Southend on Sea Borough Council

Retail and Leisure Study
Main Report

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1 INTRODUCTION

1.1 Peter Brett Associates LLP (PBA) was instructed by Southend-on-Sea Borough Council (SSBC) in April 2016 to undertake selected updates to the existing retail and leisure evidence contained within the Southend Retail and Town Centre Study (SRTCS) published in 2011.

1.2 This study has been undertaken in parallel with the South Essex Strategic Retail Study (SESRS) and both studies are informed by a common evidence base in the form of a new household survey of spending patterns.

1.3 The SESRS was commissioned in April 2016 by a consortium of five authorities to provide a strategic retail evidence base for the South Essex sub-region. The five authorities are Basildon Borough Council (BBC), Castle Point Borough Council (CPBC), Rochford District Council (RDC), SSBC and Thurrock Council (TC). The household survey was undertaken by NEMS market research in July 2016 and provides a consistent evidence base on spending patterns across the five South Essex authorities.

1.4 This study will inform future development plan policies on retail, leisure and town centre development in SSBC.

1.5 The adopted development plan currently comprises Saved Policies of the Local Plan (1994), the Core Strategy (2007), Joint Area Action Plan for London Southend Airport and its Environs (2014), Development Management Document (2015), the Essex and Southend Replacement Waste Local Plan (2017), and the Southend Central Area Action Plan (SCAAP 2018) which contains area specific proposals to support the delivery of the Core Strategy development targets in Southend Central Area up to 2021.

1.6 SSBC have also commenced the preparation of a new local plan, the Southend New Local Plan (SNLP) which once adopted will provide the planning framework to guide all development proposals in the Borough to 2038. The evidence base for the SNLP, will include this study and the SESRS. A summary of all adopted and emerging planning policies which are relevant to this study can be found at Appendix A.

1.7 The objectives of this study are as follows:

- to undertake a health check of the vitality and viability of the three main centres; Southend, Westcliff and Leigh;
- to assess retail spending patterns, and their split between convenience, comparison, and leisure. As well as identify flows of expenditure to and from Southend-on-Sea;
- to assess the need for additional convenience and comparison retail floor space and leisure floorspace in Southend-on-Sea; and,
- update the recommendations for the spatial distribution of floorspace and high level advice on policy formulation, including the suitability of town centre boundaries, and monitoring.

Structure of the report

1.8 Responding to the tasks as set out in the terms of reference, the report is structured as follows:

- Section 2 provides an assessment of the vitality and viability of the three main centres, as well as looking at out-of-centre retail provision and briefly identifies the main competition
- Section 3 provides a picture of spending patterns in Southend-on-Sea and the surrounding area in 2016
- Section 4 provides an updated assessment of need for retail floorspace, split between convenience and comparison goods floorspace
- Section 5 provides an updated assessment of need for commercial leisure floorspace
- Section 6 provides a set of overarching recommendations for the Council to bring forward within planning policy and monitoring.

2 HIERARCHY OF CENTRES

Introduction

2.1 This section provides an overview of the role and function of the retail hierarchy in Southend-on-Sea. For the three main centres in the Borough: Southend, Westcliff-on-Sea (Westcliff) and Leigh-on-Sea (Leigh) full health check assessments are provided against the National Planning Practice Guidance (PPG) indicators set out in Figure 2.1. Monitoring the health of centres provides a benchmark of current performance; it identifies opportunities for growth and warning signs where centres or specific areas may be in decline. Additionally, a desk-based assessment of the local centres and the role of competition outside of SSBC are also provided.

Figure 2.1 NPPG town centre vitality and viability key indicators

Key indicators of town centre vitality and viability:
▪ Diversity of uses ▪ Proportion of vacant street level property ▪ Commercial yields on non-domestic property ▪ Customer views and behaviour ▪ Retailer representation and intentions to change representation ▪ Commercial rents ▪ Pedestrian flows ▪ Accessibility ▪ Perception of safety and occurrence of crime ▪ State of town centre environmental quality

Source: PBA (2016)

2.2 The network of centres in the Borough as identified in the Core Strategy, is summarised below:

Designation	Centre
Regional Town Centre	Southend
District Centres	Westcliff and Leigh.
Local Centres	West Leigh, Thorpe Bay, Eastwood (Western Approaches), North Shoebury and Shoeburyness (West Road).

