



# **Colchester Night Time Economy Study**

## **FINAL DRAFT Report**

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Prepared by:

TSE Research

40 Chamberlayne Road  
Eastleigh  
Hampshire  
SO50 5JH

**TOURISM**  
**SOUTH EAST**

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## EXECUTIVE SUMMARY

This report presents the results of a study designed to provide part of the evidence base supporting Colchester Borough Council's application for Purple Flag accreditation. Purple Flag is a new accreditation scheme that recognises excellence in the management of town and city centres at night. Entertainment areas that achieve the standard will be those that offer *a better night out* to visitors. Purple Flag aims to raise standards and improve the quality of our towns and cities at night.

This study included desk research, a face to face survey with a random sample of town centre visitors and an economic modelling approach to estimate the overall economic impact of the night time economy on Colchester town.

A summary of the main findings follows:

### Profile of the town and wider district

**Resident population:** According to the latest estimates from the Office for National Statistics Colchester has a population of approximately 181,000. The population has grown to become the second largest district in England - growing by over 15% in the last ten years. By 2035 the population of Colchester is projected to reach 233,400, a percentage change of 33.4% on the base of 2010. This compares with 23.6% change for Essex, 23.5% change for the East of England and 18.9% for England.

**Labour Supply:** Employment rates are high; 79% of the population are economically active. This figure is higher than the regional figure of 78.8% and the national figure of 76.1%. The Office for National Statistics analysis of earnings to 2011 show that the gross weekly pay for full-time workers in Colchester is £530.2. These figures place Colchester in the middle 20% of districts nationally.

**Crime:** Overall levels of crime have remained broadly stable between December 2010 and April 2012. Anti-social behaviour fell by 6.5% whilst the crime figures show a 6.9% increase in violent crime in Colchester in 2011. In sum:

- Disturbance and violence peaks between 11 pm and midnight and between 2 am and 3 am.
- Drunkenness peaks between midnight and 1 am
- Robbery and criminal damage peaks between 1 am and 2 am
- Disturbance in licensed premises peaks between 11 pm and midnight.

**Land Uses, business and related employment:** Colchester town has a large range of night-time economy uses – ranging from restaurants, bars, taxi operations and art and entertainment facilities. 207 businesses operate in the evening and night-time economy, employing approximately 2,979 people.

## Visitor profile, perceptions and experiences

**Visitor Profile:** The vast majority of the interview sample (75.6%) was made up of Colchester residents. A further 21.4% were visiting Colchester from elsewhere and 3% were Essex University students.

Just under a third of visitors (32%) fall under the 16-24 age group. Age groups 25-34 and 35-44 account for a similar proportion of the total respondent population (16.7% and 15.7% respectively). This is followed by the 65+ age group (13.3%) and the 45-54 (11.7%). Respondents from the 55-64 age group account for 10.7% of all respondents.

**Group composition:** Visiting the town in the evening and night-time is a social activity – over half of visitors (56%) are accompanied by a group of friends. Adult couples represent 21% of all visiting parties and a further fifth visit with other family members or with a combination of family members and friends.

**Activities associated with Colchester's evening and night-time economy:** Visitors strongly associate restaurants and wine bars with the evening and night-time economy in Colchester followed by clubbing and night bars. Only a fifth associates the evening and night-time economy with late night shopping.

**Competitor destinations for night-time entertainment:** Over half of all visitors (58%) visit other destinations to take part in night-time activities. These include Ipswich, Chelmsford and London.

**Evening and night-time activities:** Among visitors of the town in the evening and night-time, the main reasons for visiting are to eat in a restaurant or visit a wine bar (mentioned by 40%). Just under a quarter visit the night clubs and bars. Entertainment (such as going to the cinema or to play Bingo) and cultural activities (such as visiting the theatre) account for 16% and 14% of the main reasons for visiting the town in the evening and night-time. Only 7% visited the town for late night shopping.

**Frequency of visits:** A significant proportion of visitors are frequent visitors; 17.5% visit at least twice a week and a further 12.5% visit at least once a week during the evening and night-time. Visit purposes with a high frequency include going clubbing (43% visit once or twice a week for this purpose) and going for a meal or a drink (32.9% visit once or twice a week for this purpose). Cultural activities and other entertainment are mostly enjoyed once every month or two (55.2%).

**Transport:** Over a third of visitors (38%) travel to the town in the evening and night time by private car and return home by private car. A significant proportion of visitors (approximately a quarter)

report they travel to the town centre and return home on foot. Taxis and the private car are the most important travel mode for returning home.

**The impact of Party Paramedics and 'The Only Way is Essex' (TOWIE) TV programmes:** Around two-thirds of town centre visitors (67%) believe these programmes do not reflect the typical behaviour of Colchester's resident population and of its night life. A fifth of visitors believe they represent the reality of Colchester "to some degree". Interestingly, a small but significant minority, of visitors (13%) think these programmes completely represent the reality of town in the evening and night-time.

**Perceptions of Colchester's night time economy:** Among the range of positive attributes of Colchester's night-time economy given by visitors - 'Having a good time' and 'Lots to do/variety of offer' were the top two. Among a range of negative attributes of Colchester's night-time economy, 'Rowdy people/drunks' and 'Cost/too expensive' were the top two mentioned by visitors.

## Volume and value

**Number of evening and night-time economy visitors:** Colchester's night time economy attracts between 1 million and 1.25 million visitors per year. The average numbers of visitors is similar for Thursday, Friday and Saturday nights. The lowest volume is seen on Tuesday. Busy nights can attract between 5,000 and 6,000 visitors with quieter nights attracting between 800 and 1,000 visitors.

**Economic impact:** Total Direct expenditure generated by Colchester's evening and night-time economic is estimated to be in the region of £39,614,000. With the addition of multipliers, total expenditure increases to £ 54,469,790 supporting around 3,090 full time equivalent jobs.

## Key performance indicators

**KPI results:** One of the aims of the study was to establish a set of performance indicators that could be used as a baseline against which to monitor the performance of Colchester town's night-time economy. The list of indicators and their results are presented overleaf.

**Table 1 – key Performance Indicators**

<b>Indicators</b>		<b>Results</b>
Reasons for visiting	Restaurants & Wine Bars	41%
	Clubs & Night Bars	23%
	Entertainment	16%
	Cultural Activities	14%
	Late Night Shopping	7%
<b>Overall satisfaction</b>		
Overall satisfaction	Excellent or Good	74%
	Average	21%
	Poor	5%
<b>Recommendation</b>		
Recommendation	Yes	75%
	No	25%
<b>Comparisons with other destinations</b>		
Comparisons with other destinations	Better than Colchester	43%
	Same as Colchester	40%
	Worse than Colchester	17%
<b>Economic Impact</b>		
Economic Impact	Direct Expenditure	£39,988,873
	Expenditure per head	£35.88
	Total Value	£54,984,700
	Direct jobs	2,979
	Total jobs	3,252

# 1. STUDY BACKGROUND

## 1.1 Aims & objectives

The evening and night-time economy is recognised as being a key agent of urban prosperity, attracting investment, creating employment and regenerating civic spaces. It covers activities as diverse as eating and drinking, clubbing, attending concerts, visiting the cinema and theatre as well as the late-night opening of shops. Whilst many emphasise the considerable benefits that the evening and night-time economy contributes to cities and towns across the UK, it also brings its own challenges including anti-social behaviour and crime.

In recognition of the economic importance of the evening and night-time economy and that its future growth and success depends of effective planning and managing policies, Colchester Borough Council is preparing itself for Purple Flag accreditation. Purple Flag is a new accreditation scheme that recognises excellence in the management of town and city centres at night. Entertainment areas that achieve the standard will be those that offer *a better night out* to visitors. Purple Flag aims to raise standards and improve the quality of our towns and cities at night.

Through accreditation, the Council's aspirations are to raise the profile of the evening and night-time economy in Colchester and improve its public image, widen patronage, increase expenditure, lower crime and anti-social behaviour, and achieve a more successful mixed-use economy long term.

To support the evidence base required for the accreditation and provide a baseline for which future monitoring of performance can be measured, Colchester Borough Council commissioned TSE Research to conduct a snapshot study of its evening and night-time economy.

The research was designed to collect data on Colchester's night-time economy to provide a better understanding of how the area works in the evening and at night and establish its overall economic value. A set of key performance indicators was also established and measured through a visitor survey. The latter provides baseline data from which subsequent monitoring can take place.

The main areas of study involved:

- Describing the nature of the evening and night-time economy in terms of business operation and socio-demographics (i.e. population, labour supply, crime rates etc).
- Gathering descriptive, behavioural and attitudinal data from a sample of evening and night-time visitors (i.e. age, group composition, reasons for visiting, places visited, perceptions of and satisfaction with the evening economy, mode of travel, frequency of visit and expenditure per visit).
- Assessing the overall economic impact of Colchester's evening and night time economy in terms of generating direct and indirect business turnover and jobs.

The research methods involved desk research, a face to face survey with a random sample of town centre visitors and an economic modelling approach using multipliers to estimate the overall economic impact of the evening and night time economy in Colchester. The methods are briefly described in the following section.

It should be noted that the study provides a snapshot of the evening and night-time economy in Colchester. Working with the resources available the study outputs present an indicative picture of business demography, visitor profile, and economic impacts. The study outputs provide a sound and reliable basis on which to make an informed assessment of the value of Colchester's evening and night-time economy, on which to monitor a set of key performance indicators over coming years, and on which to provide baseline data for Purple Flag accreditation.

## **1.2 Definition of the evening and night-time economy**

The evening and night-time economy is defined in this report primarily in terms of the hospitality and entertainment industries, and issues associated with these industries. Venues include restaurants, bars/pubs, nightclubs, cinemas, casinos, concert halls, theatres and licensed clubs. It also includes late-night shopping.

The time of day which indicate the evening and night-time hours are:

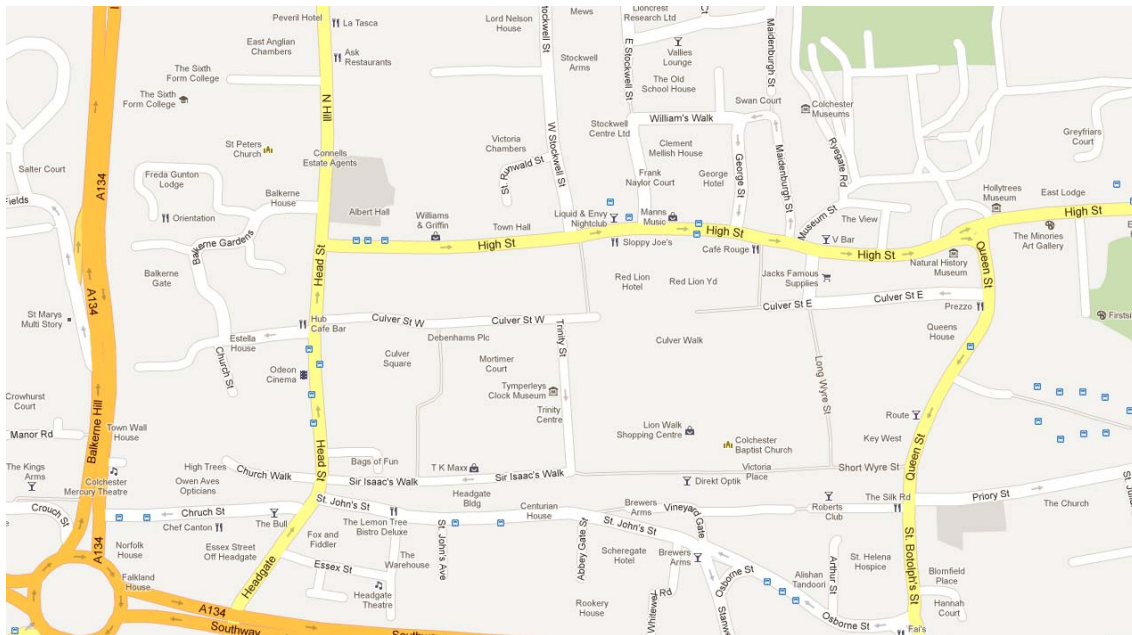
5-8pm	Early Evening
8-11pm	Late Evening
11pm-2am	Night
2-5am	Late Night



Many non-hospitality and non-entertainment related economic activities also take place at night, including cleaning services, baking and other forms of food preparation, and logistics activities. However, these activities were not examined in this study as they are not thought to pose major planning issues through their night-time operations.

This research focuses on the main town area, including North Hill, High Street, Head Street and St John Street, Culver Square area, Osborne Street and the St Botolph's St area (see Fig 1). For a full list of areas included in the study, please see Appendix I.

**Figure 1 – Study area**



### 1.3 Research methodology

In order to meet the data needs for this study, we employed the following methods.

#### *Town centre survey*

A face-to-face interview survey with a random sample of 300 town centre visitors was conducted at key sites within the town centre. Given obvious logistical and safety issues around interviewing visitors to the town centre during the evening and night-time hours, the survey work was carried out during the day.

The questionnaire was designed to gather information on:

- **Visitor profile:** age, group composition, home residence and occupation;
- **Visit characteristics:** frequency of visits, transport used, reasons for visiting, places visited, and expenditure incurred;
- **Visitor experiences & opinions:** satisfactions levels with their visit and perceptions held;
- **Competitor destinations:** other destinations visited for evening and night time leisure/entertainment.

Interview locations included the Queen Street, High Street, and Head Street, the Culver Square area, within the vicinity of the Mercury theatre / Arts Centre and the Cinema, the North Hill area and Castle Park. The locations were chosen to ensure that the survey represented visitors engaging in activities which covered the spectrum of the evening/night-time economy – which are hospitality, entertainment and shopping.

Respondents who did not visit Colchester town centre in the evening/at night were questioned on their impressions/perceptions of the town, reasons for not visiting, and what other towns/cities they visited instead.

The vast majority of the interview sample (75.6%) was made up of Colchester residents. A further 21.4% were visiting Colchester from elsewhere and 3% were Essex University students. For ease of reporting, all survey respondents who reported to visit the town during the evening/at night are referred in this report as visitors.

### ***Secondary data analysis/desktop research***

Secondary data sources were gathered and analysed to provide an overview of Colchester town and the wider district in terms of standard social and economic measures including population, employment/average earnings, crime, and business demography. The main sources of data used are listed below:

- Office for National Statistics [www.ons.gov.uk](http://www.ons.gov.uk)
- Neighbourhood Statistics - [www.neighbourhood.statistics.gov.uk](http://www.neighbourhood.statistics.gov.uk)
- Nomis - [www.nomisweb.co.uk](http://www.nomisweb.co.uk)
- Annual Business Inquiry
- Department for Work and Pensions - [www.dwp.gov.uk](http://www.dwp.gov.uk)
- Thompson's Business data
- Colchester Borough Council
- Essex Police

- Department for Communities and Local Government - [www.communities.gov.uk](http://www.communities.gov.uk)
- Police.uk (Local crime, policing and criminal justice website for England and Wales)
- Arts Council England

Data was also gathered from similar studies of the night time economy in other towns and cities across England including:

- **Camden Town night time economy research study**, 2004, London Borough of Camden and the GLA
- **Better Town Centres at Night** – Raising the Standard, Broadening the Appeal, 2010, BSCS and Association of Town Centre Management (ATCM).
- **After Dark** Newsletter, 2011, MAKE, TBR
- **Spending Time: London's Leisure Economy** – 2003, GLA Economics
- **Into the Night - Southampton Night Time Economy**, 2001, Locum Destination Consulting
- **Maidstone by Night Report**, 2007 by Bone Wells Associates and the University of Westminster
- **Hackney Night-Time Economy – Evidence Based Study**, 2005, Gillespies and Research and Marketing Ltd

### ***Economic impact assessment***

Our economic impact assessment of Colchester’s evening and night-time economy involved deploying a number of standard econometric indices such as industry standard multipliers and the use of our own modelling tools (PRIME Model) to produce an estimation of the net economic impact of the evening and night-time economy in terms of the total additional expenditure generated, the additional jobs supported and the levels of expenditure and employment taking place at local level and outside the borough.

