APPENDIX 5

ANALYSIS OF HOUSEHOLD SURVEY RESULTS

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Introduction

1. In this Appendix, we summarise both the household survey methodology and survey results. First we set out the household survey methodology, as undertaken by NEMS Market Research, and demonstrate its statistical reliability. We then summarise the results from the survey. Each question is addressed within a separate section in the order the questionnaires were undertaken. We start with the food and grocery questions, then summarise the comparison goods questions before summarising the Internet/home shopping results and the background to the respondents. Where appropriate we sub-divide the results by zone.

Household Survey Methodology

Background

2. An important input into our retail study is the findings of a telephone survey, which obtained 800 valid responses from households residing within the study area. The tabulated results from this survey are attached at **Volume 4**. The telephone survey was undertaken in April 2009 by NEMS Market Research. The main purpose of the household survey was to establish:

- The shop or shopping centre in which the household had spent most on main trips for food and groceries in the preceding six months and the shop or shopping centre in which the household had spent most money on top-up purchases of food and groceries in the preceding six months.
- The town centre/retail park in which members of the household had spent most and second most on each of the following goods, in the preceding six months:
    - clothes and shoes;
    - furniture/carpets/soft household furnishings;
    - DIY, decorating goods or gardening items;
    - Electrical items, such as TVs, DVD players, digital camers, MP3 players, mobile phones, computers and domestic appliances such as washing machines, fridges and cookers;
    - health, beauty or chemist items;
    - recreational goods such as sports equipment, bicycles, musical instruments or toys; and;
    - specialist non-food items, such as books, CDs, jewellery, china and glass.

3. Interviews were conducted using NEMS in-house CATI (Computer Assisted Telephone Interviewing) Unit. Respondents were contacted during the day, in the evening and at the weekend. All respondents were the main shopper in the

household, determined using a preliminary filter question. A random sample of live interviews were listened to and assessed by NEMS CATI Team Leaders to verify that the quality of interviewing was being maintained.

Sampling

4. Selection was done using random stratified sampling from all legally available telephone numbers within the defined survey area. The survey area was segmented into 8 zones, defined using postcode sectors. The zone details are detailed at **Table 1**

Table 1 Survey Area

Zone	Postcode Sectors	Interviews
Zone 1	CM16 4, CM16 5, CM16 6, CM16 7, CM18 7	101
Zone 2	IG10 1, IG10 2, IG10 3	101
Zone 3	EN8 0, EN8 9, EN9 2, EN10 6, EN11 0, CM19 5	99
Zone 4	CM5 0, CM17 0, CM17 9, CM21 9	99
Zone 5	CM4 0, CM5 9, CM14 5, CM15 0	100
Zone 6	EN3 6, EN3 7, EN8 7, EN9 1, EN9 3, E4 7, IG10 4	100
Zone 7	E4 6, IG7 5, IG8 7, IG8 0, IG8 8, IG9 5, IG9 6	100
Zone 8	IG7 4, IG7 6, RM4 1	100
	Total	**800**

Weighting

5. Sample size within each zone was quota controlled in proportion to population. Therefore the final tabulated data attached at **Volume 4** is weighted to make the overall results representative of the total population within the defined study area. This accounts for the total market share for the study area, rather than the individual zones. Details of the weightings are at **Table 2** below.

Table 2 Survey Weightings

Zone	Population	Interviews Achieved	Weighting
Zone 1	32,279	101	0.8311
Zone 2	26,735	101	0.6883
Zone 3	46,156	99	1.2124
Zone 4	31,595	99	0.8299
Zone 5	26,858	100	0.6984
Zone 6	67,025	100	1.7429
Zone 7	60,744	100	1.5796
Zone 8	16,255	100	0.4227

6. It should be noted that our quantitative assessments are undertaken on the zonal market share, rather than the weighted total market share, in order to capture zonal variations in per capita expenditure.

Statistical Reliability

7. As with any sample survey, there is potentially a difference between the figures from the sample and the true situation in the population as a whole. This sampling error, as it is called, can be estimated using statistical calculations based on the sample size, the population size and the particular percentage in the table under investigation. These calculations produce a 95% confidence interval for the results

- which means that you can be confident that in 95% (19 out of 20) of instances the actual attribute will be within the confidence interval range.

8. The 95% confidence intervals for this survey are as follows:

Table 3 Confidence Interval

% in table	95% confidence interval
10	±2.0
20	±2.8
30	±3.2
40	±3.4
50	±3.5

9. Thus, for example, if a table says that 10% of the population uses a particular store as its main place for food and grocery shopping then there is a 95% chance that the true percentage falls between 10% plus or minus 2.0% - that is 8.0% and 12.0%.