2.3 Experian GOAD prepares regular land use assessments of retail destinations. The previous health check assessments for each centre from the 2011 SRTCS were informed by 2009 GOAD updates. PBA updated the GOAD assessments for Southend, Westcliff, and Leigh in August 2016 and this data forms the basis of the health checks assessments[1]. A full schedule of uses based on the 2016 GOAD updates is provided for each centre at Appendix B .

[1] GOAD definition of the centres do not align with the policy designed definitions

2.4 In addition, the results of the household survey (SESRS Part 1) in relation to customer views and perceptions of the centres have been used to inform health checks.

Southend town centre

2.5 Southend is the largest centre in the Borough, and it is identified in the Core Strategy as the preferred location for all new retail development. It is a regional town centre serving a wider area encompassing Castle Point and Rochford districts. Southend provides a range of retail services and facilities, as well as a selection of leisure and cultural facilities. These are complemented by Southend's role as a major resort with significant tourist and related leisure and cultural facilities located at the southern end of the town centre adjacent to the foreshore.

Figure 2.2 Southend town centre shopping frontages

Source: Technical Report Management of Town Centre Shopping Frontage (2016)

2.6 The town centre is focused on two indoor shopping centres connected by a linear High Street. At the north of the High Street is The Victoria Shopping Centre and at the south is The Royals. The primary shopping frontage runs along the High Street between these two shopping centres, and the secondary shopping frontages are located on the streets running off the High Street, as shown in Figure 2.2 above. The town centre contains around 100,000 sqm of retail floorspace[2].

2.7 In 2013 the Southend Business Improvement District (BID) was formed to facilitate the improvement of Southend town centre. The BID encourages local businesses to work together to improve the quality of the town centre environment and performance. The main role of the BID is to encourage investment within the town centre, to improve the following:

- safety;
- marketing;
- environment and streetscape; and,
- business representation.

Diversity of uses

2.8 Table 2.1 compares the proportion of different types of units found in Southend town centre, and their floorspace, against the national average figures. This provides an indication of under provision or over provision of certain uses. Figure 2.2, above, shows the distribution of uses throughout the centre

Table 2.1 Southend town centre diversity of uses

Use	Southend units		UK units average	Southend sqm		UK sqm average
	No.	%	%	No.	%	%
Convenience goods	25	5.8	9.3	9,960	9.3	18.4
Comparison goods	171	39.9	39.7	60,430	56.2	44.9
Food and drink	90	21.0	17.1	13,740	12.8	12.7
Service retailers	69	16.1	20.6	11,950	11.1	12.8
Miscellaneous	6	1.4	1.2	700	0.7	1.0
Vacant units	68	15.9	12.2	10,820	10.1	10.2
Total	429	-	-	107,600	-	-

Source: Experian GOAD and PBA (2016)

Convenience goods

2.9 The table above shows that there is an undersupply of convenience units and floorspace in Southend town centre, as these only account for 5.8% and 9.3%

[2] Source: GOAD definition, rather than planning policy designation

respectively, compared to the national averages of 9% and 18%. The largest convenience store in Southend town centre is the Sainsbury's store on London Road, with the Iceland, Tesco Express and part of the Marks and Spencer store also providing a significant convenience offer. In addition, there are numerous independent convenience stores found around the town centre, such as the Essex convenience store and the Parkson Cash & Carry. There is a weekly general market located on Southend High Street, offering various goods including fruits and vegetables, haberdashery and toys.

Comparison goods

2.10 Southend town centre has 24 of the current 28 GOAD key attractors which are defined as those multiple retailers which are most likely to improve the consumer appeal of a centre. The key attractors present in the comparison sector in Southend town centre include Debenhams department store, variety stores such as Argos[3] and Marks & Spencer and a variety of fashion stores such as New Look and Next. Southend contains more of the GOAD key attractors than any other centre in the sub-region reflecting its role as a regional shopping centre for comparison shopping.

2.11 The table indicates that the percentage of comparison units is almost identical to the UK average, at approximately 40%. There is a difference in the floorspace figures, as 56.2% of Southend's floorspace is comparison, compared to the national average of 45%. The two indoor shopping centres contribute significantly to this floorspace figure, with The Royals providing 19% of the total figure, and the Victoria contributing 20%.