## **1.4 Structure of the report**

Following the introduction in **Section 1** of this report, we present in **Section 2** a brief descriptive overview of Colchester, and where data is available, specifically of the town area which is the main focus of this study. The results of the visitor survey are presented in **Section 3**. Finally we end the report with our economic impact assessment in **Section 4**.

## 2. DESCRIPTION OF COLCHESTER’S EVENING AND NIGHT TIME ECONOMY

### 2.1 Introduction

In this section of the report we provide a descriptive overview of Colchester terms of population, labour supply, land use, and business demography.

### 2.2 Resident population

According to the latest estimates from the Office for National Statistics Colchester has a population of approximately 181,000, making Colchester the second largest district in England. Average life expectancy is 78.7 for males and 83.3 for females.

Predominantly 92.1% of the population is White (86.9% British, 0.7% Irish and 4.5 other), Asians accounts for 2.5% of the population (1.1% Indian, 0.3% Pakistani and 0.3% Bangladeshi, other 0.8%), Afro-Caribbean ethnic group constitute 1.5% of the population (0.4% Caribbean, 0.9% African, 0.1% other), those of mixed race make up 1.7% and the remaining are Chinese and other ethnic groups (2.2%).

Table 2 provides a comparison of Colchester’s population with that of East region and the country as a whole.

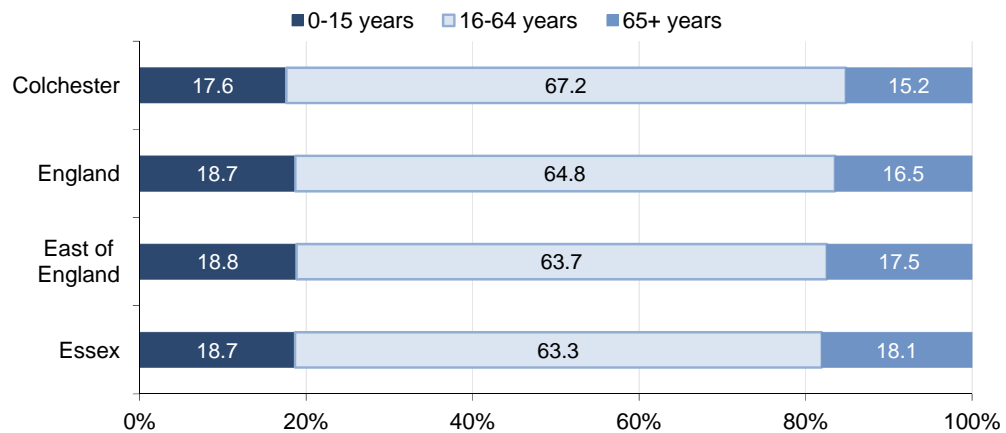
**Table 2 - Colchester total population (2010)**

	Colchester (numbers)	Colchester (percentage)	East (numbers)	East (percentage)	Great Britain (numbers)	Great Britain (percentage)
All people	181,000	100%	5,831,800	100%	60,462,600	100%
Males	90,200	49.8%	2,881,000	49.4%	29,758,900	49.2%
Females	90,800	50.2%	2,950,800	50.6%	30,703,700	50.8%

Source: ONS mid-year population estimates

Figure 2 and table 3 reveal that Colchester has a slightly higher percentage of 16 to 64 year olds compared to regional and national levels.

**Figure 2- Proportion of population by broad age band, mid-2010**



Source: Mid-Year Estimates, Office for National

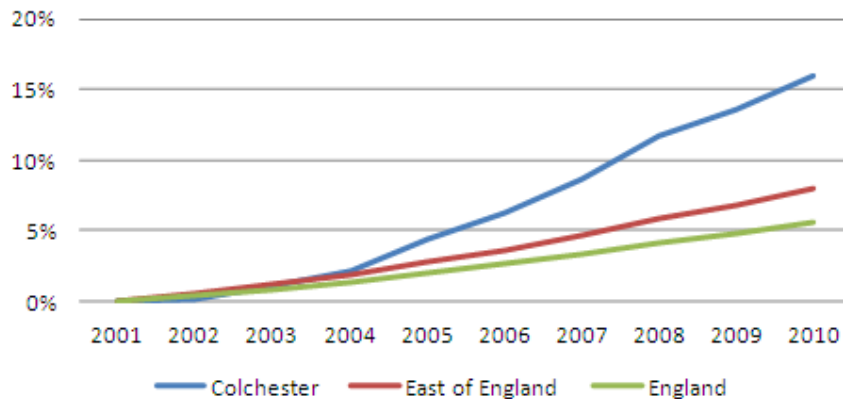
**Table 3 - Population aged 16-64 (2010)**

	Colchester (numbers)	Colchester (%)	East (%)	Great Britain (%)
All people aged 16-64	121,700	67.2%	63.7%	64.8%
Males aged 16-64	61,900	68.6%	64.7%	65.8%
Females aged 16-64	59,800	65.8%	62.7%	63.8%

Source: ONS mid-year population estimates

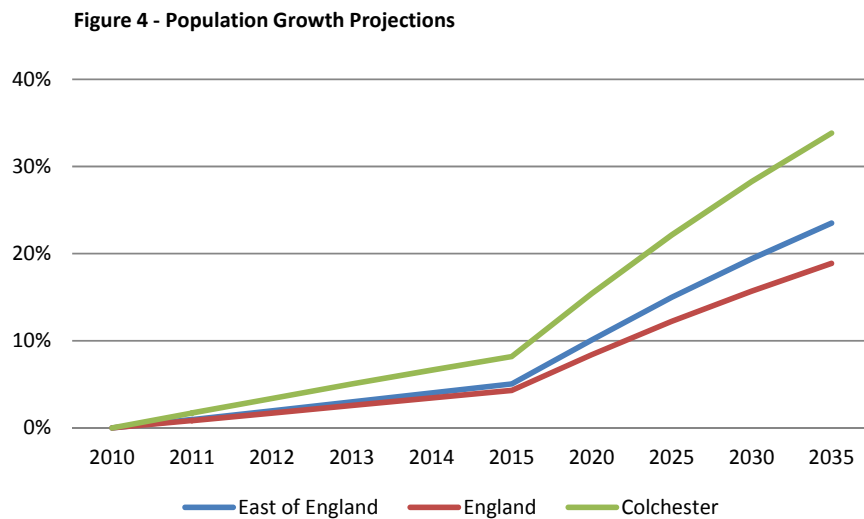
Figure 3 and 4 show how Colchester population has increased over the last ten years. Colchester's population is projected to grow faster than anywhere else in the country over the next decade. Figure 3 shows that the population has grown by over 15% in the last ten years.

**Figure 3 – Ten year cumulative population growth**



Source: Sub-national Population Projections, Office for National Statistics

Figure 4 shows the estimated future population growth by 2035. The population of Colchester is projected to reach 233,400, a percentage change of 33.4% on the base of 2010. This compares with 23.6% change for Essex, 23.5% change for the East of England and 18.9% for England.



Source: Sub-national Population Projections, Office for National Statistics

### 2.3 Colchester town centre regeneration

One of the consequences of these population growth projections is a series of planned regeneration developments, valued at £500 million, over the coming years. This, in turn, may have an effect on the nature and size of the town centre and therefore its night-time economy.

It is projected that approximately 2000 new homes will be delivered in the Town Centre. Plans also include 67,000 m<sup>2</sup> of net retail floor space and 40,000 m<sup>2</sup> of gross office floor space by 2021, as well as public transport (New bus station, town Railway Station improvements and pedestrian/cycle bridge and new open spaces. The Town Centre will also be the primary location for the delivery of 270–390 hotel bedrooms between by 2015, and additional hotel developments beyond this period.

Finally, regeneration plans also include a projects delivered or planned around the St Botolph's area. The creation of Firstsite, a new contemporary visual art gallery and social space, is intended to be a landmark building and the catalyst for the adjacent St Botolph's Quarter development scheme which will have a direct impact on how visitors enjoy evening and night time visits to the town centre.

## 2.4 Labour supply

The employment rate in Colchester as measured by the percentage of people of working age who are economically active is 79% (based on 2011 figures). This figure is higher than the regional figure of 78.8% and the national figure of 76.1% (see Table 4).

Colchester's economically active resident population totals 97,700 of which 93,800 are in employment - 80,800 are employees, 12,700 are self employed and 6,000 are unemployed. Colchester's rate of unemployment is lower than the regional and national averages.

The Office for National Statistics analysis of earnings to 2011 show that the gross weekly pay for full-time workers in Colchester is £530.20. For males this figure is £575.80 and for females £489.50. The median hourly pay for fulltime workers is £13.13. For males this is £13.45 and for females £12.45. These figures place Colchester in the middle 20% of districts nationally.

**Table 4 - Employment and unemployment (Oct 2010-Sep 2011)**

	Colchester (numbers)	Colchester (%)	East (%)	Great Britain (%)
Economically active <sup>†</sup>	97,700	79.0	78.8	76.1
In employment <sup>†</sup>	93,800	75.8	73.5	70.0
Employees <sup>†</sup>	80,800	67.4	63.0	60.5
Self employed <sup>†</sup>	12,700	8.2	10.1	9.1
Unemployed (model-based) <sup>§</sup>	6,000	6.0	6.6	7.9

Source: ONS annual population survey 2011

<sup>†</sup> Numbers are for those aged 16 and over, % are for those aged 16-64

<sup>§</sup> Numbers and % are for those aged 16 and over. % is a proportion of economically active

## 2.5 Businesses, land uses and premises in the town centre

Colchester town has a large range of night-time economy uses. For the purpose of this study businesses have been grouped into three categories – culture and entertainment, bars and nightclubs, and restaurants<sup>1</sup>. Retail outlets have been excluded as late late-night shopping is only available on some Wednesdays for a relatively short period of time and available from selected shops only.

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<sup>1</sup>Taxi operators have been omitted from the map as their business premises are located outside the map area.

**Table 5 – Business premises in Colchester town centre**

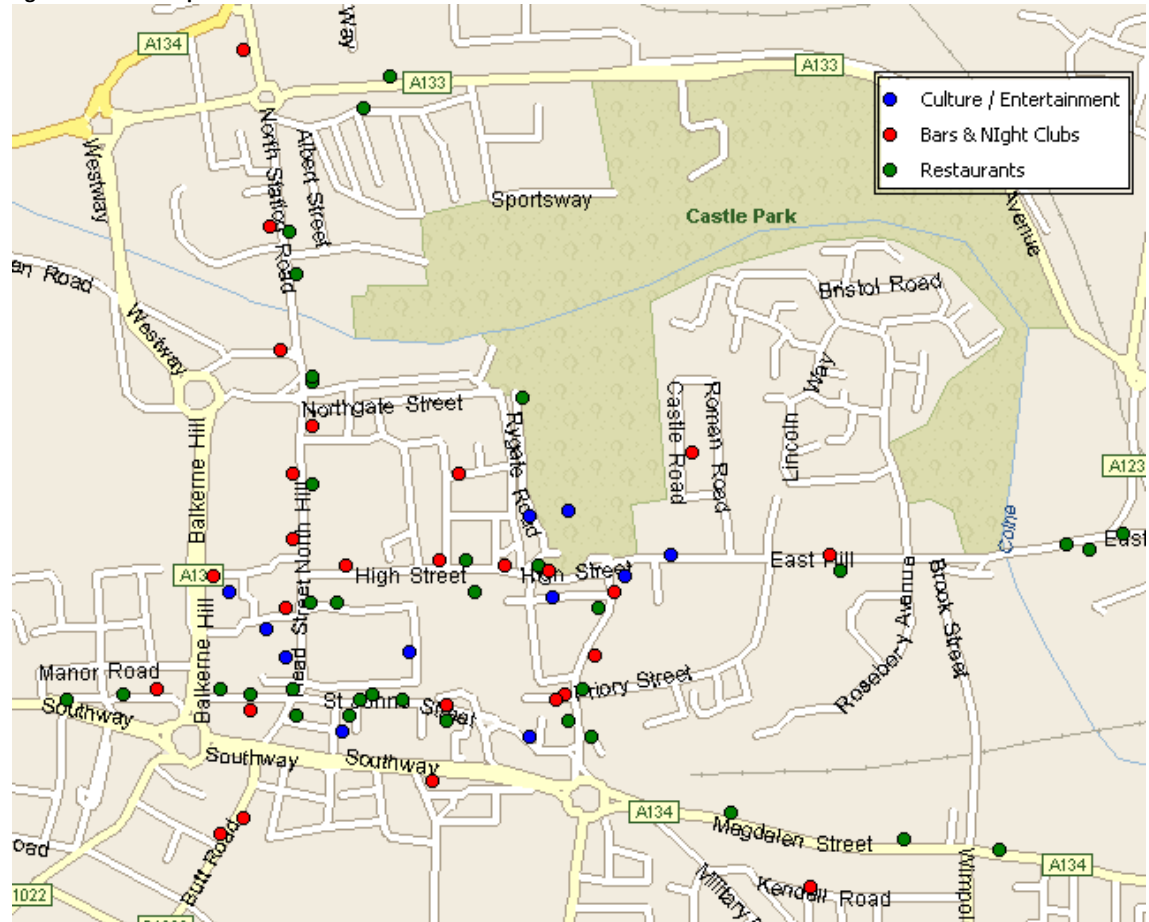
<b>Business Classification (SIC Code)</b>	<b>Establishments</b>	<b>Percentage</b>
<b>Restaurants (5530)</b>	<b>130</b>	<b>63%</b>
<i>Cafes, Snack Bars &amp; Tea Rooms</i>	<i>12</i>	<i>6%</i>
<i>Fish &amp; Chip Shops</i>	<i>9</i>	<i>4%</i>
<i>Restaurants</i>	<i>59</i>	<i>29%</i>
<i>Take Away Food Shops</i>	<i>49</i>	<i>24%</i>
<b>Bars (5540)</b>	<b>46</b>	<b>22%</b>
<i>Pubs, Bars &amp; Inns</i>	<i>43</i>	<i>21%</i>
<i>Night Clubs</i>	<i>3</i>	<i>1%</i>
<b>Taxi Operation</b>	<b>22</b>	<b>11%</b>
<b>Operation of Arts Facilities</b>	<b>7</b>	<b>3%</b>
<b>Other</b>	<b>4</b>	<b>2%</b>
<b>Total</b>	<b>207</b>	<b>100%</b>

Source: Thompsons Business Directory, ONS, own research

A total of 207 businesses have been identified in the following town centre postcode areas; CO1 and then CO2 7, CO2 8 and CO3 3. Restaurants and takeaways account for almost two thirds of the premises in Colchester’s night time economy. The area has a large number of restaurants and takeaway businesses. These premises are mainly clustered on main roads. Pubs, bars and inns account for a further 22% of all premises and vary considerably in character. A detailed breakdown of land uses and licenses premises and club premises certificates for Colchester is provided in Appendix II and V.