Shopping for Food and Groceries

Main spend locations - Q01

10. **Table 4** identifies the top two destinations for main food and grocery shopping for residents in each of the 8 survey zones.

Table 4 Main Food/Groceries Destination

Zone	Top two responses - % of households resident in each zone			
	1		2	
1	Tesco, 77-79 High Street, Epping, Essex	35.6%	Tesco, Church Langley Centre, Harlow, Essex	17.8%
2	Morrisons, 246-250 High Road, Loughton, Essex	28.7%	Sainsbury's, Old Station Road, Loughton, Essex	24.8%
3	Tesco Extra, Brookfield Centre, New River Trading Estate, Cheshunt, Hertfordshire	42.4%	Sainsbury's, Brewery Road, Hoddesdon, Hertfordshire	12.1%
4	Tesco, Church Langley Centre, Harlow, Essex	31.3%	Tesco, East Road, Edinburgh Way, Harlow, Essex	16.2%
5	Sainsbury's, 51 North Service Road, Brentwood, Essex	27.0%	Sainsbury's, Banson Lane, Chipping Ongar, Ongar, Essex	19.0%
6	Tesco, Sewardstone Road, Waltham Abbey, Essex	27.0%	Sainsbury's, Old Station Road, Loughton, Essex	6.0%
7	Tesco, Southend Road, Woodford Green, Essex	15.0%	Waitrose, 27-43 Queens Road, Buckhurst Hill, Greater London	10.0%
8	Tesco, 796 Cranbrook Road, Barkingside, Essex	16.0%	Sainsbury's, 72 Shopping Pavillion. High Street, Walthamstow, Greater London	7.0%

Linked spending trips - Q02

11. There is limited evidence of shoppers combining their main food/grocery shopping trips with other shopping activities. 53.8% of households stated that they never visit other shops, leisure or service outlets when on a main food and grocery shopping

trip. Only around 9.7% of respondents make combined trips or claim that it occurs on every trip.

12. There are only three zones where over 5% of respondents claimed that they 'always' combined trips – Zone 1 shows a percentage of 6.1%, Zone 3 also shows a percentage of 6.1% and Zone 6 shows a percentage of 5.2%. Zones 2, 3, 4 and 5 are the only zones where more than 40% of households either 'always', 'normally' or 'sometimes' undertake linked shopping and leisure trips with food and grocery shopping, showing percentages of 41.0%, 44.5%, 43.9% and 49.0% respectively.

Spending on main food and grocery shopping – Q03

13. The majority (approximately 20%) of all households spend between £100 and £124 per week in the store named in question one on food and grocery items.

Top-up food and grocery spending locations – Q04 – Q08

14. In all zones the majority of households claim that they do top-up food and grocery shopping in addition to a main food shop. Approximately 58.3% of responding households were able to name a 'top up' food and grocery spend location.

15. The main stores for 'top up' food and grocery shopping are identified in **Table 5** below. Local stores in town centre's and villages also provide important secondary food and grocery shopping destinations for the households questioned.

Table 5 'Top-Up' Food/Grocery Destination

Zone	Top two responses - % of households resident in each zone			
	1		2	
1	Tesco, 77-79 High Street, Epping, Essex	14.9%	Marks and Spencer's Simply Food, 239-253 High Street, Epping, Essex	8.9%
2	Morrisons, 246-250 High Road, Loughton, Essex	21.8%	Sainsbury's, Old Station Road, Loughton, Essex	9.9%
3	Tesco Extra, Brookfield Centre, New River Trading Estate, Cheshunt, Hertfordshire	17.2%	Sainsbury's, Brewery Road, Hoddesdon, Hertfordshire	12.1%
4	Tesco, Church Langley Centre, Harlow, Essex	21.2%	Budgens, London Road, Sawbridgeworth, Hertfordshire	11.1%
5	Sainsbury's, Bansons Lane, Chipping Ognar, Ognar, Essex	15.0%	Budgens, 74 Church Lane, Doddinghurst, Essex	5.0%
6	Tesco, Sewardstone Road, Waltham Abbey, Essex	12.0%	Somerfield, 4 Station Road, Chingford, Greater London	8.0%
7	Waitrose, 27-43 Queens Road, Buckhurst Hill, Greater London	12.0%	Budgens, 109 Snakes Lane, Woodford, Essex	6.0%
8	Tesco Express, 185 Manford Way, Grange Hill Estate, Chigwell, Essex	8.0%	Local stores, Chigwell	6.0%

16. The majority (26.3%) of households spend between £10 and £19 on their top up food shop. In addition, 37.3% of households spend money on food and groceries in small shops in town centres and villages. The centres which are visited the most in

this capacity are Chigwell, Epping and Brentwood. The majority of those who use small shops for food and groceries spend between £10 and £19.

