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	6
(Don't know / can't remember)	1.8%	20	0.0%	0	3.2%	4	1.7%	1	0.7%	1	5.8%	4	1.7%	2	0.0%	0	0.0%	0	4.2%	6	1.0%	1	1.1%	2
Weighted base:	1071			96		128		43		72		70		103		75		136		143		52		153
Sample:	1070			98		97		99		97		96		98		94		98		96		99		98

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	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
Q03AWhat form of transport do you use to visit your main food shopping destination?																								
<i>Those who do main food shopping at Q01</i>																								
Car - Driver	62.4%	679	53.4%	51	61.3%	79	60.4%	26	66.8%	48	72.2%	52	64.5%	67	70.3%	54	44.4%	61	61.4%	92	66.2%	34	73.2%	115
Car - Passenger	10.7%	116	11.0%	11	5.7%	7	14.9%	6	7.0%	5	7.0%	5	13.3%	14	11.1%	8	22.4%	31	11.1%	17	16.6%	9	2.3%	4
Bus	8.1%	88	10.0%	10	4.6%	6	7.7%	3	10.1%	7	2.6%	2	8.0%	8	13.2%	10	16.8%	23	9.4%	14	5.3%	3	1.1%	2
Cycle	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Disabled Vehicle (e.g. mobility scooter)	0.7%	8	3.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	1.7%	2	0.0%	0	0.5%	0	0.6%	1
Taxi	1.0%	10	0.0%	0	0.0%	0	1.2%	1	0.5%	0	0.0%	0	0.6%	1	2.7%	2	0.7%	1	0.0%	0	0.0%	0	3.7%	6
Train	0.6%	7	1.3%	1	3.2%	4	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
Walk	8.0%	87	9.7%	9	15.2%	20	8.9%	4	11.4%	8	9.7%	7	3.4%	4	1.3%	1	8.8%	12	6.8%	10	2.4%	1	7.0%	11
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	2.3%	25	4.8%	5	0.9%	1	4.8%	2	0.0%	0	0.0%	0	1.9%	2	0.0%	0	0.7%	1	4.0%	6	0.5%	0	5.2%	8
(Don't travel - Goods delivered)	6.1%	67	6.3%	6	9.1%	12	2.2%	1	2.8%	2	8.5%	6	7.1%	7	1.3%	1	4.5%	6	6.8%	10	8.5%	4	6.9%	11
Weighted base:	1087		96		128		43		72		72		105		76		137		149		52		157	
Sample:	1085		98		98		99		98		98		100		95		99		100		99		101	

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	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q03BWhat is the MAIN reason that you visit (STORE MENTIONED AT Q01) in preference to any other?																								
<i>Those who do main food shopping at Q01</i>																								
Attractive environment	0.7%	8	1.2%	1	0.0%	0	1.0%	0	1.4%	1	0.0%	0	0.6%	1	0.7%	1	1.3%	2	0.0%	0	0.0%	0	1.5%	2
Cleanliness	0.2%	2	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
Close to home	38.0%	413	25.2%	24	43.9%	56	43.7%	19	45.2%	33	37.5%	27	37.5%	39	32.6%	25	39.2%	54	25.0%	37	55.0%	29	45.0%	71
Close to work / en route to work	1.8%	20	2.3%	2	4.4%	6	0.0%	0	2.1%	2	0.0%	0	0.0%	0	1.0%	1	1.0%	1	1.3%	2	3.0%	2	2.9%	5
Easily accessible by foot / cycle	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good and / or free parking	1.5%	16	5.5%	5	0.5%	1	5.8%	2	0.0%	0	2.2%	2	0.6%	1	2.0%	2	0.0%	0	0.7%	1	0.0%	0	1.9%	3
Good bus service / accessible public transport	0.3%	3	0.6%	1	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Good disabled access	0.2%	2	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Good prices	21.6%	235	23.8%	23	22.3%	29	14.8%	6	20.3%	15	21.2%	15	24.6%	26	24.9%	19	23.2%	32	33.2%	50	15.8%	8	8.0%	13
Good range of comparison goods	2.0%	21	1.5%	1	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.7%	1	1.3%	2	4.6%	7	0.0%	0	5.0%	8
Good range of food offer	7.7%	84	8.6%	8	4.4%	6	8.5%	4	9.1%	7	4.4%	3	12.7%	13	12.3%	9	4.4%	6	10.2%	15	4.9%	3	6.3%	10
Good variety of goods on offer	3.0%	33	3.5%	3	0.9%	1	0.8%	0	4.8%	3	3.6%	3	2.3%	2	1.4%	1	7.6%	10	0.0%	0	0.5%	0	4.8%	8
Habit / familiarity	8.7%	95	7.9%	8	10.9%	14	6.5%	3	6.8%	5	7.8%	6	5.8%	6	6.6%	5	13.1%	18	7.4%	11	13.5%	7	8.3%	13
Has other facilities (e.g. pharmacy, optician, dry cleaners, cafes)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Links to the other shops / facilities in the town centre	1.0%	11	1.2%	1	2.6%	3	0.0%	0	1.9%	1	0.9%	1	0.0%	0	5.4%	4	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Good quality	1.9%	21	7.4%	7	0.0%	0	6.7%	3	0.5%	0	4.4%	3	0.0%	0	0.0%	0	1.9%	3	1.8%	3	1.0%	1	1.0%	2
Good loyalty scheme	0.7%	7	0.6%	1	0.0%	0	1.4%	1	0.0%	0	4.1%	3	0.0%	0	1.9%	1	0.0%	0	0.5%	1	0.0%	0	0.6%	1
Close to friends / family	0.6%	7	0.0%	0	1.1%	1	0.0%	0	0.9%	1	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	1.8%	3
Easy to get to	0.3%	3	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.6%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Convenience of Internet shopping	4.5%	48	4.8%	5	6.5%	8	2.2%	1	2.1%	2	8.5%	6	6.5%	7	1.3%	1	0.7%	1	5.0%	8	4.1%	2	5.4%	9
Helpful staff	0.1%	2	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good opening hours	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	5.1%	55	3.1%	3	0.7%	1	5.6%	2	4.4%	3	3.6%	3	5.4%	6	7.8%	6	5.6%	8	9.1%	14	1.5%	1	6.2%	10
Weighted base:	1087			96		128		43		72		72		105		76		137		149		52		157
Sample:	1085			98		98		99		98		98		100		95		99		100		99		101

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q04 When your household undertakes its main food and grocery spend (STORE MENTIONED AT Q01) does it visit other shops, leisure or service outlets on the same shopping trips? And if so which ones? [MR]																								
<i>Those who do main food shopping at Q01</i>																								
Yes - other food shops	14.1%	153	13.6%	13	10.7%	14	15.0%	6	8.1%	6	11.6%	8	12.1%	13	16.1%	12	6.8%	9	22.3%	33	10.2%	5	20.8%	33
Yes - other non food shops (clothing, footwear, electrical etc)	16.8%	182	25.9%	25	19.9%	26	20.4%	9	10.8%	8	8.2%	6	12.2%	13	10.9%	8	8.9%	12	11.5%	17	6.2%	3	35.5%	56
Yes - pubs, restaurants or cafes	2.4%	26	1.3%	1	1.1%	1	4.9%	2	0.0%	0	1.3%	1	1.2%	1	3.2%	2	4.7%	6	3.1%	5	0.0%	0	3.3%	5
Yes - financial service (i.e. bank, building society)	4.4%	48	4.2%	4	7.0%	9	0.6%	0	7.9%	6	2.3%	2	3.0%	3	3.9%	3	6.0%	8	0.5%	1	6.7%	3	5.3%	8
Yes - other service (e.g. hairdresser, travel agent, estate agent)	0.4%	4	0.0%	0	0.5%	1	0.6%	0	0.9%	1	0.0%	0	0.6%	1	1.4%	1	0.0%	0	0.0%	0	0.9%	0	0.0%	0
Yes - leisure activity	3.4%	37	0.0%	0	2.7%	3	0.8%	0	3.9%	3	6.4%	5	3.2%	3	2.0%	2	3.4%	5	7.4%	11	2.3%	1	2.5%	4
Yes - other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes - visit petrol station	1.0%	11	0.0%	0	3.9%	5	2.0%	1	0.0%	0	1.7%	1	1.8%	2	0.7%	1	0.0%	0	0.0%	0	0.7%	0	0.8%	1
No	62.7%	682	67.4%	65	62.2%	80	62.2%	27	71.2%	51	68.5%	49	66.2%	69	70.7%	54	72.3%	99	57.4%	86	75.5%	39	40.1%	63
(Don't know / varies)	3.2%	35	0.0%	0	2.1%	3	1.2%	1	1.5%	1	3.0%	2	6.2%	7	0.0%	0	1.0%	1	6.0%	9	0.0%	0	7.3%	11
Weighted base:	1087		96		128		43		72		72		105		76		137		149		52		157	
Sample:	1085		98		98		99		98		98		100		95		99		100		99		101	

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Mean score: [£]																								
Q05 Approximately how much money does your household spend per week on its main food and groceries shop at (STORE MENTIONED AT Q01)?																								
Those who do main food shopping at Q01																								
£1-10	0.5%	6	0.0%	0	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	1.3%	2	0.9%	1	0.5%	0	0.6%	1
£11-20	2.8%	31	7.6%	7	3.7%	5	4.6%	2	1.9%	1	1.8%	1	2.2%	2	2.7%	2	4.4%	6	1.4%	2	1.0%	1	0.6%	1
£21-30	5.2%	56	4.8%	5	3.2%	4	5.4%	2	7.2%	5	2.7%	2	5.0%	5	4.3%	3	13.2%	18	4.9%	7	2.1%	1	1.9%	3
£31-40	5.8%	63	4.3%	4	7.4%	9	5.6%	2	7.6%	6	4.7%	3	10.6%	11	10.3%	8	7.6%	10	3.0%	5	3.8%	2	1.3%	2
£41-50	9.3%	101	11.3%	11	7.2%	9	10.0%	4	12.8%	9	7.1%	5	8.6%	9	13.7%	10	10.6%	14	5.9%	9	8.8%	5	9.4%	15
£51-60	7.5%	82	7.4%	7	4.2%	5	12.5%	5	4.4%	3	10.0%	7	14.1%	15	11.5%	9	8.0%	11	3.1%	5	10.2%	5	6.0%	9
£61-70	8.2%	90	5.6%	5	11.3%	14	8.2%	4	10.3%	7	5.3%	4	5.9%	6	3.4%	3	6.2%	8	10.9%	16	9.7%	5	10.6%	17
£71-80	8.7%	95	13.2%	13	8.5%	11	3.9%	2	6.2%	4	10.0%	7	7.4%	8	11.0%	8	8.5%	12	10.7%	16	10.6%	6	5.4%	8
£81-90	4.2%	46	2.9%	3	4.5%	6	4.0%	2	6.6%	5	2.8%	2	3.5%	4	4.1%	3	5.7%	8	3.1%	5	2.1%	1	5.3%	8
£91-100	15.3%	166	10.9%	10	16.3%	21	22.6%	10	21.0%	15	15.7%	11	8.2%	9	11.3%	9	11.2%	15	14.0%	21	23.5%	12	21.1%	33
£101-150	12.2%	133	13.3%	13	13.0%	17	8.3%	4	12.5%	9	20.9%	15	11.2%	12	6.0%	5	2.3%	3	18.3%	27	10.1%	5	15.1%	24
£151-200	3.4%	37	5.8%	6	3.2%	4	0.0%	0	2.7%	2	1.7%	1	0.6%	1	5.3%	4	1.9%	3	1.3%	2	5.1%	3	7.9%	12
£201+	1.3%	14	0.0%	0	1.1%	1	0.8%	0	0.0%	0	0.9%	1	4.1%	4	0.0%	0	0.0%	0	1.7%	3	3.7%	2	1.5%	2
(Don't know / can't remember)	13.8%	151	11.1%	11	14.7%	19	10.7%	5	6.7%	5	11.9%	8	15.5%	16	12.4%	9	17.6%	24	20.3%	30	6.1%	3	12.7%	20
(Refused)	1.7%	19	1.9%	2	1.6%	2	1.2%	1	0.0%	0	4.4%	3	3.0%	3	3.4%	3	1.7%	2	0.5%	1	2.6%	1	0.8%	1
Mean:	83.24		80.45		85.54		74.89		79.44		90.01		79.09		74.58		62.92		90.38		94.13		97.50	
Weighted base:	1087		96		128		43		72		72		105		76		137		149		52		157	
Sample:	1085		98		98		99		98		98		100		95		99		100		99		101	

Mean score [Times a week]: Everyday = 7, 5 - 6 times a week = 5.5, 3 - 4 times a week = 3.5, Twice a week = 2, Once a week = 1, Once every two weeks = 0.5, Once a month = 0.25, Less often = 0.1

Q06 How often does your household normally visit its main food and grocery shopping destination (STORE MENTIONED AT Q01)?
Those who do main food shopping at Q01

Everyday	1.2%	13	0.6%	1	1.8%	2	3.8%	2	0.5%	0	3.0%	2	2.3%	2	0.7%	1	0.7%	1	0.0%	0	0.9%	0	1.3%	2
5 - 6 times a week	0.6%	6	0.0%	0	0.5%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	1.9%	1	0.7%	1	0.9%	1	0.9%	0	0.6%	1
3 - 4 times a week	2.1%	23	1.8%	2	0.0%	0	6.3%	3	0.7%	1	6.6%	5	1.2%	1	4.0%	3	1.0%	1	2.6%	4	0.9%	0	2.1%	3
Twice a week	7.3%	79	9.2%	9	4.7%	6	11.4%	5	7.2%	5	7.5%	5	3.8%	4	8.2%	6	14.8%	20	6.7%	10	2.1%	1	4.5%	7
Once a week	68.6%	745	72.0%	69	74.1%	95	63.1%	27	76.5%	55	65.7%	47	55.1%	58	62.9%	48	63.9%	87	77.1%	115	72.2%	38	67.6%	106
Once every two weeks	13.3%	144	9.6%	9	15.1%	19	10.2%	4	5.7%	4	6.9%	5	23.4%	25	18.9%	14	13.9%	19	8.7%	13	14.3%	7	15.2%	24
Once a month	4.0%	44	2.8%	3	1.9%	2	2.4%	1	4.8%	3	7.2%	5	11.7%	12	0.0%	0	2.1%	3	1.7%	3	6.9%	4	5.0%	8
Less often	0.2%	2	0.0%	0	1.3%	2	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
(Don't know / varies)	2.7%	30	4.0%	4	0.7%	1	2.2%	1	3.9%	3	3.1%	2	2.4%	3	3.3%	3	2.8%	4	2.3%	3	1.0%	1	3.8%	6
Mean:	1.13		1.11		1.07		1.44		1.09		1.34		1.01		1.22		1.17		1.12		1.02		1.09	
Weighted base:	1087		96		128		43		72		72		105		76		137		149		52		157	
Sample:	1085		98		98		99		98		98		100		95		99		100		99		101	

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Q07 Where did your household last undertake your 'top-up' food and grocery purchases? (i.e smaller/ 'basket' shopping purchases which are not part of your main food and groceries shop)												
Aldi, High Road Seven Kings, Ilford, IG3 8RS	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Market Place, Romford RM1, 3AB	0.7%	7	1.1%	1	0.0%	0	2.0%	1	1.4%	1	0.0%	0
Aldi, Marlborough Road, Romford, RM7 8AB	1.3%	15	1.8%	2	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Aldi, Ripple Road, Dagenham, RM9 6SJ	0.7%	8	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0
Aldi, St Mary's Lane, Upminster, RM14 2QB	1.0%	11	0.0%	0	1.3%	2	0.0%	0	0.0%	0	12.2%	9
Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE	3.4%	37	16.8%	17	6.2%	8	1.2%	1	0.5%	0	0.0%	0
Asda, Merriellands Crescent, Dagenham, RM9 6SJ	1.9%	21	0.0%	0	0.5%	1	0.0%	0	3.3%	2	0.0%	0
Asda, Whalebone Lane, Chadwell Heath, RM8 1BB	0.1%	1	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Co-op (Somerfield), Farnham Road, Harold Hill, Romford, RM3 8DX	1.2%	13	0.0%	0	3.2%	4	0.0%	0	0.0%	0	0.0%	0
Co-op, 201-207 Rayleigh Road, Hutton, Brentwood, CM13 1LZ	0.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, 208-212 Hutton Road, Shenfield, CM15 8NR	1.5%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, 6/8-8A Harewood Road, Pilgrims Hatch, Brentwood, CM15 9PD	0.7%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Co-op, Becontree Avenue, Becontree, Dagenham, RM8 2UU	0.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Dagenham Road, Rush Green, Romford, RM7 0TJ	0.4%	4	0.0%	0	0.0%	0	10.1%	4	0.0%	0	0.0%	0
Co-op, Elm Park Avenue, Hornchurch, RM12 4SD	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Station Road, Harold Wood, Romford, RM3 0BP	0.8%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.4%	9
Co-op, The Baytree Centre, Brentwood, CM14 4BX	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, The Retail Unit, Turpin Avenue, Colliers	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	6

by Zone

Weighted:

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	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Row, RM5 2PU																								
Costcutter, Farringdon Avenue, Romford, RM3 8SG	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costcutter, High Road, Romford, RM6 6PX	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0
Costcutter, Highfield Link, Romford, RM5 3DH	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, 32 The High Street, Brentwood,CM14 4AJ	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	4
Iceland, Farnham Road, Harold Hill, Romford, RM3 8DX	1.5%	16	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.5%	14	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Heathway, Dagenham, RM10 8QS	0.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	6	0.0%	0	0.0%	0
Iceland, London Road, Romford, RM7 9NA	0.4%	5	0.0%	0	0.0%	0	10.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Market Place, Romford, RM1 3AB	0.3%	3	2.6%	3	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0
Iceland, North Street, Hornchurch, RM11 1RL	0.6%	6	0.0%	0	4.4%	6	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Whalebone Lane, Dagenham, RM8 1FB	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	5	0.0%	0	0.0%	0
Lidl, Atlanta Boulevard, Romford, RM1 1TB	0.1%	2	0.0%	0	0.0%	0	3.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Heathway, Dagenham, RM10 8QS	1.0%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.2%	11	0.9%	0	0.0%	0
Lidl, Longbridge Road, Dagenham, RM8 2DB	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.7%	1	0.0%	0	0.0%	0
Londis, Warley Hill, Brentwood, CM14 5HR	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Marks & Spencer, High Street, Brentwood, CM14 4RH	0.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	5
Marks & Spencer, South Street, Romford, RM1 1NT	1.5%	16	5.2%	5	0.7%	1	3.4%	1	0.7%	1	0.0%	0	1.2%	1	2.0%	2	2.4%	3	1.3%	2	0.5%	0	0.0%	0
Marks & Spencer, Station Road, Upminster, RM14 2SU	0.6%	6	1.1%	1	0.0%	0	0.0%	0	0.5%	0	5.2%	4	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0
Morrisons M Local, Station Parade, Hornchurch, RM12 5AB	0.4%	4	0.0%	0	0.0%	0	0.0%	0	5.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Wood Lane, Becontree Heath, Dagenham, RM10 7RA	2.1%	23	0.6%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.9%	14	5.2%	8	0.5%	0	0.0%	0
Sainsbury's Local, Farnham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

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	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Road, Harold Hill, Romford, RM3 8DX																								
Sainsbury's Local, North Street, Romford, RM1 1ED	0.7%	7	7.2%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Elm Park Avenue, Hornchurch, RM12 4RX	0.3%	3	0.0%	0	0.5%	1	0.0%	0	3.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Road, Chadwell Heath, Romford, RM6 6PB	2.0%	22	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	13.6%	19	1.0%	1	0.0%	0	0.0%	0
Sainsbury's, High Street, Hornchurch, RM11 1TX	3.4%	37	0.0%	0	26.6%	35	0.0%	0	2.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0
Sainsbury's, Howard Road, Grays, RM16 6YJ	0.0%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, King George Avenue, Ilford, IG2 7SH	0.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	3.1%	5	0.0%	0	0.0%	0
Sainsbury's, The Brewery, Romford, RM1 1AU	1.6%	18	9.1%	9	0.0%	0	7.9%	3	0.0%	0	1.2%	1	1.2%	1	1.3%	1	1.0%	1	0.0%	0	1.3%	1	0.0%	0
Sainsbury's, William Hunter Way, Brentwood, CM14 4WQ	2.8%	31	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	19.7%	31
Tesco Express, 225 Hanging Hill Lane, Brentwood, CM13 2QG	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	9
Tesco Express, 405 Brentwood Road, Romford, RM2 5TJ	0.4%	4	2.4%	2	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 85-86 Viceroy Parade, Hutton Road, Shenfield, CM15 8JD	0.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	4
Tesco Express, Ardleigh Green Road, Hornchurch, RM11 2LG	0.2%	2	0.0%	0	1.1%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Butts Green Road, Hornchurch, RM11 2LD	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Dagenham Heathway, Dagenham, RM10 8QS	1.1%	13	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	12	0.0%	0	0.0%	0
Tesco Express, Elm Park Avenue, Elm Park, RM12 4SB	0.3%	3	0.0%	0	2.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Front Lane, Cranham, Upminster, RM14 1XL	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

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	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Tesco Express, High Road, Chadwell Heath, RM6 6PR	1.2%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.8%	13	0.0%	0	0.0%	0	0.0%	0
Tesco Express, London Road, Brentwood, CM14 4QG	0.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	6
Tesco Express, Main Road, Romford, RM1 3BT	1.0%	11	8.9%	9	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.6%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Mawney Road, RM7 7HL	0.6%	7	3.8%	4	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	3.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, North Road, South Ockendon, Thurrock, RM15 6QA	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Rainham Road, Rainham, RM13 7QX	1.0%	10	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	4	10.1%	5	0.0%	0
Tesco Express, Warley Hill, Brentwood, CM14 5HB	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	4
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	2.9%	32	0.0%	0	0.0%	0	0.0%	0	10.5%	8	0.6%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	3	40.7%	21	0.0%	0
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	2.4%	27	5.4%	6	0.0%	0	3.8%	2	0.0%	0	0.6%	0	15.0%	16	4.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, High Road, Goodmayes, Romford, RM6 4HY	1.0%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.4%	10	0.7%	1	0.0%	0	0.0%	0
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	3.0%	33	2.0%	2	14.9%	19	14.7%	6	1.8%	1	3.7%	3	0.0%	0	0.7%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0
Tesco Metro, Collier Row Lane, Collier Row, Romford, RM5 3NL	2.7%	30	1.6%	2	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	35.4%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Airfield Way, Hornchurch, RM12 5AF	2.0%	22	0.0%	0	0.7%	1	3.9%	2	24.0%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0
Waitrose, St Mary's Lane, Upminster, RM14 3BT	0.9%	10	0.0%	0	1.5%	2	0.0%	0	0.9%	1	8.4%	6	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	0.9%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.1%	5	0.6%	1	0.7%	1	1.4%	2	0.0%	0	0.0%	0	0.8%	1
Other foodstore outside study area	3.3%	37	2.4%	2	1.1%	1	0.0%	0	0.7%	1	2.3%	2	1.7%	2	0.7%	1	6.3%	9	13.1%	20	0.0%	0	0.0%	0
Other, zone 1	1.5%	16	8.7%	9	0.7%	1	3.3%	1	0.0%	0	0.0%	0	2.8%	3	0.7%	1	0.0%	0	0.0%	0	3.4%	2	0.0%	0
Other, zone 2	0.6%	7	1.1%	1	0.9%	1	3.9%	2	3.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 5	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.8%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 6	0.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 9	1.5%	16	0.0%	0	0.0%	0	0.0%	0	3.8%	3	0.0%	0	0.0%	0	0.0%	0	0.7%	1	6.4%	10	5.8%	3	0.0%	0
Other, zone 10	0.3%	4	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	3	0.0%	0	0.0%	0
Other, zone 11	1.0%	10	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	10
Other foodstores, Basildon	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2
Other foodstores, Billericay	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1

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Weighted:

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	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Other, zone 8	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	2.4%	26	0.0%	0	5.0%	6	0.8%	0	1.7%	1	2.5%	2
(Don't do this kind of shopping)	25.4%	280	14.9%	15	25.8%	34	23.4%	10	24.0%	18	37.5%	28
Weighted base:	1102	102	130	43	73	74	105	79	138	149	52	157
Sample:	1102	100	100	100	100	101	100	100	100	100	100	101

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	Total		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Q08 And where did you shop for top-up food shopping the time before that?													
<i>Those who specified a location at Q07</i>													
Aldi, High Road Seven Kings, Ilford, IG3 8RS	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Aldi, Market Place, Romford RM1, 3AB	0.8%	6	2.2%	2	0.0%	0	1.6%	1	0.0%	0	0.0%	0	1.8%
Aldi, Marlborough Road, Romford, RM7 8AB	2.7%	22	4.8%	4	0.0%	0	0.0%	0	0.0%	0	2.7%	2	20.4%
Aldi, Ripple Road, Dagenham, RM9 6SJ	1.3%	10	0.0%	0	0.0%	0	0.0%	0	2.5%	1	0.0%	0	0.0%
Aldi, St Mary's Lane, Upminster, RM14 2QB	1.4%	11	1.8%	2	0.9%	1	0.0%	0	2.5%	1	13.8%	6	1.0%
Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE	3.6%	29	9.4%	8	2.3%	2	3.0%	1	0.7%	0	1.9%	1	1.9%
Asda, Merriellands Crescent, Dagenham, RM9 6SJ	2.4%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%
Asda, Whalebone Lane, Chadwell Heath, RM8 1BB	0.8%	7	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%
Co-op (Somerfield), Farnham Road, Harold Hill, Romford, RM3 8DX	1.3%	11	0.0%	0	4.6%	4	0.0%	0	0.0%	0	0.0%	0	7.9%
Co-op, 201-207 Rayleigh Road, Hutton, Brentwood, CM13 1LZ	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Co-op, 208-212 Hutton Road, Shenfield, CM15 8NR	1.6%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Co-op, 6/8-8A Harewood Road, Pilgrims Hatch, Brentwood, CM15 9PD	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%
Co-op, Becontree Avenue, Becontree, Dagenham, RM8 2UU	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%
Co-op, Dagenham Road, Rush Green, Romford, RM7 0TJ	0.5%	4	0.0%	0	0.0%	0	12.3%	4	0.0%	0	0.0%	0	0.0%
Co-op, Elm Park Avenue, Hornchurch, RM12 4SD	0.3%	2	0.0%	0	0.0%	0	0.0%	0	4.5%	2	0.0%	0	0.0%
Co-op, Station Road, Harold Wood, Romford, RM3 0BP	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.5%	6	0.0%
Co-op, The Baytree Centre, Brentwood, CM14 4BX	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Co-op, The Retail Unit,	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.3%