Figure 4 - Business premises in Colchester town centre



The map has been developed using postcodes (including post areas CO1 and then CO2 7, CO2 8 and CO3 3). It is based on datasets provided by Thompsons Local business databases. It must be noted that a dot on the map may represent more than one business.

## 2.6 People working in the night-time economy

Employment data can be obtained from a range of sources. Data is available on employment in different industry sectors from the Annual Business Inquiry (ABI). However, the data set is a national set and is most reliably used for relatively large geographical areas. Table 6 provides data on the estimated levels of employment. The data indicates that the total number of people employed in Colchester Town's the night time economy is 2,979 (see Appendix V for a list of Businesses and Land Uses in Colchester Town centre).

**Table 6 – Levels of employment in the study area of Colchester**

Business Classification (SIC Code)	Est. Employees	Average employees per establishment	Percentage
<b>Restaurants (5530)</b>	<b>1665</b>	<b>13</b>	<b>59%</b>
<i>Cafes, Snack Bars &amp; Tea Rooms</i>	75	6	3%
<i>Fish &amp; Chip Shops</i>	70	8	2%
<i>Restaurants</i>	1085	18	38%
<i>Take Away Food Shops</i>	435	9	15%
<b>Bars (5540)</b>	<b>605</b>	<b>13</b>	<b>21%</b>
<i>Pubs, Bars &amp; Inns</i>	521	12	18%
<i>Night Clubs</i>	84	28	3%
<b>Taxi Operation (6022)</b>	<b>305</b>	<b>14</b>	<b>11%</b>
<b>Operation of Arts Facilities (9232)</b>	<b>155</b>	<b>22</b>	<b>5%</b>
<b>Other* (9213, 9271, 9241**)</b>	<b>249</b>	<b>23</b>	<b>3%</b>
<b>Total</b>	<b>2979</b>	<b>14</b>	<b>100%</b>

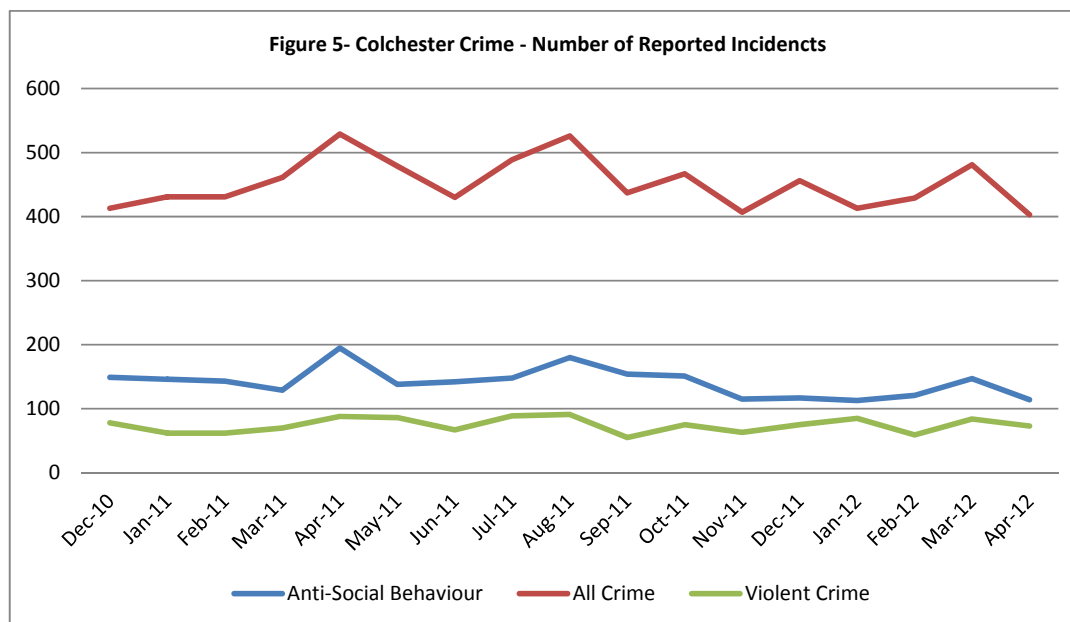
Source: Thompsons Business Directory and own research

\* (Amusement venues incl. Gala Bingo and cinema)

\*\* SIC Code 9241 – Security services. Estimate based on average of 3 staff for bars and 10 staff for nightclubs.

## 2.7 Reported crime levels

Figure 5 shows the overall levels of crime reported in Colchester over an 18-month period. It is important to note that the data presented below relates to all reported crime incidents and not just those reported during the evening and night-time.



Add source: [www.police.uk](http://www.police.uk)

The above chart shows that overall levels of crime remained broadly stable between December 2010 and April 2012. Anti-social behaviour fell by 6.5% whilst violent crime increased by 6.9%. Data from Essex Police, Police UK and CRIS (Crime Report Information System for the Metropolitan Police) suggest that different types of crime have different temporal patterns as follows:

- Disturbance and violence peaks between 11 pm - midnight and between 2 am - 3 am.
- Drunkenness peaks between midnight and 1 am
- Robbery and criminal damage peaks between 1 am and 2 am
- Disturbance in licensed premises peaks between 11 pm and midnight.

### **3. EVENING AND NIGHT TIME VISITOR DATA**

#### **3.1 Introduction**

In this section of the report we present the findings from a visitor survey. The purpose of the survey was to gather information on the profile of evening and night-time visitors and on key features of their trip (e.g. mode of travel, expenditure etc.) as well as gather data on their opinions on a range of topical issues.

As the survey was carried out during the day a small minority of people who do not visit the town centre in the evening and night-time were also interviewed. The survey found that 12% of all those interviewed had not visited the town during the evening and night-time; the vast majority, 88% had done so and many were found to be frequent night-time visitors.

#### **3.2 Profile of Colchester's evening & night-time economy visitors**

The vast majority of the interview sample (75.6%) was made up of Colchester residents. A further 21.4% were visiting Colchester from elsewhere and 3% were Essex University students. Table 7 shows the breakdown of visitors by age groups.

**Table 7 – Respondents by Age Groups**

Age Groups	Percentage
16-24	32.0%
25-34	16.7%
35-44	15.7%
45-54	11.7%
55-64	10.7%
65+	13.3%

The socio-economic profile of residents interviewed in Colchester during the survey period is based on the respondent's occupation and industry. It takes into account the previous occupation of those who were retired. 12% of residents surveyed fell into the AB category (professionals, senior and middle managers). A further 34% of residents fell into the C1 classification (all other white-collar occupations). 24% of all residents surveyed were in the C2 category (skilled manual) and 30% in the DE category (unskilled manual).

### **3.3 Key features of evening and night-time economy visits**

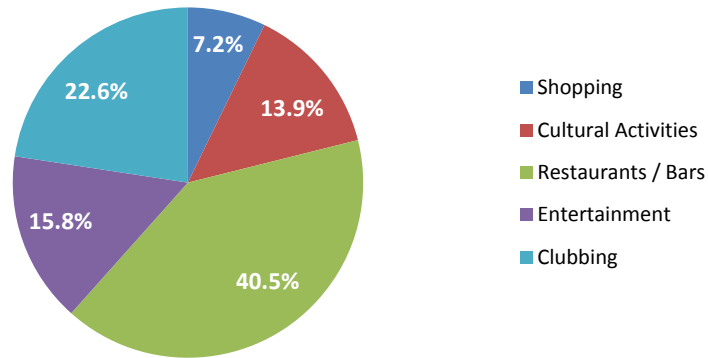
#### ***Reasons for visiting***

The most popular reason for visiting Colchester town in the evening/at night is to eat out at a restaurant or visit a wine bar (40.5%).

The next most popular reason for visiting in the evening/at night is to go clubbing, which was mentioned by just over a fifth of all visitors (22.6%).

Entertainment (such as going to the cinema or going to the Bingo hall) was mentioned by 16% of visitors. Late night shopping appears to be less popular, mentioned by only 7.2% of visitors as the main reason for visiting.

**Figure 6 - Main Activity During Most Recent Visit**



Fourteen percent of respondents (or 42 respondents) visit Colchester’s town in the evening/at night to engage in a cultural activity. Just over a third of these respondents visit the Mercury Theatre and a quarter visit events taking place in the park. Smaller proportions engage in other activities such as visit the Arts Centre and attend live music events.

**Table 8 –Main cultural activities undertaken**

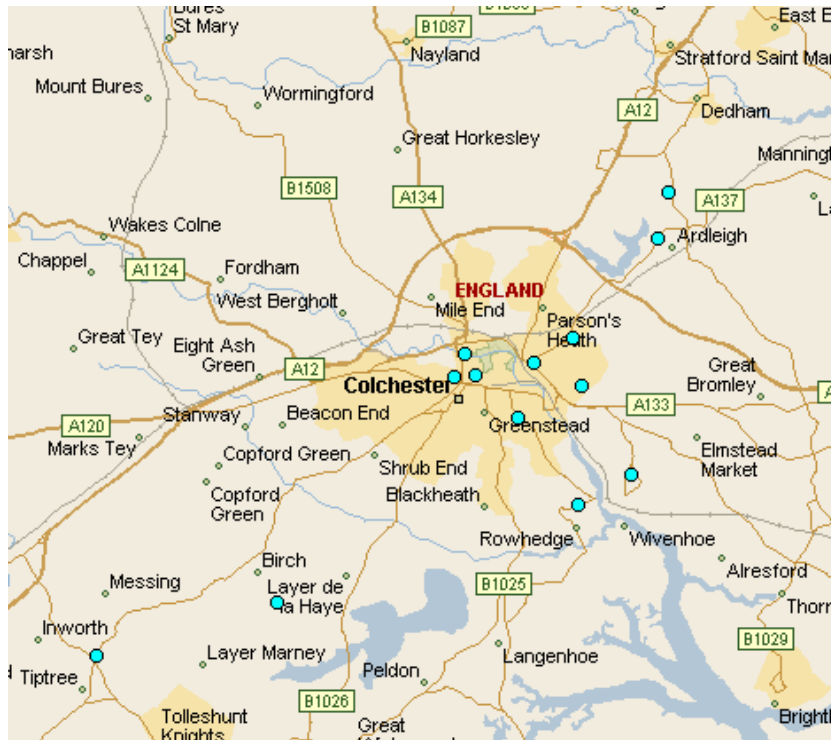
Cultural Activities	Percentage
Mercury Theatre	35%
Events in the Park	25%
Arts Centre	15%
Live Music	14%
Headgate Theatre	9%
FirstSite	8%

***Purpose of visit by area of residence***

Based on the post-code data gathered from Colchester’s evening and night-time economy visitors, we are able to assess whether there is any relationship between the area where visitors live and the main purpose for visiting the town centre during the evening/at night. The results are summarised below and illustrated in maps overleaf.

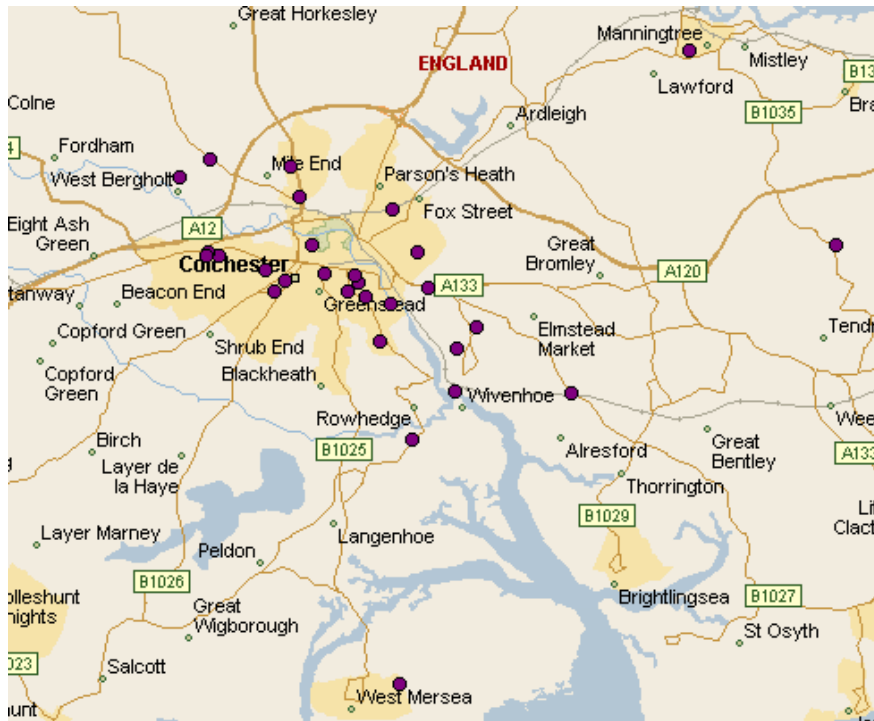
**Figure 7 - Late-night Shopping**

Most visitors come from within Colchester (East), Ardleigh and Wivenhoe / Rowhedge areas.



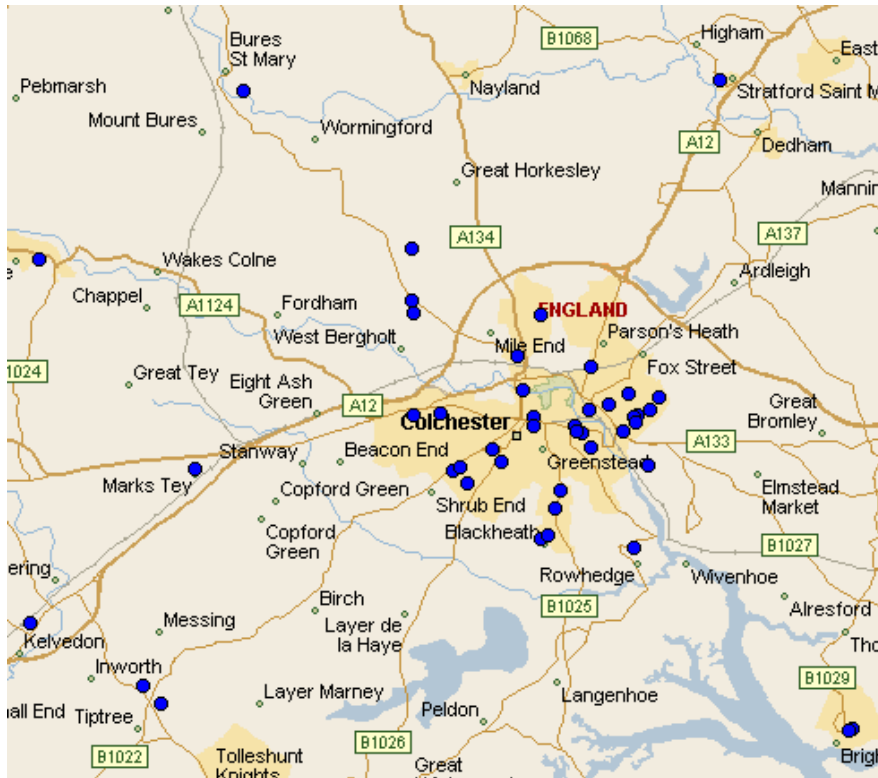
**Figure 8 - Cultural Activities**

Most visitors come from Colchester (South and West) and near Wivenhoe / Rowhedge.