Clothes and Shoes

Main spend locations - Q011

17. Households were asked to name up to two town/district centres/retail parks in which the most money had been spent on clothes and shoes in the previous six months. Overall, Harlow and Romford were the most popular locations. Harlow was the top location for 21.5% of all households in the survey area, followed by Romford (10.0%). The Brookfield Centre in Cheshunt, Waltham Cross and the West End each captured a smaller proportion of the total market share (9.9% and 4.5% respectively), with the remaining centres altogether attracting less than 4.5% of the total market share. Harlow is the main location for clothes and shoes spending for residents in Zones 1, 4 and 6 (see **Table 6** below).

Table 6 Clothes/Shoes Destination

Zone	Top two responses - % of households resident in each zone			
	1		2	
1	Harlow	50.5%	Epping	8.9%
2	Loughton High Street	25.7%	Romford	17.8%
3	Brookfield Centre,in Cheshunt, Waltham Cross	38.4%	Harlow	29.3%
4	Harlow	61.6%	Brookfield Centre in Cheshunt, Waltham Cross	6.1%
5	Brentwood	27.0%	Chelmsford	18.0%
6	Harlow	19.0%	Brookfield Centre in Cheshunt, Waltham Cross	15.0%
7	Ilford	18.0%	Romford	17.0%
8	Romford	37.0%	Ilford	16.0%

Furniture, Carpets and Soft Household Furnishings

Main Spend Location - Q11

18. Households were asked to name up to two town/district centres/retail parks in which most money has been spent on furniture, carpets and soft household furnishings in the past six months. Although up to 27.5% of respondents stated that they do not purchase these items or at least have not done so within the last six months, Harlow stands out as the primary location for those who have (12.3%). This is followed by Waltham Cross (6.9%) and Romford (5.4%).

19. As shown in **Table 7**, Harlow and Romford are the most popular destinations across all zones in the survey area for this type of comparison shopping.

Table 7 Furniture, Carpets and Soft Household Furnishings Destination

Zone	Top two responses - % of households resident in each zone			
	1		2	
1	Harlow	35.7%	Epping	6.9%
2	Romford	8.9%	Waltham Abbey	8.9%
3	Harlow	16.2%	Waltham Cross	16.2%
4	Harlow	38.4%	Waltham Cross	5.1%
5	Lakeside Regional Shopping Centre	12.0%	Romford	10.0%
6	Waltham Cross	21.0%	Enfield	13.0%
7	Ilford	8.0%	The West End	7.0%
8	Romford	13.0%	Ilford	11.0%

DIY, Decorating Goods and Gardening Items

Main Spend Location – Q13

20. Households were asked to name up to two town/district centres/retail parks in which most money had been spent on DIY and decorating goods in the past six months. 16.6% of those surveyed either did not buy these items or have not bought them in the last six months. For those who did however, Harlow was the main destination chosen by 18.8% of respondents, followed by Homebase in Loughton (8.0%) and Loughton High Road (4.6%). These results are outlined in **Table 8** below.

Table 8 DIY, Decorating Goods and Gardening Items Destination

Zone	Top two responses - % of households resident in each zone			
	1		2	
1	Harlow	52.5%	Homebase Ltd, 140 Church Hill, Loughton, Essex	5.0%
2	Homebase Ltd, 140 Church Hill, Loughton, Essex	42.6%	Loughton High Road	19.8%
3	Harlow	25.3%	Waltham Cross	11.1%
4	Harlow	57.6%	Edinburgh Way Retail Park, Harlow	9.1%
5	Romford	22.0%	Brentwood	10.0%
6	Enfield	25.0%	Homebase Ltd, High Street, Waltham Cross, Hertfordshire	16.0%
7	Walthamstow	11.0%	Homebase Ltd, 140 Church Hill, Loughton, Essex	9.0%
8	B&Q, Springfield Drive, Ilford	12.0%	Ilford	12.0%

Electrical Items

Main spend location – Q15

21. Households were asked to name town/district centres/retail parks in which most money has been spent on electrical items, such as TVs, DVD players, digital cameras, MP3 players, mobile phones, computers and domestic appliances such as washing machines, fridges and cookers. As shown in **Table 9** below, Harlow has the largest market share of 19.5% which is largely due to its dominant market share in Zone 4 of 64.6%. Enfield has the second largest market share at 5.9%, followed by Romford with 4.3%.