2.12 Within the comparison sector, Southend provides a value to middle market selection of clothing and footwear. As highlighted above, there are many national multiplies on the High Street and within the indoor shopping centre. There is a small selection of independent fashion stores, including Bustles Boutique and Brother 2 Brother Menswear.

2.13 The remaining comparison sector retail offer provides a selection of household goods, stationary, electrical goods, mobile phone stores, health and beauty, and jewellery stores, including WH Smith, Brighthouse, the Body Shop, and Pandora. There is a significant proportion of value retailers and charity stores in Southend, including Poundland, Bargain Buys, Oxfam, and the Havens Hospice.

Food and drink and service retailers

2.14 Table 2.1 also shows the proportion of service retailers and food and drink facilities in Southend town centre compared to the national average. The proportion of food and drink floorspace in Southend (12.8%) is generally in line with the national average (12.7%). However, the number of units in Southend town centre (21.0%) is higher than the national average (17.1%). The food and drink offer is varied, with a selection of independent cafes and restaurants, as well as a few representations from national operators, such as Nando's, Starbucks, Bella Italia and Patisserie Valerie. There are a

[3] Downgraded following the town centre survey and relocated to Sainsbury's

number of fast food and takeaway restaurants which cater towards the value end of the market, such as 90 Seconds Pizza, McDonalds and Burger King.

2.15 The number of service retail units is significantly lower in Southend town centre than the national average, 16.1% compared to 20.6% respectively; however, the floorspace figure for Southend town centre (11.1%) is almost in line with the national average of 12.8%. Hairdressing and health and beauty units dominate the service offer, contributing to 9% of Southend's total service retail units. Other significant service retailers include banks and financial services.

2.16 There are limited D2 leisure facilities within Southend town centre. At the northern end of the High Street there is an Odeon cinema, and there are also several gyms located within the town centre. Adjacent to the southern edge of the town centre are some of the main tourism facilities of the town centred around the iconic Southend Pier and foreshore. These include: the Royal Pavilion cultural centre on the Pier, seafront lido, cafes and restaurants, clubs and casino, public gardens, and theme park, which are significant attractors for the town.

2.17 The vibrant evening economy is principally based at the northern and southern ends of the High Street. To the north, restaurants and bars are centred around the Odeon Cinema (including London Road and Queens Road) whilst to the south facilities include a range of bars, restaurants and other eating establishments, complemented by the leisure offer of the central seafront area.

2.18 It is estimated that over six million day visitors come to Southend annually[4] which bolsters the level of retail and leisure expenditure made in the town centre. Accordingly, while the current food and drink and leisure offer is reasonable, given the significance of the tourist economy in Southend, there is scope for improvement to enhance the visitor (whether local or tourist) experience of the town centre.

Proportion of vacant street level property

2.19 Table 2.1 also shows the proportion of vacant units and floorspace in Southend town centre. The percentage of vacant units has decreased from 18.5% to 15.9%, when compared to the 2011 Southend retail and town centre study. The proportion of vacant retail units in Southend town centre (15.9%) remains slightly above the national average (12.2%) however.

2.20 The vacant units are predominately small, with the exception being the former BHS comparison department store unit in the southern end of the High Street. The Victoria shopping centre, which was extensively refurbished creating a number of new units and additional floorspace in 2008, contains 30% of the total number of vacant units. The cluster of vacancies on the first level of the shopping centre seems to be unchanged from the 2011 report.