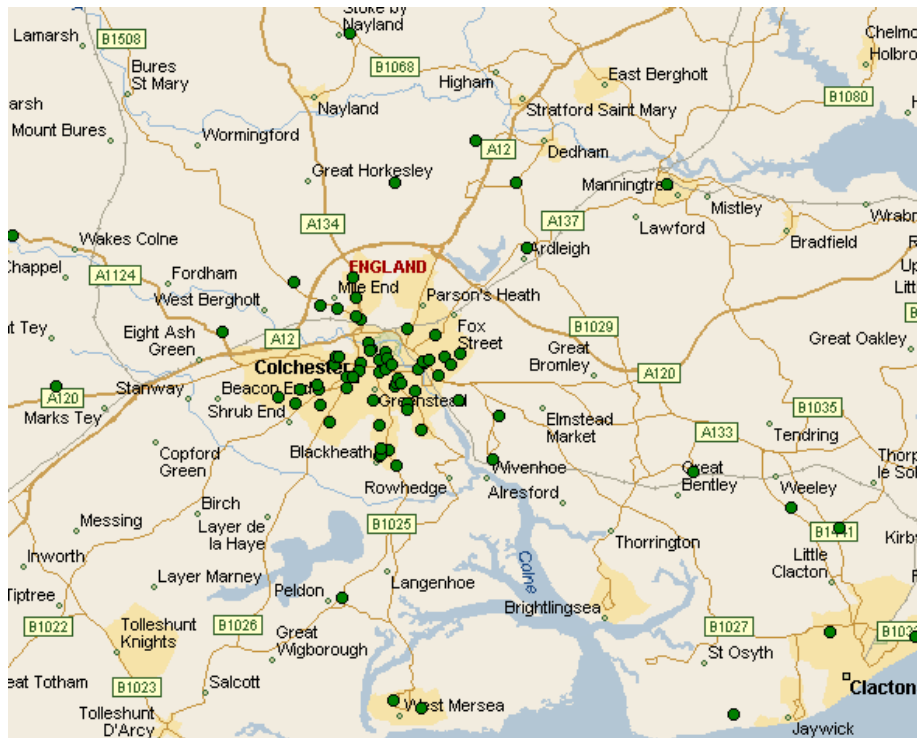
**Figure 9 - Nightclubs and Night Bars**

Visitors come from most areas within Colchester and from a 10 mile radius of town.



**Figure 10 - Restaurants and Wine Bars**

Again most come from within Colchester and from a 10 mile radius and Tendring peninsula.



**Figure 11 – Entertainment**

Most visitors come from within Colchester town and from the villages north of the town.



***Other towns/cities visited for night-time economy***

Over half of all evening/night-time patrons (58%) visit other towns/cities for evening and night-time hospitality/entertainment.

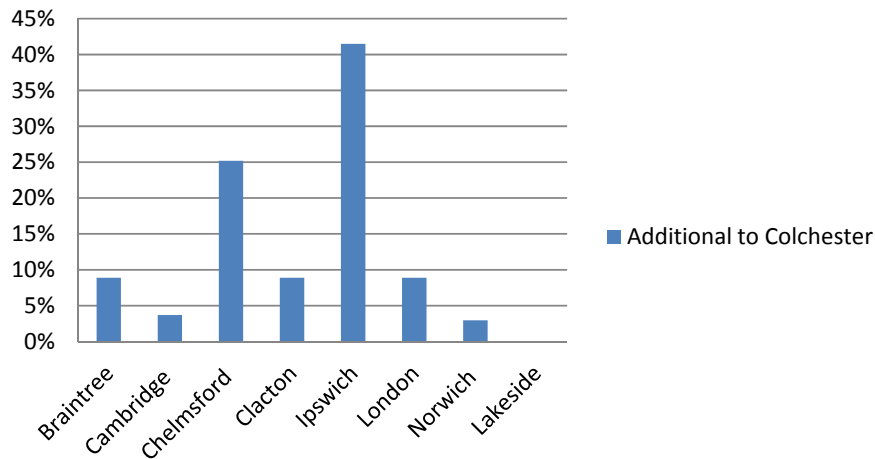
**Table 9 –Visited other night-time destinations**

Other destinations	%
Yes	57.8%
No	42.2%

Other popular towns/cities visited in the evening and night-time include Ipswich, mentioned by 42% of respondents and Chelmsford, mentioned by 25% of respondents , as illustrated in Figure 12.



**Figure 12 - Other night-time economies visited**



A small number of visitors mentioned other locations (often mentioned by one or two people) – these are listed below:

- Canterbury
- Sudbury
- Basildon
- Brightlingsea
- Felixstowe
- Lowestoft
- Luton
- Marks Tey
- Northampton
- Leeds

### ***Evening and night-time economy activities not taken part in***

To get some insight into whether visitors to Colchester’s evening and night-time economy specifically visit to take part in one or two main activities and shunned others, the sample were asked about activities they would *not take part* in during the evening/at night in Colchester Town.

The results are cross-tabulated by the main purpose of the visit. The results show that at least half of all respondents engaging in other activities (late-night shopping, cultural activities, restaurants / bars and entertainment) would not go clubbing or visit night bars. The proportion is even higher for cultural patrons (80% would not consider this activity).

**Table 10a - Late night shoppers**

Evening/night-time activities not carried out in Colchester among late night shoppers (Note small sample – 18 respondents)	
Cultural activities	0%
Restaurants / bars	0%
Entertainment (cinema / bingo, etc)	5.6%
Clubbing / night bars	50%
<i>I would consider all of them</i>	50%

**Table 10b – Cultural patrons**

Evening/night-time activities not carried out in Colchester among cultural patrons (Note small sample – 35 respondents)	
Late Night Shopping	25.7%
Restaurants / bars	14.3%
Entertainment (cinema / bingo, etc)	5.7%
Clubbing / night bars	80.0%
<i>I would consider all of them</i>	14.3%

**Table 10c – Restaurant / wine bars patrons**

Evening/night-time activities not carried out in Colchester among restaurant/bar patrons (Sample: 102)	
Late Night Shopping	15.7%
Cultural activities	9.8%
Entertainment (cinema / bingo, etc)	5.9%
Clubbing / night bars	48.0%
<i>I would consider all of them</i>	35.3%

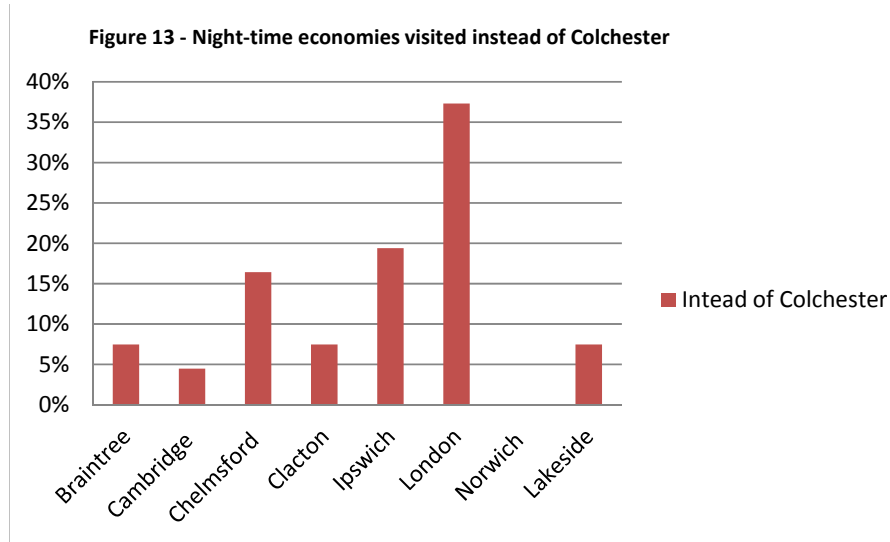
**Table 10d – Entertainment venue patrons**

Evening/night-time activities not carried out in Colchester among entertainment venue patrons. (Sample: 40)	
Late Night Shopping	12.5%
Cultural activities	15.0%
Restaurants / bars	5.0%
Clubbing / night bars	50.0%
<i>I would consider all of them</i>	27.5%

**Table 10a – Night clubbers**

Evening/night-time activities not carried out in Colchester among night clubbers. (Sample: 57)	
Late Night Shopping	49.1%
Cultural activities	31.6%
Restaurants / bars	12.3%
Entertainment (cinema / bingo, etc)	7.0%
<i>I would consider all of them</i>	29.8%

The results of the survey reveal that Colchester’s evening and night-time patrons prefer to go mainly to London to take part in evening and night-time activities they would not normally do in Colchester.



A small number of visitors mentioned other locations (often mentioned by one or two people) – these are listed below:

- St Albans
- Weston Supermare
- Maldon
- Norwich
- Milton Keynes
- Liverpool
- Leigh on Sea
- Felixstowe
- Duxford
- Dedham

**Group composition**

Given the importance of hospitality and entertainment in the evening and night-time economy, it is not surprising that nearly everyone visits the town during this period with other people. Only late night shopping and visiting cultural institutions were activities which some people carried out alone.

The most common group composition during the evening/at night is a group of friends, which makes up on average 56% of all visiting groups. Visiting with groups of friends increases to 93% for those visiting to go clubbing and drinking.

Adult couples represent 21% of all visiting parties with families and groups of family and friends accounting for 11% and 9% respectively.

**Table 11 – Part composition and type of activity**

Party composition	All Respondents	Late night shopping	Cultural activities	Restaurants / bars	Entertainment	Clubbing / night bars
	<b>Base</b>	18	38	137	54	65
Alone	<b>2%</b>	11%	6%	1%	0%	0%
Adult couple	<b>21%</b>	22%	26%	21%	27%	2%
Family	<b>11%</b>	17%	11%	13%	23%	0%
Group of friends	<b>56%</b>	39%	46%	55%	40%	93%
Family & friends	<b>9%</b>	6%	9%	11%	10%	5%
Other	<b>1%</b>	6%	3%	0%	0%	0%

### *Average length of stay*

On average, Colchester’s evening and night-time economy visitors spend four hours on their visit. Night clubbers have the longest average length of stay at 5 hours and 40 minutes and those shopping have the shortest at 3 hours and 19 minutes.

**Table 12 – Average length of stay**

Activity	Average length of stay (hh:mm)
Late Night Shopping	03:19
Cultural Activities	03:54
Restaurant / Wine Bars	03:57
Entertainment	03:38
Clubs / Night Bars	05:40
Average length of stay	04:05

### *Frequency of visit*

A significant proportion of visitors are frequent visitors during the evening and night-time – 17.5% visit at least twice a week and a further 12.5% visit at least once a week.

Activities with a high frequency of participation include going clubbing or to night bars (43% visit once or twice a week for this purpose) and going for a meal or a drink (32.9% visit once or twice a week for this purpose).

Cultural activities and other entertainment are mostly enjoyed once every month or two (55.2%).

**Table 13 – Frequency of visit by main activity**

	Average	Late Night Shopping	Cultural Activities	Restaurants / Wine Bars	Entertainment (cinema / bingo, etc)	Clubbing / Night Bars
	Base	18	38	137	54	65
Once a week	12.5%	5.6%	7.9%	16.8%	13.0%	13.8%
Twice a week	17.5%	22.2%	13.2%	16.1%	16.7%	29.2%
Twice a month	17.1%	27.8%	5.3%	13.9%	24.1%	21.5%
Once a month	18.3%	16.7%	26.3%	16.1%	24.1%	13.8%
Every couple of months	14.8%	0.0%	28.9%	14.6%	3.7%	9.2%
Three / four times year	9.1%	0.0%	10.5%	12.4%	9.3%	4.6%
Once / twice a year	7.2%	27.8%	2.6%	5.8%	5.6%	3.1%
Less often than that	3.4%	0.0%	5.3%	4.4%	3.7%	4.6%

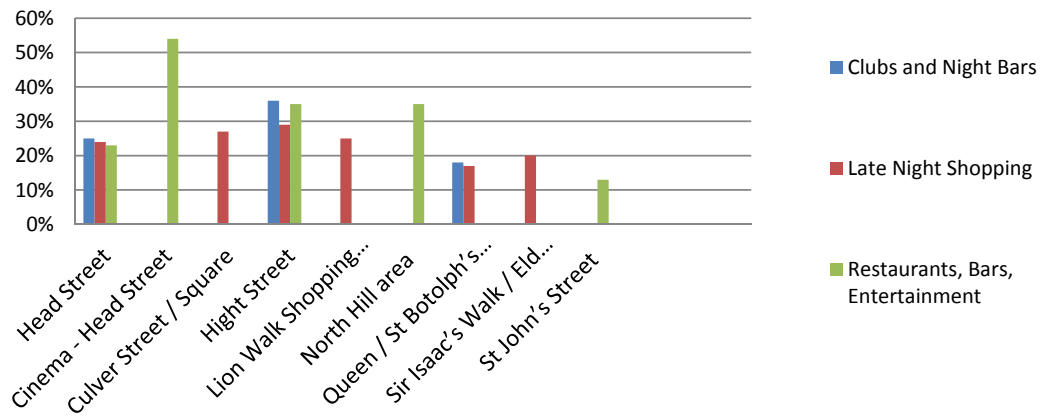
## Spatial patterns of activities

The survey provided information on pedestrian movement across Colchester Town in the evening/at night. Table 14 and Figure 14 show the activities engaged in by location. The results show that High Street and Head Street attract the widest mixture of activities, whereas other locations appear to be visited exclusively for one main activity, for example Sir Isaac's Walk / Eld lane for shopping and North Hill for restaurants and wine bars.

**Table 14 – Spatial Patterns of activity (where do they go)**

	Clubs and Night Bars	Late Night Shopping	Restaurants, Bars, Entertainment
Head Street	25%	24%	23%
Cinema - Head Street	-	-	54%
Culver Street / Square	-	27%	-
High Street	36%	29%	35%
Lion Walk Shopping Centre	-	25%	-
North Hill area	-	-	35%
Queen / St Botolph's Street	18%	17%	-
Sir Isaac's Walk / Eld Lane	-	20%	-
St John's Street	-	-	13%

**Figure 14 - Current Activities by Location**



## Transport

Table 15 shows people's modes of travel to and from the town during the evening/at night. The most popular mode of travel to and from the town is the car (38% travel to and from the town by car).

**Table 15 – Modes of transport used**

Mode	To town centre	From town centre
Private car	38%	38%
Taxi	17%	30%
Bus	16%	7%
Train	3%	1%
Walked	23%	24%
Cycle	2%	1%

The results indicate some variation in travel patterns between *going to* the town and travelling *back from* the town: about half of those arriving into town by bus will then go on to use a taxi for their journey home. Relatively few use trains and interestingly around a quarter travel to and from the town on foot.

## 3.4 Perceptions and opinions

### *Activities associated with Colchester's night-time economy*

Respondents were asked to identify all the activities they associate with Colchester's evening and night-time economy. Restaurants and Wine Bars and Clubbing / Night Bars were both selected by two thirds of visitors.

Around a fifth associated late-night shopping with Colchester's evening and night-time economy.

**Table 16 – Activities associated with Colchester's night-time economy**

Activities	%
Late Night Shopping	19.1%
Cultural Activities	38.8%
Restaurants / Wine Bars	68.2%
Entertainment (cinema / bingo, etc)	49.8%
Clubbing / Night Bars	66.2%

## ***Perceptions of Colchester's night time economy***

Respondents were asked about the first things that come to mind when they think about spending their leisure time and budget in Colchester Town during the evening and night time. The results have been grouped into a set of positive and negative attributes and cross-tabulated by age as the latter appeared to be a strong indicator of types of perceptions held (see Tables 17 and 18).

On the positive side, having a good time and the variety things to do were rated particularly high among all respondents. The 16-24 age group is twice as likely to relate Colchester's town with having a good time than the average.