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	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Turpin Avenue, Colliers Row, RM5 2PU																								
Costcutter, Becontree Avenue, Dagenham, RM8 3UH	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Costcutter, Farringdon Avenue, Romford, RM3 8SG	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costcutter, Highfield Link, Romford, RM5 3DH	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costcutter, The Cardrome, Upper Rainham Road, Hornchurch, RM12 4ET	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	5	0.0%	0	0.0%	0
Iceland, 32 The High Street, Brentwood,CM14 4AJ	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	4
Iceland, Farnham Road, Harold Hill, Romford, RM3 8DX	2.4%	19	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	26.1%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Heathway, Dagenham, RM10 8QS	1.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.8%	9	0.0%	0	0.0%	0
Iceland, London Road, Romford, RM7 9NA	0.4%	3	0.0%	0	0.0%	0	10.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Market Place, Romford, RM1 3AB	0.8%	6	5.0%	4	0.0%	0	4.0%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, North Street, Hornchurch, RM11 1RL	1.3%	10	0.0%	0	10.3%	9	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Whalebone Lane, Dagenham, RM8 1FB	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.2%	6	0.0%	0	0.0%	0
Lidl, Atlanta Boulevard, Romford, RM1 1TB	0.5%	4	2.5%	2	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Lidl, Heathway, Dagenham, RM10 8QS	1.0%	8	0.0%	0	0.0%	0	1.4%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	5	3.1%	1	0.0%	0
Lidl, Longbridge Road, Dagenham, RM8 2DB	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.8%	1	0.0%	0	0.0%	0
Londis, Rainham Road South, Dagenham, RM10 8AH	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0
Londis, Warley Hill, Brentwood, CM14 5HR	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Marks & Spencer, High Street, Brentwood, CM14 4RH	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3
Marks & Spencer, Lakeside, West Thurrock, RM20 2ZQ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.8%	1
Marks & Spencer, Ongar Road Pilgrims Hatch,	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	3

by Zone

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	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Brentwood, CM15 9HZ												
Marks & Spencer, South Street, Romford, RM1 1NT	2.6%	20	13.5%	12	0.9%	1	5.9%	2	0.9%	1	0.0%	0
Marks & Spencer, Station Road, Upminster, RM14 2SU	1.2%	9	0.0%	0	1.3%	1	0.0%	0	2.3%	1	13.4%	6
Morrisons M Local, Station Parade, Hornchurch, RM12 5AB	0.7%	5	0.0%	0	0.0%	0	0.0%	0	9.9%	5	0.0%	0
Morrisons, London Road, Grays, RM17 5XZ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Morrisons, Wood Lane, Becontree Heath, Dagenham, RM10 7RA	2.1%	17	0.0%	0	0.0%	0	3.8%	1	0.9%	1	0.0%	0
Sainsbury's Local, Farnham Road, Harold Hill, Romford, RM3 8DX	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Sainsbury's Local, North Street, Romford, RM1 1ED	0.5%	4	4.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Elm Park Avenue, Hornchurch, RM12 4RX	0.5%	4	0.0%	0	1.4%	1	0.0%	0	3.8%	2	0.0%	0
Sainsbury's, High Road, Chadwell Heath, Romford, RM6 6PB	2.6%	21	1.8%	2	0.0%	0	6.2%	2	0.0%	0	0.0%	0
Sainsbury's, High Street, Hornchurch, RM11 1TX	3.9%	31	0.9%	1	26.4%	24	0.0%	0	9.9%	5	1.1%	0
Sainsbury's, Howard Road, Grays, RM16 6YJ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Sainsbury's, King George Avenue, Ilford, IG2 7SH	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, The Brewery, Romford, RM1 1AU	1.7%	14	4.9%	4	0.0%	0	9.7%	3	1.3%	1	0.0%	0
Sainsbury's, William Hunter Way, Brentwood, CM14 4WQ	2.7%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 225 Hanging Hill Lane, Brentwood, CM13 2QG	1.5%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 405 Brentwood Road, Romford, RM2 5TJ	0.4%	3	1.8%	2	1.9%	2	0.0%	0	0.0%	0	0.0%	0
Tesco Express, 85-86 Viceroy Parade, Hutton Road, Shenfield, CM15	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
8JD																								
Tesco Express, Ardleigh Green Road, Hornchurch, RM11 2LG	0.3%	2	0.0%	0	1.6%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Butts Green Road, Hornchurch, RM11 2LD	0.3%	2	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Dagenham Heathway, Dagenham, RM10 8QS	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	3	0.0%	0	0.0%	0
Tesco Express, Elm Park Avenue, Elm Park, RM12 4SB	0.4%	3	0.0%	0	3.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Front Lane, Cranham, Upminster, RM14 1XL	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, High Road, Chadwell Heath, RM6 6PR	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	6	0.0%	0	0.0%	0	0.0%	0
Tesco Express, London Road, Brentwood, CM14 4QG	1.3%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.4%	10
Tesco Express, Main Road, Romford, RM1 3BT	2.1%	17	16.0%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.9%	1	0.0%	0	0.0%	0	4.6%	2	0.0%	0
Tesco Express, Mawney Road, RM7 7HL	0.6%	5	2.8%	2	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, North Road, South Ockendon, Thurrock, RM15 6QA	0.1%	1	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Rainham Road, Rainham, RM13 7QX	1.0%	8	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	3	12.0%	5	0.0%	0
Tesco Express, South Street, Romford, RM1 1RX	0.1%	1	0.0%	0	0.0%	0	2.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Warley Hill, Brentwood, CM14 5HB	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	3
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	3.5%	28	0.0%	0	0.0%	0	0.0%	0	15.4%	8	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	45.6%	17	0.0%	0
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	2.6%	21	3.3%	3	2.8%	2	1.4%	0	0.0%	0	1.1%	0	19.6%	13	2.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, High Road, Goodmayes, Romford, RM6 4HY	1.4%	11	4.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.1%	7	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	5.3%	43	2.3%	2	27.9%	25	17.3%	6	3.4%	2	7.3%	3	1.3%	1	0.0%	0	0.0%	0	2.2%	3	0.0%	0	1.1%	1
Tesco Metro, Collier Row	2.7%	21	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	32.1%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11												
Lane, Collier Row, Romford, RM5 3NL																								
Tesco, Airfield Way, Hornchurch, RM12 5AF	1.8%	14	0.0%	0	0.9%	1	5.1%	2	22.0%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, St Mary's Lane, Upminster, RM14 3BT	1.6%	13	0.0%	0	1.8%	2	0.0%	0	1.3%	1	20.7%	9	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Internet / delivered	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	2	2.3%	2	0.9%	1	2.0%	2	0.6%	1	0.0%	0	1.1%	1
Other foodstore outside study area	5.6%	45	0.9%	1	3.5%	3	0.0%	0	0.0%	0	1.1%	0	6.4%	4	1.9%	1	16.4%	16	16.1%	19	1.3%	0	0.0%	0
Other, zone 1	1.7%	13	7.5%	6	0.0%	0	3.6%	1	1.3%	1	0.0%	0	5.4%	4	0.0%	0	1.0%	1	0.0%	0	0.7%	0	0.0%	0
Other, zone 2	1.0%	8	1.3%	1	2.0%	2	5.1%	2	5.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 5	1.3%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	22.7%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 6	0.5%	4	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 9	1.6%	13	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	2	6.1%	7	7.5%	3	0.0%	0
Other, zone 10	0.4%	4	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	3	0.0%	0	0.0%	0
Other, zone 11	1.6%	13	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.6%	12
Other foodstores, Basildon	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Other foodstores, Billericay	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Other, zone 7	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 8	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	4.9%	6	0.0%	0	0.0%	0
(Don't know / can't remember)	1.9%	15	2.0%	2	2.2%	2	2.1%	1	0.0%	0	2.8%	1	1.0%	1	0.0%	0	4.2%	4	3.6%	4	1.8%	1	0.0%	0
Weighted base:	796		87		90		33		54		44		67		59		98		115		38		110	
Sample:	755		80		69		69		68		60		59		74		66		69		72		69	

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Mean score: [£]																								
Q09 Approximately how much money does your household spend per week on top-up food and groceries shopping (STORE MENTIONED AT Q07)?																								
Those who specified a location at Q07																								
£1-10	25.1%	199	29.5%	26	21.0%	19	26.4%	9	26.8%	15	21.3%	9	21.7%	15	25.5%	15	23.0%	22	26.5%	31	21.7%	8	28.5%	31
£11-20	26.3%	209	23.7%	21	18.6%	17	36.5%	12	21.2%	12	35.2%	15	30.6%	21	32.3%	19	23.2%	23	23.6%	27	32.9%	13	28.1%	31
£21-30	18.9%	150	12.5%	11	29.6%	27	13.7%	4	31.9%	17	12.5%	6	14.4%	10	8.7%	5	26.6%	26	22.8%	26	16.1%	6	10.9%	12
£31-40	5.7%	45	4.6%	4	8.1%	7	1.1%	0	4.4%	2	1.4%	1	9.2%	6	7.0%	4	1.4%	1	7.0%	8	11.4%	4	6.1%	7
£41-50	3.8%	30	6.2%	5	2.5%	2	1.1%	0	0.9%	1	4.2%	2	3.6%	2	5.6%	3	4.2%	4	4.4%	5	0.0%	0	4.5%	5
£51-60	1.0%	8	4.6%	4	1.8%	2	0.0%	0	1.8%	1	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0
£61-70	0.6%	5	2.0%	2	1.6%	1	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
£71-80	0.6%	5	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	1.6%	2	1.7%	1	1.1%	1
£81-90	0.3%	3	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2
£91-100	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£101-150	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£151-200	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
£201+	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	15.9%	126	16.2%	14	15.6%	14	20.4%	7	10.1%	5	14.8%	7	20.5%	14	16.4%	10	18.4%	18	13.4%	15	11.6%	4	16.5%	18
(Refused)	1.5%	12	0.7%	1	1.3%	1	0.0%	0	0.0%	0	5.4%	2	0.0%	0	3.6%	2	3.3%	3	0.0%	0	2.9%	1	1.1%	1
Mean:	22.08		23.39		24.26		17.03		22.35		22.80		20.38		20.20		19.96		22.03		22.41		23.97	
Weighted base:	796		87		90		33		54		44		67		59		98		115		38		110	
Sample:	755		80		69		69		68		60		59		74		66		69		72		69	
Q10 Does your household also spend money on food and groceries in small shops? (i.e., not supermarkets)																								
Yes	36.3%	400	27.1%	28	37.3%	48	32.5%	14	44.8%	33	40.2%	30	30.4%	32	32.3%	26	40.8%	56	45.3%	68	24.2%	13	33.9%	53
No	63.7%	702	72.9%	74	62.7%	81	67.5%	29	55.2%	40	59.8%	44	69.6%	73	67.7%	54	59.2%	82	54.7%	82	75.8%	40	66.1%	104
Weighted base:	1102		102		130		43		73		74		105		79		138		149		52		157	
Sample:	1102		100		100		100		100		101		100		100		100		100		100		101	

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

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	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
Q11 Where are these small shops located?																								
<i>Those who use small shops at Q10</i>																								
Local Stores - Romford	14.9%	60	60.3%	17	1.8%	1	56.5%	8	2.7%	1	0.0%	0	28.1%	9	26.0%	7	13.8%	8	9.8%	7	27.3%	3	0.0%	0
Local Stores - Hornchurch	11.9%	48	6.2%	2	57.0%	28	0.0%	0	48.9%	16	5.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	1	0.0%	0
Local Stores - Upminster	7.6%	30	0.0%	0	3.4%	2	0.0%	0	1.5%	1	86.6%	26	3.6%	1	0.0%	0	0.0%	0	0.0%	0	5.0%	1	1.6%	1
Local Stores - Collier Row	4.8%	19	5.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	69.0%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local Stores - Elm Park	4.5%	18	0.0%	0	15.1%	7	0.0%	0	29.4%	10	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Local Stores - Harold Hill	6.4%	26	0.0%	0	8.5%	4	0.0%	0	0.0%	0	0.0%	0	64.2%	20	2.9%	1	0.0%	0	0.0%	0	3.9%	0	0.0%	0
Local Stores - Rainham	2.5%	10	0.0%	0	0.0%	0	2.5%	0	8.1%	3	1.6%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	45.2%	6	0.0%	0
Local Stores - Chadwell Heath	5.7%	23	0.0%	0	0.0%	0	3.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	38.1%	21	1.1%	1	0.0%	0	0.0%	0
Local Stores - Dagenham	13.2%	53	0.0%	0	0.0%	0	3.6%	1	5.6%	2	0.0%	0	0.0%	0	0.0%	0	24.6%	14	52.7%	36	5.8%	1	0.0%	0
Local Stores - Ilford	3.5%	14	0.0%	0	0.0%	0	0.0%	0	1.5%	1	1.6%	0	0.0%	0	0.0%	0	14.8%	8	6.9%	5	0.0%	0	0.0%	0
Local Stores - Barking	3.5%	14	3.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	18.6%	13	0.0%	0	0.0%	0
Local Stores - Brentwood	10.5%	42	5.2%	1	3.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0	70.2%	37
Other, outside area	4.3%	17	3.0%	1	2.4%	1	2.5%	0	0.0%	0	5.3%	2	4.1%	1	0.0%	0	4.5%	3	6.9%	5	3.9%	0	8.2%	4
Gidea Park	2.0%	8	14.5%	4	8.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rush Green	1.1%	4	0.0%	0	0.0%	0	31.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shenfield	2.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.0%	9
(Don't know / varies)	1.5%	6	2.2%	1	0.0%	0	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	2	3.9%	0	3.9%	2
Weighted base:		400		28		48		14		33		30		32		26		56		68		13		53
Sample:		389		33		38		35		43		40		28		32		36		40		27		37

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Weighted:

September 2014

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Mean score: [£]																								
Q12 Approximately how much money does your household spend per week on food and groceries in these small shops?																								
Those who use small shops at Q10																								
£1-10	46.7%	187	46.5%	13	66.9%	32	45.2%	6	36.2%	12	50.0%	15	44.0%	14	49.5%	13	49.5%	28	35.7%	24	44.7%	6	45.1%	24
£11-20	17.2%	69	22.3%	6	20.0%	10	22.1%	3	29.4%	10	13.0%	4	8.4%	3	31.9%	8	13.5%	8	9.4%	6	24.4%	3	16.0%	9
£21-30	9.3%	37	9.2%	3	0.0%	0	4.3%	1	6.0%	2	7.8%	2	12.2%	4	3.9%	1	20.0%	11	11.7%	8	12.4%	2	7.8%	4
£31-40	0.6%	2	2.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	2.9%	0	1.6%	1
£41-50	2.4%	10	0.0%	0	1.8%	1	0.0%	0	1.1%	0	0.0%	0	8.2%	3	0.0%	0	4.5%	3	1.4%	1	0.0%	0	4.5%	2
£51-60	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£61-70	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£71-80	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	0	0.0%	0
£81-90	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£91-100	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£101-150	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1
£151-200	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£201+	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	22.0%	88	17.7%	5	11.3%	5	28.4%	4	27.2%	9	27.0%	8	23.1%	7	10.4%	3	10.1%	6	41.7%	28	12.7%	2	21.1%	11
(Refused)	1.2%	5	2.2%	1	0.0%	0	0.0%	0	0.0%	0	2.1%	1	2.1%	1	2.1%	1	2.4%	1	0.0%	0	0.0%	0	2.2%	1
Mean:	13.88		13.89		9.91		10.82		12.25		11.38		19.06		11.75		14.84		13.79		16.33		17.46	
Weighted base:	400		28		48		14		33		30		32		26		56		68		13		53	
Sample:	389		33		38		35		43		40		28		32		36		40		27		37	

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
Mean score: [%]																								
Q13 Approximately what proportion of your household's total spending on all food and grocery goods is done using the Internet?																								
0%	66.3%	730	82.9%	84	69.3%	90	80.4%	35	81.2%	59	38.2%	28	65.7%	69	88.7%	70	73.6%	101	54.7%	82	53.2%	28	53.3%	84
1-5%	1.6%	18	1.2%	1	4.1%	5	2.7%	1	0.0%	0	4.4%	3	1.1%	1	0.7%	1	0.0%	0	0.0%	0	2.6%	1	2.5%	4
6-10%	1.6%	18	0.8%	1	3.2%	4	1.1%	0	3.3%	2	2.8%	2	0.0%	0	2.8%	2	1.3%	2	0.0%	0	3.4%	2	1.5%	2
11-20%	1.0%	11	1.7%	2	4.1%	5	0.0%	0	0.0%	0	0.9%	1	0.6%	1	0.0%	0	0.0%	0	1.3%	2	1.0%	1	0.0%	0
21-30%	1.1%	12	1.6%	2	0.0%	0	1.6%	1	0.0%	0	4.2%	3	0.0%	0	2.0%	2	1.9%	3	0.5%	1	0.0%	0	1.0%	2
31-40%	0.6%	6	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	3	0.0%	0	3.4%	2	0.8%	1
41-50%	2.7%	30	1.7%	2	3.1%	4	3.4%	1	0.7%	1	1.7%	1	1.6%	2	2.0%	2	1.3%	2	6.6%	10	3.4%	2	2.9%	5
51-60%	0.2%	2	0.0%	0	1.4%	2	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
61-70%	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	2.3%	2	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.8%	1
71-80%	4.3%	47	5.1%	5	8.2%	11	2.4%	1	0.7%	1	5.9%	4	6.7%	7	0.0%	0	1.0%	1	2.5%	4	5.7%	3	6.4%	10
81-90%	2.7%	30	3.5%	4	4.5%	6	0.0%	0	1.4%	1	4.2%	3	1.6%	2	0.0%	0	0.0%	0	2.1%	3	0.7%	0	7.1%	11
91-99%	0.6%	7	0.6%	1	0.7%	1	1.6%	1	1.4%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.8%	1
100%	1.0%	11	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	1.4%	2	1.3%	2	2.3%	1	2.2%	3
(Don't know / varies)	15.6%	172	1.0%	1	0.0%	0	5.1%	2	11.3%	8	35.2%	26	20.3%	21	2.6%	2	16.9%	23	29.8%	45	21.4%	11	20.7%	33
(Refused)	0.2%	3	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	2.3%	1	0.0%	0
Mean:	11.99		9.51		15.88		6.45		4.26		20.00		11.80		3.14		5.14		14.23		15.29		21.59	
Weighted base:	1102		102		130		43		73		74		105		79		138		149		52		157	
Sample:	1102		100		100		100		100		101		100		100		100		100		100		101	

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
Q14 So, speaking as an individual, can you tell me where you last made a purchase of clothes or shoes?																								
Brentwood	3.1%	34	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	0	20.9%	33
Central London - West End (Oxford Street / Regent Street / Bond Street)	2.4%	27	0.0%	0	5.6%	7	1.7%	1	4.3%	3	1.2%	1	3.4%	4	0.0%	0	4.2%	6	2.2%	3	0.9%	0	1.0%	2
Dagenham	0.8%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	9	0.0%	0	0.0%	0
Harold Hill	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hornchurch	1.0%	11	0.0%	0	4.7%	6	0.0%	0	4.8%	3	1.5%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ilford	1.0%	11	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	3.4%	5	3.1%	5	0.0%	0	0.0%	0
Rainham	0.6%	7	0.0%	0	0.0%	0	0.0%	0	3.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.6%	3	0.8%	1
Romford (including The Liberty, The Mall and The Brewery)	42.2%	465	65.5%	67	39.7%	52	62.2%	27	43.7%	32	10.5%	8	48.2%	50	66.6%	53	63.1%	87	40.3%	60	25.0%	13	10.8%	17
Stratford (including Westfield Stratford City)	2.2%	25	2.8%	3	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	2.9%	4	3.8%	6	0.0%	0	6.9%	11
Upminster	1.0%	11	0.0%	0	0.0%	0	1.1%	0	0.0%	0	10.8%	8	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2
Bluewater	1.2%	13	0.0%	0	1.8%	2	2.4%	1	0.0%	0	2.1%	2	1.5%	2	0.0%	0	0.0%	0	1.3%	2	0.9%	0	2.9%	5
Lakeside	21.8%	240	10.4%	11	25.1%	33	13.1%	6	34.7%	25	59.8%	44	13.2%	14	8.3%	7	7.5%	10	20.5%	31	53.6%	28	20.5%	32
Gallows Corner Retail Park, Romford	0.8%	8	0.0%	0	1.3%	2	0.0%	0	1.2%	1	0.0%	0	3.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2
Merrielands Retail Park, Dagenham	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0
B&Q Roneo Corner Retail Park, Romford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Matalan, North Street, Romford	0.2%	3	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.7%	0	0.0%	0
Asda Superstore, Whalebone Lane, Chadwell Heath, RM8 1BB	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0
Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE	0.1%	2	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Street, Hornchurch, RM11 1TX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, King George Avenue, Ilford, IG2 7SH	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, The Brewery, Romford, RM1 1AU	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, William Hunter Way, Brentwood, CM14 4WQ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.7%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, High Road,	0.7%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.9%	8	0.0%	0	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Goodmayes, Romford, RM6 4HY																								
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	0.1%	2	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	6.9%	76	5.6%	6	10.5%	14	2.1%	1	0.7%	1	5.2%	4	12.2%	13	7.8%	6	3.7%	5	11.9%	18	2.7%	1	5.3%	8
Home Catalogue	1.4%	16	1.2%	1	0.0%	0	2.9%	1	0.5%	0	0.0%	0	4.4%	5	2.0%	2	2.1%	3	1.0%	1	1.0%	1	1.1%	2
TV / Interactive Shopping	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.8%	1
Other location outside study area	1.5%	16	3.3%	3	3.2%	4	2.1%	1	0.0%	0	1.7%	1	0.6%	1	0.0%	0	0.0%	0	1.1%	2	4.9%	3	1.1%	2
Other, zone 8	0.2%	3	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0
London (Other)	0.3%	3	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.9%	0	0.6%	1
Southend	0.1%	2	1.1%	1	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Goodmayes (including retail park)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0
Chelmsford	1.5%	17	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.2%	11
Billericay	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2
Beckton superstores and retail parks	0.4%	5	0.0%	0	3.2%	4	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Basildon	1.6%	18	0.0%	0	0.0%	0	0.6%	0	1.2%	1	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.8%	15
(Don't know / can't remember)	2.1%	23	1.2%	1	0.7%	1	3.0%	1	0.0%	0	3.6%	3	3.0%	3	5.2%	4	1.7%	2	1.0%	1	1.2%	1	3.3%	5
(Don't do this type of shopping)	2.9%	32	6.3%	6	2.2%	3	3.5%	2	2.4%	2	1.3%	1	1.8%	2	5.0%	4	2.1%	3	3.6%	5	0.9%	0	2.2%	4
Weighted base:	1102			102		130		43		73		74		105		79		138		149		52		157
Sample:	1102			100		100		100		100		101		100		100		100		100		100		101

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Total Zone 1 Zone 2 Zone 3 Zone 4 Zone 5 Zone 6 Zone 7 Zone 8 Zone 9 Zone 10 Zone 11

Mean score [Times a week]: Everyday = 7, 5 - 6 times a week = 5.5, 3 - 4 times a week = 3.5, Twice a week = 2, Once a week = 1, Once every two weeks = 0.5, Once a month = 0.25, Once every two months = 0.125, 3 or 4 times a year = 0.067, Twice a year = 0.038, Once a year = 0.019, Less often = 0.01

Q15 How often do you visit (LOCATION MENTIONED AT Q14) for clothes or shoes shopping?