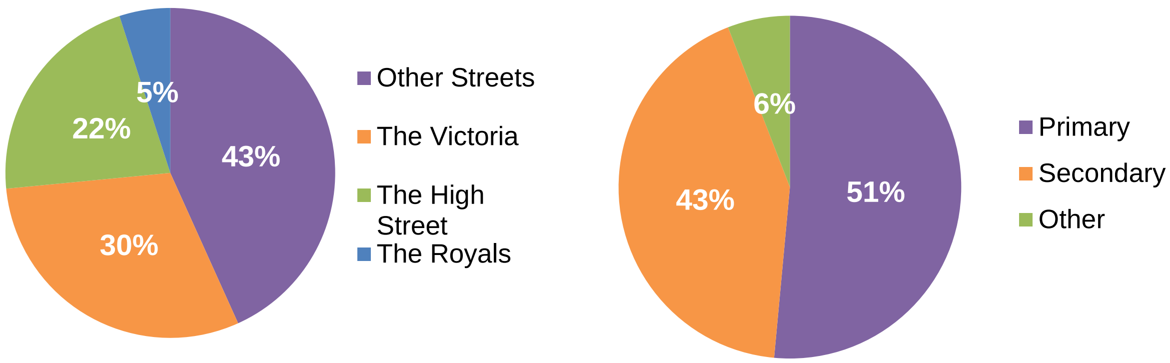
2.21 As Figure 2.3 indicates, the majority of the vacant sites are located on other secondary streets in the town centre, and within The Victoria shopping centre. Approximately 22%

[4] SSBC

of vacant units are located on the High Street, and only 5% are within the Royals shopping centre.

2.22 Comparing Southend town centre to other similar centres can give some insight into the performance of the retail offer. The Basildon Retail and Commercial Leisure Capacity Study (PBA, 2015) shows that Basildon town centre has a unit vacancy rate of 11.5% and the Chelmsford Retail and Commercial Leisure Capacity Study (GVA, 2015) shows that Chelmsford has a unit vacancy rate of 10.4%. This shows that Southend town centre has a higher vacancy rate than these comparable destinations.

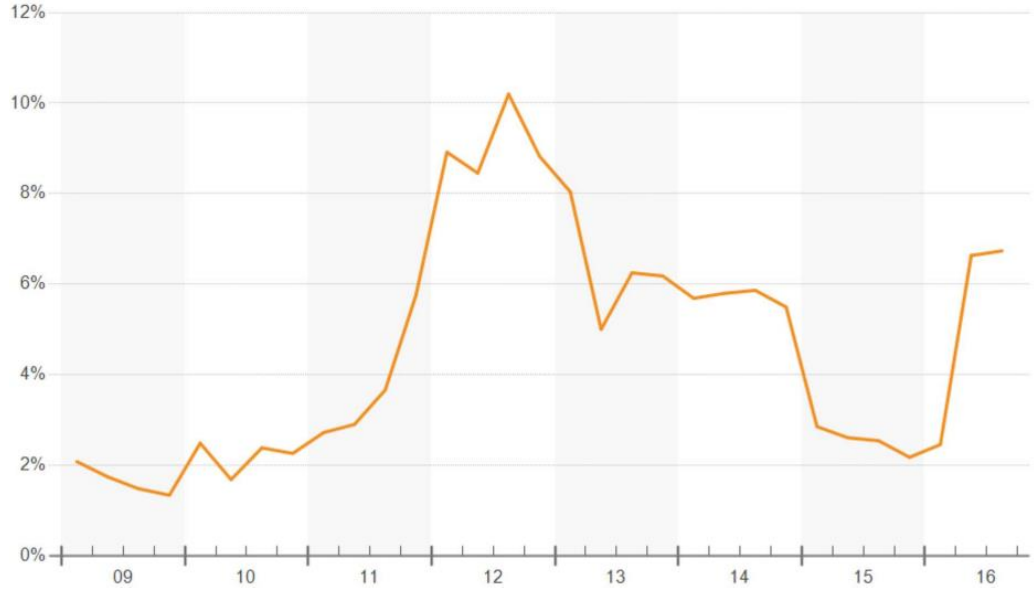
Figure 2.3 Percentage of vacant units in Southend town centre, by shopping location (left) and frontage type (right)



Source: Experian GOAD and PBA (2016)

2.23 To illustrate the change in vacancy rate over time, data provided by CoStar has been used in the production of Figure 2.4. This graph shows the vacancy rate for Southend town centre between 2009 and 2016. The town centre boundary used for the calculation of the vacancy rate by PBA and CoStar will be different, and therefore so will the vacancy rate for 2016. Nevertheless, this CoStar data is useful in displaying the rate at which the vacancy rate has changed, revealing a general trend over time, including the rising level of vacancies in the period of and following the recession.