The 35-44 age group have a particularly good image of Colchester's wine bar and restaurant offer whereas the 65+ age group is twice as likely to highlight the variety of things on offer in the town.

**Table 17 – Positives aspects of Colchester Town as a night-time destination**

	Total	16-24	25-34	35-44	45-54	55-64	65+
Having a good time	19%	37%	13%	6%	18%	12%	10%
Lots to do / Variety of offer	15%	13%	13%	22%	9%	21%	30%
Wine Bars / Restaurants	14%	0%	21%	39%	0%	25%	20%
Good Value for Money	11%	11%	17%	0%	9%	8%	10%
Cultural Activities (Live Music, Cinema)	11%	0%	4%	11%	36%	12%	10%
Quiet / Safe / Nice Place / Atmosphere	10%	5%	17%	11%	18%	9%	10%
Good for Shopping	7%	13%	4%	6%	0%	3%	0%
Night Bars / Drinking	7%	13%	8%	6%	0%	4%	0%
Good for Meeting Friends	5%	8%	4%	0%	9%	6%	10%

On negative images which first come to mind – the most dominant one is of drunkenness and rowdy people. Overall a third mentioned this negative aspect.

Anti-social behaviour such as fighting is a strong negative image held by the 25-34 age group, whilst for younger visitors – those aged between 16 to 24 visiting in the evening/at night was seen as too expensive.



**Table 18 – Negatives aspects of Colchester Town as a night-time destination**

	Total	16-24	25-34	35-44	45-54	55-64	65+
Rowdy People / Drunks	32%	34%	25%	39%	30%	31%	29%
Cost / Too expensive	20%	41%	6%	11%	22%	12%	5%
Anti-Social Behaviour (fights, violence)	19%	6%	44%	11%	26%	23%	19%
Cost of transport (Parking)	6%	0%	13%	6%	7%	8%	10%
Access to public transport (Getting home)	6%	6%	0%	17%	4%	4%	5%
Safety / Note enough police	4%	0%	0%	6%	0%	4%	19%
Dirt on streets	4%	3%	6%	0%	4%	4%	5%
Limited offer (clubs, traditional pubs)	4%	0%	6%	11%	0%	6%	5%
Type of people (Students, Army)	3%	6%	0%	0%	4%	4%	0%
Too busy / Crowded	3%	3%	0%	0%	4%	4%	5%

### ***Role of reality TV shows on perceptions of the town***

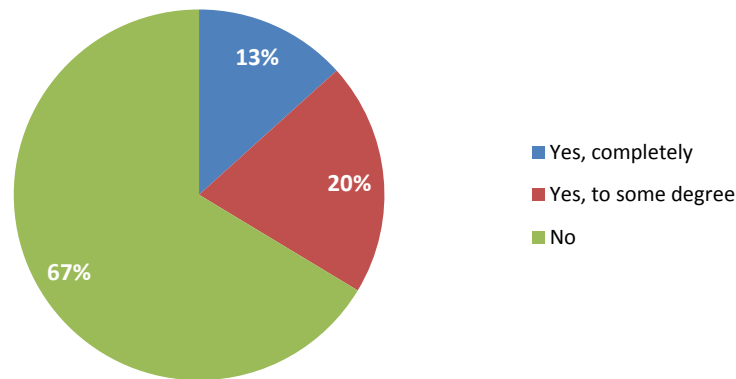
The role of reality TV shows such as Party Paramedics and The Only Way is Essex<sup>2</sup> in shaping people’s perceptions of the town was explored. Respondents were asked if they felt these shows reflected the reality of life in Colchester and of its evening/night-time social scene. The majority of respondents (67%) do not believe these shows reflect the reality of everyday life in Colchester or of its night life.

A fifth believes that the shows represent the reality of Colchester to some degree.

A small but significant minority of respondents (13%) think TV shows such as Party Paramedics and ‘The Only Way is Essex’ completely represent the reality of life in Colchester and of its social scene.

<sup>2</sup> Party Paramedics, was a one-off programme screened on January 23 2012 on Channel 4, and which labelled Colchester one of “Britain’s hardest drinking towns”. ‘The Only Way is Essex’, broadcasted by ITV, is a reality show based in Essex and described in the press as showing “real people in modified situations, saying unscripted lines but in a structured way”.

**Figure 15 - TV Programmes 'Party Paramedics' and 'TOWIE' reflect reality of Colchester**



**Overall satisfaction**

Forty percent of Colchester’s evening and late-night economy visitors rate other towns/cities they have visited for the same purpose as ‘About the same’ as Colchester.

Just over 43% rate other towns/cities visited in the evening and night as better than Colchester (of which 18.4% rate it as ‘A bit better’ and 25% rate it as ‘Considerably better’).

Nearly 17% rate other towns/cities visited as a bit or considerably worse than Colchester.

**Table 19 – Comparison between other places with Colchester**

Comparison Scale	%
A bit better than Colchester town centre	18.4%
Considerably better than Colchester town centre	25.0%
About the same	40.1%
A bit worse than Colchester town centre	11.2%
Considerably worse than Colchester town centre	5.3%

In terms of the overall level of satisfaction with their experience of Colchester’s evening and night-time economy, 74% rate their satisfaction level based on their most recent visit as either ‘Excellent’ or ‘Good’ (16.4% rated Excellent and 58% rated Good).

A fifth of evening and night-time visitors rate their level of satisfaction with their most recent visit as ‘Average’. Only 5% reported satisfaction levels as poor or very poor.

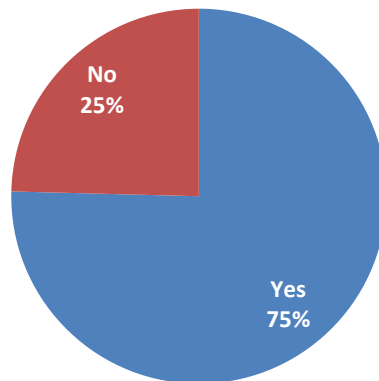
**Table 20 – Level of satisfaction with Colchester**

Rating	%
Excellent	16.4%
Good	58.0%
Average	20.6%
Poor	4.2%
Very Poor	0.8%

### ***Likelihood of recommendation***

The likelihood of recommending Colchester as a place to visit in the evening/at night is relatively high among visitors. Three quarters of evening and night-time economy visitors (75.4%) reported they would recommend Colchester Town as a place to visit in the evening and night-time to their friends and relatives.

**Figure 16- Likelihood of recommending Colchester**



### ***Areas of improvement***

Respondents unlikely to recommend Colchester town centre for evening and night-time entertainment were asked to identify actions they felt needed addressing in order encourage such recommendations to others in the near future.

Around a third of respondents believe that the town centre needs more variety in the evening/at night in terms of things to do/places to visit; a fifth feel that anti-social behaviour

and issues around personal safety needs addressing more seriously. A fifth also feels that excessive drinking needs more urgent attention.

**Table 21: Recommended changes**

Action	Percentage	Specific comments
Increase Variety of Activities	34%	More activities for younger people
		More activities for families
		More activities for over 40s / in separate area
		Increase shopping area
		More music, comedy and culture
Anti-Social Behaviour	22%	Feel threatened
		Bad behaviour
		Rowdiness
		Soldiers
Tackle Excessive Drinking and Safety Issue	20%	Make drinking stop earlier
		Increase opening hours for night bars to avoid fast drinking
Restructuring (Layout of Premises, Traffic)	7%	
More Police Presence	7%	
Close Nightclubs	5%	
Cheaper Parking	2%	
Increase Opening Hours for Night Bars	2%	

## 4. EVENING AND NIGHT TIME ECONOMY VOLUME & VALUE

### 4.1 Calculating visitor volume

A key measure of the economic importance of Colchester's evening and night-time economy is the number of people who visit it. However, pedestrian footfall data is limited. To establish some scale of likely volume we drew on data from studies of other night-time economies (e.g. London (Camden/Hackney) and Maidstone) to produce broad estimates of the likely annual volume of visitors. We also consulted with Essex Police and Colchester Borough Council to both corroborate our estimates and to get some indication of the likely spread of visitor volume over a typical week.

**Based on this approach we estimate that between 1 million and 1.25 million people visit Colchester town in the evening/at night.**

**Table 22 – Broad estimate of participants in Colchester night time**

Day of the Week	High Flow	Low Flow	(Low) Annual Estimate	(High) Annual Estimate
Monday	800	1,000	41,600	52,000
Tuesday	800	1,000	41,600	52,000
Wednesday	2,000	2,500	104,000	130,000
Thursday	5,000	6,000	260,000	312,000
Friday	5,000	6,000	260,000	312,000
Saturday	5,000	6,000	260,000	312,000
Sunday	1,000	1,500	52,000	78,000
<b>Totals</b>	<b>19,600</b>	<b>24,000</b>	<b>1,019,200</b>	<b>1,248,000</b>

*Note: rounded to nearest thousand*

Our research shows that visitor volumes are broadly similar for Thursday, Friday and Saturday nights and that Tuesday often attracts the lowest volumes of the week. Busier nights can attract between 5,000 and 6,000 visitors with quieter ones attracting between 800 and 1,000.

Drawing on the visitor survey data on the main reason for visiting the town in the evening/at night, we estimate that of the largest volume of visitors, at around 460,000 per year as those visiting to eat and drink out.

## 4.2 Calculating economic impact

### *Direct business turnover*

The annual turnover figure for each business operating in Colchester's evening and night-time economy is not available to us. The results from the Annual Business Inquiry present incomplete turnover data. Even with robust turnover data, a well-grounded estimation would need to be made of the proportion of total turnover generated through visitor expenditure in the evening/at night given that most businesses, with the exception of night clubs, will also receive income from customers during the day.

A very strong measure of turnover is to use the visitor data on average spend per head from the visitor survey and multiply this by total gross visitor volume.

### *Average expenditure per head*

The survey found that those visiting for late-night shopping spend a higher amount per trip (£51.7) than the average. Interestingly, a proportion of the average expenditure of shoppers goes towards food and drink and entertainment like going to the cinema, revealing the range of other hospitality provision utilised during the visit.

**Table 23 – Estimated average spend per person by purpose of visit**

	Total	Food & Drink	Travel	Entertainment	Shopping
<b>Shopping</b>	<b>£51.7</b>	£11.3	£3.3	£9.4	£27.6
<b>Cultural Activities</b>	<b>£29.4</b>	£14.0	£4.3	£11.0	£0.0
<b>Restaurants / Bars</b>	<b>£35.8</b>	£17.6	£3.6	£14.6	£0.0
<b>Entertainment</b>	<b>£21.6</b>	£11.6	£2.2	£7.8	£0.0
<b>Clubbing</b>	<b>£40.9</b>	£18.5	£5.7	£16.7	£0.0

Based on the average expenditure and the estimated annual volume of visits, we calculate that visitors spend approximately between £35.9 million and £44.0 million £39.98 million per year.

**Table 24 – Estimated Total Direct expenditure by purpose of visit**

	Total	Main Activity	Participants (Low Estimate)	Participants (High Estimate)	Total Value (Low Estimate)	Total Value High Estimate)
Shopping	£51.70	7%	71,344	87,360	£3,688,485	£4,516,512
Cultural Activities	£29.40	14%	142,688	174,720	£4,195,027	£5,136,768
Restaurants / Bars	£35.80	41%	417,872	511,680	£14,959,818	£18,318,144
Entertainment	£21.60	16%	163,072	199,680	£3,522,355	£4,313,088
Clubbing	£40.90	23%	234,416	287,040	£9,587,614	£11,739,936
<b>TOTALS</b>			<b>1,019,200</b>	<b>1,248,000</b>	<b>£35,953,299</b>	<b>£44,024,448</b>

**Average Total Annual Direct Expenditure:**  $\frac{£35,953,299 + £44,024,448}{2} = \text{£ } 39,988,873$

2

### ***Net total economic impact***

In econometric terms, economic impact is measured by the additional expenditure and additional employment generated. So an evaluation is made not just of economic performance per se in terms of gross turnover and gross employment in the sector, but crucially, it includes an assessment of how this turnover and employment supports other business sectors in the local economy – this is described as its ‘additionality’.

Businesses such as restaurants, pubs and night clubs, by spending a proportion of their turnover on suppliers, in turn generate further spending and job creation down the supply chain. Staff in supplier businesses, whose employment is sustained by the expenditure of these businesses in turn, spends a proportion of their salary in the local economy, further bolstering the performance of local businesses. The former is known as supply or indirect multiplier and the later as income or induced multiplier.

However, not all business turnover generated through visitor spending and through the supply chain is retained locally. A proportion of turnover will leak out from supplies and services purchased from out-of-borough businesses, from salaries paid to out-of-borough staff (who will spend some of their salary elsewhere), and from taxes and national insurance contributions.

To calculate business turnover generated by the evening and night-time economy in Colchester through successive rounds of spending (through the supply chain) and to

estimate how much turnover is retained within Colchester Town and the wider District we have used standard industry multipliers<sup>3</sup> and our own multipliers model<sup>4</sup>.

With multiplier effects added, we estimate that the total economic impact of Colchester town's evening and night time economy is somewhere between £49,435,786 and £60,533,616 and the total employment assumed to reach 3,224 and 3,279 full time equivalent jobs.

Of total turnover, approximately 71% is retained within Colchester town and borough. Of total jobs, approximately 68% are jobs supported within Colchester town and borough.