Those who specified a location at Q15

Everyday	0.9%	10	1.5%	1	0.0%	0	0.0%	0	0.0%	0	2.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	6
5 - 6 times a week	0.0%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
3 - 4 times a week	0.6%	6	0.9%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	2.3%	3	0.0%	0	0.5%	0	0.6%	1
Twice a week	1.1%	12	0.6%	1	0.9%	1	0.6%	0	0.0%	0	1.7%	1	1.5%	2	0.8%	1	2.1%	3	1.7%	2	2.1%	1	0.0%	0
Once a week	7.8%	82	9.3%	9	5.0%	6	12.5%	5	5.4%	4	6.0%	4	10.9%	11	5.9%	4	8.8%	12	8.9%	13	5.3%	3	7.8%	12
Once every two weeks	12.9%	135	13.2%	12	15.6%	20	12.3%	5	20.0%	14	15.4%	11	8.6%	9	11.9%	8	20.3%	27	14.8%	21	9.6%	5	1.7%	2
Once a month	25.6%	268	26.1%	25	30.2%	38	20.0%	8	31.5%	22	24.2%	17	24.5%	24	18.0%	13	22.3%	30	24.2%	34	39.1%	20	24.9%	37
Once every two months	14.4%	150	14.0%	13	9.9%	12	6.7%	3	18.4%	13	10.9%	8	16.4%	16	11.9%	9	13.5%	18	13.9%	20	13.6%	7	21.5%	32
3 or 4 times a year	12.0%	126	13.4%	13	10.7%	14	17.8%	7	14.4%	10	10.9%	8	6.9%	7	18.6%	13	11.5%	15	8.1%	12	8.0%	4	15.9%	24
Twice a year	7.2%	75	4.7%	4	15.7%	20	6.8%	3	2.8%	2	6.6%	5	10.1%	10	8.5%	6	7.1%	9	0.5%	1	5.2%	3	8.5%	13
Once a year	3.0%	31	3.1%	3	5.7%	7	4.2%	2	0.0%	0	3.1%	2	3.2%	3	4.5%	3	2.5%	3	1.2%	2	7.1%	4	1.4%	2
Less often	2.3%	24	6.0%	6	3.0%	4	3.5%	1	3.1%	2	0.9%	1	2.0%	2	4.4%	3	1.5%	2	1.2%	2	1.6%	1	0.6%	1
(Don't know / varies)	12.3%	128	7.1%	7	3.3%	4	15.6%	6	3.7%	3	16.5%	12	16.0%	16	15.5%	11	8.2%	11	25.5%	36	7.9%	4	12.8%	19
Mean:	0.41		0.45		0.27		0.34		0.33		0.59		0.33		0.26		0.44		0.39		0.33		0.60	
Weighted base:	1047		94		126		40		71		70		100		71		133		143		51		148	
Sample:	1026		89		96		90		96		94		94		90		95		92		97		93	

Q16 How do you normally travel to (LOCATION MENTIONED AT Q14)?

Not those who shop via Internet / catalogue / TV at Q15

Car - Driver	58.2%	555	44.3%	39	66.1%	74	51.8%	20	59.5%	42	72.5%	48	53.3%	43	55.8%	35	45.0%	56	57.2%	71	74.5%	37	65.9%	90
Car - Passenger	8.9%	85	7.4%	6	2.6%	3	7.7%	3	6.9%	5	5.6%	4	16.6%	14	5.0%	3	15.6%	19	10.5%	13	16.0%	8	5.1%	7
Bus	17.4%	166	14.6%	13	12.0%	13	17.8%	7	24.2%	17	8.7%	6	18.1%	15	32.6%	21	30.5%	38	24.2%	30	8.0%	4	1.9%	3
Cycle	0.2%	2	0.7%	1	0.0%	0	0.0%	0	1.4%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Disabled vehicle (e.g. mobility scooter)	0.2%	2	2.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Taxi	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.8%	1	1.7%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Train	6.5%	62	5.0%	4	4.2%	5	5.2%	2	4.4%	3	1.3%	1	8.3%	7	0.0%	0	6.2%	8	4.2%	5	1.6%	1	19.5%	27
Walk	5.6%	54	18.0%	16	7.7%	9	14.1%	5	2.4%	2	8.7%	6	2.1%	2	2.4%	1	1.1%	1	1.2%	1	0.0%	0	7.7%	11
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tube	0.3%	3	0.0%	0	2.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aeroplane	0.4%	4	0.0%	0	3.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.8%	17	7.4%	6	1.0%	1	3.3%	1	0.7%	1	2.2%	1	0.8%	1	2.4%	2	0.8%	1	2.7%	3	0.0%	0	0.0%	0
Weighted base:	954		87		113		38		71		66		82		64		125		123		49		137	
Sample:	934		84		85		84		94		88		76		80		88		82		90		83	

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	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q17 And the time before that, where did your household go to make a purchase of clothes or shoes?																								
<i>Those who specified a location at Q15</i>																								
Barking	0.2%	3	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0
Brentwood	3.4%	36	1.9%	2	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	22.2%	33
Central London - West End (Oxford Street / Regent Street / Bond Street)	3.4%	36	2.6%	2	7.9%	10	1.2%	0	4.4%	3	2.4%	2	2.6%	3	2.2%	2	2.5%	3	5.6%	8	1.5%	1	1.4%	2
Collier Row	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dagenham	1.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.4%	11	3.5%	2	0.0%	0
Elm Park	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harold Hill	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hornchurch	0.7%	7	0.6%	1	0.5%	1	0.0%	0	6.9%	5	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Ilford	1.7%	18	0.6%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	7.4%	10	3.3%	5	0.7%	0	0.0%	0
Rainham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.8%	1
Romford (including The Liberty, The Mall and The Brewery)	34.3%	359	56.6%	53	25.4%	32	60.6%	24	37.7%	27	16.1%	11	43.1%	43	54.3%	39	47.3%	63	32.0%	46	22.1%	11	6.8%	10
Stratford (including Westfield Stratford City)	4.4%	46	2.6%	2	3.1%	4	1.8%	1	1.2%	1	4.8%	3	7.3%	7	0.0%	0	7.6%	10	1.3%	2	1.0%	1	9.8%	14
Upminster	0.5%	5	0.9%	1	0.0%	0	0.0%	0	1.4%	1	3.7%	3	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bluewater	3.1%	33	0.0%	0	6.4%	8	4.2%	2	4.6%	3	9.7%	7	1.9%	2	0.8%	1	0.0%	0	0.7%	1	0.0%	0	6.4%	9
Lakeside	28.8%	301	19.4%	18	36.5%	46	21.6%	9	35.1%	25	50.1%	35	18.3%	18	21.5%	15	16.7%	22	27.9%	40	63.7%	33	27.0%	40
Gallows Corner Retail Park, Romford	1.0%	10	1.2%	1	2.2%	3	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.7%	1	3.3%	5	0.0%	0	0.0%	0
Ilford Retail Park	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	6	0.0%	0	0.0%	0	0.0%	0
Merriellands Retail Park, Dagenham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
Matalan, North Street, Romford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0
Asda Superstore, Whalebone Lane, Chadwell Heath, RM8 1BB	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE	0.5%	5	0.0%	0	3.3%	4	0.9%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Road, Chadwell Heath, Romford, RM6 6PB	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Street, Hornchurch, RM11 1TX	0.3%	3	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	1.7%	2
Sainsbury's, The Brewery, Romford, RM1 1AU	0.1%	1	0.0%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	1	0.0%	0
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	0.4%	4	0.0%	0	2.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

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	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
Tesco Extra, High Road, Goodmayes, Romford, RM6 4HY	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Internet / delivered	5.2%	55	5.2%	5	4.9%	6	2.3%	1	2.1%	2	8.9%	6	10.8%	11	0.0%	0	1.7%	2	7.3%	10	0.5%	0	7.5%	11
Home Catalogue	1.6%	17	0.6%	1	0.0%	0	2.4%	1	0.5%	0	0.0%	0	2.6%	3	4.6%	3	2.5%	3	2.4%	3	1.0%	1	1.4%	2
Other location outside study area	1.4%	15	3.0%	3	3.3%	4	0.0%	0	1.5%	1	1.8%	1	1.7%	2	1.0%	1	0.7%	1	0.5%	1	0.0%	0	0.8%	1
Other, zone 8	0.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	4	0.7%	1	0.0%	0	0.0%	0
Other, zone 9	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0
London (Other)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Southend	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chelmsford	1.1%	12	0.6%	1	0.0%	0	1.2%	0	0.0%	0	0.0%	0	5.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	6
Basildon	1.2%	12	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	1.4%	1	1.3%	2	0.0%	0	0.0%	0	6.2%	9
(Don't know / can't remember)	2.8%	29	3.3%	3	3.5%	4	2.1%	1	2.2%	2	0.0%	0	2.6%	3	6.0%	4	0.7%	1	4.0%	6	1.6%	1	3.2%	5
Weighted base:	1047			94		126		40		71		70		100		71		133		143		51		148
Sample:	1026			89		96		90		96		94		94		90		95		92		97		93

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	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q18 Now can you tell me where your household last made a purchase of furniture, carpets, or soft household furnishings?																								
Barking	0.0%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brentwood	1.1%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	1.1%	1	0.0%	0	1.9%	3	0.0%	0	0.0%	0	4.8%	8
Central London - West End (Oxford Street / Regent Street / Bond Street)	0.6%	7	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	5	0.0%	0	1.5%	1	0.0%	0
Dagenham	1.4%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	5	7.4%	11	0.0%	0	0.0%	0
Elm Park	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harold Hill	0.3%	3	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	1.5%	2	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hornchurch	1.8%	20	3.0%	3	8.3%	11	3.9%	2	1.6%	1	3.1%	2	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.5%	0	0.0%	0
Ilford	0.8%	9	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	6	0.9%	1	1.2%	1	0.0%	0
Rainham	0.4%	5	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.1%	4	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	11.4%	126	19.6%	20	17.0%	22	15.7%	7	6.2%	5	5.2%	4	12.1%	13	16.3%	13	14.0%	19	5.0%	7	7.3%	4	8.2%	13
South Ockendon	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0
Stratford (including Westfield Stratford City)	0.5%	6	0.8%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.9%	1	2.6%	4	0.0%	0	0.0%	0	0.0%	0
Upminster	5.7%	63	5.4%	5	5.3%	7	2.3%	1	6.9%	5	26.9%	20	5.4%	6	4.3%	3	2.1%	3	0.9%	1	5.1%	3	5.5%	9
Bluewater	0.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.6%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	2.1%	3
Lakeside	13.2%	145	6.2%	6	17.3%	23	7.4%	3	21.9%	16	14.4%	11	7.1%	7	5.3%	4	5.7%	8	12.1%	18	38.2%	20	18.6%	29
Chase Lane Retail Park, Ilford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
Eastern Avenue West Retail Park, Romford	1.7%	18	0.8%	1	1.1%	1	5.7%	2	2.4%	2	0.9%	1	1.1%	1	9.0%	7	1.3%	2	0.0%	0	0.0%	0	0.8%	1
Gallows Corner Retail Park, Romford	6.9%	76	16.6%	17	7.6%	10	12.6%	5	5.5%	4	3.1%	2	14.0%	15	10.9%	9	3.4%	5	3.2%	5	0.0%	0	3.1%	5
Grove Farm Retail Park, Romford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ilford Retail Park	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0
Merriellands Retail Park, Dagenham	0.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	4	1.6%	1	0.0%	0
Newbury Retail Park, Horns Road, Ilford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rom Valley Way Retail Park, Romford	1.5%	16	2.1%	2	3.1%	4	3.5%	2	4.4%	3	1.2%	1	1.7%	2	2.3%	2	0.7%	1	0.0%	0	0.0%	0	0.0%	0
B&Q Roneo Corner Retail Park, Romford	0.8%	9	0.0%	0	1.3%	2	7.1%	3	0.5%	0	0.0%	0	1.6%	2	0.0%	0	0.7%	1	0.0%	0	0.9%	0	0.6%	1
B&Q Tangent Link, Harold Hill, Romford	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	4
Homebase, High Road, Seven Kings, Ilford	0.7%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	8	0.0%	0	0.0%	0
Homebase, Rom Valley Way, Romford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Ikea, Lakeside	2.6%	29	5.6%	6	5.1%	7	0.6%	0	0.7%	1	0.0%	0	3.3%	3	3.4%	3	0.0%	0	4.0%	6	0.0%	0	2.2%	3
Tesco Extra, Bridge Road,	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Rainham, RM13 9YZ												
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	2
Internet / delivered	4.9%	54	4.2%	4	3.6%	5	1.6%	1	3.3%	2	12.7%	9
Home Catalogue	1.4%	16	0.0%	0	0.0%	0	0.0%	0	6.7%	5	0.0%	0
TV / Interactive Shopping	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other location outside study area	0.8%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1
Other, zone 1	0.2%	2	0.0%	0	0.0%	0	0.0%	0	2.3%	2	0.0%	0
Other, zone 5	0.3%	3	0.0%	0	0.0%	0	0.0%	0	3.1%	2	0.6%	1
Other, zone 8	0.8%	9	0.0%	0	1.5%	2	0.0%	0	0.0%	0	0.0%	0
Other, zone 9	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 11	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
London (Other)	0.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Goodmayes (including retail park)	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Chelmsford	0.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Billericay	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Beckton superstores and retail parks	0.3%	3	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0
Basildon	1.3%	14	0.0%	0	0.0%	0	0.6%	0	1.2%	1	0.0%	0
(Don't know / can't remember)	11.2%	123	7.9%	8	9.8%	13	11.4%	5	10.9%	8	13.6%	10
(Don't do this type of shopping)	22.9%	252	27.0%	27	18.5%	24	24.9%	11	23.1%	17	9.6%	7
Weighted base:	1102		102		130		43		73		74	
Sample:	1102		100		100		100		101		100	

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
Q19 And the time before that, where did your household go to make a purchase of furniture, carpets, or soft household furnishings?																								
Those who specified a location at Q18																								
Barking	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brentwood	2.2%	16	0.0%	0	0.0%	0	0.0%	0	0.8%	0	1.5%	1	3.0%	2	0.0%	0	3.1%	3	0.0%	0	0.0%	0	9.1%	11
Central London - West End (Oxford Street / Regent Street / Bond Street)	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	2.1%	1	1.6%	1	0.0%	0	1.3%	0	0.0%	0
Dagenham	2.1%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.4%	6	10.2%	9	0.0%	0	0.0%	0
Harold Hill	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	4.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hornchurch	3.0%	22	2.4%	2	15.7%	15	0.0%	0	3.4%	2	1.9%	1	0.0%	0	4.9%	2	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Ilford	0.3%	2	0.0%	0	0.0%	0	0.9%	0	0.0%	0	1.5%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Rainham	1.0%	7	0.0%	0	0.9%	1	0.0%	0	0.8%	0	1.1%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	11.2%	4	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	14.3%	104	31.0%	21	12.1%	11	14.0%	4	6.4%	3	5.4%	3	19.6%	12	20.7%	10	34.4%	29	4.3%	4	9.8%	4	3.8%	4
South Ockendon	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Stratford (including Westfield Stratford City)	0.7%	5	2.4%	2	0.9%	1	1.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	1.3%	0	1.0%	1
Upminster	7.2%	52	11.2%	7	4.3%	4	1.7%	0	16.5%	8	27.6%	16	10.4%	6	6.1%	3	3.5%	3	0.0%	0	5.1%	2	2.5%	3
Bluewater	0.7%	5	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	1.8%	2
Lakeside	17.5%	127	7.1%	5	19.1%	18	23.2%	6	17.6%	8	18.9%	11	14.8%	9	6.8%	3	14.7%	12	18.6%	17	57.7%	21	14.5%	17
Chase Lane Retail Park, Ilford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Eastern Avenue West Retail Park, Romford	2.4%	18	4.7%	3	3.3%	3	9.8%	3	1.5%	1	1.1%	1	0.0%	0	12.8%	6	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Gallows Corner Retail Park, Romford	7.1%	51	14.5%	10	12.3%	11	11.6%	3	3.8%	2	2.2%	1	17.4%	10	13.2%	6	1.6%	1	4.1%	4	0.0%	0	2.0%	2
Grove Farm Retail Park, Romford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ilford Retail Park	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0
Merriellands Retail Park, Dagenham	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	3	2.3%	1	0.0%	0
Newbury Retail Park, Horns Road, Ilford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rom Valley Way Retail Park, Romford	1.3%	10	3.3%	2	1.2%	1	4.7%	1	2.1%	1	0.0%	0	1.9%	1	3.9%	2	1.2%	1	0.0%	0	0.0%	0	0.0%	0
B&Q Roneo Corner Retail Park, Romford	1.1%	8	0.0%	0	1.8%	2	16.6%	5	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.8%	1
Homebase, Rom Valley Way, Romford	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ikea, Lakeside	4.1%	30	2.6%	2	7.1%	7	2.4%	1	7.9%	4	0.8%	0	4.3%	3	3.3%	2	0.0%	0	8.7%	8	1.0%	0	3.5%	4
Matalan, North Street, Romford	0.2%	2	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Street, Hornchurch, RM11 1TX	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, The Brewery,	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Romford, RM1 1AU												
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	8.3%	60	6.5%	4	6.0%	6	4.2%	1	5.1%	2	14.3%	8
Home Catalogue	2.3%	17	0.0%	0	0.0%	0	0.0%	0	10.1%	5	0.0%	0
Other location outside study area	0.8%	6	1.2%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Other, zone 1	0.2%	2	0.0%	0	0.0%	0	0.0%	0	3.5%	2	0.0%	0
Other, zone 5	0.3%	3	0.0%	0	0.0%	0	0.0%	0	3.3%	2	1.1%	1
Other, zone 8	0.5%	4	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Other, zone 9	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 11	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
London (Other)	1.5%	11	6.0%	4	0.0%	0	0.9%	0	0.0%	0	0.0%	0
Goodmayes (including retail park)	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chelmsford	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Beckton superstores and retail parks	0.9%	6	0.0%	0	0.0%	0	1.7%	0	0.0%	0	0.0%	0
Basildon	2.1%	15	0.0%	0	0.0%	0	1.7%	0	1.0%	1	0.0%	0
(Don't know / can't remember)	13.4%	98	7.2%	5	11.2%	10	5.3%	1	15.1%	7	17.3%	10
Weighted base:	727	66	93	27	48	57	60	47	83	92	37	116
Sample:	697	60	76	53	63	75	60	58	53	52	72	75

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Q20 Now can you tell me where your household last made a purchase of DIY and decorating goods?												
Brentwood	1.9%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	21
Collier Row	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	1	0.0%	0
Dagenham	1.5%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	4	8.1%	12
Elm Park	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harold Hill	0.5%	5	0.0%	0	0.0%	0	0.0%	0	2.5%	3	3.2%	3
Hornchurch	0.7%	8	0.0%	0	0.0%	0	0.6%	0	0.9%	1	3.4%	3
Ilford	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rainham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Romford (including The Liberty, The Mall and The Brewery)	6.4%	71	11.8%	12	2.2%	3	8.3%	4	4.5%	3	4.5%	3
Upminster	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lakeside	4.3%	48	0.0%	0	0.0%	0	3.9%	2	2.6%	2	14.7%	11
Abbey Retail Park, Barking	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Eastern Avenue West Retail Park, Romford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1
Gallows Corner Retail Park, Romford	8.1%	89	9.7%	10	2.9%	4	0.0%	0	1.3%	1	9.2%	7
Grove Farm Retail Park, Romford	0.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ilford Retail Park	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Merriellands Retail Park, Dagenham	3.0%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rom Valley Way Retail Park, Romford	0.3%	3	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0
B&Q Roneo Corner Retail Park, Romford	26.2%	289	30.0%	31	65.2%	85	55.6%	24	64.6%	47	22.0%	16
B&Q Tangent Link, Harold Hill, Romford	11.4%	126	16.5%	17	7.0%	9	0.0%	0	3.3%	2	19.5%	14
Homebase, High Road, Seven Kings, Ilford	0.7%	8	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Homebase, Rom Valley Way, Romford	3.5%	39	8.8%	9	5.1%	7	12.2%	5	3.8%	3	2.0%	1
Ikea, Lakeside	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wickes Extra, Hertford Road, Barking	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wickes, Brook Street, Brentwood	0.9%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	2
Sainsbury's, High Street, Hornchurch, RM11 1TX	0.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	1.1%	12	0.0%	0	0.0%	0	0.0%	0	0.7%	1	2.9%	2
Home Catalogue	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other location outside study area	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Other, zone 8	0.9%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Other, zone 9	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Other, zone 11	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	4
London (Other)	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Goodmayes (including retail park)	1.5%	16	0.6%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	8.6%	12	2.1%	3	0.0%	0	0.0%	0
Beckton superstores and retail parks	1.0%	11	0.0%	0	3.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	3	2.8%	4	0.7%	0	0.0%	0
Basildon	1.4%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	8.9%	14
(Don't know / can't remember)	3.2%	35	3.3%	3	0.9%	1	6.0%	3	2.3%	2	3.8%	3	0.6%	1	2.1%	2	3.1%	4	7.6%	11	4.4%	2	2.1%	3
(Don't do this type of shopping)	18.1%	200	18.8%	19	11.7%	15	12.1%	5	14.7%	11	11.5%	8	25.6%	27	19.6%	16	27.6%	38	19.4%	29	13.1%	7	15.9%	25
Weighted base:	1102			102		130		43		73		74		105		79		138		149		52		157
Sample:	1102			100		100		100		100		101		100		100		100		100		100		101

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

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	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q21 And the time before that, where did your household go to make a purchase of DIY and decorating goods?																								
<i>Those who specified a location at Q20</i>																								
Barking	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Brentwood	1.9%	16	0.0%	0	0.0%	0	0.7%	0	0.0%	0	2.7%	2	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.5%	13
Collier Row	0.1%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dagenham	1.4%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	9.2%	10	2.3%	1	0.0%	0
Elm Park	0.2%	2	0.0%	0	1.0%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Grays	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0
Harold Hill	0.9%	8	2.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	3	4.0%	3	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Hornchurch	1.0%	8	0.0%	0	0.0%	0	0.7%	0	1.1%	1	5.5%	3	0.8%	1	0.0%	0	1.0%	1	1.2%	1	2.5%	1	0.0%	0
Ilford	0.2%	2	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Rainham	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	2.8%	1	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	7.5%	65	15.9%	13	1.5%	2	9.4%	3	1.4%	1	4.3%	3	3.7%	3	5.7%	4	17.8%	17	6.0%	7	12.1%	5	7.0%	9
Upminster	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0
Lakeside	5.4%	47	0.0%	0	0.7%	1	4.8%	2	3.7%	2	13.5%	8	0.0%	0	0.0%	0	3.2%	3	8.6%	9	36.5%	16	4.4%	6
Eastern Avenue West Retail Park, Romford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0
Gallows Corner Retail Park, Romford	9.0%	78	12.4%	10	6.5%	7	3.3%	1	1.6%	1	10.2%	6	21.7%	17	18.1%	11	5.1%	5	0.0%	0	0.0%	0	15.2%	20
Grove Farm Retail Park, Romford	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	3	0.0%	0	0.0%	0	0.0%	0
Ilford Retail Park	0.3%	3	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0
Merriellands Retail Park, Dagenham	3.1%	27	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	19.2%	21	10.2%	4	0.0%	0
Rom Valley Way Retail Park, Romford	0.5%	5	0.0%	0	2.2%	2	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.9%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
B&Q Roneo Corner Retail Park, Romford	27.2%	236	22.3%	18	59.8%	68	44.4%	16	65.8%	40	26.2%	16	7.9%	6	24.7%	15	20.4%	19	13.8%	15	19.2%	8	11.2%	14
B&Q Tangent Link, Harold Hill, Romford	12.5%	108	12.5%	10	5.7%	6	0.0%	0	5.1%	3	18.8%	12	41.1%	32	23.1%	14	0.0%	0	4.8%	5	7.8%	3	17.2%	22
Homebase, High Road, Seven Kings, Ilford	1.0%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.2%	9	0.0%	0	0.0%	0	0.0%	0
Homebase, Rom Valley Way, Romford	10.1%	88	29.1%	23	14.5%	17	31.2%	11	17.0%	10	2.9%	2	1.7%	1	18.6%	12	3.1%	3	5.7%	6	1.8%	1	1.9%	2
Wickes Extra, Hertford Road, Barking	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0
Wickes, Brook Street, Brentwood	2.1%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	2	9.0%	7	0.0%	0	1.0%	1	0.0%	0	0.0%	0	6.1%	8
Sainsbury's, High Street, Hornchurch, RM11 1TX	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	6
Internet / delivered	1.2%	11	0.0%	0	0.0%	0	1.9%	1	0.8%	1	3.4%	2	1.2%	1	1.6%	1	0.0%	0	5.0%	5	0.0%	0	0.0%	0
Home Catalogue	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Other location outside study area	0.8%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	4.3%	5	0.0%	0	0.9%	1

Haverling Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Other, zone 8	1.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.7%	9	0.0%	0	0.0%	0	0.0%	0
Other, zone 9	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Other, zone 11	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	4
London (Other)	0.2%	2	0.0%	0	0.0%	0	0.7%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Goodmayes (including retail park)	1.6%	14	0.0%	0	0.7%	1	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.8%	11	1.7%	2	0.0%	0	0.0%	0
Billericay	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Beckton superstores and retail parks	1.6%	14	0.0%	0	3.6%	4	1.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	7.2%	8	0.0%	0	0.0%	0
Basildon	2.2%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.5%	19
(Don't know / can't remember)	3.7%	32	3.6%	3	3.0%	3	0.0%	0	0.0%	0	5.7%	4	0.8%	1	3.4%	2	5.1%	5	10.2%	11	1.7%	1	1.9%	2
Weighted base:	867			79		114		35		61		62		77		62		96		109		43		129
Sample:	854			73		84		78		85		83		78		75		68		71		80		79