Table 9 Electrical Items Destination

Zone	Top two responses - % of households resident in each zone			
	1		2	
1	Harlow	45.5%	Epping	6.9%
2	Loughton High Road	13.9%	Loughton Broadway	11.9%
3	Harlow	26.3%	Brookfield Centre, Cheshunt, Waltham Cross	14.1%
4	Harlow	64.6%	Chelmsford	2.0%
5	Brentwood	18.0%	Romford	14.0%
6	Enfield	26.0%	Harlow	7.0%
7	The West End	13.0%	North Chingford	10.0%
8	Romford	15.0%	Ilford	12.0%

Health, beauty and chemist items

Main spend location – Q17

22. Households were asked to name up to two town/district centres/retail parks in which most money has been spent on health, beauty and chemist items. Once again, Harlow was chosen as the main location claiming 13.4% of the market share, followed by Loughton High Road with 8.5% and Epping with 7.6%. Overall, 9.8% of respondents claimed that they do not buy these items or at least have not done so in the last six months. The dominant location for this type of comparison shopping is different in all eight zones, and is shown in **Table 10** below.

Table 10 Health, Beauty and Chemist Goods Destination

Zone	Top two responses - % of households resident in each zone			
	1		2	
1	Epping	44.6%	Harlow	27.7%
2	Loughton High Road	51.5%	Loughton Broadway	14.9%
3	Brookfield Centre, Cheshunt, Waltham Cross	37.4%	Harlow	18.2%
4	Harlow	55.6%	Chipping Ongar	6.1%
5	Brentwood	35.0%	Chelmsford	9.0%
6	Enfield	17.0%	Waltham Cross	17.0%
7	Ilford	12.0%	North Chingford	12.0%
8	Chigwell	20.0%	Ilford	14.0%

Recreational Goods

Main spend location – Q19

23. Households were asked to name the town/district centres/retail parks in which most money has been spent on recreational goods such as sports equipment, bicycles, musical instruments or toys. Harlow again proves to be a popular location for comparison shopping as it captures the highest share of the market (10.5%), followed by Enfield (4.5%). Overall, 49.6% of respondents claimed that they do not buy these items or at least have not done so in the last six months.

24. Harlow is the dominant location in Zones 1, 3 and 4. Ilford is dominant in Zones 7 and 8. See **Table 11**.

Table 11 Recreational Goods Destination

Zone	Top two responses - % of households resident in each zone			
	1		2	
1	Harlow	29.7%	Epping	5.0%
2	Loughton High Road	7.9%	Romford	5.9%
3	Harlow	17.2%	Enfield	11.1%
4	Harlow	29.3%	Epping	3.0%
5	Brentwood	15.0%	Chelmsford	7.0%
6	Enfield	20.0%	Harlow	3.0%
7	Ilford	10.0%	Loughton High Road	4.0%
8	Ilford	11.0%	Romford	3.0%

Specialist Non-Food Goods

Main spend location – Q21

25. Households were asked to name the town/district centres/retail parks in which most money has been spent on specialist non-food items, such as books, CDs, jewellery, china and glass. Harlow again proves to be a popular location for comparison shopping as it captures the highest share of the market (9.3%), followed by Romford (4.4%) and Loughton High Road (4.0%) Overall, 25.3% of respondents claimed that they do not buy these items or at least have not done so in the last six months.

Table 12 Specialist Non-Food Goods Destination

Zone	Top two responses - % of households resident in each zone			
	1		2	
1	Harlow	21.8%	Epping	13.9%
2	Loughton High Road	18.8%	Romford	7.9%
3	Brookfield Centre, Cheshunt, Waltham Cross	16.2%	Harlow	13.1%
4	Harlow	34.3%	Tesco, Church Langley Centre, Harlow	7.1%
5	Brentwood	27.0%	Chelmsford	7.0%
6	Enfield	11.0%	Waltham Cross	10.0%
7	Ilford	11.0%	The West End	7.0%
8	Romford	18.0%	Chigwell	4.0%

Internet – Q27

26. Within the whole study area, 47.0% of respondents purchase food and non-food goods over the internet. The percentage of people spending the most money on internet shopping is highest in Zone 7 at 64.0%, and lowest in Zone 8 at 29.0%.

27. The most popular goods purchased over the internet are CD's, DVD's, games books etc with 72.3% of households using the internet for these purchases. Clothes and shoes were the second highest type of goods purchased over the internet at 32.4%. Domestic appliances were purchased online by 18.4% of households and 16.5% of households purchased food and groceries online.