**Table 25 – Estimated Total Direct expenditure**

	Total Expenditure	Local Level	Outside Colchester
<b>Direct Expenditure</b>	£ 39,988,873	89%	11%
Supply spend	£ 9,997,218	45%	55%
Income multiplier	£ 4,998,609	39%	61%
<b>Total Economic Impact</b>	<b>£ 54,984,700</b>	<b>71%</b>	<b>29%</b>
	Total Employment	Local Level	Outside Colchester
Direct Employment	2,979	89%	11%
Supplier	182	45%	55%
Income generated	91	39%	61%
<b>Total Employment</b>	<b>3,252</b>	<b>68%</b>	<b>32%</b>

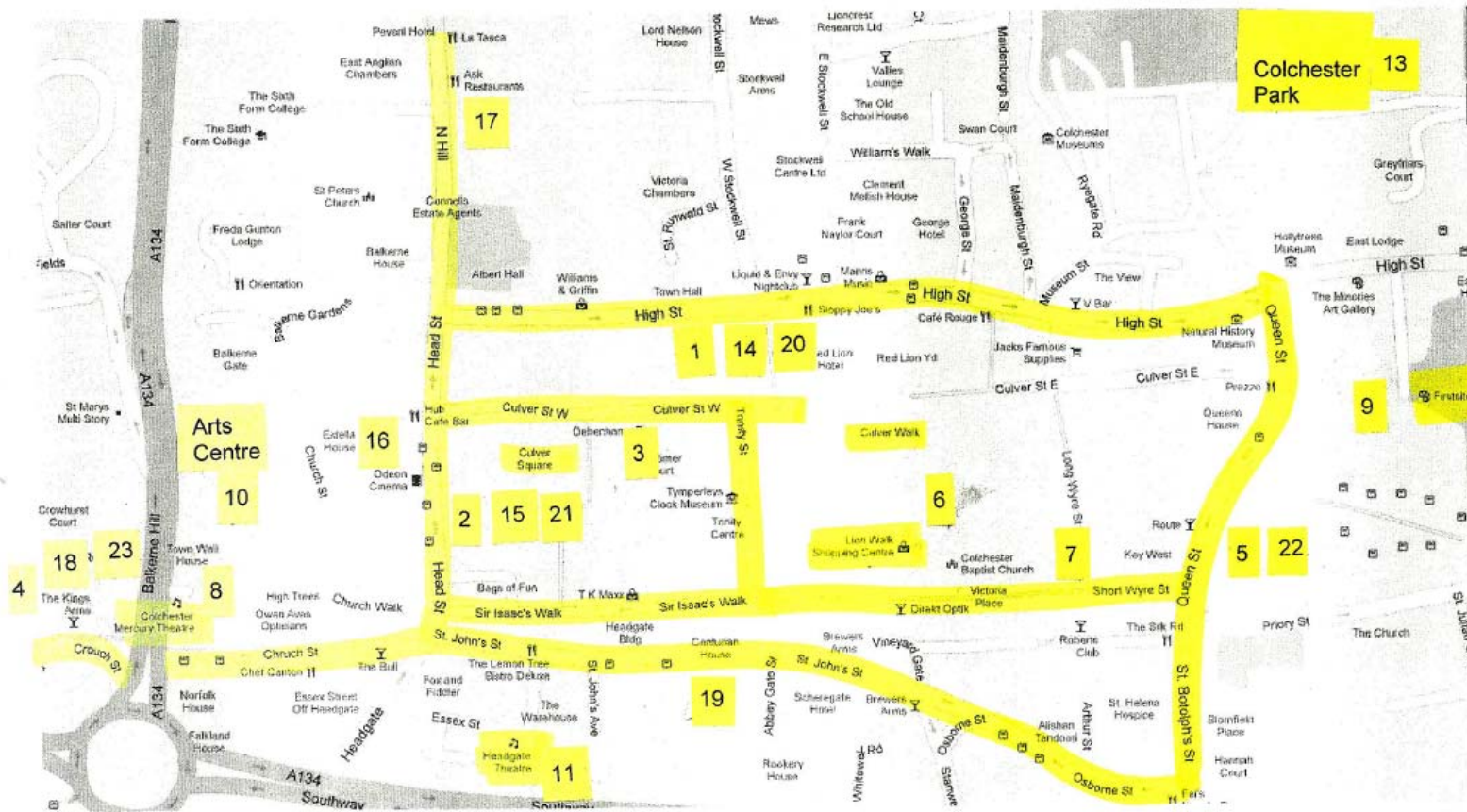
Note: the figures presented in this table represent an average of the high and low expenditure and employment estimates detailed above.

<sup>3</sup> Ideally, the economic impact of each business would be assessed by tracking expenditures made by the business themselves including their employees, visitors/customers and suppliers through the economy, to identify the impact on other local firms and the effects in supporting incomes and employment. However, this is a very data hungry exercise, which is impossible without a major (and costly) study. An alternative approach involves the application of standard multipliers that assess the direct, indirect and induced effects of expenditures on overall income and employment in the local economy. Standardised economic multipliers for the local level are provided by English Partnerships Additionality Guide.

<sup>4</sup> We have applied our own computer model (PRIME Model) to estimate the proportion of indirect and induced multipliers as well as the proportion of expenditure that take place at local level and outside Colchester.



## Appendix I – Evening and Night time activities and Colchester locations



### Late night shopping

High Street	-01
Head Street	-02
Culver Street / Square	-03
Crouch Street	-04
Queen / St Botolph's Street	-05
Lion Walk Shopping Centre	-06
Sir Isaac's Walk / Eld Lane	-07

### Cultural Activities

Mercury theatre	-08
FirstSite	-09
Arts centre	-10
Headgate Theatre	-11
Live Music	-12
Events in the Park	-13

### Restaurants / Wine bars / Entertainment

High Street	-14
Head Street	-15
Cinema (Head Street)	-16
North Hill area	-17
Crouch Street	-18
St John's Street	-19

### Clubs / Night Bars

High Street	-20
Head Street	-21
Queen / St Botolph's Street	-22
Crouch Street	-23

**Appendix II - Detailed breakdown of land uses and licenses premises and club premises certificates for Colchester and Essex districts.**

**Table i - Colchester land uses and licensed premises – group totals**

Number of Premises Licences	Group Totals
On-sales or supply of alcohol only	120
Off-sales of alcohol only	138
Both on and off sales or supply of alcohol	201
Licences not permitted to sell or supply alcohol	79
Late night refreshment	196
<b>Any regulated entertainment</b>	<b>291</b>

**Table ii - Colchester land uses and licensed premises – Types of premises**

Number of Premises Licences	Types
Plays	67
Films	107
Indoor sporting events	78
Boxing or wrestling	13
Live music	225
Recorded music	278
Performance of dance	125
Entertainment similar to live music, recorded music or dance	92
Facilities for making music	128
Facilities for dancing	171
Facilities for entertainment similar to making music or dancing	80

**Table iii - Colchester land uses and licensed premises – Essex comparison**

Licensing Authority	On-sales or supply of alcohol only	Off-sales of alcohol only	Both on and off sales or supply of alcohol	Licences not permitted to sell or supply alcohol	Late night refreshment	Any regulated entertainment
Basildon	54	114	100	71	208	184
Braintree	110	90	400	40	150	380
Brentwood	58	63	119	14	104	179
Castle Point	35	54	45	55	99	98
Chelmsford	49	117	303	95	272	336
<b>Colchester</b>	<b>120</b>	<b>138</b>	<b>201</b>	<b>79</b>	<b>196</b>	<b>291</b>
Epping Forest	0	36	328	0		364
Harlow	42	48	61	39	88	94
Maldon	72	48	96	35	85	138
Rochford	20	46	81	23	72	120
Southend-on-Sea	n/a	n/a	n/a	n/a	n/a	n/a
Tendring	83	95	182	98	180	458
Thurrock	117	174	0	206	175	320
Uttlesford	68	42	140	35	95	190

**Table iv - Colchester Club Premises Certificates – group totals**

Number of Club Premises Certificates	Group Totals
On-sales or supply of alcohol only	30
Both on and off sales or supply of alcohol	11
Licences not permitted to sell or supply alcohol	0
<b>Any regulated entertainment</b>	<b>31</b>

**Table v - Colchester Club Premises Certificates – Types of premises**

Number of Club Premises Certificates	Types
Plays	3
Films	6
Indoor sporting events	12
Boxing or wrestling	0
Live music	25
Recorded music	30
Performance of dance	6
Entertainment similar to live music, recorded music or dance	4
Facilities for making music	10
Facilities for dancing	27
Facilities for entertainment similar to making music or dancing	5

**Table vi - Colchester Club Premises Certificates – Essex comparison**

Licensing Authority	On-sales or supply of alcohol only	Both on and off sales or supply of alcohol	Licences not permitted to sell or supply alcohol	Any regulated entertainment
Basildon	6	21	0	27
Braintree	23	56	0	40
Brentwood	12	10	0	22
Castle Point	12	5	1	15
Chelmsford	2	44	0	26
Colchester	30	11	0	31
Epping Forest	0	34	0	34
Harlow	15	5	0	18
Maldon	28	5	0	29
Rochford	4	20	0	23
Southend-on-Sea	n/a	n/a	n/a	n/a
Tendring	44	21	1	66
Thurrock	45	0	0	n/a
Uttlesford	33	9	0	15

**Appendix III – Questionnaire – Colchester Night Time Economy 2012**

**1. Which of the following do you associate with Colchester’s evening / night time offer? By this we mean any of the following activities between 17:00 and 06:00.**

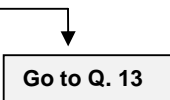
- Late night shopping -1
- Cultural activities -2
- Restaurants / bars -3
- Entertainment (cinema / bingo, etc) -4
- Clubbing / night bars -5
- Other (Specify): -6
- Other:.....

**2. Have you ever visited Colchester during the evening / night time for any of these activities?**

*NOTE: Please see Appendix I for a list of activities and locations*

- 01      -06      -11      -16      -21
- 02      -07      -12      -17      -22
- 03      -08      -13      -18      -23
- 04      -09      -14      -19      -24
- 05      -10      -15      -20      -25

Other:.....



**3. Have you visited other destinations to take part in similar activities in the evening / night-time?**

- Yes    -1
- No     -2 (Go to Q4)

**3a. Which other town centres have you visited in the last 12 months?**

**3b. Taking everything into account, would you say that the other town centres are..? (Single answer)**

- A bit better than Colchester town centre -1
- Considerably better than Colchester town centre -2
- About the same -3
- A bit worse than Colchester town centre -4
- Considerably worse than Colchester town centre -5

**4. Which evening / night time activities would you NOT carry out in Colchester? SHOWCARD 1 (multiple answers)**

- Late night shopping -1
- Cultural activities -2
- Restaurants / bars -3
- Entertainment (cinema / bingo, etc) -4
- Clubbing / night bars -5
- I would consider all of them -6
- Other (Specify): -7
- Other:.....

**4b. Do you go somewhere else to take part in these activities?**

5. **How often do you visit Colchester in the evening / night time?** (SHOWCARD 3) (Single answer)

- |               |    |                         |    |
|---------------|----|-------------------------|----|
| Once a week   | -1 | Every couple of months  | -5 |
| Twice a week  | -2 | Three / four times year | -6 |
| Twice a month | -3 | Once / twice a year     | -7 |
| Once a month  | -4 | Less often than that    | -8 |

6. **What's the first think that comes to mind (positive or negative) when you think about spending your leisure time and budget in Colchester during the evening / night time?**

7. **Based on your own experience, how good a time do you have when you visit Colchester in the evening / night time?** (SHOWCARD 4) (Single answer)

- |           |    |
|-----------|----|
| Excellent | -1 |
| Good      | -2 |
| Average   | -3 |
| Poor      | -4 |
| Very Poor | -5 |

8a. **Would you recommend Colchester as a place to visit during the evening / night time?**

- |     |                |    |                |
|-----|----------------|----|----------------|
| Yes | -1 (Go to Q9a) | No | -2 (ask Q. 8b) |
|-----|----------------|----|----------------|

8b. **If not, would any particular changes to the town centre encourage you to recommend it?**  
(e.g. more late night shopping, music / comedy / theatre in public areas, more family activities)

9a. **Thinking of your last visit to Colchester during the evening / night time, what was your MAIN and OTHER reasons for visiting?** One MAIN response only and as many OTHERS as apply (SHOWCARD 1)

	<u>MAIN</u>	<u>OTHER</u>
Late night Shopping	-1	-1
Cultural activities	-2	-2
Restaurants / bars	-3	-3
Entertainment (cinema /	-4	-4
Clubbing / night bars	-5	-5
Other(specify below)	-6	-6
Other:.....		

9b. **Can you remember approx. how many hours did you spent in total in Colchester that evening?**

\_(to nearest hour):

Hours: .....

10a. **Who were you here with on that visit?** (SHOWCARD 5)

(Single answer)

- |              |     |                       |     |
|--------------|-----|-----------------------|-----|
| Alone        | -01 | Group of friends      | -04 |
| Adult couple | -02 | With family & friends | -05 |
| Family       | -03 | Other (specify below) | -06 |

10b. **Total size of group:** .....

11. **How did you get to and from the town centre that evening?**

	(to town centre)	(from town centre)
Private car	-1	-1
Taxi	-2	-2
Bus	-3	-3
Train	-4	-4
Walked	-5	-5
Cycle	-6	-6
Motorbike	-7	-7
Other (Specify)	-8	-8

Other:.....

12. **Can you estimate how much you and your immediate party spent in total that evening / night on:**

Food & Drink      £:.....

Travel              £:.....

Entertainment    £:.....

Shopping           £:.....

(Specify if expenditure per person / per group)

Circle as appropriate

**GO TO QUESTION 16**

13. **What's the first think that comes to mind (positive or negative) when you think about spending your leisure time and budget in Colchester during the evening / night time?**

14. **Where else do you go to take part in similar evening / night time activities?** *SHOWCARD 1*

15. **If there was a change that would encourage you to take part in any of these evening / night time activities, in Colchester, what would it be?** *SHOWCARD 1*

16. **Do you think TV programmes such as Party Paramedics or The Only Way is Essex reflect the reality of Colchester as a evening / night time destination?**

Yes, completely -1 Yes, to some degree -2 No -3

16b. **What make you say that?**

17. **Are you:**

- Local Colchester resident -1 (Go to Q18)
- University student -2 (Go to Q18)
- I am a visitor -3 (Go to Q17a)

**17a Where do you live:**

Town:  
District:

**18. What is your postcode?**

**19. Which age group do you fall into?**

- |       |     |       |     |
|-------|-----|-------|-----|
| 0-15  | -01 | 45-54 | -05 |
| 16-24 | -02 | 55-64 | -06 |
| 25-34 | -03 | 65+   | -07 |
| 35-44 | -04 |       |     |

**20. What is your occupation?: (probe for level, grade etc)**

Position/job title :  
Industry:

**Could I have your name and phone number / email?**

As part of our strict quality assurance policy, our employer checks the authenticity of all completed questionnaire by contacting a sample of those who were interviewed to check that they were indeed interviewed by the researchers. Are you happy for me to obtain your email address for this purpose? I can assure you we will not use it for any other purpose".

Name of respondent: .....  
Tel / Email: .....

**Finally, could I ask whether you would be available for any additional consultation about Colchester as an evening / night time destination?**

- |     |     |    |     |
|-----|-----|----|-----|
| Yes | -01 | No | -02 |
|-----|-----|----|-----|

**THANK YOU VERY MUCH FOR YOUR TIME**

## Appendix IV – Cultural Segmentation

Arts Council England developed the segmentation based on data from [Taking Part](#) (which collects data on many aspects of leisure, culture and sport in England) and TGI (Target Group Index). The results were updated in 2011.

<b>Highly engaged</b>	
% Urban arts eclectic	Highly qualified, affluent, and in the early stages of their career, Urban arts eclectic are dynamic, and believe in seizing life's opportunities.
% Traditional culture vultures	At a later stage in life and having attained a high standard of living, Traditional culture vultures have time to devote to their many leisure interests. Art and culture takes up the majority of their time, alongside travelling and spending time with family.
<b>Some engagement</b>	
% Fun, fashion and friends	Fun, fashion and friends are developing their careers or just starting families. In their leisure time, they like to indulge in their interests of fashion and food. They are ambitious, optimistic and relish seeking out new experiences with friends and family.
% Mature explorers	Balanced and practical, Mature explorers keep up to date with current affairs and the news and seek to develop informed opinions, displaying their ethical concerns through their lifestyle choices. Neither faddish nor brand or image conscious, they are more practical in their spending habits and tend to opt for the 'tried and tested' approach. They use art as a way to bring a new perspective to their lives.
% Dinner and a show	Dinner and show are a mainstream group consisting of a significant proportion of young and middle-aged people. With two-thirds employed and a third comfortably off, this group has disposable income to spend on leisure activities. Young or young at heart they enjoy life - eating well, socialising and going on outings related to music.
% Family and community focused	Typically in their 30s and 40s, Family and community focused have built a comfortable nest with their moderate financial means, and their priorities lie with their children, connecting with the local community and holding on to their cultural roots. Their interests lie squarely with their immediate surroundings and understanding people like themselves.
% Bedroom DJs	In their late teens or 20s, still living with their parents or having just flown the nest, Bedroom DJs are starting out in life. They are motivated and aspire to do well in their careers. With few commitments, they tend to live for the moment and spend impulsively even though they are financially constrained. Appearance conscious and sociable, they spend much of their time and money on shopping, socialising and entertainment.