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Q22 Can you tell me where you or your household last made a purchase of electrical items such as TVs, DVD players, digital cameras, MP3 players, mobile phones or computers?												
Barking	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brentwood	2.5%	27	0.0%	0	0.0%	0	0.6%	0	0.0%	0	1.2%	1
Central London - West End (Oxford Street / Regent Street / Bond Street)	0.5%	6	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	0
Dagenham	2.5%	28	0.0%	0	0.0%	0	4.7%	2	1.9%	1	0.0%	0
Elm Park	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Harold Hill	0.5%	6	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.9%	1
Hornchurch	2.2%	24	1.8%	2	5.4%	7	1.1%	0	10.6%	8	3.6%	3
Ilford	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rainham	0.5%	6	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	11.4%	126	31.0%	32	8.8%	11	27.8%	12	11.3%	8	7.7%	6
Stratford (including Westfield Stratford City)	0.6%	6	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Upminster	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.6%	0
Bluewater	1.0%	11	0.0%	0	2.1%	3	0.0%	0	0.0%	0	6.6%	5
Lakeside	9.8%	108	0.6%	1	13.3%	17	3.4%	1	13.2%	10	23.4%	17
Chase Lane Retail Park, Ilford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Eastern Avenue West Retail Park, Romford	6.0%	66	7.2%	7	16.2%	21	12.2%	5	2.0%	1	1.5%	1
Gallows Corner Retail Park, Romford	3.8%	41	3.9%	4	3.3%	4	5.7%	2	0.5%	0	1.2%	1
Grove Farm Retail Park, Romford	0.7%	8	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0
Merrilands Retail Park, Dagenham	1.0%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rom Valley Way Retail Park, Romford	0.2%	2	0.0%	0	0.5%	1	0.0%	0	0.9%	1	0.0%	0
B&Q Roneo Corner Retail Park, Romford	0.3%	3	0.0%	0	0.0%	0	0.6%	0	1.2%	1	0.0%	0
B&Q Tangent Link, Harold Hill, Romford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Homebase, Rom Valley Way, Romford	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Asda Superstore, Whalebone Lane, Chadwell Heath, RM8 1BB	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Morrisons, Wood Lane, Becontree Heath,	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Dagenham, RM10 7RA																								
Sainsbury's, Elm Park Avenue, Hornchurch, RM12 4RX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Road, Chadwell Heath, Romford, RM6 6PB	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, William Hunter Way, Brentwood, CM14 4WQ	0.2%	2	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	0.9%	10	0.0%	0	0.0%	0	0.0%	0	3.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	10.4%	5	0.0%	0
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	1.6%	18	10.6%	11	0.0%	0	0.8%	0	0.7%	1	0.0%	0	4.5%	5	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, High Road, Goodmayes, Romford, RM6 4HY	0.5%	6	0.0%	0	0.9%	1	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	4	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	1.0%	11	0.0%	0	1.8%	2	3.3%	1	5.0%	4	2.4%	2	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Lakeside, West Thurrock, Grays, RM20 1TX	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	2	0.0%	0
Tesco, Airfield Way, Hornchurch, RM12 5AF	0.0%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	15.3%	168	11.6%	12	21.4%	28	10.8%	5	11.0%	8	19.3%	14	16.2%	17	11.4%	9	14.8%	20	11.9%	18	21.4%	11	16.9%	27
Home Catalogue	0.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.7%	1	0.7%	1	0.0%	0	0.0%	0
Other location outside study area	0.7%	8	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	3.7%	6
Other, zone 1	0.6%	7	1.8%	2	1.6%	2	0.0%	0	0.7%	1	0.0%	0	1.8%	2	0.7%	1	0.0%	0	0.0%	0	0.5%	0	0.0%	0
Other, zone 6	0.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Other, zone 8	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	2	1.7%	3	0.0%	0	0.0%	0
Other, zone 11	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
London (Other)	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	1.9%	3	1.3%	2	0.0%	0	0.8%	1
Goodmayes (including retail park)	1.1%	12	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.3%	10	0.7%	1	0.0%	0	0.0%	0
Chelmsford	0.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	4
Beckton superstores and retail parks	0.6%	7	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	6	0.0%	0	0.0%	0
Basildon	1.9%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.2%	21
(Don't know / can't remember)	9.2%	102	5.1%	5	10.7%	14	10.3%	4	7.6%	6	9.0%	7	11.4%	12	9.3%	7	6.8%	9	10.5%	16	4.4%	2	12.3%	19
(Don't do this type of shopping)	19.4%	214	25.2%	26	12.5%	16	13.9%	6	23.2%	17	18.9%	14	20.0%	21	30.2%	24	21.3%	29	21.2%	32	15.4%	8	13.8%	22
Weighted base:	1102			102		130		43		73		74		105		79		138		149		52		157
Sample:	1102			100		100		100		100		101		100		100		100		100		100		101

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Q23 And the time before that, where you or your household last made a purchase of electrical items such as TVs, DVD players, digital cameras, MP3 players, mobile phones or computers?												
<i>Those who specified a location at Q22</i>												
Barking	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brentwood	1.7%	13	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	12
Central London - West End (Oxford Street / Regent Street / Bond Street)	1.1%	8	0.8%	1	0.0%	0	0.0%	0	9.6%	5	0.0%	0
Collier Row	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	0
Dagenham	3.1%	25	0.0%	0	0.0%	0	5.1%	2	0.7%	0	0.0%	0
Elm Park	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Harold Hill	0.3%	2	0.0%	0	0.9%	1	0.0%	0	0.0%	0	1.2%	0
Hornchurch	1.9%	15	1.7%	1	1.3%	1	0.8%	0	14.6%	7	4.9%	3
Ilford	0.8%	6	0.0%	0	4.7%	5	0.0%	0	0.0%	0	0.0%	0
Rainham	0.4%	3	0.0%	0	0.0%	0	0.0%	0	2.3%	1	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	14.1%	111	35.4%	25	10.4%	10	24.7%	8	7.9%	4	4.5%	2
Stratford (including Westfield Stratford City)	1.0%	8	0.0%	0	0.0%	0	0.0%	0	1.9%	1	1.6%	1
Upminster	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1
Bluewater	1.0%	8	0.0%	0	1.6%	2	1.1%	0	0.0%	0	6.7%	4
Lakeside	13.2%	104	2.9%	2	19.8%	20	3.4%	1	22.4%	11	26.5%	14
Chase Lane Retail Park, Ilford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Eastern Avenue West Retail Park, Romford	7.5%	59	7.5%	5	16.8%	17	17.7%	6	5.6%	3	0.9%	0
Gallows Corner Retail Park, Romford	4.5%	35	2.3%	2	2.3%	2	8.0%	3	1.7%	1	3.7%	2
Grove Farm Retail Park, Romford	1.3%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ilford Retail Park	0.3%	2	0.0%	0	1.6%	2	0.0%	0	0.7%	0	0.0%	0
Merriellands Retail Park, Dagenham	1.7%	14	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0
Rom Valley Way Retail Park, Romford	0.2%	2	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
B&Q Roneo Corner Retail Park, Romford	0.4%	3	0.0%	0	0.0%	0	2.9%	1	1.7%	1	0.0%	0
B&Q Tangent Link, Harold Hill, Romford	0.6%	5	1.6%	1	0.0%	0	0.0%	0	0.0%	0	4.2%	3
Homebase, Rom Valley Way, Romford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	2
Sainsbury's, High Road, Chadwell Heath, Romford,	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

by Zone

Weighted:

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	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
RM6 6PB																								
Sainsbury's, The Brewery, Romford, RM1 1AU	0.1%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, William Hunter Way, Brentwood, CM14 4WQ	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.4%	6
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	0.7%	5	0.0%	0	0.0%	0	0.0%	0	1.9%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.2%	3	0.0%	0
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	1.5%	12	12.2%	9	0.0%	0	2.5%	1	0.0%	0	0.0%	0	2.4%	2	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, High Road, Goodmayes, Romford, RM6 4HY	0.4%	3	0.0%	0	1.2%	1	1.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	1.3%	10	0.0%	0	1.3%	1	9.4%	3	1.7%	1	2.5%	1	0.0%	0	0.0%	0	3.8%	4	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Lakeside, West Thurrock, Grays, RM20 1TX	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	2	0.0%	0
Tesco, Airfield Way, Hornchurch, RM12 5AF	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	19.6%	154	20.5%	15	22.2%	22	9.6%	3	16.1%	8	25.8%	14	25.2%	18	16.8%	8	16.1%	16	8.9%	9	21.7%	9	27.7%	32
Home Catalogue	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	2	0.0%	0	1.0%	1	1.0%	1	0.0%	0	0.0%	0
TV / Interactive Shopping	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.6%	0	0.0%	0
Other location outside study area	1.2%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0	1.0%	1	1.4%	1	0.0%	0	5.0%	6
Other, zone 1	0.7%	6	1.7%	1	1.7%	2	0.0%	0	1.0%	1	1.6%	1	0.9%	1	1.1%	1	0.0%	0	0.0%	0	0.6%	0	0.0%	0
Other, zone 6	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Other, zone 8	0.7%	5	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	1.8%	2	0.0%	0	0.0%	0
London (Other)	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.1%	7	0.0%	0	0.0%	0
Goodmayes (including retail park)	1.0%	8	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.6%	6	1.0%	1	0.0%	0	0.0%	0
Chelmsford	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Beckton superstores and retail parks	1.0%	8	0.0%	0	0.0%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.4%	7	0.0%	0	0.0%	0
Basildon	2.9%	23	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	19.3%	22
(Don't know / can't remember)	9.8%	77	12.5%	9	10.9%	11	12.7%	4	5.1%	3	8.4%	4	9.3%	7	8.5%	4	12.2%	12	10.4%	11	3.6%	1	10.0%	12
Weighted base:		786		71		100		33		51		53		72		48		99		102		42		116
Sample:		762		67		75		70		73		71		67		61		67		68		73		70

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Weighted:

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	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q24 Can you tell me where you or your household last made a purchase of domestic appliances, such as washing machines, fridges or cookers?																								
Barking	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.5%	0	0.0%	0
Brentwood	3.4%	37	0.0%	0	0.9%	1	0.0%	0	0.5%	0	2.5%	2	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.0%	33
Central London - West End (Oxford Street / Regent Street / Bond Street)	0.5%	5	0.6%	1	1.3%	2	1.1%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	2	0.0%	0
Collier Row	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dagenham	2.9%	32	0.0%	0	1.3%	2	4.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	4	15.5%	23	1.2%	1	0.0%	0
Harold Hill	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hornchurch	4.1%	46	6.3%	6	6.9%	9	3.3%	1	15.2%	11	10.1%	7	3.8%	4	1.9%	2	1.0%	1	0.7%	1	4.8%	2	0.0%	0
Ilford	0.3%	3	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0
Rainham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	8.0%	88	20.8%	21	3.4%	4	18.0%	8	8.1%	6	5.0%	4	6.9%	7	5.9%	5	14.3%	20	5.4%	8	2.2%	1	2.9%	5
Stratford (including Westfield Stratford City)	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0
Upminster	0.4%	4	0.0%	0	0.0%	0	0.0%	0	1.8%	1	3.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bluewater	1.3%	14	0.6%	1	3.8%	5	0.0%	0	0.5%	0	4.0%	3	0.0%	0	1.3%	1	0.0%	0	0.7%	1	0.0%	0	2.3%	4
Lakeside	7.3%	80	0.8%	1	5.1%	7	0.8%	0	12.6%	9	14.9%	11	0.9%	1	2.5%	2	1.2%	2	9.4%	14	31.7%	17	10.9%	17
Eastern Avenue West Retail Park, Romford	6.2%	68	13.3%	14	9.9%	13	19.1%	8	0.0%	0	0.0%	0	10.3%	11	17.6%	14	4.1%	6	2.0%	3	0.0%	0	0.0%	0
Gallows Corner Retail Park, Romford	4.2%	46	4.2%	4	0.5%	1	2.6%	1	1.2%	1	2.1%	2	17.6%	18	13.7%	11	0.7%	1	0.0%	0	3.4%	2	3.3%	5
Grove Farm Retail Park, Romford	0.3%	3	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	3	0.0%	0	0.0%	0	0.0%	0
Ilford Retail Park	0.1%	2	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Merriellands Retail Park, Dagenham	1.0%	11	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	6.1%	9	0.7%	0	0.0%	0
Rom Valley Way Retail Park, Romford	0.5%	5	0.0%	0	0.5%	1	0.6%	0	0.7%	1	0.0%	0	0.0%	0	1.3%	1	2.1%	3	0.0%	0	0.0%	0	0.0%	0
B&Q Roneo Corner Retail Park, Romford	0.4%	5	0.0%	0	1.1%	1	1.7%	1	3.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q Tangent Link, Harold Hill, Romford	0.4%	4	0.0%	0	3.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Homebase, High Road, Seven Kings, Ilford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE	0.2%	2	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Lakeside Retail Park, Thurrock, RM20 3LP	0.1%	2	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Street, Hornchurch, RM11 1TX	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.9%	0	0.0%	0
Sainsbury's, Howard Road, Grays, RM16 6YJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0

by Zone

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	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Sainsbury's, The Brewery, Romford, RM1 1AU	0.1%	1	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	0.5%	6	0.0%	0	0.0%	0	0.0%	0	4.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	3	0.0%	0
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	0.3%	3	0.8%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, High Road, Goodmayes, Romford, RM6 4HY	0.3%	3	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	0.3%	3	0.6%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Tesco, Airfield Way, Hornchurch, RM12 5AF	0.0%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	19.1%	210	12.9%	13	22.9%	30	14.5%	6	17.6%	13	29.3%	22	13.7%	14	15.2%	12	14.6%	20	17.8%	27	23.3%	12	26.2%	41
Home Catalogue	1.5%	16	0.0%	0	0.0%	0	1.1%	0	3.3%	2	0.0%	0	2.3%	2	1.3%	1	1.7%	2	2.1%	3	0.5%	0	2.6%	4
Other, zone 6	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Other, zone 8	1.2%	13	0.0%	0	0.0%	0	1.2%	1	1.9%	1	0.0%	0	0.0%	0	0.0%	0	6.1%	8	1.9%	3	0.0%	0	0.0%	0
Other, zone 11	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
London (Other)	0.5%	5	1.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.3%	2	0.0%	0	0.0%	0
Goodmayes (including retail park)	1.8%	20	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	13.2%	18	0.7%	1	0.0%	0	0.0%	0
Chelmsford	0.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	5
Billericay	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Beckton superstores and retail parks	1.0%	10	0.0%	0	3.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	6	0.0%	0	0.0%	0
Basildon	1.2%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.8%	12
(Don't know / can't remember)	7.2%	79	11.4%	12	10.6%	14	12.6%	5	4.0%	3	4.9%	4	11.3%	12	5.0%	4	4.2%	6	7.6%	11	6.0%	3	3.4%	5
(Don't do this type of shopping)	22.1%	244	26.6%	27	18.6%	24	14.7%	6	21.0%	15	21.8%	16	30.6%	32	29.3%	23	24.7%	34	23.4%	35	14.4%	8	14.6%	23
Weighted base:	1102			102		130		43		73		74		105		79		138		149		52		157
Sample:	1102			100		100		100		100		101		100		100		100		100		100		101

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	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q25 And the time before that, where you or your household last made a purchase of domestic appliances, such as washing machines, fridges or cookers?																								
<i>Those who specified a location at Q24</i>																								
Barking	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.5%	6	0.6%	0	0.0%	0
Brentwood	2.4%	19	0.0%	0	0.0%	0	0.0%	0	0.7%	0	1.2%	1	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.4%	16
Central London - West End (Oxford Street / Regent Street / Bond Street)	0.6%	5	1.0%	1	0.0%	0	1.5%	0	0.0%	0	1.2%	1	0.0%	0	3.0%	2	0.0%	0	0.0%	0	4.2%	2	0.0%	0
Dagenham	3.4%	26	1.3%	1	0.0%	0	7.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	6	16.3%	17	1.8%	1	0.0%	0
Harold Hill	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hornchurch	5.2%	41	5.2%	3	11.7%	11	3.3%	1	19.2%	11	12.1%	7	3.0%	2	3.9%	2	1.4%	1	0.9%	1	5.4%	2	0.0%	0
Ilford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Rainham	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	8.8%	68	24.0%	15	4.4%	4	18.2%	6	9.6%	5	5.5%	3	7.7%	5	5.6%	3	14.5%	14	6.2%	6	6.1%	3	3.4%	4
Stratford (including Westfield Stratford City)	0.7%	5	0.0%	0	1.8%	2	0.0%	0	2.4%	1	0.0%	0	0.0%	0	1.0%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Upminster	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.7%	0	4.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bluewater	1.7%	13	1.0%	1	1.8%	2	1.1%	0	0.0%	0	4.3%	2	0.0%	0	1.9%	1	0.0%	0	0.9%	1	0.0%	0	5.0%	6
Lakeside	12.1%	94	8.6%	5	9.0%	8	1.1%	0	14.1%	8	22.3%	12	6.9%	4	3.8%	2	3.1%	3	13.2%	14	38.0%	16	17.2%	22
Eastern Avenue West Retail Park, Romford	8.2%	64	18.7%	12	11.1%	10	21.6%	7	0.9%	1	0.0%	0	17.2%	10	27.6%	14	6.6%	6	2.9%	3	0.0%	0	0.0%	0
Gallows Corner Retail Park, Romford	5.2%	40	1.8%	1	2.5%	2	1.6%	1	2.8%	2	2.3%	1	26.0%	16	21.9%	11	1.0%	1	0.7%	1	0.0%	0	3.8%	5
Grove Farm Retail Park, Romford	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	3	0.0%	0	0.0%	0	0.0%	0
Ilford Retail Park	0.2%	2	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Merriclands Retail Park, Dagenham	1.7%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	10.7%	11	1.5%	1	0.0%	0
Rom Valley Way Retail Park, Romford	0.4%	3	1.0%	1	0.7%	1	0.8%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
B&Q Roneo Corner Retail Park, Romford	0.5%	4	0.0%	0	0.9%	1	0.0%	0	6.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q Tangent Link, Harold Hill, Romford	0.1%	1	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Homebase, High Road, Seven Kings, Ilford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Street, Hornchurch, RM11 1TX	0.2%	2	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.2%	0	0.0%	0
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	0.6%	4	0.0%	0	0.0%	0	0.0%	0	5.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	1	0.0%	0
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	2.1%	1	3.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, High Road, Goodmayes, Romford, RM6 4HY	0.4%	3	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2	0.0%	0	0.0%	0	0.0%	0

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	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	0.3%	3	0.0%	0	0.9%	1	1.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0
Tesco, Airfield Way, Hornchurch, RM12 5AF	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	24.7%	192	23.4%	15	34.0%	31	19.7%	6	14.2%	8	37.7%	20	19.5%	12	19.4%	10	14.7%	14	23.8%	25	26.3%	11	31.1%	40
Home Catalogue	1.9%	15	0.0%	0	0.0%	0	1.5%	0	8.9%	5	0.0%	0	3.9%	2	1.9%	1	1.0%	1	0.7%	1	0.6%	0	3.2%	4
Other location outside study area	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Other, zone 6	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Other, zone 8	1.7%	13	0.0%	0	0.0%	0	1.6%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	10.1%	10	1.8%	2	0.0%	0	0.0%	0
Other, zone 11	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
London (Other)	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	1.8%	2	0.0%	0	0.0%	0
Goodmayes (including retail park)	1.8%	14	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	12.8%	13	0.9%	1	0.0%	0	0.0%	0
Chelmsford	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	2
Beckton superstores and retail parks	0.6%	5	0.0%	0	4.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Basildon	1.2%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.1%	9
(Don't know / can't remember)	11.7%	91	12.4%	8	12.9%	12	19.4%	6	9.8%	5	7.7%	4	11.1%	7	2.5%	1	15.5%	15	11.6%	12	9.4%	4	13.0%	17
Weighted base:	779			63		92		31		55		54		61		52		98		103		42		129
Sample:	772			61		73		68		76		75		60		63		71		66		77		82

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	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
Q26 Can you tell me where you or your household last made a purchase of health, beauty or chemist items?																								
Barking	1.0%	11	0.8%	1	0.0%	0	0.0%	0	3.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	8	0.0%	0	0.0%	0
Brentwood	10.1%	111	0.6%	1	0.0%	0	0.6%	0	0.0%	0	1.2%	1	2.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	68.0%	107
Central London - West End (Oxford Street / Regent Street / Bond Street)	2.4%	26	0.8%	1	7.0%	9	0.0%	0	3.3%	2	2.6%	2	0.9%	1	1.8%	1	3.8%	5	3.1%	5	0.0%	0	0.0%	0
Chigwell	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Collier Row	2.6%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	35.4%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dagenham	5.8%	64	0.0%	0	0.0%	0	0.6%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	9.7%	13	32.2%	48	2.3%	1	0.0%	0
Elm Park	1.3%	15	0.0%	0	3.6%	5	0.0%	0	12.3%	9	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Harold Hill	2.4%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.5%	22	3.5%	3	0.0%	0	0.0%	0	0.9%	0	0.8%	1
Hornchurch	7.5%	82	1.4%	1	44.3%	58	3.9%	2	24.1%	18	2.0%	1	1.9%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Ilford	1.0%	11	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	4	3.1%	5	0.0%	0	0.0%	0
Rainham	1.9%	21	0.0%	0	0.0%	0	0.6%	0	4.3%	3	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.7%	1	29.6%	16	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	24.8%	273	63.3%	64	9.7%	13	67.8%	29	20.4%	15	7.0%	5	23.0%	24	41.8%	33	41.0%	56	17.2%	26	12.6%	7	0.6%	1
Stratford (including Westfield Stratford City)	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.3%	2	0.0%	0	0.0%	0
Upminster	3.8%	42	0.0%	0	1.1%	1	0.6%	0	1.2%	1	53.6%	39	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bluewater	0.1%	1	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lakeside	4.1%	45	0.0%	0	0.7%	1	0.0%	0	6.5%	5	14.8%	11	1.1%	1	0.0%	0	2.6%	4	7.2%	11	12.7%	7	4.3%	7
Gallows Corner Retail Park, Romford	1.2%	14	1.1%	1	1.9%	2	0.0%	0	0.0%	0	0.9%	1	6.0%	6	3.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Merrielands Retail Park, Dagenham	0.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	4	0.0%	0	0.0%	0
B&Q Roneo Corner Retail Park, Romford	0.2%	2	0.0%	0	1.3%	2	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda Superstore, Whalebone Lane, Chadwell Heath, RM8 1BB	0.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	3	0.0%	0	0.0%	0	0.0%	0
Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE	1.3%	14	3.2%	3	6.3%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Lakeside Retail Park, Thurrock, RM20 3LP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Sainsbury's, Elm Park Avenue, Hornchurch, RM12 4RX	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Road, Chadwell Heath, Romford, RM6 6PB	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	7	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Street, Hornchurch, RM11 1TX	0.3%	3	1.1%	1	1.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Howard Road, Grays, RM16 6YJ	0.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0

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	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Sainsbury's, The Brewery, Romford, RM1 1AU	0.6%	6	3.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
Sainsbury's, William Hunter Way, Brentwood, CM14 4WQ	0.7%	8	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	7
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	1.7%	19	0.0%	0	0.0%	0	0.0%	0	7.3%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	3	20.4%	11	0.0%	0
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	2.8%	30	3.6%	4	0.0%	0	0.0%	0	0.9%	1	2.5%	2	20.7%	22	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Tesco Extra, High Road, Goodmayes, Romford, RM6 4HY	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	3	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	1.9%	21	2.6%	3	7.8%	10	5.8%	2	2.9%	2	0.6%	0	0.0%	0	0.0%	0	0.7%	1	1.3%	2	0.7%	0	0.0%	0
Tesco, Airfield Way, Hornchurch, RM12 5AF	0.2%	2	0.0%	0	0.7%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	2.9%	32	2.1%	2	4.7%	6	0.0%	0	0.7%	1	7.1%	5	1.2%	1	2.0%	2	0.0%	0	4.1%	6	5.7%	3	4.1%	6
Home Catalogue	0.9%	10	1.1%	1	0.0%	0	0.0%	0	4.0%	3	0.0%	0	0.0%	0	0.0%	0	0.7%	1	3.1%	5	0.7%	0	0.0%	0
TV / Interactive Shopping	0.1%	1	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0
Other location outside study area	0.3%	3	0.0%	0	0.7%	1	1.9%	1	0.7%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 1	0.1%	2	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 3	0.5%	6	0.0%	0	0.0%	0	9.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.5%	1	0.0%	0	0.0%	0
Other, zone 5	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 6	0.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 8	1.5%	16	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.7%	16	0.0%	0	0.0%	0	0.0%	0
Other, zone 9	0.3%	3	0.0%	0	0.8%	1	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.7%	1	0.0%	0	0.0%	0
Other, zone 11	0.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	5
London (Other)	0.2%	2	0.6%	1	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Chelmsford	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Billericay	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Basildon	1.0%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.0%	11
(Don't know / can't remember)	1.2%	13	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	4	1.2%	1	0.7%	1	4.6%	7	0.5%	0	0.0%	0
(Don't do this type of shopping)	8.4%	92	10.2%	10	5.1%	7	4.9%	2	5.3%	4	3.9%	3	13.7%	14	5.7%	5	12.1%	17	10.6%	16	10.1%	5	6.3%	10
Weighted base:	1102			102		130		43		73		74		105		79		138		149		52		157
Sample:	1102			100		100		100		100		101		100		100		100		100		100		101