Figure 2.4 Vacancy rates in Southend



Source: CoStar (2016)[5]

2.24 The CoStar data in Figure 2.4 shows that the vacancy rate in Southend was at its highest in 2012, where it reached 10%. Before this date the vacancy rate was relatively low and stable, at approximately 2%. Between 2012 and 2016 the vacancy rate has fluctuated significantly, reaching a low of 2% at the end of 2015 and finishing at 7% in the second quarter of 2016.

2.25 Research with local agents active in the town centre conducted by PBA has revealed that there is uncertainty from retail operators whether to open in Southend town centre due to the potential competition from out-of-centre retail development that could come forward at Fossetts Farm[6]. The potential creation of this alternative retail location appears to be deterring investment in the town centre. It is understood from discussions with agents that some retailers have been reluctant to take up available vacant units in the Victoria Shopping Centre, resulting in the continuing high vacancy rate.

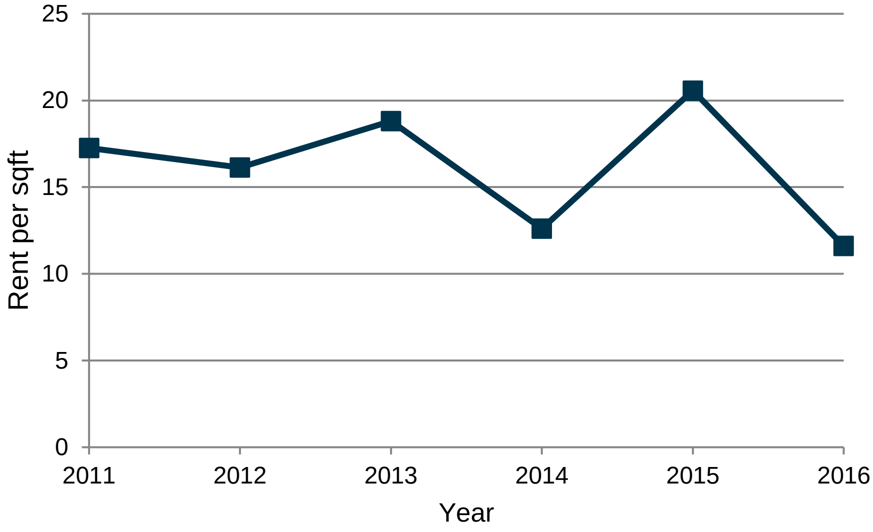
Commercial rents and yields

2.26 The level of rent that businesses are prepared to pay for retail space in a centre provides a further indication of the relative strength of its retail offer. Using data provided by CoStar, the graph in Figure 2.5 shows the average achieved rent per sqft in Southend between 2011 and 2016. The achieved rent figure also includes effective rents; these are rents which have had an incentive, such as a discount for the first few months.

[5] Based on adopted frontage boundaries

[6] Current application for relocation of Southend United FC to Fossetts Farm including hotel, 26,505 sqm A1, 4,524 sqm A3 and 5,091 D2 cinema (GIA) (1700733FULM). Historic permission for development of similar scheme but with a lesser quantum of A1 and A3 space, and no cinema now lapsed.

Figure 2.5 Average achieved rent per sqft in Southend 2011-2016



Source: CoStar (2016)

2.27 The above chart shows that rents per sqft in Southend peaked at £20 in 2015. Before this date, the rents were relatively stable between £16-£18 per sqft. 2014 and 2016 have both experienced low rental figures, at approximately £12 per sqft. The 2016 figure is the lowest of the data set, at £11.60 per sqft. To put this in context, available data for Basildon suggests that town centre rents in 2015 ranged between £16-22 per sqft[7], which is not dissimilar to Southend in the same period.

2.28 Consultation with local agents active within Southend town centre revealed that internal units within the Royals shopping centre achieved rents ranging between £40 and £55 per sqft, and Royals units with High Street frontages ranged between £30 and £40 per sqft. Other High Street 'prime' frontage rents were between £20 and £30 per sqft. The smaller district centres (Westcliff and Leigh) both had prime rents of £30 per sqft. This data indicates that despite the High Street in Southend being designated as a primary shopping frontage, the rents do not reflect this; indeed, the smaller centres have the same, if not higher, Zone A rents.