Nearest town centre - Q25 to Q28

28. Respondents were asked what they considered to be their nearest Town Centre within Epping Forest District. 25.8% of all households considered Epping to be their nearest Town Centre, followed by Loughton High Road (18.4%)

Table 13 What is considered the nearest Town Centre in the Epping Forest District

Nearest Centre	Percentage of Responses
Epping	25.8%
Loughton High Road	18.4%
Waltham Abbey	17.1%
Loughton Broadway	4.8%
Chipping Ognar	11.0%
Buckhurst Hill	11.5%

29. Question 26 asked respondents if they visited their nearest Town Centre on a regular basis. Overall 51.8 % said yes and 47.7% of households claimed they did not.

30. Respondents were asked what they considered to be good features of their nearest town centres. Overall the highest percentage of households (14.1%) stated an adequate choice of shops in general as a good feature, followed by 13.3 % stating the appearance/ environment of the centre. **Table 14** shows the top five things that people considered to be a good feature of their nearest town centre

Table 14 What are considered to be good features of the nearest Town Centres in the Epping Forest District

Features	Percentage
An adequate choice of shops in general	14.1%
The appearance/environment of the centre	13.3%
Adequate quality of shops	8.1%
Adequate supermarket offer	4.8%
Close to home/convenient	4.7%

31. Respondents were also asked what they thought could be most improved within their nearest town centres. The following table shows the top five things that could be improved within the nearest town centres with more choice of shops in general being cited by 12.0% of respondents, followed by more parking provision at 5.2%

Table 15 What can be improved in the nearest Town Centres

Features	Percentage
More choice of shops in general	12.0%
More parking provision	5.2%
Better links from car park to centre	5.1%
More clothes/fashion shops	3.5%
Cheaper parking	2.3%

Leisure Activities – Q31

32. The NEMS survey data includes questions that asked respondents where they spent the most money on certain types of leisure activity, including restaurants, pubs/cafes/bars, cinema/theatre, bingos/casinos/bookmakers, health and fitness and, family entertainment uses (i.e. ten pin bowling).

33. **Table 16** below identifies the top two responses for each leisure activity where the respondent has indicated they undertake any of the mentioned leisure activities.

Table 16 Expenditure of different types of leisure activity (study area)

Leisure activity	Top two responses - % of households for each leisure activity			
	1		2	
Restaurants	Harlow	7.6%	Loughton High Road	7.5%
Cafés/pubs/bars	Loughton High Road	7.4%	Harlow	6.8%
Cinema/Theatre	The West End	16.5%	Harlow	16.3%
Health and Fitness	Harlow	6.0%	Loughton Leisure Centre, Traps Hill, Loughton	3.1%
Family Entertainment	Romford	9.1%	Harlow	6.3%

Source: NEMS Household Survey 2009

34. From the study area as a whole, Harlow features as one of the top two destinations for every activity.

35. 21.3% of all households do not visit restaurants. Harlow is dominant in Zones 1,3 and 4, with Loughton High Road being dominant with 31.7% in Zone 2. In Zone 5 Brentwood is dominant (23.0%), Zone 6, Enfield (18.0%), North Chingford (14.0%) in Zone 7 and Chigwell (9.0%) in Zone 8.

36. Overall, 32.6% of households claimed that they did not visit pubs. The main location for Zone 1 is Epping (24.8%) and Loughton High Road (42.6%) is the main location for households in Zone 2. For households in Zone 3 and 4, the dominant location is Harlow (7.1% and 21.2% respectively). For Zone 5 Brentwood is dominant (26.0%), Zone 6, Waltham Abbey (10.0%), Zone 7 North Chingford (11.0%) and in Zone 8 Chigwell is the dominant location (14.0%).

37. Overall, 32.3% of households claimed that they did not visit the cinema or theatre. The most popular locations for visiting the cinema were the West End which is

dominant in Zones 2, 7 and 8 and Harlow, which is dominant in Zones 1, 3 and 4. The highest proportion of households in Zone 5 visited cinemas or theatres in Chelmsford and in Zone 6 the most popular destination was Enfield.

38. Overall, 63.6% of all households do not use health and fitness facilities. For those who do undertake such facilities, the majority use facilities in Harlow which has a market share of 6.0%.

39. 66.3% of those households questioned do not undertake family entertainment activities. The dominant location for family entertainment is Romford followed by Harlow. The only other location to achieve a market share of more than 2% was Chelmsford (5.6%) which is dominant in Zone 5.

Background Information

40. The majority of all respondents (35.5%) were aged 65 and over.

41. In respect of car ownership, 42.9% of all households surveyed had at least one car. The highest proportion was in Zone 2 where 51.5% of households had at least one car.

42. For 40.5% of households the chief wage earner was a retired person. This is the largest group apart from those who work full-time (48.3%).