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

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	Total		Zone 1	Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q27 And the time before that, where did you or your household go to make a purchase of health, beauty or chemist items?																								
Those who specified a location at Q26																								
Barking	0.8%	8	0.9%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.2%	7	0.0%	0	0.0%	0
Brentwood	9.7%	97	0.7%	1	0.0%	0	0.6%	0	0.0%	0	1.2%	1	4.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	62.0%	91
Central London - West End (Oxford Street / Regent Street / Bond Street)	2.5%	25	1.8%	2	7.4%	9	0.0%	0	0.7%	1	3.6%	3	0.0%	0	3.3%	2	1.1%	1	3.7%	5	0.0%	0	1.6%	2
Chigwell	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Collier Row	3.0%	30	2.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	37.0%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dagenham	5.7%	57	0.0%	0	0.0%	0	1.2%	1	1.7%	1	0.0%	0	0.0%	0	0.0%	0	9.3%	11	33.6%	43	3.4%	2	0.0%	0
Elm Park	1.4%	14	0.0%	0	3.3%	4	0.0%	0	13.0%	9	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Grays	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0
Harold Hill	2.5%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	27.0%	23	1.0%	1	0.0%	0	0.0%	0	1.1%	0	0.0%	0
Hornchurch	7.2%	72	0.7%	1	32.0%	39	4.1%	2	30.6%	21	2.7%	2	2.3%	2	0.0%	0	0.8%	1	1.5%	2	4.4%	2	0.0%	0
Ilford	1.9%	19	4.4%	4	1.3%	2	0.0%	0	2.4%	2	0.0%	0	0.0%	0	0.0%	0	6.1%	7	3.7%	5	0.0%	0	0.0%	0
Rainham	1.3%	13	0.0%	0	0.0%	0	0.0%	0	3.1%	2	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.8%	1	18.0%	8	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	27.1%	270	61.1%	55	21.0%	26	59.5%	24	17.0%	12	3.4%	2	24.6%	21	43.4%	32	47.2%	57	22.6%	29	18.5%	9	2.2%	3
Stratford (including Westfield Stratford City)	0.6%	6	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	1.5%	2	1.1%	0	0.8%	1
Upminster	3.9%	39	0.0%	0	1.4%	2	0.6%	0	0.5%	0	48.5%	34	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.6%	1
Bluewater	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Lakeside	5.8%	58	0.7%	1	5.0%	6	7.6%	3	11.3%	8	18.1%	13	1.0%	1	0.0%	0	2.1%	3	10.2%	13	17.7%	8	2.0%	3
Gallows Corner Retail Park, Romford	2.2%	22	4.4%	4	2.7%	3	0.0%	0	0.0%	0	2.4%	2	8.9%	8	5.2%	4	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Merriellands Retail Park, Dagenham	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	3	0.8%	0	0.0%	0
Asda Superstore, Whalebone Lane, Chadwell Heath, RM8 1BB	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	3	0.0%	0	0.0%	0	0.0%	0
Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE	0.8%	8	1.2%	1	3.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	2	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Elm Park Avenue, Hornchurch, RM12 4RX	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Road, Chadwell Heath, Romford, RM6 6PB	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.4%	6	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Street, Hornchurch, RM11 1TX	0.6%	6	1.2%	1	3.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Howard Road, Grays, RM16 6YJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0
Sainsbury's, The Brewery, Romford, RM1 1AU	1.3%	13	4.4%	4	0.0%	0	2.3%	1	0.0%	0	0.0%	0	2.7%	2	1.4%	1	2.1%	3	0.6%	1	3.8%	2	0.0%	0

by Zone

Weighted:

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	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Sainsbury's, William Hunter Way, Brentwood, CM14 4WQ	0.7%	6	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	6
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	2.0%	20	0.0%	0	0.0%	0	0.0%	0	9.5%	7	1.2%	1	0.0%	0	0.0%	0	0.0%	0	2.1%	3	21.7%	10	0.0%	0
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	3.2%	32	4.9%	4	1.6%	2	0.0%	0	1.7%	1	4.3%	3	21.3%	18	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Tesco Extra, High Road, Goodmayes, Romford, RM6 4HY	0.4%	4	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	4	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	1.7%	17	1.2%	1	9.8%	12	6.9%	3	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Airfield Way, Hornchurch, RM12 5AF	0.6%	6	0.0%	0	2.0%	2	0.0%	0	5.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivered	2.8%	27	2.4%	2	3.6%	4	0.0%	0	0.0%	0	6.5%	5	3.0%	3	1.5%	1	0.0%	0	4.3%	5	3.8%	2	3.6%	5
Home Catalogue	0.8%	8	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.8%	1	3.7%	5	0.8%	0	0.0%	0
TV / Interactive Shopping	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0
Other location outside study area	0.2%	2	0.0%	0	0.7%	1	0.8%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 1	0.3%	3	3.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 3	0.6%	6	0.0%	0	0.0%	0	10.7%	4	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Other, zone 5	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 6	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 8	1.6%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.1%	14	0.8%	1	0.0%	0	0.0%	0
Other, zone 9	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 11	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	5
London (Other)	0.2%	2	0.7%	1	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Chelmsford	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	6
Billericay	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Beckton superstores and retail parks	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Basildon	1.6%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.7%	14
(Don't know / can't remember)	1.7%	17	0.0%	0	0.0%	0	3.7%	2	0.0%	0	2.2%	2	1.8%	2	0.0%	0	1.9%	2	2.5%	3	2.1%	1	3.7%	5
Weighted base:	996			91		123		41		69		71		87		74		120		127		47		147
Sample:	976			85		95		92		92		96		79		94		85		77		89		92

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

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	Total		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11											
Q28 Can you tell me where you or your household last made a purchase of recreational goods such as sports equipment, bicycles, musical instruments or toys?																								
Brentwood	2.8%	31	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.9%	30
Central London - West End (Oxford Street / Regent Street / Bond Street)	0.8%	9	0.8%	1	3.2%	4	0.0%	0	0.0%	0	2.0%	1	0.0%	0	1.8%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Collier Row	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dagenham	1.5%	16	0.0%	0	0.0%	0	0.0%	0	3.3%	2	0.0%	0	0.6%	1	0.0%	0	1.9%	3	7.2%	11	0.0%	0	0.0%	0
Elm Park	0.2%	2	0.0%	0	0.0%	0	0.0%	0	3.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hornchurch	0.9%	10	1.6%	2	2.8%	4	0.0%	0	4.0%	3	2.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ilford	0.4%	4	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.7%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Rainham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.7%	0	0.0%	0	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	9.7%	107	17.6%	18	16.5%	21	13.8%	6	13.7%	10	3.9%	3	9.2%	10	8.9%	7	10.5%	14	7.7%	11	9.2%	5	0.8%	1
Stratford (including Westfield Stratford City)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Upminster	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bluewater	0.1%	2	0.8%	1	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lakeside	9.2%	102	1.9%	2	13.7%	18	0.0%	0	15.5%	11	33.0%	24	6.7%	7	1.6%	1	0.7%	1	10.4%	15	39.0%	20	0.8%	1
Gallows Corner Retail Park, Romford	2.2%	24	3.9%	4	5.1%	7	2.7%	1	0.7%	1	0.0%	0	5.4%	6	3.9%	3	1.3%	2	0.0%	0	0.0%	0	0.8%	1
Grove Farm Retail Park, Romford	0.6%	6	0.0%	0	1.3%	2	4.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	3	0.0%	0	0.0%	0	0.0%	0
Merrielands Retail Park, Dagenham	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	5	1.4%	1	0.0%	0
Rom Valley Way Retail Park, Romford	0.1%	1	0.6%	1	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Homebase, Rom Valley Way, Romford	0.1%	1	0.0%	0	0.0%	0	2.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Matalan, North Street, Romford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	2.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Road, Chadwell Heath, Romford, RM6 6PB	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, The Brewery, Romford, RM1 1AU	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	2	0.0%	0
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	0.9%	9	3.9%	4	2.2%	3	0.0%	0	0.0%	0	0.0%	0	0.6%	1	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Internet / delivered	8.8%	97	3.7%	4	17.4%	23	3.7%	2	4.9%	4	7.8%	6	5.6%	6	2.6%	2	5.5%	8	4.3%	6	7.7%	4	21.2%	33
Home Catalogue	0.4%	4	0.0%	0	0.0%	0	3.9%	2	0.0%	0	0.6%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
TV / Interactive Shopping	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.5%	0	0.0%	0
Other location outside study area	0.4%	5	0.0%	0	1.5%	2	1.1%	0	0.0%	0	0.9%	1	0.0%	0	0.9%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Other, zone 1	0.2%	2	0.6%	1	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 8	1.6%	17	1.6%	2	0.0%	0	3.2%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	5.2%	7	4.4%	7	0.0%	0	0.0%	0
Other, zone 11	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
London (Other)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Beckton superstores and retail parks	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0	3.1%	5	0.0%	0	0.0%	0
Basildon	0.1%	2	0.0%	0	0.0%	0	0.0%	0	0.5%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	3.1%	34	7.5%	8	2.2%	3	4.6%	2	0.0%	0	0.0%	0	1.5%	2	0.0%	0	4.7%	6	1.7%	3	4.4%	2	5.6%	9
(Don't do this type of shopping)	53.4%	589	54.0%	55	32.3%	42	57.9%	25	50.9%	37	44.0%	32	66.6%	70	72.7%	58	65.8%	91	55.1%	82	33.7%	18	50.5%	79
Weighted base:	1102		102		130		43		73		74		105		79		138		149		52		157	
Sample:	1102		100		100		100		100		101		100		100		100		100		100		101	

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

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	Total		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Q29 And the time before that, where did you or your household go to make a purchase of recreational goods such as sports equipment, bicycles, musical instruments or toys?													
<i>Those who specified a location at Q28</i>													
Brentwood	5.6%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	26
Central London - West End (Oxford Street / Regent Street / Bond Street)	1.4%	7	0.0%	0	4.8%	4	0.0%	0	0.0%	0	3.2%	1	0
Chigwell	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0
Collier Row	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0
Dagenham	2.9%	14	0.0%	0	0.0%	0	0.0%	0	6.8%	2	0.0%	0	0
Elm Park	0.7%	3	0.0%	0	0.0%	0	0.0%	0	9.5%	3	0.0%	0	0
Grays	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0
Hornchurch	1.7%	8	0.0%	0	6.9%	6	0.0%	0	2.8%	1	3.6%	1	0
Ilford	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0
Rainham	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0
Romford (including The Liberty, The Mall and The Brewery)	22.2%	106	56.7%	22	26.7%	23	32.0%	5	18.2%	7	11.3%	5	24.4%
Stratford (including Westfield Stratford City)	0.3%	1	2.1%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%
Upminster	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	2	2.7%
Bluewater	0.3%	2	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%
Lakeside	23.9%	115	15.1%	6	21.4%	18	5.8%	1	38.2%	14	57.0%	23	26.0%
Gallows Corner Retail Park, Romford	2.3%	11	0.0%	0	1.0%	1	0.0%	0	1.4%	1	0.0%	0	16.2%
Grove Farm Retail Park, Romford	1.4%	7	0.0%	0	4.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%
Merriellands Retail Park, Dagenham	1.2%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Newbury Retail Park, Horns Road, Ilford	1.4%	7	0.0%	0	0.0%	0	10.4%	2	0.0%	0	0.0%	0	6.6%
Rom Valley Way Retail Park, Romford	0.1%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
B&Q Tangent Link, Harold Hill, Romford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%
Homebase, Rom Valley Way, Romford	0.2%	1	0.0%	0	0.0%	0	7.2%	1	0.0%	0	0.0%	0	0.0%
Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	1.0%	5	0.0%	0	3.4%	3	0.0%	0	0.0%	0	0.0%	0	9.2%
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	0.5%	2	0.0%	0	2.0%	2	2.9%	0	0.0%	0	0.0%	0	0.0%

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

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	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Internet / delivered	17.5%	84	9.7%	4	20.8%	18	8.6%	1	1.4%	1	17.3%	7	18.3%	6	14.5%	3	22.0%	9	5.0%	3	15.8%	5	38.6%	27
Home Catalogue	0.8%	4	0.0%	0	0.0%	0	10.4%	2	0.0%	0	1.1%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1
TV / Interactive Shopping	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.8%	0	0.0%	0
Other location outside study area	1.1%	5	0.0%	0	4.3%	4	2.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Other, zone 1	0.2%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 8	3.5%	17	6.1%	2	0.0%	0	10.5%	2	0.0%	0	0.0%	0	0.0%	0	4.7%	1	11.9%	5	10.2%	7	0.0%	0	0.0%	0
Other, zone 11	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1
London (Other)	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0	0.0%	0
Goodmayes (including retail park)	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chelmsford	1.3%	6	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.4%	6
Beckton superstores and retail parks	1.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.3%	5	0.0%	0	0.0%	0
Basildon	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	3.8%	18	5.7%	2	1.0%	1	9.4%	2	18.8%	7	1.5%	1	0.0%	0	6.0%	1	0.0%	0	3.5%	2	0.0%	0	3.6%	2
Weighted base:		479		39		85		16		36		41		33		22		41		64		32		69
Sample:		423		34		57		29		41		52		29		28		27		35		53		38

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Weighted:

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	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
Q30 And where was the last purchase of other non-food items such as books, CDs, jewellery or china and glass items?																								
Barking	0.2%	2	0.0%	0	0.0%	0	0.0%	0	2.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brentwood	3.0%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.4%	32
Central London - West End (Oxford Street / Regent Street / Bond Street)	0.5%	6	1.4%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.9%	1	0.0%	0	2.0%	3	0.0%	0	0.0%	0	0.0%	0
Collier Row	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dagenham	1.5%	17	0.0%	0	0.0%	0	1.6%	1	3.3%	2	0.0%	0	0.0%	0	0.0%	0	3.9%	5	5.5%	8	0.0%	0	0.0%	0
Elm Park	0.2%	2	0.0%	0	0.0%	0	0.0%	0	3.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harold Hill	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hornchurch	0.4%	4	0.0%	0	0.5%	1	0.0%	0	3.2%	2	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Ilford	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	4.6%	6	0.0%	0	0.5%	0	0.0%	0
Rainham	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	3	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	17.3%	191	31.0%	32	22.5%	29	42.8%	18	25.3%	18	2.9%	2	14.0%	15	26.0%	21	22.2%	31	14.4%	21	6.0%	3	0.6%	1
Upminster	1.0%	11	1.6%	2	0.0%	0	0.0%	0	0.0%	0	11.5%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Bluewater	0.3%	3	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2
Lakeside	3.8%	42	0.0%	0	2.6%	3	1.2%	1	9.3%	7	23.1%	17	0.9%	1	0.0%	0	0.0%	0	2.2%	3	16.9%	9	0.6%	1
Eastern Avenue West Retail Park, Romford	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gallows Corner Retail Park, Romford	0.5%	6	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0	1.9%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Merrielands Retail Park, Dagenham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE	0.2%	3	0.0%	0	0.0%	0	3.5%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Road, Chadwell Heath, Romford, RM6 6PB	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Street, Hornchurch, RM11 1TX	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Sainsbury's, The Brewery, Romford, RM1 1AU	0.3%	4	1.6%	2	0.0%	0	0.6%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	0.6%	7	0.0%	0	0.0%	0	0.0%	0	4.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.9%	4	0.0%	0
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	0.2%	3	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.9%	1	2.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, High Road, Goodmayes, Romford, RM6 4HY	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	0.4%	4	1.6%	2	1.4%	2	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Airfield Way,	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

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	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Hornchurch, RM12 5AF																								
Internet / delivered	35.6%	392	30.8%	31	50.5%	66	22.4%	10	23.4%	17	36.4%	27	28.3%	30	28.0%	22	24.3%	33	37.1%	55	36.4%	19	51.9%	82
Home Catalogue	0.1%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
TV / Interactive Shopping	0.2%	2	0.6%	1	0.0%	0	0.6%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0
Other location outside study area	0.2%	2	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Other, zone 6	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 9	0.0%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 11	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2
London (Other)	0.1%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Southend	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chelmsford	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	3
Basildon	0.1%	2	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
(Don't know / can't remember)	3.1%	34	0.0%	0	2.8%	4	3.2%	1	0.5%	0	7.5%	5	2.5%	3	3.5%	3	5.1%	7	4.9%	7	0.0%	0	2.3%	4
(Don't do this type of shopping)	27.6%	304	28.1%	29	15.8%	21	23.6%	10	21.1%	15	16.3%	12	44.4%	46	37.2%	30	35.0%	48	35.0%	52	25.2%	13	17.9%	28
Weighted base:		1102		102		130		43		73		74		105		79		138		149		52		157
Sample:		1102		100		100		100		100		101		100		100		100		100		100		101

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Weighted:

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	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
Q31 And the time before that, where did you or your household go to make a purchase of other non-food items such as books, CDs, jewellery or china and glass items?																								
<i>Those who specified a location at Q30</i>																								
Barking	0.2%	2	0.0%	0	0.0%	0	0.0%	0	2.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brentwood	4.2%	32	0.8%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	23.9%	30
Central London - West End (Oxford Street / Regent Street / Bond Street)	1.4%	11	2.2%	2	0.6%	1	0.0%	0	4.2%	2	1.5%	1	0.0%	0	0.0%	0	6.4%	5	0.0%	0	0.0%	0	0.0%	0
Collier Row	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dagenham	2.0%	16	0.8%	1	0.0%	0	2.1%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	6.4%	5	9.2%	8	0.0%	0	0.0%	0
Harold Hill	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hornchurch	1.2%	9	0.0%	0	4.5%	5	0.0%	0	5.1%	3	1.1%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0
Ilford	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	7.7%	6	0.0%	0	0.0%	0	0.0%	0
Rainham	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.9%	5	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	22.6%	173	40.5%	30	18.1%	19	58.9%	19	28.7%	16	3.8%	2	18.7%	10	49.0%	23	32.9%	27	22.7%	20	7.7%	3	2.1%	3
Stratford (including Westfield Stratford City)	0.4%	3	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0
Upminster	1.4%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.3%	9	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Bluewater	0.2%	1	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Lakeside	10.4%	80	3.7%	3	14.7%	16	1.6%	1	20.0%	11	34.9%	20	12.5%	7	3.1%	1	3.1%	3	5.7%	5	25.8%	10	2.8%	3
Eastern Avenue West Retail Park, Romford	0.2%	1	0.8%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gallows Corner Retail Park, Romford	0.9%	7	0.0%	0	3.2%	3	0.0%	0	0.0%	0	0.0%	0	1.6%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	2
Asda Superstore, Whalebone Lane, Chadwell Heath, RM8 1BB	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE	0.3%	2	0.0%	0	0.0%	0	3.7%	1	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, High Street, Hornchurch, RM11 1TX	0.2%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0
Sainsbury's, The Brewery, Romford, RM1 1AU	0.5%	4	2.2%	2	0.0%	0	1.5%	0	0.0%	0	0.0%	0	3.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Bridge Road, Rainham, RM13 9YZ	1.2%	9	0.0%	0	0.0%	0	0.0%	0	5.9%	3	0.0%	0	3.1%	2	0.0%	0	0.0%	0	1.1%	1	7.9%	3	0.0%	0
Tesco Extra, Bryant Avenue, Romford, RM3 0LL	0.5%	4	1.5%	1	0.0%	0	0.8%	0	0.0%	0	0.0%	0	3.2%	2	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, High Road, Goodmayes, Romford, RM6 4HY	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY	0.5%	4	2.2%	2	1.7%	2	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Airfield Way,	0.4%	3	0.0%	0	0.0%	0	0.0%	0	4.9%	3	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
Hornchurch, RM12 5AF																								
Internet / delivered	45.5%	347	40.2%	29	52.8%	56	25.0%	8	22.0%	13	38.9%	22	47.9%	27	38.2%	18	38.0%	31	57.6%	52	36.5%	14	61.9%	77
Home Catalogue	0.3%	3	1.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
TV / Interactive Shopping	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1	0.0%	0
Other location outside study area	0.3%	2	0.8%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 6	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other, zone 11	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2
Southend	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chelmsford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2
Basildon	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
(Don't know / can't remember)	1.8%	13	2.6%	2	1.7%	2	5.6%	2	0.9%	1	0.0%	0	1.2%	1	0.0%	0	1.6%	1	0.8%	1	3.2%	1	2.8%	3
Weighted base:		763		73		106		31		57		56		55		47		83		90		39		125
Sample:		710		70		77		61		66		77		50		58		56		54		65		76

Q32 Do you visit Romford town centre regularly for shopping, leisure or work?

Yes	58.6%	646	90.9%	92	61.6%	80	82.4%	35	80.1%	59	29.6%	22	59.8%	63	71.0%	56	72.4%	100	52.0%	78	43.1%	23	24.7%	39
No	41.4%	456	9.1%	9	38.4%	50	17.6%	8	19.9%	15	70.4%	52	40.2%	42	29.0%	23	27.6%	38	48.0%	72	56.9%	30	75.3%	118
Weighted base:		1102		102		130		43		73		74		105		79		138		149		52		157
Sample:		1102		100		100		100		100		101		100		100		100		100		100		101

Mean score [Times a week]: Everyday / daily = 7, 2 - 3 times a week = 2.5, Once a week = 1, Once a fortnight = 0.5, Once a month = 0.25, Once every 2 - 3 months = 0.1, Once every 6 months = 0.038, Once a year = 0.019, Less often = 0.01

Q32A How often do you visit Romford town centre?

Those who visit Romford town centre at Q32

Everyday / daily	4.8%	31	12.8%	12	2.1%	2	7.7%	3	0.0%	0	2.9%	1	7.2%	5	1.9%	1	3.3%	3	2.4%	2	0.0%	0	8.2%	3
2 – 3 times a week	16.8%	108	32.5%	30	8.0%	6	21.8%	8	8.5%	5	6.0%	1	10.1%	6	23.7%	13	15.8%	16	27.5%	21	5.0%	1	0.0%	0
Once a week	31.5%	203	37.9%	35	36.6%	29	45.9%	16	24.3%	14	8.2%	2	34.5%	22	36.9%	21	36.9%	37	17.7%	14	33.8%	8	15.8%	6
Once a fortnight	16.7%	108	4.6%	4	20.0%	16	13.9%	5	17.7%	10	21.4%	5	14.0%	9	23.8%	13	15.6%	16	24.1%	19	29.4%	7	11.3%	4
Once a month	19.0%	123	8.4%	8	25.0%	20	5.4%	2	30.8%	18	40.3%	9	26.8%	17	9.1%	5	22.0%	22	11.7%	9	10.4%	2	28.4%	11
Once every 2 - 3 months	6.5%	42	1.8%	2	6.4%	5	0.7%	0	12.3%	7	16.2%	4	5.4%	3	1.8%	1	4.6%	5	10.3%	8	13.7%	3	11.3%	4
Once every 6 months	2.3%	15	0.9%	1	1.1%	1	0.0%	0	2.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.5%	3	6.6%	1	19.0%	7
Once a year	0.7%	4	0.0%	0	0.0%	0	0.7%	0	1.7%	1	2.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	5.9%	2
Less often	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.7%	11	1.1%	1	0.8%	1	4.0%	1	1.3%	1	2.1%	0	1.8%	1	2.7%	2	1.8%	2	2.8%	2	0.0%	0	0.0%	0
Mean:		1.24		2.16		0.90		1.69		0.66		0.70		1.28		1.28		1.16		1.23		0.65		0.89
Weighted base:		646		92		80		35		59		22		63		56		100		78		23		39
Sample:		669		87		64		81		76		29		62		75		72		53		49		21

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q32BWhat do you like about Romford town centre? [MR]																								
Those who visit Romford town centre at Q32																								
Close to home	38.9%	251	55.4%	51	44.8%	36	44.3%	16	26.6%	16	29.1%	6	47.4%	30	50.3%	28	44.0%	44	15.2%	12	26.8%	6	17.1%	7
Close to work / en route to work	2.7%	17	7.3%	7	0.0%	0	0.0%	0	0.9%	1	8.7%	2	0.0%	0	0.0%	0	0.0%	0	9.4%	7	0.0%	0	2.3%	1
Easily accessible by foot / cycle	1.9%	12	1.7%	2	3.5%	3	4.2%	1	4.2%	2	0.0%	0	2.7%	2	1.8%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Good and / or free car parking	3.5%	22	2.4%	2	3.1%	2	2.8%	1	3.4%	2	5.6%	1	2.7%	2	2.8%	2	1.0%	1	3.9%	3	1.6%	0	14.9%	6
Good bus service / accessible public transport	5.1%	33	2.0%	2	2.1%	2	4.2%	1	11.3%	7	4.3%	1	9.2%	6	7.0%	4	6.7%	7	1.3%	1	15.2%	3	0.0%	0
Markets	6.1%	39	2.2%	2	4.7%	4	4.2%	1	16.0%	9	12.8%	3	2.5%	2	5.7%	3	6.9%	7	4.8%	4	10.9%	2	5.3%	2
Good range of chain / well known stores	30.5%	197	14.7%	14	39.6%	32	36.4%	13	29.3%	17	22.3%	5	23.6%	15	22.0%	12	36.9%	37	54.7%	42	27.2%	6	10.7%	4
Good range of independent stores	18.4%	119	19.5%	18	26.2%	21	15.3%	5	12.2%	7	11.2%	2	12.2%	8	8.0%	4	23.5%	23	25.2%	20	19.3%	4	13.5%	5
Restaurants / cafes	5.2%	33	5.8%	5	6.8%	5	0.0%	0	2.0%	1	2.1%	0	1.0%	1	1.8%	1	7.4%	7	10.6%	8	5.9%	1	5.9%	2
Bars / pubs / clubs	1.2%	8	4.3%	4	2.2%	2	0.0%	0	1.2%	1	0.0%	0	1.0%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Leisure facilities	0.8%	5	0.0%	0	2.5%	2	1.0%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0	0.0%	0	2.4%	2	0.0%	0	0.0%	0
Good range of services (bank, library, hairdresser etc.)	1.8%	11	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	1.9%	1	1.8%	1	2.3%	2	4.8%	4	9.8%	2	0.0%	0
Good prices	0.8%	5	0.0%	0	0.8%	1	0.7%	0	1.2%	1	2.1%	0	1.4%	1	0.0%	0	2.6%	3	0.0%	0	0.0%	0	0.0%	0
Good disabled access	0.3%	2	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Attractive environment	6.6%	42	8.3%	8	7.4%	6	2.0%	1	4.1%	2	8.9%	2	4.5%	3	11.2%	6	12.0%	12	1.3%	1	3.6%	1	2.3%	1
Cleanliness	1.1%	7	0.0%	0	0.0%	0	0.7%	0	0.9%	1	0.0%	0	1.0%	1	1.0%	1	0.0%	0	6.6%	5	0.0%	0	0.0%	0
Interesting activities / promotional events	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.7%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Safe and secure	0.6%	4	0.0%	0	0.0%	0	0.0%	0	5.6%	3	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Compact centre	3.5%	23	3.0%	3	5.7%	5	0.7%	0	4.7%	3	0.0%	0	4.5%	3	1.0%	1	2.7%	3	4.1%	3	3.6%	1	5.9%	2
Undercover / sheltered areas	3.0%	19	0.7%	1	0.0%	0	2.8%	1	1.5%	1	5.8%	1	1.0%	1	1.0%	1	2.9%	3	4.3%	3	0.0%	0	21.3%	8
Familiarity	1.2%	8	0.0%	0	0.0%	0	6.6%	2	0.6%	0	2.1%	0	2.5%	2	1.9%	1	1.8%	2	0.0%	0	0.0%	0	0.0%	0
Easy to get to	1.1%	7	0.0%	0	2.1%	2	5.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	3	0.0%	0	0.0%	0	3.1%	1
Friendly people	1.1%	7	0.7%	1	2.1%	2	0.7%	0	4.2%	2	0.0%	0	1.4%	1	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Close to family	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.9%	2
Not too busy	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0
Nothing / very little (Don't know)	11.9%	77	15.5%	14	7.6%	6	14.2%	5	19.3%	11	24.4%	5	16.5%	10	14.1%	8	1.9%	2	5.3%	4	15.6%	4	18.7%	7
	1.2%	8	1.1%	1	5.1%	4	0.0%	0	0.6%	0	0.0%	0	2.7%	2	1.0%	1	0.0%	0	0.0%	0	1.2%	0	0.0%	0
Weighted base:		646		92		80		35		59		22		63		56		100		78		23		39
Sample:		669		87		64		81		76		29		62		75		72		53		49		21