% Mid-life hobbyists	In their 30s, 40s and 50s, Mid-life hobbyists are family-focused and spend most of their leisure time at home. They do not currently attend any arts events, mostly citing cost and lack of time as the main reasons. This group are most likely to respond to events and activities that are family friendly and informal and which don't require too much planning or advanced booking.
% Retired arts and crafts	Home-loving and down to earth, Retired arts and crafts favour a regular routine and a slower pace of life. This group have a passion for nature and are keen gardeners. They are happy with life, but may be limited in their ability to get out and about due to their age, disability or illness.
<b>Not currently engaged</b>	
% Time-poor dreamers	Early or mid-career, often juggling work and family commitments, Time-poor dreamers are busy, and short-term orientated, living in the moment. They engage with popular culture and the arts are not a priority for them.
% A quiet pint with the match	A quiet pint with the match are content with life and are not seeking change. They spend much of their leisure time at home, or you might find them having a drink with friends at the local pub.
% Older and home-bound	In their senior years, the Older and home-bound group are generally content and have a practical outlook on life. They enjoy a slower pace of life and like spending a lot of their free time at home. Some of them report poor levels of health, which restricts their activities in general.
% Limited means, nothing fancy	Limited means, nothing fancy are information seekers who tend to spend their disposable income cautiously. Non-judgmental and dutiful, they value family and friendships - for them leisure time is all about having a break and chilling out, within their limited means.

Source: Arts Council England – <http://www.artscouncil.org.uk/what-we-do/research-and-data/arts-audiences/arts-based-segmentation-research/13-segments/>

**Appendix V- Land Uses in Colchester Town centre**

Company Name	Postcode	No. of Employees	Type of Business	SIC Code	SIC Description
Cameo	CO1 1NF	2-5.	Cafes, Snack Bars & Tea Rooms	5530	Restaurants
Food Pronto	CO1 1JJ	2-5.	Cafes, Snack Bars & Tea Rooms	5530	Restaurants
Johnsons Catering & Lesiure	CO1 1UD	2-5.	Cafes, Snack Bars & Tea Rooms	5530	Restaurants
La Patisserie	CO2 7EA	2-5.	Cafes, Snack Bars & Tea Rooms	5530	Restaurants
Lunch	CO1 1JJ	2-5.	Cafes, Snack Bars & Tea Rooms	5530	Restaurants
Minstrels Cafe Bar	CO2 7DB	2-5.	Cafes, Snack Bars & Tea Rooms	5530	Restaurants
The Art Cafe	CO1 1JN	2-5.	Cafes, Snack Bars & Tea Rooms	5530	Restaurants
The Tea Rose Cafe	CO1 1JJ	2-5.	Cafes, Snack Bars & Tea Rooms	5530	Restaurants
Vagabonds	CO2 7AD	2-5.	Cafes, Snack Bars & Tea Rooms	5530	Restaurants
Love Bistro	CO1 1UE	6-10.	Cafes, Snack Bars & Tea Rooms	5530	Restaurants
Poppy's	CO1 1JN	6-10.	Cafes, Snack Bars & Tea Rooms	5530	Restaurants
Pumpkin	CO1 1XD	6-10.	Cafes, Snack Bars & Tea Rooms	5530	Restaurants
Second Chance	CO3 0RH	2-5.	Fish & Chip Shops	5530	Restaurants
Fish N Grill	CO1 1SZ	2-5.	Fish & Chip Shops	5530	Restaurants
Fish & Chip Shop	CO1 1RB	2-5.	Fish & Chip Shops	5530	Restaurants
King Fish	CO2 8LY	2-5.	Fish & Chip Shops	5530	Restaurants
Ocean Fish Bar	CO3 0NR	2-5.	Fish & Chip Shops	5530	Restaurants
Sullivans Fishbar	CO2 8EB	2-5.	Fish & Chip Shops	5530	Restaurants
Fish & Chicken	CO2 8PZ	6-10.	Fish & Chip Shops	5530	Restaurants
Johns	CO2 9EB	6-10.	Fish & Chip Shops	5530	Restaurants
Nindy Fish & Chip Shop	CO3 9EJ	6-10.	Fish & Chip Shops	5530	Restaurants
Clowns	CO1 1DN	26-50.	Restaurants - American	5530	Restaurants
Frankie & Bennys	CO3 8RH	26-50.	Restaurants - American	5530	Restaurants
Sloppy Joe's	CO1 1DH	26-50.	Restaurants - American	5530	Restaurants
China Blue	CO1 1NH	11-25.	Restaurants - Chinese	5530	Restaurants
China Chef	CO3 3EZ	11-25.	Restaurants - Chinese	5530	Restaurants
Chef Canton	CO3 3ES	2-5.	Restaurants - Chinese	5530	Restaurants
Embassy Buffet	CO3 3AA	2-5.	Restaurants - Chinese	5530	Restaurants

House Of China	CO3 3EN	2-5.	Restaurants - Chinese	5530	Restaurants
Banquet 1408	CO3 8LT	26-50.	Restaurants - Chinese	5530	Restaurants
Amber Chinese	CO1 2QX	6-10.	Restaurants - Chinese	5530	Restaurants
Fai's Noodle Bar	CO2 7EA	6-10.	Restaurants - Chinese	5530	Restaurants
Fu Lin	CO2 7DA	6-10.	Restaurants - Chinese	5530	Restaurants
Lexden Wood Golf Club Restaurant	CO3 4AU	11-25.	Restaurants - English	5530	Restaurants
The Lemon Tree	CO2 7AD	11-25.	Restaurants - English	5530	Restaurants
The Warehouse Brasserie Ltd	CO2 7AT	11-25.	Restaurants - English	5530	Restaurants
Lila Cafe	CO2 7DB	2-5.	Restaurants - English	5530	Restaurants
Wimpy	CO1 1TB	2-5.	Restaurants - English	5530	Restaurants
The Albert	CO1 1UT	26-50.	Restaurants - English	5530	Restaurants
The Harvester	CO3 0NU	51-100.	Restaurants - English	5530	Restaurants
Copacabana	CO1 1DN	6-10.	Restaurants - English	5530	Restaurants
Eat Inn Diner	CO2 8HG	6-10.	Restaurants - English	5530	Restaurants
The Old Court Restaurant	CO1 1NF	6-10.	Restaurants - English	5530	Restaurants
Warehouse Brasserie	CO2 7AT	6-10.	Restaurants - English	5530	Restaurants
Bella Pais	CO2 7AH	2-5.	Restaurants - Greek	5530	Restaurants
Curry India Tandoori	CO3 3HA	11-25.	Restaurants - Indian	5530	Restaurants
Maharani	CO1 1TH	2-5.	Restaurants - Indian	5530	Restaurants
Mahararana	CO1 1TH	2-5.	Restaurants - Indian	5530	Restaurants
Manna Tandoori	CO1 2TQ	2-5.	Restaurants - Indian	5530	Restaurants
The Indian Ocean	CO1 1EG	2-5.	Restaurants - Indian	5530	Restaurants
Zaal	CO2 7EB	2-5.	Restaurants - Indian	5530	Restaurants
Ashiana	CO1 2JX	6-10.	Restaurants - Indian	5530	Restaurants
Mirchi Rasoi	CO1 1RQ	6-10.	Restaurants - Indian	5530	Restaurants
Raj Palace	CO1 1RB	6-10.	Restaurants - Indian	5530	Restaurants
Tandoori Villa	CO3 0RH	6-10.	Restaurants - Indian	5530	Restaurants
Ask Restaurants Ltd	CO1 1DZ	11-25.	Restaurants - Italian	5530	Restaurants
Strada	CO1 1DZ	11-25.	Restaurants - Italian	5530	Restaurants

Zizzi's	CO3 3BT	11-25.	Restaurants - Italian	5530	Restaurants
Granata	CO1 1PY	2-5.	Restaurants - Italian	5530	Restaurants
Mussi's Restaurant	CO1 1TN	6-10.	Restaurants - Italian	5530	Restaurants
Portofino	CO2 8HT	6-10.	Restaurants - Italian	5530	Restaurants
Nip-pon Central	CO1 1QS	2-5.	Restaurants - Japanese	5530	Restaurants
Na-Ree Thai Restaurant	CO1 1DZ	6-10.	Restaurants - Oriental	5530	Restaurants
The Old Siege House	CO1 2TS	11-25.	Restaurants - Other	5530	Restaurants
Golden Dragon Restaurant & Take Away	CO2 7AN	2-5.	Restaurants - Other	5530	Restaurants
Vinny's Restaurant	CO1 1NU	2-5.	Restaurants - Other	5530	Restaurants
McDonald's Restaurants Ltd	CO1 1DH	51-100.	Restaurants - Other	5530	Restaurants
McDonald's Restaurants Ltd	CO1 1US	51-100.	Restaurants - Other	5530	Restaurants
McDonald's Restaurants Ltd	CO3 8RG	51-100.	Restaurants - Other	5530	Restaurants
Chrystal	CO2 7EB	6-10.	Restaurants - Other	5530	Restaurants
Pizza Galore	CO1 2PQ	6-10.	Restaurants - Other	5530	Restaurants
Azumi	CO1 2QX	Unclassified.	Restaurants - Other	5530	Restaurants
Prezzo	CO1 1LD	11-25.	Restaurants - Pizzeria	5530	Restaurants
Finezza	CO2 7DB	2-5.	Restaurants - Pizzeria	5530	Restaurants
Pizza Hut	CO1 1DH	26-50.	Restaurants - Pizzeria	5530	Restaurants
Sa Leisure	CO1 1NX	11-25.	Restaurants - Pub Food	5530	Restaurants
Cherry Tree Steak House	CO2 0AD	6-10.	Restaurants - Pub Food	5530	Restaurants
La Tasca	CO1 1DZ	6-10.	Restaurants - Spanish	5530	Restaurants
Thai 1	CO1 2QW	11-25.	Restaurants - Thai	5530	Restaurants
Coconut Tree	CO1 2QX	2-5.	Restaurants - Thai	5530	Restaurants
Naka Thai Restaurant	CO1 2QX	2-5.	Restaurants - Thai	5530	Restaurants
China City Take Away	CO2 7LQ	2-5.	Take Away Food Shops	5530	Restaurants
Lottery House	CO2 7DP	2-5.	Take Away Food Shops	5530	Restaurants
Tea Rose Lunch Box	CO1 1JJ	2-5.	Take Away Food Shops	5530	Restaurants
China House	CO2 0BB	11-25.	Take Away Food Shops	5530	Restaurants
KFC	CO1 1DA	11-25.	Take Away Food Shops	5530	Restaurants

Nibbles	CO1 1JJ	11-25.	Take Away Food Shops	5530	Restaurants
Subway	CO1 1PG	11-25.	Take Away Food Shops	5530	Restaurants
Subway	CO2 7DU	11-25.	Take Away Food Shops	5530	Restaurants
Abra Kebabra	CO1 1RB	2-5.	Take Away Food Shops	5530	Restaurants
Albany Garden Fish & Chips & Kebab House	CO2 8HT	2-5.	Take Away Food Shops	5530	Restaurants
Asia Delight	CO2 8LY	2-5.	Take Away Food Shops	5530	Restaurants
B C Diner	CO3 3ES	2-5.	Take Away Food Shops	5530	Restaurants
Bagel Sandwich Bar	CO1 1RE	2-5.	Take Away Food Shops	5530	Restaurants
Best Kebab	CO2 7EA	2-5.	Take Away Food Shops	5530	Restaurants
Bodrum Kebab House	CO3 3ES	2-5.	Take Away Food Shops	5530	Restaurants
China City	CO2 7LQ	2-5.	Take Away Food Shops	5530	Restaurants
Cinnamon Tandoori	CO1 2LJ	2-5.	Take Away Food Shops	5530	Restaurants
Classic Oriental	CO3 4NN	2-5.	Take Away Food Shops	5530	Restaurants
Dilan Kebab House	CO2 8RB	2-5.	Take Away Food Shops	5530	Restaurants
Doorsteps Ltd	CO1 2NH	2-5.	Take Away Food Shops	5530	Restaurants
Exp Chinese	CO1 2TR	2-5.	Take Away Food Shops	5530	Restaurants
Goodlife Sandwich Bar	CO1 1NY	2-5.	Take Away Food Shops	5530	Restaurants
Hong Kong Chef	CO3 0NR	2-5.	Take Away Food Shops	5530	Restaurants
Hot Wok	CO2 7ES	2-5.	Take Away Food Shops	5530	Restaurants
Istanbul Delight	CO2 7DU	2-5.	Take Away Food Shops	5530	Restaurants
La Baguette	CO1 1QT	2-5.	Take Away Food Shops	5530	Restaurants
Lotus Garden	CO3 0NR	2-5.	Take Away Food Shops	5530	Restaurants
Lotus Garden Chinese Takeaway	CO3 0NR	2-5.	Take Away Food Shops	5530	Restaurants
Mayflower	CO1 2JX	2-5.	Take Away Food Shops	5530	Restaurants
Mogul Indian Takeaway	CO2 0BB	2-5.	Take Away Food Shops	5530	Restaurants
New Yummy	CO1 1RQ	2-5.	Take Away Food Shops	5530	Restaurants
Pizza Go Go	CO1 1RQ	2-5.	Take Away Food Shops	5530	Restaurants
Rickshaw Club	CO1 2JX	2-5.	Take Away Food Shops	5530	Restaurants
Roosters	CO1 1PG	2-5.	Take Away Food Shops	5530	Restaurants

Rose Burger & Kebab Centre	CO1 2LJ	2-5.	Take Away Food Shops	5530	Restaurants
Sam's Pizzeria & Grill	CO3 3EN	2-5.	Take Away Food Shops	5530	Restaurants
Sangers Take Away Food Shops	CO1 2LF	2-5.	Take Away Food Shops	5530	Restaurants
Shangshi House	CO2 7DP	2-5.	Take Away Food Shops	5530	Restaurants
Shemul	CO2 7DB	2-5.	Take Away Food Shops	5530	Restaurants
Shrubend	CO2 9EB	2-5.	Take Away Food Shops	5530	Restaurants
Sonali Indian Takeway	CO1 2QX	2-5.	Take Away Food Shops	5530	Restaurants
Southern Fried Chicken	CO2 7EA	2-5.	Take Away Food Shops	5530	Restaurants
The Spice Of India	CO3 0NR	2-5.	Take Away Food Shops	5530	Restaurants
Tins	CO3 0RH	2-5.	Take Away Food Shops	5530	Restaurants
Wan Fung House	CO1 1RB	2-5.	Take Away Food Shops	5530	Restaurants
Burger King	CO1 1DA	26-50.	Take Away Food Shops	5530	Restaurants
Beijing Cantonese	CO1 2SZ	6-10.	Take Away Food Shops	5530	Restaurants
Food Express	CO1 2PQ	6-10.	Take Away Food Shops	5530	Restaurants
Subway	CO1 1JJ	6-10.	Take Away Food Shops	5530	Restaurants
Vallies Lounge		11-25.	Night Clubs	5540	Bars
Roberts Club		6-10.	Night Clubs	5540	Bars
Sky Rooms Nightclub		Unclassified.	Night Clubs	5540	Bars
Pat Malloys	CO1 1PX	11-25.	Pubs, Bars & Inns	5540	Bars
River Lodge	CO1 1QX	11-25.	Pubs, Bars & Inns	5540	Bars
Slug & Lettuce	CO1 1TB	11-25.	Pubs, Bars & Inns	5540	Bars
T P Sports Bar	CO1 2PQ	11-25.	Pubs, Bars & Inns	5540	Bars
The Castle Inn	CO1 1TH	11-25.	Pubs, Bars & Inns	5540	Bars
The Hare & Hound	CO2 0PN	11-25.	Pubs, Bars & Inns	5540	Bars
The Lexden & Crown	CO3 4DA	11-25.	Pubs, Bars & Inns	5540	Bars
The Silk Road	CO2 7DX	11-25.	Pubs, Bars & Inns	5540	Bars
The White Hart	CO3 8LT	11-25.	Pubs, Bars & Inns	5540	Bars
Brewers Arms	CO2 7DA	2-5.	Pubs, Bars & Inns	5540	Bars
British Grenadier	CO1 2AP	2-5.	Pubs, Bars & Inns	5540	Bars
Live & Let Live	CO3 OPS	2-5.	Pubs, Bars & Inns	5540	Bars