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q32C Can I ask, what things could be improved about Romford town centre? [MR]																								
<i>Those who visit Romford town centre at Q32</i>																								
More parking	7.5%	48	8.6%	8	8.5%	7	4.5%	2	6.3%	4	17.5%	4	6.1%	4	10.8%	6	8.5%	9	2.6%	2	14.0%	3	2.3%	1
More secure parking	0.4%	3	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0	1.2%	0	0.0%	0
Cheaper parking	12.3%	80	12.5%	12	22.5%	18	5.6%	2	16.0%	9	17.4%	4	12.7%	8	10.5%	6	9.6%	10	8.2%	6	18.8%	4	2.3%	1
More accessible car parking	2.6%	17	3.3%	3	3.6%	3	0.7%	0	3.4%	2	2.1%	0	2.5%	2	2.3%	1	1.9%	2	0.0%	0	10.2%	2	2.3%	1
More frequent bus services to the centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
More reliable / comfortable bus services	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	0	0.0%	0
New / relocated bus stops	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Better signposting within the Centre	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More priority for pedestrians	0.3%	2	0.0%	0	1.1%	1	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improved access for wheelchair and pushchair users	0.9%	6	1.5%	1	1.1%	1	2.0%	1	0.0%	0	0.0%	0	2.7%	2	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Cleaner Streets / removal of litter	4.8%	31	12.3%	11	5.2%	4	1.0%	0	3.4%	2	5.6%	1	5.8%	4	9.8%	6	0.0%	0	0.0%	0	0.0%	0	6.8%	3
More shelter from wind / rain	1.3%	8	4.3%	4	2.5%	2	2.6%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Improve appearance / environment of centre	3.4%	22	3.0%	3	5.2%	4	2.6%	1	4.6%	3	0.0%	0	5.8%	4	0.0%	0	1.0%	1	6.5%	5	0.0%	0	4.5%	2
Improved security measures / more CCTV / more police	1.4%	9	1.7%	2	0.0%	0	1.0%	0	0.6%	0	0.0%	0	5.4%	3	0.0%	0	1.0%	1	2.4%	2	1.6%	0	0.0%	0
More control on alcohol / drinkers / drug users	1.3%	8	2.6%	2	1.1%	1	2.0%	1	0.9%	1	0.0%	0	4.8%	3	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
More control on other anti-social behaviour	2.0%	13	3.8%	4	0.0%	0	1.7%	1	0.9%	1	0.0%	0	12.0%	7	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Better street furniture / floral displays	2.2%	14	1.3%	1	0.0%	0	0.7%	0	0.6%	0	0.0%	0	5.8%	4	7.3%	4	1.0%	1	2.4%	2	1.2%	0	3.1%	1
More green spaces / areas	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More national multiple (high street chain) retailers	1.8%	12	2.2%	2	0.0%	0	4.1%	1	0.0%	0	2.9%	1	1.0%	1	1.0%	1	6.4%	6	0.0%	0	0.0%	0	0.0%	0
Bigger / better supermarket	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	2	0.0%	0	2.4%	2	0.0%	0	0.0%	0
More independent shops	2.7%	17	1.3%	1	6.7%	5	0.0%	0	0.9%	1	0.0%	0	3.0%	2	2.9%	2	6.9%	7	0.0%	0	0.0%	0	0.0%	0
Better choice of shops in general	3.5%	23	0.0%	0	2.1%	2	3.1%	1	4.1%	2	0.0%	0	0.0%	0	3.1%	2	12.2%	12	4.6%	4	0.0%	0	0.0%	0
Better quality of shops	2.2%	14	1.8%	2	1.1%	1	2.0%	1	1.7%	1	0.0%	0	0.0%	0	4.1%	2	6.8%	7	0.9%	1	0.0%	0	0.0%	0
Improvement to the market	6.0%	39	6.2%	6	5.3%	4	8.6%	3	11.3%	7	0.0%	0	6.8%	4	4.7%	3	5.7%	6	3.1%	2	8.9%	2	5.9%	2
More / better eating places	1.2%	8	2.7%	2	5.1%	4	0.0%	0	0.9%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fewer bars / nightclubs	0.4%	3	1.7%	2	0.0%	0	1.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better leisure facilities	1.5%	10	6.9%	6	0.0%	0	0.0%	0	3.9%	2	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More family oriented facilities	0.8%	5	1.7%	2	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	3	0.0%	0	0.0%	0	0.0%	0
More secure children's play	0.4%	3	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
areas																								
Fewer closed shops	0.6%	4	3.0%	3	0.0%	0	1.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More public toilets	0.7%	4	0.0%	0	1.1%	1	1.4%	1	4.2%	2	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better range of services	1.1%	7	6.1%	6	0.0%	0	0.7%	0	0.9%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fewer people / too busy	0.6%	4	0.7%	1	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	2.4%	2	0.0%	0	0.0%	0
Make it more compact / shops are too spread out	1.0%	7	3.3%	3	0.0%	0	1.3%	0	0.0%	0	2.1%	0	1.8%	1	1.0%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
(Don't know)	3.4%	22	3.3%	3	1.1%	1	6.7%	2	0.6%	0	8.2%	2	1.0%	1	7.2%	4	1.0%	1	6.1%	5	5.2%	1	5.9%	2
(None mentioned)	48.7%	315	30.1%	28	43.7%	35	56.4%	20	46.4%	27	40.3%	9	45.6%	29	43.9%	25	52.3%	52	63.2%	49	54.4%	12	76.0%	29
Weighted base:		646		92		80		35		59		22		63		56		100		78		23		39
Sample:		669		87		64		81		76		29		62		75		72		53		49		21

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Q33 In which town, village or out-of-town location does your household spend most money on restaurants?												
Barking	0.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bluewater	0.2%	2	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Brentwood	11.2%	123	3.1%	3	1.8%	2	2.3%	1	3.0%	2	6.8%	5
Central London - West End (Oxford Street / Regent Street / Bond Street)	8.0%	88	6.7%	7	13.7%	18	5.8%	2	2.3%	2	7.0%	5
Chigwell	0.5%	5	0.6%	1	0.0%	0	0.6%	0	0.0%	0	0.6%	1
Collier Row	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.5%	4
Dagenham	2.5%	27	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0
Grays	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harold Hill	0.3%	3	1.6%	2	0.0%	0	0.6%	0	0.0%	0	1.1%	1
Hornchurch	14.6%	160	16.0%	16	49.5%	64	29.5%	13	40.3%	30	11.8%	9
Ilford	0.6%	7	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Lakeside	4.0%	44	1.1%	1	3.2%	4	4.3%	2	5.0%	4	0.9%	1
Rainham	0.9%	9	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	18.4%	202	34.3%	35	17.2%	22	28.4%	12	9.5%	7	2.3%	2
Stratford (including Westfield Stratford City)	0.6%	7	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Upminster	4.6%	50	0.0%	0	1.9%	2	0.0%	0	7.6%	6	50.6%	37
Abroad	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Barkingside	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Basildon	0.8%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Beckton	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	2
Billericay	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Blackmore	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Canterbury	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chadwell Heath	1.5%	16	1.6%	2	0.0%	0	3.3%	1	0.0%	0	0.0%	0
Chelmsford	0.4%	5	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Clacton-on-Sea	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cranham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0
Dartford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	2.3%	2	0.0%	0
East Ham	0.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Edmonton	0.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Epping	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Gidea Park	0.1%	2	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Great Warley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Greenwich	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Guildford	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Hatfield Peverel	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Heathrow Airport	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Hutton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Laindon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Navestock	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Newbury Park	0.2% 2	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	1.3% 2	0.0% 0	0.0% 0	0.0% 0
Ongar	0.1% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.8% 1
Shenfield	0.2% 2	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	1.3% 2
Shoeburyness	0.1% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.7% 1	0.0% 0	0.0% 0
Southend-on-Sea	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.6% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
Stanford Rivers	0.1% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.7% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0
Waltham Cross	0.1% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.7% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0
Woodford Green	0.2% 2	0.0% 0	0.0% 0	1.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.7% 1	0.0% 0	1.3% 1	0.0% 0
(Don't know / varies)	8.0% 88	13.2% 13	0.0% 0	5.4% 2	5.3% 4	3.9% 3	4.8% 5	7.2% 6	10.4% 14	11.4% 17	5.9% 3	13.2% 21
(Don't do this activity)	18.8% 207	19.6% 20	10.6% 14	15.1% 6	23.1% 17	9.9% 7	37.6% 39	30.4% 24	28.6% 39	15.4% 23	15.1% 8	5.6% 9
Weighted base:	1102	102	130	43	73	74	105	79	138	149	52	157
Sample:	1102	100	100	100	100	101	100	100	100	100	100	101

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
Q34 In which town, village or out-of-town location does your household spend most money on cafes / pubs / bars?																								
Barking	0.9%	10	0.0%	0	0.0%	0	0.0%	0	0.7%	1	2.9%	2	0.0%	0	0.0%	0	1.3%	2	4.0%	6	0.0%	0	0.0%	0
Bluewater	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Brentwood	9.8%	107	1.6%	2	1.9%	2	1.6%	1	1.6%	1	2.9%	2	9.5%	10	1.6%	1	0.0%	0	0.5%	1	1.5%	1	55.1%	87
Central London - West End (Oxford Street / Regent Street / Bond Street)	5.5%	61	8.5%	9	7.9%	10	1.1%	0	1.4%	1	3.5%	3	8.9%	9	4.5%	4	6.6%	9	7.6%	11	1.9%	1	2.2%	3
Chigwell	0.3%	3	0.0%	0	0.0%	0	3.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Collier Row	0.9%	10	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.3%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dagenham	2.1%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	3	13.0%	19	1.2%	1	0.0%	0
Elm Park	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	2	0.0%	0
Harold Hill	0.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2	3.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hornchurch	11.5%	127	5.5%	6	40.8%	53	19.5%	8	44.9%	33	6.7%	5	1.5%	2	3.2%	3	2.8%	4	2.6%	4	19.7%	10	0.0%	0
Ilford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0
Lakeside	0.9%	10	0.0%	0	3.8%	5	0.0%	0	0.7%	1	0.6%	0	0.0%	0	0.7%	1	0.0%	0	0.7%	1	5.1%	3	0.0%	0
Rainham	0.7%	8	0.0%	0	0.0%	0	0.6%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.4%	7	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	15.2%	167	35.4%	36	19.9%	26	28.1%	12	10.6%	8	1.7%	1	20.0%	21	11.1%	9	23.3%	32	8.2%	12	17.1%	9	0.6%	1
Stratford (including Westfield Stratford City)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.5%	1	0.0%	0	0.0%	0
Upminster	3.8%	42	0.0%	0	2.2%	3	0.8%	0	1.7%	1	48.2%	35	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.6%	1
Abroad	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Basildon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bath	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Becontree	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
Chadwell Heath	1.9%	21	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.7%	13	4.3%	6	0.0%	0	0.0%	0
Chelmsford	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Clacton-on-Sea	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0
East Ham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Forest Gate	0.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	5	0.0%	0	0.0%	0
Gidea Park	0.6%	7	3.1%	3	1.9%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Great Warley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Greenwich	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harold Wood	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Havering-atte-Bower	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Heacham, King's Lynn	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hutton	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2
Ingatestone	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Margaretting Tye	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Navestock	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rush Green	0.1%	1	0.0%	0	0.0%	0	2.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shenfield	0.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	5
Stock	0.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
West Hanningfield	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Woodford Green	0.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Haverling Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
(Don't know / varies)	4.9%	54	8.5%	9	0.9%	1	3.9%	2	2.1%	2	6.9%	5	3.6%	4	2.3%	2	5.6%	8	7.2%	11	2.9%	1	6.6%	10
(Don't do this activity)	37.1%	409	33.4%	34	19.5%	25	37.2%	16	34.5%	25	24.5%	18	46.5%	49	58.8%	47	44.5%	61	47.3%	71	33.6%	18	28.8%	45
Weighted base:		1102		102		130		43		73		74		105		79		138		149		52		157
Sample:		1102		100		100		100		100		101		100		100		100		100		100		101

Havering Retail & Leisure Study for Peter Brett Associates

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q35 In which town, village or out-of-town location does your household spend most money on the cinema / theatre?																								
Brookside Theatre, Eastern Road, Romford	0.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central London (West End)	11.4%	125	14.9%	15	10.8%	14	3.2%	1	8.3%	6	16.4%	12	6.8%	7	3.8%	3	9.7%	13	7.0%	10	7.2%	4	24.6%	39
Cineworld, Ilford	0.8%	9	0.0%	0	0.0%	0	0.0%	0	2.3%	2	2.9%	2	0.0%	0	0.0%	0	1.2%	2	2.2%	3	0.0%	0	0.0%	0
Kenneth More Theatre, Oakfield Road, Ilford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0
Odeon, West Thurrock	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Premiere Cinema, Mercury Mall, Romford	9.8%	108	24.0%	24	14.9%	19	23.2%	10	17.8%	13	4.4%	3	17.9%	19	7.6%	6	3.8%	5	1.5%	2	9.0%	5	0.8%	1
Queens Theatre, Billet Lane, Hornchurch	1.9%	21	1.7%	2	2.2%	3	2.9%	1	5.1%	4	3.0%	2	1.9%	2	3.7%	3	1.4%	2	0.5%	1	3.0%	2	0.0%	0
Showcase Cinema, Bluewater	0.5%	5	0.0%	0	1.3%	2	3.9%	2	2.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stratford Picture House, Stratford	0.1%	2	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Theatre Royal, Stratford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Vue, Dagenham Leisure Park, Dagenham	4.3%	47	0.0%	0	0.7%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0	1.2%	1	3.5%	5	19.5%	29	19.7%	10	0.0%	0
Vue, Lakeside Shopping Centre, Thurrock	6.4%	71	0.0%	0	5.7%	7	1.6%	1	8.1%	6	34.6%	25	2.3%	2	5.1%	4	0.0%	0	4.2%	6	17.2%	9	6.3%	10
Vue, The Brewery, Romford	21.3%	235	25.2%	26	36.5%	47	30.3%	13	16.5%	12	8.0%	6	16.0%	17	24.6%	20	22.9%	32	25.7%	38	15.0%	8	10.7%	17
Vue, Westfield Stratford City	0.1%	1	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Abroad	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Apollo, Piccadily Circus, Regent Street, London	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
BFI IMAX, Charlie Chaplin Walk, Southwark	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Empire Cinemas, Festival Leisure Park, Basildon	3.8%	42	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.9%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	25.6%	40
New Barbican Cinemas, Silk Street, Barbican Centre, London	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Odeon, Head Street, Colchester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Odeon, High Road, South Woodford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Odeon, Kings Head Walk, Chelmsford	0.7%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	4.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2
Odeon, London Road, Southend-on-Sea	0.4%	5	0.0%	0	3.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
Odeon, Parkway, Camden Town	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0
Showcase Cinemas, Jenkins Lane, Barking	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	1.9%	3	0.7%	1	0.0%	0	0.0%	0
(Don't know / varies)	3.9%	43	7.7%	8	0.5%	1	3.9%	2	0.5%	0	0.9%	1	5.4%	6	3.8%	3	3.3%	5	4.7%	7	2.1%	1	6.9%	11

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
(Don't do this activity)	32.8%	361	26.5%	27	23.0%	30	30.5%	13	36.3%	27	23.1%	17	42.5%	44	46.8%	37	47.9%	66	32.7%	49	26.8%	14	23.6%	37
Weighted base:		1102		102		130		43		73		74		105		79		138		149		52		157
Sample:		1102		100		100		100		100		101		100		100		100		100		100		101
Q36 In which town, village or out-of-town location does your household spend most money on art galleries & museums?																								
Central London - West End (Oxford Street / Regent Street / Bond Street)	48.0%	529	59.0%	60	57.5%	75	49.5%	21	36.6%	27	66.8%	49	29.9%	31	30.7%	24	41.2%	57	38.9%	58	56.2%	29	61.6%	97
Dagenham	0.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	2	0.0%	0	0.0%	0	2.6%	4	0.0%	0	0.0%	0	0.0%	0
Hornchurch	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	0.5%	6	1.6%	2	0.0%	0	1.1%	0	0.0%	0	0.6%	0	0.6%	1	1.4%	1	0.7%	1	0.5%	1	0.0%	0	0.0%	0
Abroad	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Dulwich	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Duxford	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Greenwich	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lambeth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Margate	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rochester	0.1%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Southend-on-Sea	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
York	0.1%	2	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.4%	16	3.7%	4	0.0%	0	0.6%	0	0.9%	1	0.0%	0	0.6%	1	0.7%	1	0.0%	0	4.3%	6	0.7%	0	1.9%	3
(Don't do this activity)	48.7%	537	34.6%	35	41.2%	54	48.2%	21	60.8%	45	28.2%	21	67.1%	70	66.5%	53	54.6%	75	56.3%	84	43.1%	23	36.6%	57
Weighted base:		1102		102		130		43		73		74		105		79		138		149		52		157
Sample:		1102		100		100		100		100		101		100		100		100		100		100		101

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q37 In which town, village or out-of-town location does your household spend most money on bingo / casino / bookmakers?																								
Brentwood	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Central London - West End (Oxford Street / Regent Street / Bond Street)	0.6%	7	0.0%	0	3.2%	4	0.8%	0	0.0%	0	0.6%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Collier Row	0.3%	4	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dagenham	1.8%	20	1.1%	1	0.0%	0	1.4%	1	4.0%	3	1.7%	1	0.0%	0	0.0%	0	1.3%	2	6.3%	9	5.7%	3	0.0%	0
Elm Park	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Hornchurch	1.8%	20	2.6%	3	5.3%	7	1.1%	0	5.5%	4	2.9%	2	2.6%	3	0.9%	1	0.0%	0	0.0%	0	0.5%	0	0.0%	0
Rainham	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	2.0%	1	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	2.2%	25	3.2%	3	3.2%	4	6.5%	3	0.0%	0	0.0%	0	0.6%	1	1.9%	2	3.0%	4	4.9%	7	2.0%	1	0.0%	0
Stratford (including Westfield Stratford City)	1.1%	12	3.9%	4	2.5%	3	4.7%	2	0.9%	1	0.0%	0	0.9%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Upminster	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Barkingside	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chadwell Heath	0.3%	3	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.5%	1	0.0%	0	0.0%	0
Southend-on-Sea	1.0%	11	0.0%	0	1.9%	2	0.0%	0	0.0%	0	2.8%	2	0.0%	0	0.9%	1	0.0%	0	1.3%	2	3.4%	2	1.5%	2
Westcliffe-on-Sea	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.9%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.7%	1	0.7%	0	1.5%	2
(Don't do this activity)	89.6%	987	88.5%	90	84.0%	109	83.9%	36	87.9%	64	89.9%	66	94.1%	98	92.3%	73	92.0%	127	85.5%	128	85.8%	45	95.5%	150
Weighted base:	1102		102		130		43		73		74		105		79		138		149		52		157	
Sample:	1102		100		100		100		100		101		100		100		100		100		100		101	

Havering Retail & Leisure Study for Peter Brett Associates

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September 2014

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q38 In which town, village or out-of-town location does your household spend most money on health & fitness?																								
Barking	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0
Brentwood	6.0%	67	0.0%	0	0.9%	1	0.0%	0	0.0%	0	12.4%	9	1.5%	2	1.3%	1	0.0%	0	0.0%	0	0.0%	0	34.2%	54
Central London - West End (Oxford Street / Regent Street / Bond Street)	0.8%	9	0.0%	0	3.2%	4	0.8%	0	0.0%	0	0.9%	1	2.5%	3	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Chigwell	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2
Collier Row	0.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dagenham	3.6%	40	0.0%	0	0.0%	0	3.5%	2	1.2%	1	0.0%	0	0.0%	0	0.0%	0	9.8%	13	14.8%	22	3.5%	2	0.0%	0
Elm Park	0.2%	2	0.0%	0	1.3%	2	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Grays	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0
Harold Hill	2.4%	27	9.4%	10	0.0%	0	0.0%	0	0.9%	1	2.7%	2	9.9%	10	5.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hornchurch	5.8%	64	3.2%	3	24.6%	32	6.0%	3	18.6%	14	4.4%	3	4.1%	4	3.1%	2	0.0%	0	0.0%	0	5.0%	3	0.0%	0
Ilford	0.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	1.4%	2	3.1%	5	0.0%	0	0.0%	0
Lakeside	0.2%	3	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	2	0.0%	0
Rainham	0.6%	7	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.4%	7	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	5.6%	62	24.7%	25	0.7%	1	25.1%	11	1.3%	1	2.5%	2	2.9%	3	6.6%	5	5.0%	7	0.9%	1	7.4%	4	1.5%	2
South Ockendon	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Upminster	0.9%	10	0.0%	0	1.1%	1	0.0%	0	0.0%	0	9.4%	7	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Ashford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Aveley	0.3%	3	0.0%	0	0.0%	0	0.0%	0	3.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Barkingside	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.7%	1	0.0%	0	0.0%	0
Basildon	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Becontree	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	3	1.3%	2	0.0%	0	0.0%	0
Billericay	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2
Chadwell Heath	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	5	0.0%	0	0.0%	0	0.0%	0
Chafford Hundred	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0
Cranham	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dartford	0.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	5	0.0%	0	0.0%	0
Gidea Park	0.4%	5	0.6%	1	1.3%	2	0.0%	0	2.3%	2	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harlow	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Harold Wood	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hutton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Loughton	0.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	5	0.0%	0	0.0%	0
Rush Green	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Thurrock	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0
Warley	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2
(Don't know / varies)	0.5%	6	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.6%	0	1.6%	2	0.0%	0	1.0%	1	0.0%	0	0.7%	0	0.0%	0
(Don't do this activity)	67.4%	743	62.1%	63	64.0%	83	63.5%	27	71.1%	52	56.7%	42	74.4%	78	80.2%	64	74.9%	103	72.4%	108	62.7%	33	57.4%	90
Weighted base:		1102		102		130		43		73		74		105		79		138		149		52		157
Sample:		1102		100		100		100		100		101		100		100		100		100		100		101

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11		
Q39 In which town, village or out-of-town location does your household spend most money on family entertainment centres (i.e. ten pin bowling; skating rinks etc.)?																								
Brentwood	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Central London - West End (Oxford Street / Regent Street / Bond Street)	0.5%	6	2.4%	2	0.0%	0	0.0%	0	0.7%	1	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Chigwell	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
Collier Row	2.3%	25	2.0%	2	0.7%	1	1.1%	0	4.9%	4	1.7%	1	1.7%	2	12.4%	10	3.1%	4	0.7%	1	0.0%	0	0.0%	0
Dagenham	4.5%	50	0.0%	0	5.7%	7	0.0%	0	2.7%	2	1.7%	1	0.0%	0	1.3%	1	1.9%	3	15.7%	23	23.3%	12	0.0%	0
Hornchurch	0.2%	2	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ilford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lakeside	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Romford (including The Liberty, The Mall and The Brewery)	19.8%	218	39.4%	40	31.9%	41	37.0%	16	33.0%	24	24.1%	18	14.8%	16	4.9%	4	14.3%	20	10.8%	16	16.3%	9	9.6%	15
Stratford (including Westfield Stratford City)	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Upminster	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Basildon	3.8%	42	0.0%	0	0.9%	1	0.0%	0	0.0%	0	1.7%	1	0.0%	0	1.3%	1	0.0%	0	1.3%	2	0.7%	0	23.2%	36
Billericay	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	4
Chelmsford	1.1%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.9%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	6.2%	10
Hainault	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hutton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Loughton	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Maldon	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2
Marks Gate	0.4%	4	0.0%	0	3.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.7%	18	1.1%	1	0.7%	1	2.7%	1	0.5%	0	0.0%	0	2.9%	3	0.0%	0	1.0%	1	1.3%	2	1.6%	1	5.0%	8
(Don't do this activity)	64.1%	707	55.1%	56	56.2%	73	59.2%	25	56.0%	41	64.8%	48	74.6%	78	80.2%	64	79.8%	110	68.5%	102	58.1%	30	50.4%	79
Weighted base:	1102			102		130		43		73		74		105		79		138		149		52		157
Sample:	1102			100		100		100		100		101		100		100		100		100		100		101

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
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Q40 Are there any leisure facilities that you think are lacking within a reasonable distance of your home? [MR]

Yes, bingo	0.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	4	0.5%	1	0.0%	0	0.8%	1
Yes, bowling	1.8%	20	0.6%	1	0.7%	1	1.7%	1	0.9%	1	2.6%	2	1.7%	2	0.0%	0	0.0%	0	1.3%	2	6.2%	3	5.1%	8
Yes, cinema	5.4%	60	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	36.9%	58
Yes, leisure / fitness centre	4.3%	48	2.5%	3	1.9%	2	0.8%	0	3.9%	3	8.4%	6	0.9%	1	4.7%	4	3.0%	4	7.9%	12	9.6%	5	5.0%	8
Yes, museum / art gallery	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes, pubs / clubs / bars	0.5%	6	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	2.6%	4	0.0%	0	0.0%	0
Yes, restaurants / cafes	0.7%	8	0.8%	1	0.9%	1	0.0%	0	3.0%	2	0.0%	0	0.0%	0	0.0%	0	0.7%	1	1.3%	2	1.6%	1	0.0%	0
Yes, shops	0.6%	7	0.0%	0	0.7%	1	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.5%	0	2.2%	3
Yes, swimming pool	15.0%	165	36.3%	37	23.9%	31	17.7%	8	12.3%	9	14.2%	10	1.5%	2	29.6%	24	13.6%	19	4.2%	6	32.1%	17	2.0%	3
Yes, theatre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Yes, other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes, more things for older people to do	0.3%	3	0.0%	0	0.7%	1	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.6%	1
Yes, more things for younger people to do	1.2%	13	0.0%	0	0.0%	0	0.0%	0	0.5%	0	2.3%	2	1.1%	1	5.0%	4	0.0%	0	0.5%	1	3.9%	2	2.1%	3
Yes, cycling facilities	0.3%	4	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Yes, ice rink	7.6%	83	10.0%	10	19.1%	25	10.3%	4	11.2%	8	5.1%	4	3.8%	4	5.1%	4	0.0%	0	7.2%	11	13.9%	7	3.7%	6
Yes, more green spaces	0.6%	7	0.0%	0	0.0%	0	3.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	3	1.9%	3	0.0%	0	0.0%	0
Yes, athletics stadium	0.1%	1	0.8%	1	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes, football pitches	0.2%	3	1.1%	1	1.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes, live music venue	0.4%	4	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	3	0.0%	0	0.0%	0
Yes, ski centre	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes, tennis courts	0.3%	3	0.0%	0	2.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
No	62.1%	684	48.5%	49	54.0%	70	65.5%	28	71.4%	52	69.7%	51	80.0%	84	52.6%	42	77.8%	107	63.8%	95	52.2%	27	49.4%	78
(Don't know)	4.5%	50	4.5%	5	2.6%	3	2.2%	1	1.2%	1	4.9%	4	11.9%	12	9.6%	8	2.1%	3	6.5%	10	3.2%	2	1.5%	2
Weighted base:	1102			102		130		43		73		74		105		79		138		149		52		157
Sample:	1102			100		100		100		100		101		100		100		100		100		100		101

GEN Gender of respondent:

Male	28.1%	310	30.2%	31	23.7%	31	34.3%	15	32.0%	23	26.0%	19	42.0%	44	22.8%	18	29.1%	40	24.2%	36	25.0%	13	25.1%	39
Female	71.9%	792	69.8%	71	76.3%	99	65.7%	28	68.0%	50	74.0%	54	58.0%	61	77.2%	61	70.9%	98	75.8%	113	75.0%	39	74.9%	118
Weighted base:	1102			102		130		43		73		74		105		79		138		149		52		157
Sample:	1102			100		100		100		100		101		100		100		100		100		100		101

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
AGE Could I ask how old are you please?																								
18 to 24	5.1%	56	0.0%	0	8.8%	11	10.8%	5	9.2%	7	2.9%	2	8.5%	9	3.2%	3	0.0%	0	4.4%	7	2.3%	1	7.7%	12
25 to 34	15.2%	168	19.5%	20	19.0%	25	15.6%	7	23.3%	17	0.0%	0	12.3%	13	0.0%	0	4.6%	6	31.4%	47	30.4%	16	11.0%	17
35 to 44	19.8%	219	18.7%	19	30.3%	39	7.8%	3	15.9%	12	28.2%	21	13.1%	14	16.3%	13	16.7%	23	20.1%	30	10.8%	6	24.9%	39
45 to 54	18.0%	198	12.9%	13	20.3%	26	10.5%	5	23.4%	17	30.9%	23	11.9%	12	9.4%	7	15.4%	21	13.0%	19	15.4%	8	28.9%	45
55 to 64	16.1%	177	16.3%	17	9.7%	13	19.6%	8	13.9%	10	16.2%	12	17.2%	18	29.2%	23	22.0%	30	11.4%	17	21.7%	11	11.3%	18
65 +	23.5%	259	28.4%	29	11.1%	14	29.6%	13	14.2%	10	19.6%	14	33.7%	35	35.9%	29	38.8%	53	17.2%	26	18.5%	10	16.2%	25
(Refused)	2.3%	25	4.2%	4	0.8%	1	6.2%	3	0.0%	0	2.2%	2	3.3%	3	6.1%	5	2.5%	3	2.5%	4	0.9%	0	0.0%	0
Weighted base:		1102		102		130		43		73		74		105		79		138		149		52		157
Sample:		1102		100		100		100		100		101		100		100		100		100		100		101
CAR How many cars does your household own or have the use of?																								
None	15.6%	172	14.4%	15	12.8%	17	14.3%	6	18.5%	14	4.3%	3	18.3%	19	16.1%	13	30.6%	42	19.2%	29	12.8%	7	5.4%	9
One	43.8%	482	39.7%	40	48.4%	63	44.3%	19	48.2%	35	48.3%	36	43.8%	46	44.4%	35	49.4%	68	50.9%	76	37.5%	20	28.3%	44
Two	25.9%	286	29.3%	30	27.1%	35	29.1%	13	21.8%	16	28.9%	21	22.1%	23	26.7%	21	12.2%	17	20.4%	31	31.2%	16	40.2%	63
Three or more	10.8%	119	12.9%	13	9.5%	12	5.1%	2	10.1%	7	12.8%	9	11.3%	12	7.5%	6	7.0%	10	3.8%	6	16.4%	9	21.1%	33
(Refused)	3.8%	42	3.7%	4	2.2%	3	7.2%	3	1.4%	1	5.7%	4	4.5%	5	5.3%	4	0.7%	1	5.7%	8	2.1%	1	5.0%	8
Weighted base:		1102		102		130		43		73		74		105		79		138		149		52		157
Sample:		1102		100		100		100		100		101		100		100		100		100		100		101
WOR Which of the following best describes the chief wage earner of your household's current employment situation? [PR]																								
Working full time	54.6%	602	60.0%	61	71.7%	93	39.7%	17	65.4%	48	62.0%	46	45.5%	48	32.1%	26	33.8%	47	63.7%	95	59.8%	31	57.8%	91
Working part time	7.2%	79	5.4%	5	5.8%	8	10.0%	4	3.7%	3	5.7%	4	5.7%	6	11.3%	9	6.7%	9	6.2%	9	10.8%	6	10.1%	16
Unemployed	3.0%	33	0.0%	0	5.7%	7	3.0%	1	7.8%	6	1.2%	1	1.6%	2	2.8%	2	5.7%	8	1.9%	3	4.1%	2	0.8%	1
Retired	29.8%	328	31.5%	32	15.9%	21	38.9%	17	18.3%	13	27.7%	20	42.6%	45	49.1%	39	51.2%	71	19.7%	29	23.2%	12	18.6%	29
A housewife	0.7%	7	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	6
A student	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	4
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Refused)	4.4%	49	3.1%	3	0.9%	1	8.4%	4	2.7%	2	3.5%	3	4.5%	5	4.6%	4	2.6%	4	8.5%	13	2.1%	1	6.7%	10
Weighted base:		1102		102		130		43		73		74		105		79		138		149		52		157
Sample:		1102		100		100		100		100		101		100		100		100		100		100		101

Havering Retail & Leisure Study for Peter Brett Associates

Weighted:

September 2014

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
QUOTA Zone:																								
Zone 01	9.2%	102	100.0%	102	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 02	11.8%	130	0.0%	0	100.0%	130	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 03	3.9%	43	0.0%	0	0.0%	0	100.0%	43	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 04	6.6%	73	0.0%	0	0.0%	0	0.0%	0	100.0%	73	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 05	6.7%	74	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	74	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 06	9.5%	105	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	105	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 07	7.2%	79	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	79	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 08	12.5%	138	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	138	0.0%	0	0.0%	0	0.0%	0
Zone 09	13.6%	149	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	149	0.0%	0	0.0%	0
Zone 10	4.8%	52	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	52	0.0%	0
Zone 11	14.3%	157	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	157
Weighted base:		1102		102		130		43		73		74		105		79		138		149		52		157
Sample:		1102		100		100		100		100		101		100		100		100		100		100		101

Havering Retail & Leisure Study
for Peter Brett Associates

		Total	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
PC	Postcode sector:																							
	CM13 1	2.5%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.2%	27	
	CM13 2	4.5%	49	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	31.4%	49	
	CM13 3	0.8%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.4%	9	
	CM14 4	2.1%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.9%	23	
	CM14 5	1.3%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.2%	14	
	CM15 8	1.2%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.2%	13	
	CM15 9	1.9%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.6%	21	
	RM1 1	0.1%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM1 2	1.0%	11	11.1%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM1 3	0.2%	2	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM1 4	3.4%	37	36.6%	37	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM10 7	3.6%	39	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	26.4%	39	0.0%	0	0.0%	0	
	RM10 8	4.8%	53	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	35.4%	53	0.0%	0	0.0%	0	
	RM10 9	4.3%	48	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	32.1%	48	0.0%	0	0.0%	0	
	RM11 1	4.0%	44	0.0%	0	33.6%	44	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM11 2	1.5%	16	0.0%	0	12.7%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM11 3	2.6%	28	0.0%	0	21.6%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM12 4	3.8%	42	0.0%	0	32.1%	42	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM12 5	1.8%	20	0.0%	0	0.0%	0	0.0%	0	27.4%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM12 6	2.2%	24	0.0%	0	0.0%	0	0.0%	0	32.7%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM13 7	2.7%	29	0.0%	0	0.0%	0	0.0%	0	39.9%	29	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM13 8	1.8%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	38.7%	20	0.0%	0	
	RM13 9	2.9%	32	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	61.3%	32	0.0%	0	
	RM14 1	3.4%	37	0.0%	0	0.0%	0	0.0%	0	0.0%	0	50.3%	37	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM14 2	1.6%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	24.6%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM14 3	1.7%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	25.1%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM2 5	2.1%	24	23.2%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM2 6	1.1%	12	11.5%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM3 0	3.0%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	31.9%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	
	RM3 7	1.7%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	17.5%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	
	RM3 8	2.3%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	24.7%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	
	RM3 9	2.5%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	25.9%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	
	RM4 1	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM5 2	2.2%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	30.8%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM5 3	2.8%	31	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	38.6%	31	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM6 4	3.6%	39	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	28.6%	39	0.0%	0	0.0%	0	0.0%	0	
	RM6 5	3.0%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	24.0%	33	0.0%	0	0.0%	0	0.0%	0	
	RM6 6	2.0%	22	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.0%	22	0.0%	0	0.0%	0	0.0%	0	
	RM7 0	2.4%	27	0.0%	0	0.0%	0	62.0%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM7 7	1.4%	15	14.8%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM7 8	1.9%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	26.4%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM7 9	1.5%	16	0.0%	0	0.0%	0	38.0%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	
	RM8 1	1.6%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.9%	18	0.0%	0	0.0%	0	0.0%	0	
	RM8 3	2.3%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.5%	26	0.0%	0	0.0%	0	0.0%	0	
	RM9 5	0.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	4	0.0%	0	0.0%	0	

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	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8		Zone 9		Zone 10		Zone 11	
RM9 6	0.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	6	0.0%	0	0.0%	0
Weighted base:	1102		102		130		43		73		74		105		79		138		149		52		157	
Sample:	1102		100		100		100		100		101		100		100		100		100		100		101	

Appendix 3:

Composite Analysis (Inc. SFT)

080914 Havering incl. SFT Results Summary

Percentage of Spend by Zone

		Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
Composite food													
1	Zone 1	17.6%	61.6%	10.8%	40.8%	8.3%	3.7%	16.8%	47.8%	14.8%	3.2%	9.4%	2.9%
2	Zone 2	13.8%	7.9%	64.8%	27.7%	28.6%	11.5%	3.3%	0.4%	1.7%	4.6%	8.2%	0.4%
3	Zone 3	0.3%	0.0%	0.0%	7.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%
4	Zone 4	1.9%	0.0%	1.3%	4.2%	21.8%	0.5%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%
5	Zone 5	5.5%	1.4%	5.7%	0.5%	6.1%	52.9%	4.0%	1.3%	0.0%	0.6%	1.4%	1.9%
6	Zone 6	11.4%	17.9%	7.1%	6.2%	0.5%	7.7%	62.5%	17.5%	0.0%	0.0%	1.9%	6.7%
7	Zone 7	2.1%	2.3%	0.0%	0.5%	0.0%	0.0%	1.2%	22.7%	0.6%	0.0%	0.0%	0.3%
8	Zone 8	7.3%	1.5%	0.0%	5.7%	0.5%	0.0%	0.0%	1.8%	46.0%	6.7%	0.2%	0.0%
9	Zone 9	12.3%	0.1%	0.3%	4.0%	8.4%	0.2%	0.0%	1.2%	19.6%	59.0%	16.3%	1.1%
10	Zone 10	4.7%	0.0%	1.6%	0.6%	20.6%	2.6%	0.0%	0.0%	0.0%	6.8%	41.2%	0.0%
11	Zone 11	10.1%	1.4%	0.2%	0.0%	0.0%	2.2%	2.4%	0.3%	0.5%	0.0%	0.0%	67.2%
0	Outside catchment area	7.9%	1.4%	0.9%	1.0%	3.2%	10.1%	3.3%	5.5%	13.3%	13.3%	14.5%	12.6%
X	SFT	5.2%	4.6%	7.2%	1.7%	2.0%	8.4%	6.5%	1.5%	3.5%	5.2%	6.8%	6.9%
Composite Non-food													
1	Zone 1	34.6%	60.4%	36.7%	64.6%	33.6%	12.7%	45.4%	64.0%	44.9%	24.1%	15.0%	9.0%
2	Zone 2	5.2%	4.6%	8.9%	3.5%	11.9%	16.5%	5.4%	3.2%	1.3%	0.4%	2.5%	2.5%
3	Zone 3	0.1%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.4%	0.6%	0.0%	0.0%
4	Zone 4	0.3%	0.0%	0.3%	0.0%	2.9%	0.1%	0.0%	0.0%	0.2%	0.0%	0.1%	0.0%
5	Zone 5	0.1%	0.0%	0.0%	0.0%	0.0%	0.6%	0.1%	0.0%	0.0%	0.3%	0.0%	0.0%
6	Zone 6	1.3%	3.9%	0.9%	0.6%	0.2%	0.4%	5.1%	3.6%	0.1%	0.2%	0.0%	0.4%
7	Zone 7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
8	Zone 8	1.9%	0.6%	1.1%	1.7%	0.3%	0.0%	0.1%	0.8%	10.9%	2.7%	0.0%	0.0%
9	Zone 9	3.3%	0.1%	0.0%	1.9%	2.0%	0.0%	0.2%	0.0%	3.9%	19.8%	1.9%	0.0%
10	Zone 10	1.1%	0.0%	0.1%	0.0%	3.3%	0.8%	0.2%	0.0%	0.2%	0.4%	12.0%	0.2%
11	Zone 11	4.1%	0.6%	0.0%	0.2%	0.1%	1.3%	1.4%	0.0%	0.5%	0.0%	0.1%	25.3%
0	Outside catchment area	28.5%	13.9%	30.3%	14.9%	33.9%	47.3%	18.4%	12.8%	21.7%	30.9%	51.7%	35.3%
X	SFT	19.6%	15.9%	21.7%	12.3%	11.9%	20.4%	23.4%	15.7%	15.9%	20.5%	16.7%	27.3%

Appendix 4:

Composite Analysis (Excl. SFT)

Percentage of Spend by Zone

[illegible]

Appendix 5:

Sample Questionnaire

Q01 Where did your household last undertake a main food and grocery purchase?

DO NOT PROMPT. ONE ANSWER ONLY.

IF 'OTHER' PLEASE SPECIFY STORE NAME AND LOCATION. IF 'MARKET STALL' PROBE FOR LOCATION

#Food
d Food Shopping List

Q02 And where did you shop the time before that (was it the same, or different, and if so, please specify)?

DO NOT PROMPT. ONE ANSWER ONLY.

IF 'OTHER' PLEASE SPECIFY STORE NAME AND LOCATION. IF 'MARKET STALL' PROBE FOR LOCATION

#Food
d Food Shopping List

Q03A What form of transport do you use to visit your main food shopping destination?

DO NOT PROMPT. ONE ANSWER ONLY.

- 1 Car - Driver
- 2 Car - Passenger
- 3 Bus
- 4 Cycle
- 5 Disabled Vehicle (e.g. mobility scooter)
- 6 Taxi
- 7 Train
- 8 Walk
- 9 Other (PLEASE WRITE IN)
- A (Don't know / varies)
- B (Don't travel - Goods delivered)

Q03B What is the MAIN reason that you visit (STORE MENTIONED AT Q01) in preference to any other?

DO NOT PROMPT. ONE ANSWER ONLY.

- 1 Attractive environment
- 2 Cleanliness
- 3 Close to home
- 4 Close to work / en route to work
- 5 Easily accessible by foot / cycle
- 6 Good and / or free parking
- 7 Good bus service / accessible public transport
- 8 Good disabled access
- 9 Good disabled facilities
- A Good prices
- B Good range of comparison goods
- C Good range of food offer
- D Good variety of goods on offer
- E Habit / familiarity
- F Has other facilities (e.g. pharmacy, optician, dry cleaners, cafes)
- G Links to the other shops / facilities in the town centre
- H Other (PLEASE WRITE IN)
- I (Don't know)

Q04 When your household undertakes its main food and grocery spend (STORE MENTIONED AT Q01) does it visit other shops, leisure or service outlets on the same shopping trips? And if so which ones?
DO NOT READ OUT. CAN BE MULTICODED.

- 1 Yes - other food shops
- 2 Yes - other non food shops (clothing, footwear, electrical etc)
- 3 Yes - pubs, restaurants or cafes
- 4 Yes - financial service (i.e. bank, building society)
- 5 Yes - other service (e.g. hairdresser, travel agent, estate agent)
- 6 Yes - leisure activity
- 7 Yes - other (PLEASE WRITE IN)
- 8 No
- 9 (Don't know / varies)

Q05 Approximately how much money does your household spend per week on its main food and groceries shop at (STORE MENTIONED AT Q01)?

PLEASE WRITE IN TO THE NEAREST £

- 1 To the nearest £: (PLEASE WRITE IN)
- X (Don't know / varies)
- Y (Refused)

Q06 How often does your household normally visit its main food and grocery shopping destination (STORE MENTIONED AT Q01)?

ONE ANSWER ONLY.

- 1 Everyday
- 2 5 - 6 times a week
- 3 3 - 4 times a week
- 4 Twice a week
- 5 Once a week
- 6 Once every two weeks
- 7 Once a month
- 8 Less often
- 9 (Don't know / varies)

Q07 Where did your household last undertake your 'top-up' food and grocery purchases? (i.e smaller/ 'basket' shopping purchases which are not part of your main food and groceries shop)

DO NOT PROMPT. ONE ANSWER ONLY.

IF 'OTHER' PLEASE SPECIFY STORE NAME AND LOCATION. IF 'MARKET STALL' PROBE FOR LOCATION

#Food Food Shopping List
d

Q08 And where did you shop for top-up food shopping the time before that?

DO NOT PROMPT. ONE ANSWER ONLY.

IF 'OTHER' PLEASE SPECIFY STORE NAME AND LOCATION. IF 'MARKET STALL' PROBE FOR LOCATION

#Food Food Shopping List
d

Q09 Approximately how much money does your household spend per week on top-up food and groceries shopping (STORE MENTIONED AT Q07)?

PLEASE WRITE IN TO THE NEAREST £

- 1 To the nearest £: (PLEASE WRITE IN)
X (Don't know / varies)
Y (Refused)

Q10 Does your household also spend money on food and groceries in small shops? (i.e., not supermarkets)

DO NOT PROMPT. ONE ANSWER ONLY.

- 1 Yes
2 No

GO TO Q11
GO TO Q13

Q11 Where are these small shops located?

DO NOT PROMPT. ONE ANSWER ONLY.

#Small Small Shops List
IIShop
ps

Q12 Approximately how much money does your household spend per week on food and groceries in these small shops?

PLEASE WRITE IN TO THE NEAREST £

- 1 To the nearest £: (PLEASE WRITE IN)
X (Don't know / varies)
Y (Refused)

Q13 Approximately what proportion of your household's total spending on all food and grocery goods is done using the internet?

PLEASE WRITE IN TO THE NEAREST %

- 1 To the nearest %: (PLEASE WRITE IN)
X (Don't know / varies)
Y (Refused)

Q14 So, speaking as an individual, can you tell me where you last made a purchase of clothes or shoes?

DO NOT PROMPT. ONE ANSWER ONLY.

IF 'MARKET STALL' PROBE FOR LOCATION

#Non Non Food List
Food

Q15 How often do you visit (LOCATION MENTIONED AT Q14) for clothes or shoes shopping?
ONE ANSWER ONLY.

- 1 Everyday
2 5 - 6 times a week
3 3 - 4 times a week
4 Twice a week
5 Once a week
6 Once every two weeks
7 Once a month
8 Once every two months
9 3 or 4 times a year
A Twice a year
B Once a year
C Less often
D (Don't know / varies)

If Internet / catalogue or TV at Q14, go to Q17

Q16 How do you normally travel to (LOCATION MENTIONED AT Q14)?
ONE ANSWER ONLY.

- 1 Car - Driver
2 Car - Passenger
3 Bus
4 Cycle
5 Disabled Vehicle (e.g. mobility scooter)
6 Taxi
7 Train
8 Walk
9 Other (PLEASE WRITE IN)
A (Don't know / varies)

Q17 And the time before that, where did your household go to make a purchase of clothes or shoes?

DO NOT PROMPT. ONE ANSWER ONLY.
IF 'MARKET STALL' PROBE FOR LOCATION

#Non Non Food List
Food

Q18 Now can you tell me where your household last made a purchase of furniture, carpets, or soft household furnishings?

DO NOT PROMPT. ONE ANSWER ONLY.
IF 'MARKET STALL' PROBE FOR LOCATION

#Non Non Food List
Food

Q19 And the time before that, where did your household go to make a purchase of furniture, carpets, or soft household furnishings?

DO NOT PROMPT. ONE ANSWER ONLY.
IF 'MARKET STALL' PROBE FOR LOCATION

#Non Non Food List
Food

Q20 Now can you tell me where your household last made a purchase of DIY and decorating goods?

DO NOT PROMPT. ONE ANSWER ONLY.
IF 'MARKET STALL' PROBE FOR LOCATION

#Non Non Food List
Food

Q21 And the time before that, where did your household go to make a purchase of DIY and decorating goods?

DO NOT PROMPT. ONE ANSWER ONLY.
IF 'MARKET STALL' PROBE FOR LOCATION

#Non Non Food List
Food

Q22 Can you tell me where you or your household last made a purchase of electrical items such as TVs, DVD players, digital cameras, MP3 players, mobile phones or computers?

DO NOT PROMPT. ONE ANSWER ONLY.
IF 'MARKET STALL' PROBE FOR LOCATION

#Non Non Food List
Food

Q23 And the time before that, where you or your household last made a purchase of electrical items such as TVs, DVD players, digital cameras, MP3 players, mobile phones or computers?

DO NOT PROMPT. ONE ANSWER ONLY.
IF 'MARKET STALL' PROBE FOR LOCATION

#Non Non Food List
Food

Q24 Can you tell me where you or your household last made a purchase of domestic appliances, such as washing machines, fridges or cookers?

DO NOT PROMPT. ONE ANSWER ONLY.
IF 'MARKET STALL' PROBE FOR LOCATION

#Non Non Food List
Food

Q25 And the time before that, where you or your household last made a purchase of domestic appliances, such as washing machines, fridges or cookers?

DO NOT PROMPT. ONE ANSWER ONLY.
IF 'MARKET STALL' PROBE FOR LOCATION

#Non Non Food List
Food

Q26 Can you tell me where you or your household last made a purchase of health, beauty or chemist items?

DO NOT PROMPT. ONE ANSWER ONLY.
IF 'MARKET STALL' PROBE FOR LOCATION

#Non Non Food List
Food

Q27 And the time before that, where did you or your household go to make a purchase of health, beauty or chemist items?

DO NOT PROMPT. ONE ANSWER ONLY.
IF 'MARKET STALL' PROBE FOR LOCATION

#Non Non Food List
Food

Q28 Can you tell me where you or your household last made a purchase of recreational goods such as sports equipment, bicycles, musical instruments or toys?

DO NOT PROMPT. ONE ANSWER ONLY.
IF 'MARKET STALL' PROBE FOR LOCATION

#Non Non Food List
Food

Q29 And the time before that, where did you or your household go to make a purchase of recreational goods such as sports equipment, bicycles, musical instruments or toys?
DO NOT PROMPT. ONE ANSWER ONLY.
IF 'MARKET STALL' PROBE FOR LOCATION

#Non Non Food List
Food

Q30 And where was the last purchase of other non-food items such as books, CDs, jewellery or china and glass items?

DO NOT PROMPT. ONE ANSWER ONLY.
IF 'MARKET STALL' PROBE FOR LOCATION

#Non Non Food List
Food

Q31 And the time before that, where did you or your household go to make a purchase of other non-food items such as books,

CDs, jewellery or china and glass items?
DO NOT PROMPT. ONE ANSWER ONLY.
IF 'MARKET STALL' PROBE FOR LOCATION

#Non Non Food List
Food

Q32 Do you visit Romford town centre regularly for shopping, leisure or work?