New Town Tavern	CO1 2BN	2-5.	Pubs, Bars & Inns	5540	Bars
Royal Mortar	CO1 2AS	2-5.	Pubs, Bars & Inns	5540	Bars
The Abbey Arms	CO2 7HA	2-5.	Pubs, Bars & Inns	5540	Bars
The Ale House	CO3 3DA	2-5.	Pubs, Bars & Inns	5540	Bars
The Ancient Briton	CO2 9EG	2-5.	Pubs, Bars & Inns	5540	Bars
The Bridge Bar	CO2 8FN	2-5.	Pubs, Bars & Inns	5540	Bars
The Fat Cat Public House	CO3 3BZ	2-5.	Pubs, Bars & Inns	5540	Bars
The Foresters Arms	CO1 1UW	2-5.	Pubs, Bars & Inns	5540	Bars
The Grapes	CO2 7RB	2-5.	Pubs, Bars & Inns	5540	Bars
The Heckford Bridge Angel	CO3 OSP	2-5.	Pubs, Bars & Inns	5540	Bars
The Lord Nelson	CO1 2NF	2-5.	Pubs, Bars & Inns	5540	Bars
The Norfolk	CO1 1UZ	2-5.	Pubs, Bars & Inns	5540	Bars
The Prettygate	CO3 4NW	2-5.	Pubs, Bars & Inns	5540	Bars
The Spinnaker Inn	CO2 8JB	2-5.	Pubs, Bars & Inns	5540	Bars
Victoria Inn	CO1 1RB	2-5.	Pubs, Bars & Inns	5540	Bars
Cell	CO1 2PQ	26-50.	Pubs, Bars & Inns	5540	Bars
Yates's Wine Lodge	CO1 1NX	26-50.	Pubs, Bars & Inns	5540	Bars
After Office Hours Colchester Ltd	CO1 1SP	6-10.	Pubs, Bars & Inns	5540	Bars
Curve Bar	CO1 2QW	6-10.	Pubs, Bars & Inns	5540	Bars
Donkey & Buskins	CO2 0HU	6-10.	Pubs, Bars & Inns	5540	Bars
Elite Food & Drink	CO2 8HT	6-10.	Pubs, Bars & Inns	5540	Bars
Fashion Cafe	CO2 7DX	6-10.	Pubs, Bars & Inns	5540	Bars
The Bull	CO3 3ES	6-10.	Pubs, Bars & Inns	5540	Bars
The Cricketers	CO3 9TG	6-10.	Pubs, Bars & Inns	5540	Bars
The Duchess	CO1 1PG	6-10.	Pubs, Bars & Inns	5540	Bars
The Hole In The Wall	CO3 3LA	6-10.	Pubs, Bars & Inns	5540	Bars
The Huntsmans Tavern	CO3 4RG	6-10.	Pubs, Bars & Inns	5540	Bars
The Kings Arms	CO3 3EY	6-10.	Pubs, Bars & Inns	5540	Bars
Twisters Ltd	CO1 1PY	6-10.	Pubs, Bars & Inns	5540	Bars
What Bar	CO1 2PG	6-10.	Pubs, Bars & Inns	5540	Bars

Ye Olde Marquis	CO1 1EG	6-10.	Pubs, Bars & Inns	5540	Bars
Portigo	CO3 9ET	6-10.	Taxis & Private Hire	6022	Taxi operation
1A Taxi	CO1 2UY	6-10.	Taxis & Private Hire	6022	Taxi operation
2001 Airport Travel Services	CO3 4QQ	6-10.	Taxis & Private Hire	6022	Taxi operation
Town Cars	CO2 8HG	11-25.	Taxis & Private Hire	6022	Taxi operation
Hawaii Five O	CO2 7DU	11-25.	Taxis & Private Hire	6022	Taxi operation
Panther Cabs	CO1 2TJ	11-25.	Taxis & Private Hire	6022	Taxi operation
Aa Meter Cabs	CO2 0BD	2-5.	Taxis & Private Hire	6022	Taxi operation
S B Taxis	CO2 8DZ	2-5.	Taxis & Private Hire	6022	Taxi operation
Lexden Executive Cars	CO3 4AS	2-5.	Taxis & Private Hire	6022	Taxi operation
West End Cars	CO3 4QQ	2-5.	Taxis & Private Hire	6022	Taxi operation
Airlink Cars	CO2 0JY	2-5.	Taxis & Private Hire	6022	Taxi operation
Five Eights	CO2 8HG	2-5.	Taxis & Private Hire	6022	Taxi operation
SAS Taxis Ltd	CO2 8QY	2-5.	Taxis & Private Hire	6022	Taxi operation
Text Cars	CO3 3DA	2-5.	Taxis & Private Hire	6022	Taxi operation
A 1 Taxis	CO1 1WE	2-5.	Taxis & Private Hire	6022	Taxi operation
P & L & MCS Ltd	CO2 7DP	2-5.	Taxis & Private Hire	6022	Taxi operation
V E V	CO2 8BU	2-5.	Taxis & Private Hire	6022	Taxi operation
Minicab Services (Colchester) Ltd	CO2 7DT	26-50.	Taxis & Private Hire	6022	Taxi operation
Minicab Services	CO2 7DP	26-50.	Taxis & Private Hire	6022	Taxi operation
Five Sevens Travel Services Ltd	CO2 7DB	6-10.	Taxis & Private Hire	6022	Taxi operation
Wow Cabs	CO2 0NA	6-10.	Taxis & Private Hire	6022	Taxi operation
Five One Taxis	CO1 1BH	6-10.	Taxis & Private Hire	6022	Taxi operation
Odeon Cinema	CO1 1NH	11-25.	Cinemas	9213	Motion picture projection
Headgate Theatre	CO2 7AT	Unclassified.	Theatres	9231	Artistic creation / interpretation
Minorities Art Gallery	CO1 1UE	2-5.	Art Galleries & Fine Art Dealers	9232	Operation of arts facilities
Tymperleys Clock Museum	CO1 1JN	Unclassified.	Museums	9232	Operation of arts facilities
Firstsite	CO1 1JT	Unclassified.	Art Galleries & Fine Art Dealers	9232	Operation of arts facilities
The Castle Museum	CO1 1TJ	11-25.	Museums	9232	Operation of arts facilities
Hollytrees Museum	CO1 1UG	2-5.	Museums	9232	Operation of arts facilities



Colchester Museums	CO1 1YG	26-50.	Museums	9232	Operation of arts facilities
Natural History Museum	CO1 1DN	Unclassified.	Museums	9232	Operation of arts facilities
Gala Clubs	CO2 7DP	26-50.	Bingo Halls	9271	Gambling and betting activities

#### RETAIL OUTLETS

Company Name	Postcode	No. of Employees	Type of Business	SIC Code	SIC Description
Marks & Spencer PLC	CO1 1DH	101 to 200	Department Stores	5212	Other retail sale in non-specialised stores
Clarins Studio At Debenhams	CO1 1JG	26 to 50	Department Stores	5212	Other retail sale in non-specialised stores
Debenhams	CO1 1JG	201 to 500	Department Stores	5212	Other retail sale in non-specialised stores
T K Maxx	CO1 1JJ	51 to 100	Department Stores	5212	Other retail sale in non-specialised stores
Eclettico	CO1 1JN	6 to 10	Gift Shops	5212	Other retail sale in non-specialised stores
Evolution	CO1 1LF	6 to 10	Gift Shops	5212	Other retail sale in non-specialised stores
Star Traders	CO1 1LF	6 to 10	Gift Shops	5212	Other retail sale in non-specialised stores
Bhs Ltd	CO1 1LF	51 to 100	Department Stores	5212	Other retail sale in non-specialised stores
Glyph In Colchester	CO1 1LG	2 to 5	Gift Shops	5212	Other retail sale in non-specialised stores
Peacocks Stores PLC	CO1 1LG	26 to 50	Department Stores	5212	Other retail sale in non-specialised stores
The Gift Centre	CO1 1LN	2 to 5	Gift Shops	5212	Other retail sale in non-specialised stores
Traders Of The East	CO1 1LN	2 to 5	Gift Shops	5212	Other retail sale in non-specialised stores
Williams & Griffin Ltd	CO1 1PN	201 to 500	Department Stores	5212	Other retail sale in non-specialised stores
Thorntons PLC	CO1 1JR	2 to 5	Confectionery Retailers	5224	Retail sale of bread, cakes, confectionery
Julian Graves	CO1 1LJ	2 to 5	Confectionery Retailers	5224	Retail sale of bread, cakes, confectionery
Eld Lane	CO1 1LS	2 to 5	Confectionery Retailers	5224	Retail sale of bread, cakes, confectionery
Minerva Chocolate	CO1 1LS	2 to 5	Confectionery Retailers	5224	Retail sale of bread, cakes, confectionery
The Chocolate Studio	CO1 2TJ	2 to 5	Confectionery Retailers	5224	Retail sale of bread, cakes, confectionery
Oasis Stores	CO1 1DA	2 to 5	Clothes Shops - Ladies	5241	Retail sale of clothing
Moss Bros	CO1 1DA	6 to 10	Clothes Shops - Mens	5241	Retail sale of clothing
Dorothy Perkins Retail Ltd	CO1 1DB	11 to 25	Clothes Shops - Ladies	5241	Retail sale of clothing
Burton	CO1 1DB	11 to 25	Clothes Shops - Mens	5241	Retail sale of clothing

Miss Neon	CO1 1DB	2 to 5	Clothes Shops - Ladies	5241	Retail sale of clothing
The Edinburgh Woollen Mill	CO1 1DB	6 to 10	Clothes Shops	5241	Retail sale of clothing
Mrs Marmalade	CO1 1DX	2 to 5	Clothes Shops - Ladies	5241	Retail sale of clothing
Gap	CO1 1JG	11 to 25	Clothes Shops	5241	Retail sale of clothing
Jane Norman Ltd	CO1 1JG	2 to 5	Clothes Shops	5241	Retail sale of clothing
Oasis	CO1 1JG	2 to 5	Clothes Shops - Ladies	5241	Retail sale of clothing
Warehouse Fashion	CO1 1JG	6 to 10	Clothes Shops - Ladies	5241	Retail sale of clothing
Ann Summers Retail	CO1 1JG	6 to 10	Lingerie & Hosiery Shops	5241	Retail sale of clothing
Revolver	CO1 1JJ	2 to 5	Clothes Shops	5241	Retail sale of clothing
Dress Again	CO1 1JJ	2 to 5	Clothes Shops - Ladies	5241	Retail sale of clothing
Man John	CO1 1JJ	2 to 5	Clothes Shops - Mens	5241	Retail sale of clothing
Karen Millen	CO1 1JJ	6 to 10	Clothes Shops - Ladies	5241	Retail sale of clothing
Baccus Menswear	CO1 1JJ	6 to 10	Clothes Shops - Mens	5241	Retail sale of clothing
Fat Face Ltd	CO1 1JN	6 to 10	Clothes Shops	5241	Retail sale of clothing
Elizabeth	CO1 1JT	2 to 5	Clothes Shops	5241	Retail sale of clothing
Samantha's	CO1 1LF	2 to 5	Clothes Shops - Ladies	5241	Retail sale of clothing
Bon Marche	CO1 1LJ	6 to 10	Clothes Shops - Ladies	5241	Retail sale of clothing
Era	CO1 1LN	2 to 5	Clothes Shops	5241	Retail sale of clothing
Long Tall Sally	CO1 1LN	2 to 5	Clothes Shops	5241	Retail sale of clothing
Taylors Of Sudbury Ltd	CO1 1LN	2 to 5	Clothes Shops	5241	Retail sale of clothing
Denim City	CO1 1LS	2 to 5	Clothes Shops	5241	Retail sale of clothing
Phase 8	CO1 1LS	2 to 5	Clothes Shops	5241	Retail sale of clothing
Patricia R Ltd	CO1 1LS	2 to 5	Clothes Shops - Ladies	5241	Retail sale of clothing
Innes Cole	CO1 1LS	2 to 5	Clothes Shops - Mens	5241	Retail sale of clothing
Metro	CO1 1LS	2 to 5	Clothes Shops - Mens	5241	Retail sale of clothing
River Island	CO1 1LX	26 to 50	Clothes Shops	5241	Retail sale of clothing
East Ltd	CO1 1PN	2 to 5	Clothes Shops - Ladies	5241	Retail sale of clothing
Jeneveve	CO1 1TB	6 to 10	Clothes Shops - Ladies	5241	Retail sale of clothing
Monsoon	CO1 1WF	11 to 25	Clothes Shops	5241	Retail sale of clothing

Super Dry	CO1 1WF	6 to 10	Clothes Shops	5241	Retail sale of clothing
Topshop	CO1 1XJ	51 to 100	Clothes Shops - Ladies	5241	Retail sale of clothing
Topman	CO1 1XJ	51 to 100	Clothes Shops - Mens	5241	Retail sale of clothing
Jacques Vert	CO1 1XJ	6 to 10	Clothes Shops - Ladies	5241	Retail sale of clothing
Kamden	CO2 7DB	2 to 5	Clothes Shops	5241	Retail sale of clothing
Number 27	CO3 3EN	2 to 5	Clothes Shops	5241	Retail sale of clothing
Ambiance	CO3 3EZ	2 to 5	Clothes Shops	5241	Retail sale of clothing
Margot's	CO3 3HA	2 to 5	Clothes Shops	5241	Retail sale of clothing
Shoe Zone	CO1 1DB	2 to 5	Shoe Shops	5241	Retail sale of footwear and leather goods
Priceless	CO1 1DH	6 to 10	Shoe Shops	5241	Retail sale of footwear and leather goods
Office	CO1 1JG	11 to 25	Shoe Shops	5241	Retail sale of footwear and leather goods
Sands	CO1 1JJ	2 to 5	Shoe Shops	5241	Retail sale of footwear and leather goods
Clarks Shoes Ltd	CO1 1LH	11 to 25	Shoe Shops	5241	Retail sale of footwear and leather goods
Charlie & Oscar	CO1 1LS	2 to 5	Shoe Shops	5241	Retail sale of footwear and leather goods
Dune Shoes	CO1 1PN	6 to 10	Shoe Shops	5241	Retail sale of footwear and leather goods
Stompers Ltd	CO1 1TH	2 to 5	Shoe Shops	5241	Retail sale of footwear and leather goods
Jones Bootmaker	CO1 1WG	11 to 25	Shoe Shops	5241	Retail sale of footwear and leather goods
Angelico Bambino	CO2 7SB	2 to 5	Shoe Shops	5241	Retail sale of footwear and leather goods
Laura Ashley Ltd	CO1 1JR	11 to 25	Soft Furnishings - Retail	5241	Retail sale of furniture, and household articles