DO NOT PROMPT. ONE ANSWER ONLY.

1 Yes
2 No

GO TO Q32A
GO TO Q33

Q32A How often do you visit Romford town centre?

DO NOT PROMPT. ONE ANSWER ONLY

1 Everyday / daily
2 2 – 3 times a week
3 Once a week
4 Once a fortnight
5 Once a month
6 Once every 2 - 3 months
7 Once every 6 months
8 Once a year
9 Less often
A Never
B (Don't know / varies)

Q32B What do you like about Romford town centre?

DO NOT PROMPT. TICK ALL THAT APPLY

1 Nothing / very little
2 Close to home
3 Close to work / en route to work
4 Easily accessible by foot / cycle
5 Good and / or free car parking
6 Good bus service / accessible public transport
7 Good cycle parking
8 Markets
9 Good range of chain / well known stores
A Good range of independent stores
B Restaurants / cafes
C Bars / pubs / clubs
D Leisure facilities
E Good range of services (bank, library, hairdresser etc.)
F Good prices
G Good disabled access
H Attractive environment
I Cleanliness
J Interesting activities / promotional events
K Safe and secure
L Other (PLEASE WRITE IN)
M (Don't know)

Q32C Can I ask, are there what things that could be improved about Romford town centre?

DO NOT PROMPT. TICK ALL THAT APPLY

- 001 More parking
- 002 More secure parking
- 003 Cheaper parking
- 004 More accessible car parking
- 005 More frequent bus services to the centre
- 006 More reliable / comfortable bus services
- 007 New / relocated bus stops
- 008 More frequent train services
- 009 More reliable train services
- 010 Better signposting within the Centre
- 011 More priority for pedestrians
- 012 Improved access for wheelchair and pushchair users
- 013 Cleaner Streets / removal of litter
- 014 More shelter from wind / rain
- 015 Improve appearance / environment of centre
- 016 Improved security measures / more CCTV / more police
- 017 More control on alcohol / drinkers / drug users
- 018 More control on other anti-social behaviour
- 019 Better street furniture / floral displays
- 020 More green spaces / areas
- 021 More national multiple (high street chain) retailers
- 022 Bigger / better supermarket
- 023 More independent shops
- 024 Better choice of shops in general
- 025 Better quality of shops
- 026 Improvement to the market
- 027 More / better pubs / night-life
- 028 More / better eating places
- 029 Fewer bars / nightclubs
- 030 More / better leisure facilities
- 031 More family oriented facilities
- 032 More secure children's play areas
- 033 Better crèche facilities
- 034 Provision of more residential accommodation
- 035 Expand the town centre's colleges / expand university
- 036 Other (PLEASE WRITE IN)
- 037 (Don't know)
- 038 (None mentioned)

Q33 In which town, village or out-of-town location does your household spend most money on restaurants?

DO NOT READ OUT. ONE ANSWER ONLY.

#Leisure Leisure List

Q34 In which town, village or out-of-town location does your household spend most money on cafes / pubs / bars?

DO NOT READ OUT. ONE ANSWER ONLY.

#Leisure Leisure List

Q35 In which town, village or out-of-town location does your household spend most money on the cinema / theatre?

DO NOT READ OUT. ONE ANSWER ONLY.

#Cinema Theatre Cinema / Theatre List

Q36 In which town, village or out-of-town location does your household spend most money on art galleries & museums?

DO NOT READ OUT. ONE ANSWER ONLY.

#Leisure Leisure List

Q37 In which town, village or out-of-town location does your household spend most money on bingo / casino / bookmakers?

DO NOT READ OUT. ONE ANSWER ONLY.

#Leisure Leisure List

Q38 In which town, village or out-of-town location does your household spend most money on health & fitness?

DO NOT READ OUT. ONE ANSWER ONLY.

#Leisure Leisure List

Q39 In which town, village or out-of-town location does your household spend most money on family entertainment centres (i.e. ten pin bowling; skating rinks etc.)?

DO NOT READ OUT. ONE ANSWER ONLY.

#Leisure Leisure List

Q40 Are there any leisure facilities that you think are lacking within a reasonable distance of your home?
DO NOT READ OUT. CAN BE MULTI-CODED.

- 1 No
- 2 Yes, bingo
- 3 Yes, bowling
- 4 Yes, cinema
- 5 Yes, leisure / fitness centre
- 6 Yes, museum / art gallery
- 7 Yes, pubs / clubs / bars
- 8 Yes, restaurants / cafes
- 9 Yes, shops
- A Yes, swimming pool
- B Yes, theatre
- C Yes, other (PLEASE WRITE IN)
- D (Don't know)

GEN Gender of Respondent:
CODE FROM OBSERVATION

- 1 Male
- 2 Female

AGE Could I ask how old are you please?
ONE ANSWER ONLY. DO NOT READ OUT.

- 1 18 to 24
- 2 25 to 34
- 3 35 to 44
- 4 45 to 54
- 5 55 to 64
- 6 65 +
- 7 (Refused)

OCC What is the occupation of the chief income earner of your household?
(IF RETIRED, ASK PREVIOUS OCCUPATION)

- 1 Occupation / job description (PLEASE WRITE IN)
- 2 Retired - Basic state pension
- 3 (Refused)

CAR How many cars does your household own or have the use of?
ONE ANSWER ONLY. DO NOT READ OUT.

- 1 None
- 2 One
- 3 Two
- 4 Three or more
- 5 (Refused)

WOR Which of the following best describes the chief wage earner of your household's current employment situation?

READ OUT. ONE ANSWER ONLY.

- 1 Working full time
- 2 Working part time
- 3 Unemployed
- 4 Retired
- 5 A housewife
- 6 A student
- 7 Other (PLEASE WRITE IN)
- 8 (Refused)

Thank and Close

Code	Description
FOOD CODEFRAME:	
095	Aldi, High Road Seven Kings, Ilford, IG3 8RS
001	Aldi, Market Place, Romford RM1, 3AB
002	Aldi, Marlborough Road, Romford, RM7 8AB
064	Aldi, Ripple Road, Dagenham, RM9 6SJ
036	Aldi, St Mary's Lane, Upminster, RM14 2QB
003	Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE
096	Asda, Lakeside Retail Park, Thurrock, RM20 3LP
065	Asda, Merrielands Crescent, Dagenham, RM9 6SJ
097	Asda, Vicarage Field Shopping Centre, Barking, IG11 8DJ
054	Asda, Whalebone Lane, Chadwell Heath, RM8 1BB
043	Co-op (Somerfield), Farnham Road, Harold Hill, Romford, RM3 8DX
072	Co-op, 201-207 Rayleigh Road, Hutton, Brentwood, CM13 1LZ
073	Co-op, 208-212 Hutton Road, Shenfield, CM15 8NR
074	Co-op, 6/8-8A Harewood Road, Pilgrims Hatch, Brentwood, CM15 9PD
098	Co-op, Becontree Avenue, Becontree, Dagenham, RM8 2UU
018	Co-op, Billet Lane, Hornchurch, RM11 1XA
075	Co-op, Chapel High, Brentwood, CM14 4BX
030	Co-op, Dagenham Road, Rush Green, Romford, RM7 0TJ
019	Co-op, Elm Park Avenue, Hornchurch, RM12 4SD
099	Co-op, Faircross Parade, Longbridge Road, Barking, IG11 8UW
100	Co-op, Gale Street, Dagenham, RM9 4TP
055	Co-op, Green Lane, Becontree, Dagenham, RM8 1UU
101	Co-op, High Street, Aveley, South Ockendon, RM15 4BB
102	Co-op, Porters Avenue, Dagenham, RM9 4ND
056	Co-op, Rose Lane, Marks Gate East, Chadwell Heath, RM6 5NR
044	Co-op, Station Road, Harold Wood, Romford, RM3 0BP
080	Co-op, The Baytree Centre, Brentwood, CM14 4BX
050	Co-op, The Retail Unit, Turpin Avenue, Colliers Row, RM5 2PU
004	Costcutter, Balgores Lane, Romford, RM2 6BT
057	Costcutter, Becontree Avenue, Dagenham, RM8 3UH
045	Costcutter, Farringdon Avenue, Romford, RM3 8SG
058	Costcutter, High Road, Romford, RM6 6PX
051	Costcutter, Highfield Link, Romford, RM5 3DH
005	Costcutter, Mawney Road, Romford, RM7 7HL
046	Costcutter, Petersfield Avenue, Romford, RM3 9PH
032	Costcutter, Station Lane, Hornchurch, RM12 6NJ
037	Costcutter, Station Road, Upminster, RM14 2UB
020	Costcutter, The Cardrome, Upper Rainham Road, Hornchurch, RM12 4ET
081	Iceland, 32 The High Street, Brentwood, CM14 4AJ
103	Iceland, East Street, Barking, IG11 8EP
047	Iceland, Farnham Road, Harold Hill, Romford, RM3 8DX
066	Iceland, Heathway, Dagenham, RM10 8QS
031	Iceland, London Road, Romford, RM7 9NA
006	Iceland, Market Place, Romford, RM1 3AB
021	Iceland, North Street, Hornchurch, RM11 1RL
059	Iceland, Whalebone Lane, Dagenham, RM8 1FB
007	Lidl, Atlanta Boulevard, Romford, RM1 1TB
104	Lidl, Cranbrook Road, Ilford, IG1 4NF
105	Lidl, Daiglen Drive, South Ockendon, RM15 5AE
067	Lidl, Heathway, Dagenham, RM10 8QS
106	Lidl, Ilford High Road, Ilford, IG1 1NJ
107	Lidl, Longbridge Road, Dagenham, RM8 2DB
082	Londis, Brook Street, Brentwood, CM14 5LZ
052	Londis, Collier Row, RM5 3NP
038	Londis, Corbetts Tey Road, Upminster, RM14 2AA
033	Londis, Mungo Park Road, Rainham, RM13 7PP
068	Londis, Rainham Road South, Dagenham, RM10 8AH
008	Londis, South Street, Romford, RM1 1PS
039	Londis, Upminster Road, Upminster, RM14 2RB
083	Londis, Warley Hill, Brentwood, CM14 5HR

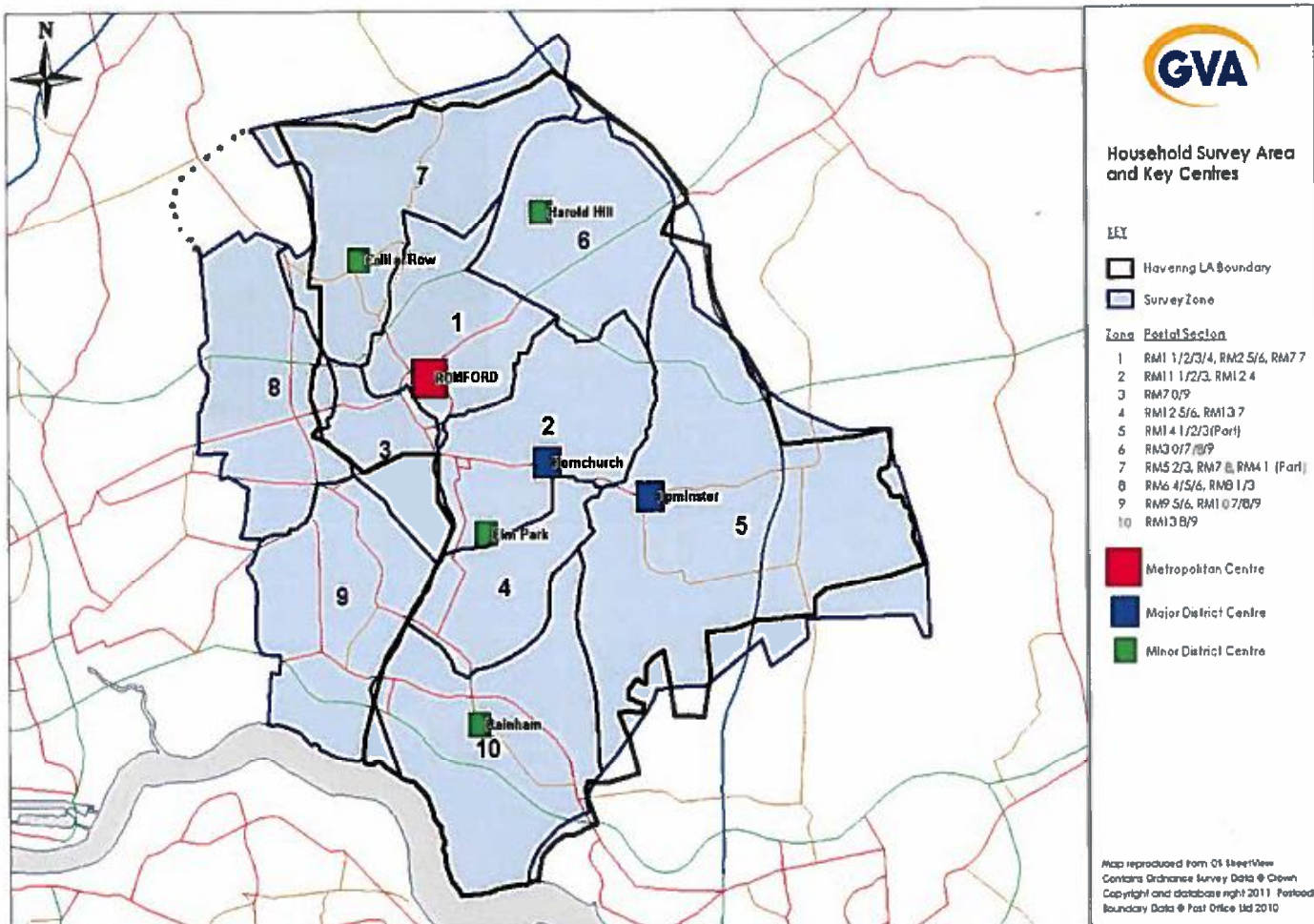
084 Marks & Spencer, High Street, Brentwood, CM14 4RH
 108 Marks & Spencer, Lakeside, West Thurrock, RM20 2ZQ
 085 Marks & Spencer, Ongar Road Pilgrims Hatch, Brentwood, CM15 9HZ
 009 Marks & Spencer, South Street, Romford, RM1 1NT
 023 Marks & Spencer, Southend Arterial Rd, Hornchurch, RM11 3UJ
 040 Marks & Spencer, Station Road, Upminster, RM14 2SU
 034 Morrisons M Local, Station Parade, Hornchurch, RM12 5AB
 109 Morrisons, London Road, Grays, RM17 5XZ
 069 Morrisons, Wood Lane, Becontree Heath, Dagenham, RM10 7RA
 048 Sainsbury's Local, Farnham Road, Harold Hill, Romford, RM3 8DX
 010 Sainsbury's Local, North Street, Romford, RM1 1ED
 024 Sainsbury's, Elm Park Avenue, Hornchurch, RM12 4RX
 060 Sainsbury's, High Road, Chadwell Heath, Romford, RM6 6PB
 025 Sainsbury's, High Street, Hornchurch, RM11 1TX
 110 Sainsbury's, Howard Road, Grays, RM16 6YJ
 111 Sainsbury's, King George Avenue, Ilford, IG2 7SH
 011 Sainsbury's, The Brewery, Romford, RM1 1AU
 086 Sainsbury's, William Hunter Way, Brentwood, CM14 4WQ
 112 Sainsbury's, Tanners Lane, Ilford, IG6 1QE
 087 Tesco Express, 225 Hanging Hill Lane, Brentwood, CM13 2QG
 014 Tesco Express, 405 Brentwood Road, Romford, RM2 5TJ
 088 Tesco Express, 85-86 Viceroy Parade, Hutton Road, Shenfield, CM15 8JD
 026 Tesco Express, Ardleigh Green Road, Hornchurch, RM11 2LG
 027 Tesco Express, Butts Green Road, Hornchurch, RM11 2LD
 070 Tesco Express, Dagenham Heathway, Dagenham, RM10 8QS
 113 Tesco Express, Derry Court, Derry Avenue, Thurrock, RM15 5GH
 028 Tesco Express, Elm Park Avenue, Elm Park, RM12 4SB
 012 Tesco Express, Fairview Parade, Romford, Essex, RM7 7HH
 041 Tesco Express, Front Lane, Cranham, Upminster, RM14 1XL
 062 Tesco Express, High Road, Chadwell Heath, RM6 6PR
 090 Tesco Express, London Road, Brentwood, CM14 4QG
 015 Tesco Express, Main Road, Romford, RM1 3BT
 016 Tesco Express, Mawney Road, RM7 7HL
 114 Tesco Express, North Road, South Ockendon, Thurrock, RM15 6QA
 115 Tesco Express, Rainham Road, Rainham, RM13 7QX
 013 Tesco Express, South Street, Romford, RM1 1RX
 093 Tesco Express, Warley Hill, Brentwood, CM14 5HB
 071 Tesco Extra, Bridge Road, Rainham, RM13 9YZ
 049 Tesco Extra, Bryant Avenue, Romford, RM3 0LL
 063 Tesco Extra, High Road, Goodmayes, Romford, RM6 4HY
 029 Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY
 116 Tesco Extra, Lakeside, West Thurrock, Grays, RM20 1TX
 053 Tesco Metro, Collier Row Lane, Collier Row, Romford, RM5 3NL
 035 Tesco, Airfield Way, Hornchurch, RM12 5AF
 022 Waitrose (Little), High Street, Hornchurch, RM11 1TP
 042 Waitrose, St Mary's Lane, Upminster, RM14 3BT
 400 Internet / delivered
 401 Other foodstore outside study area
 402 (Don't know / can't remember)
 403 (Don't do a main food shop)
 404 (Don't do this kind of shopping)
 405 (Nowhere else)
 600 Other, zone 1
 601 Other, zone 2
 602 Other, zone 5
 603 Other, zone 6
 604 Other, zone 9
 605 Other, zone 10
 606 Other, zone 11
 607 Other foodstores, Basildon
 608 Other foodstores, Billericay
 609 Other, zone 7
 610 Other, zone 8

Code	Description
NON-FOOD CODEFRAME:	
001	Barking
002	Brentwood
003	Central London - West End (Oxford Street / Regent Street / Bond Street)
004	Chigwell
005	Collier Row
006	Dagenham
007	Elm Park
008	Grays
009	Harold Hill
010	Hornchurch
011	Ilford
012	Purfleet
013	Rainham
014	Romford (including The Liberty, The Mall and The Brewery)
015	South Ockendon
016	Stratford (including Westfield Stratford City)
017	Upminster
018	Bluewater
019	Lakeside
020	Abbey Retail Park, Barking
021	Chase Lane Retail Park, Ilford
022	Eastern Avenue West Retail Park, Romford
023	Gallows Corner Retail Park, Romford
024	Grove Farm Retail Park, Romford
025	Ilford Retail Park
026	Merriellands Retail Park, Dagenham
027	Newbury Retail Park, Horns Road, Ilford
028	Rom Valley Way Retail Park, Romford
030	B&Q Roneo Corner Retail Park, Romford
031	B&Q Tangent Link, Harold Hill, Romford
032	Homebase, High Road, Seven Kings, Ilford
033	Homebase, Rom Valley Way, Romford
029	Ikea, Lakeside
034	Matalan, North Street, Romford
035	Wickes Extra, Hertford Road, Barking
036	Wickes, Brook Street, Brentwood
044	Asda Superstore, Whalebone Lane, Chadwell Heath, RM8 1BB
037	Asda, Dolphin Approach, Mercury Gardens, Romford, RM1 3EE
050	Asda, Lakeside Retail Park, Thurrock, RM20 3LP
051	Asda, Vicarage Field Shopping Centre, Barking, IG11 8DJ
052	Morrisons, London Road, Grays, RM17 5XZ
047	Morrisons, Wood Lane, Becontree Heath, Dagenham, RM10 7RA
039	Sainsbury's, Elm Park Avenue, Hornchurch, RM12 4RX
045	Sainsbury's, High Road, Chadwell Heath, Romford, RM6 6PB
040	Sainsbury's, High Street, Hornchurch, RM11 1TX
053	Sainsbury's, Howard Road, Grays, RM16 6YJ
054	Sainsbury's, King George Avenue, Ilford, IG2 7SH
038	Sainsbury's, The Brewery, Romford, RM1 1AU
049	Sainsbury's, William Hunter Way, Brentwood, CM14 4WQ
055	Sainsbury's, Tanners Lane, Ilford, IG6 1QE
048	Tesco Extra, Bridge Road, Rainham, RM13 9YZ
043	Tesco Extra, Bryant Avenue, Romford, RM3 0LL
046	Tesco Extra, High Road, Goodmayes, Romford, RM6 4HY
041	Tesco Extra, Hornchurch Road, Hornchurch, RM11 1PY
056	Tesco Extra, Lakeside, West Thurrock, Grays, RM20 1TX
042	Tesco, Airfield Way, Hornchurch, RM12 5AF
400	Internet / delivered
401	Home Catalogue
402	TV / Interactive Shopping
403	Other location outside study area
404	(Don't know / can't remember)
405	(Don't do this type of shopping)
406	(Nowhere else / same as before)
600	Other, zone 1
601	Other, zone 3
602	Other, zone 5
603	Other, zone 6
604	Other, zone 8
605	Other, zone 9
606	Other, zone 11
607	London (Other)
608	Southend
609	Goodmayes (including retail park)
610	Chelmsford
611	Billericay
612	Beckton superstores and retail parks
613	Basildon

Code	Description
<i>SMALL SHOPS CODEFRAME:</i>	
001	Local Stores - Romford
002	Local Stores - Hornchurch
003	Local Stores - Upminster
004	Local Stores - Collier Row
005	Local Stores - Elm Park
006	Local Stores - Harold Hill
007	Local Stores - Rainham
008	Local Stores - Chadwell Heath
009	Local Stores - Dagenham
010	Local Stores - Ilford
011	Local Stores - Barking
012	Local Stores - Brentwood
400	Other, outside area
401	(Don't know / varies)
600	Gidea Park
601	Rush Green
602	Shenfield

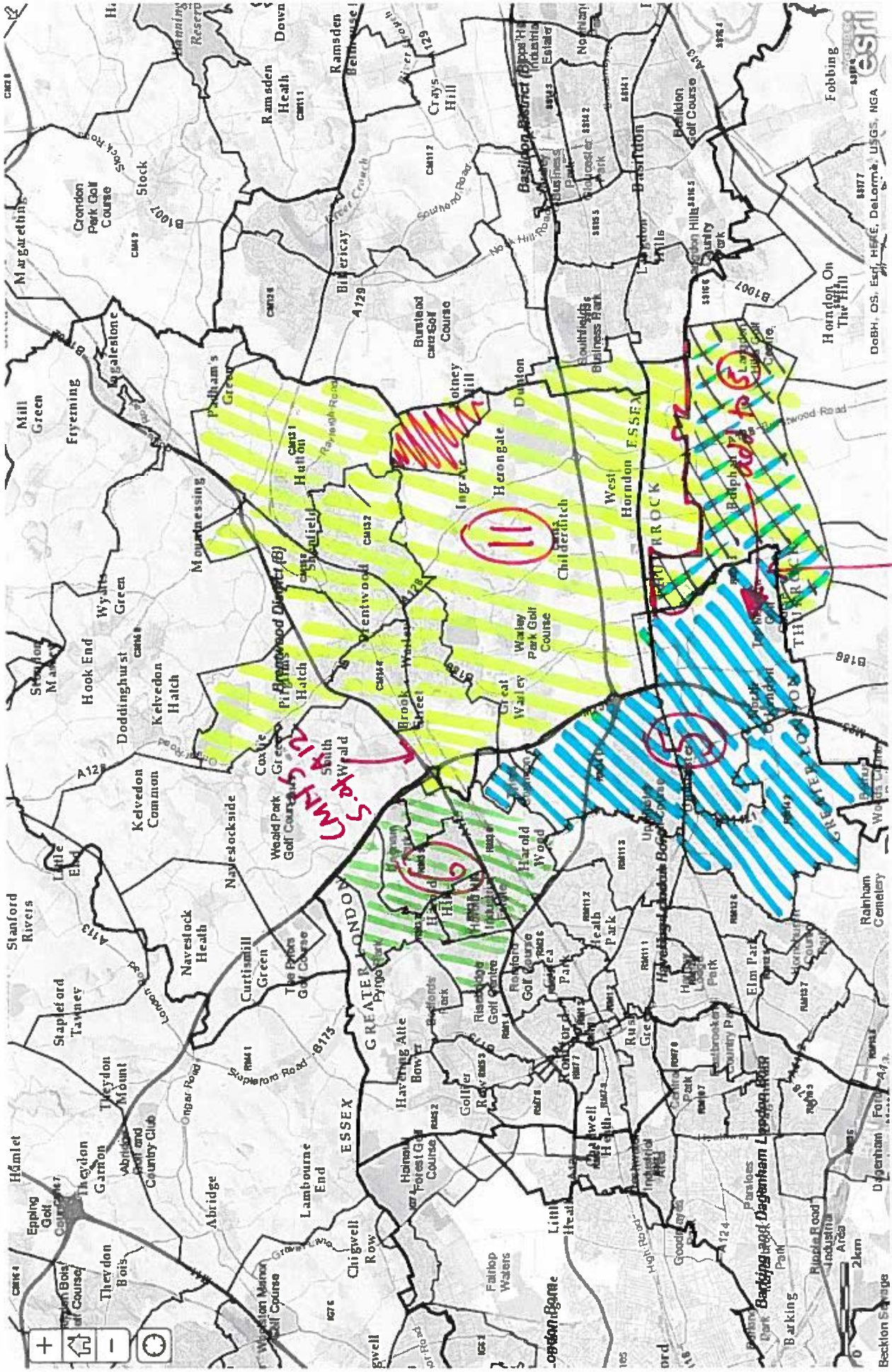
Appendix 6:

Map



Havering Retail & Leisure Needs Assessment

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RM14 only up to LSH boundary