2.29 Furthermore, consultation with local agents has shown that the decreasing quality of the retail offer on the High Street is resulting in lower rents. Sources have informed PBA that landlords are taking the highest offers for units on the High Street, with limited consideration of the implications the overall quality of the offer. It is the local agents' views that this reduction in the quality of the offer appears to be contributing to falling rental values in the town centre.

2.30 Discussions with local agents indicate that both the Royals and the Victoria shopping centres have had difficulty in retaining existing retailers, as well as attracting new ones. In response to this those managing the shopping centres have had to offer

[7] Basildon Retail & Commercial Leisure Study (2015) Table 3.1

incentives to retailers to take up units or remain in units such as shorter leases and reductions on rents.

Retailer requirements

2.31 The level of retailer demand provides a further indication of the market strength of a town centre. Table 2.2 shows the current list of published retailer requirements for Southend, provided by Shopproperty.

2.32 Published retailer requirements do not provide a comprehensive picture of retailer demand since operators are becoming less inclined to seek space in this way and as a result fewer requirements are publicly available. Nevertheless, it is useful to see the type of operators seeking space in Southend.

2.33 There are eight published retailer requirements for Southend. Most of the demand is for Use Class A1, as there is a need for five A1 retail units, totalling 2,101 sqm of floorspace. The largest demand comes from the Aldi foodstore. The total demand for A3 units is 1,486 sqm, which is split equally between Chiquito's and Frankie & Benny's. Five Guys is the only operator seeking A5 floorspace in Southend.

2.34 While in overall terms, the level of demand is not that different to what was reported in the Chelmsford Retail study (2015), there is a notable difference in quality, particularly in relation to the type of comparison retailers interested in Chelmsford (L'Occitane, Phase Eight, Rituals, Farrow & Ball and Joules) compared to the value-focus of those with requirements in Southend. However, and perhaps the more obvious comparator to Southend, the Basildon Retail and Commercial Leisure Study reported only limited demand in the town centre from national retailers[8].

Table 2.2 Southend retailer requirements

Operator	Class	Date	Min (sqm)	Max (sqm)
Solutions Inc	A1	11/12/2015	120	150
Saltrock	A1	16/05/2016	93	186
Cards Direct	A1	02/06/2016	111	139
Menkind	A1	02/06/2016	139	186
Aldi Foodstore Ltd	A1	09/05/2016	418	1,440
Chiquito	A3	08/05/2015	344	743
Frankie & Benny's	A3	07/05/2015	344	743
Five Guys	A5	03/06/2016	186	279

Source: Shopproperty (2016)

[8] Table 3.1

New tenants

2.35 The quantity and type of new tenants choosing to locate in a centre can provide a perspective on the type of operators attracted to a centre. According to data from CoStar there have been six new tenants in Southend in 2016. The majority of these new tenants are cafes and fast food restaurants (A3 Use Class) such as Muffin Break and Wok 'n' Go Noodle Bar.

2.36 This scale of change is similar to Basildon where new tenants to the centre are largely independent, and include some enhancement to the food and drink offer. By contrast, the change in Chelmsford with the opening of the Bond Street development has been significant and has meant that new tenants to the town centre include John Lewis, along with a number of other higher-order comparison retailers including Whistles, and also significant enhancement to the commercial leisure offer with the development of a new cinema (Everyman) and accompanying food and drink offer.

2.37 This confirms the points raised by local agents that Southend is not seen by national retail multiples as a location for expansion. This is in the context where Chelmsford, and further afield at Westfield Stratford, has welcomed new retail (and leisure) tenants. This suggests that while those locations have benefited from the polarisation trend within town centres[9], Southend has suffered.

Development opportunities and investment in the town

2.38 The Southend Central Area Action Plan (SCAAP) identifies a number of Policy Areas and Opportunity Sites which are either fully or partly located within the existing PSA and could accommodate additional retail space. These comprise:

- Policy Area PA1 High Street (enhancement of the High Street through development and investment)
- Policy Area PA2 London Road (retail, leisure, café/restaurants, office and residential, and provision of a street market)
- Policy Area PA4.1 'Better Queensway' Project (residential, social & community uses, secondary town centre uses, including small retail, cafes)
- Policy Area PA6 Clifftown (for small scale niche retail);
- Policy Area PA7.1 Tylers (retail, residential, public parking, transport interchange)

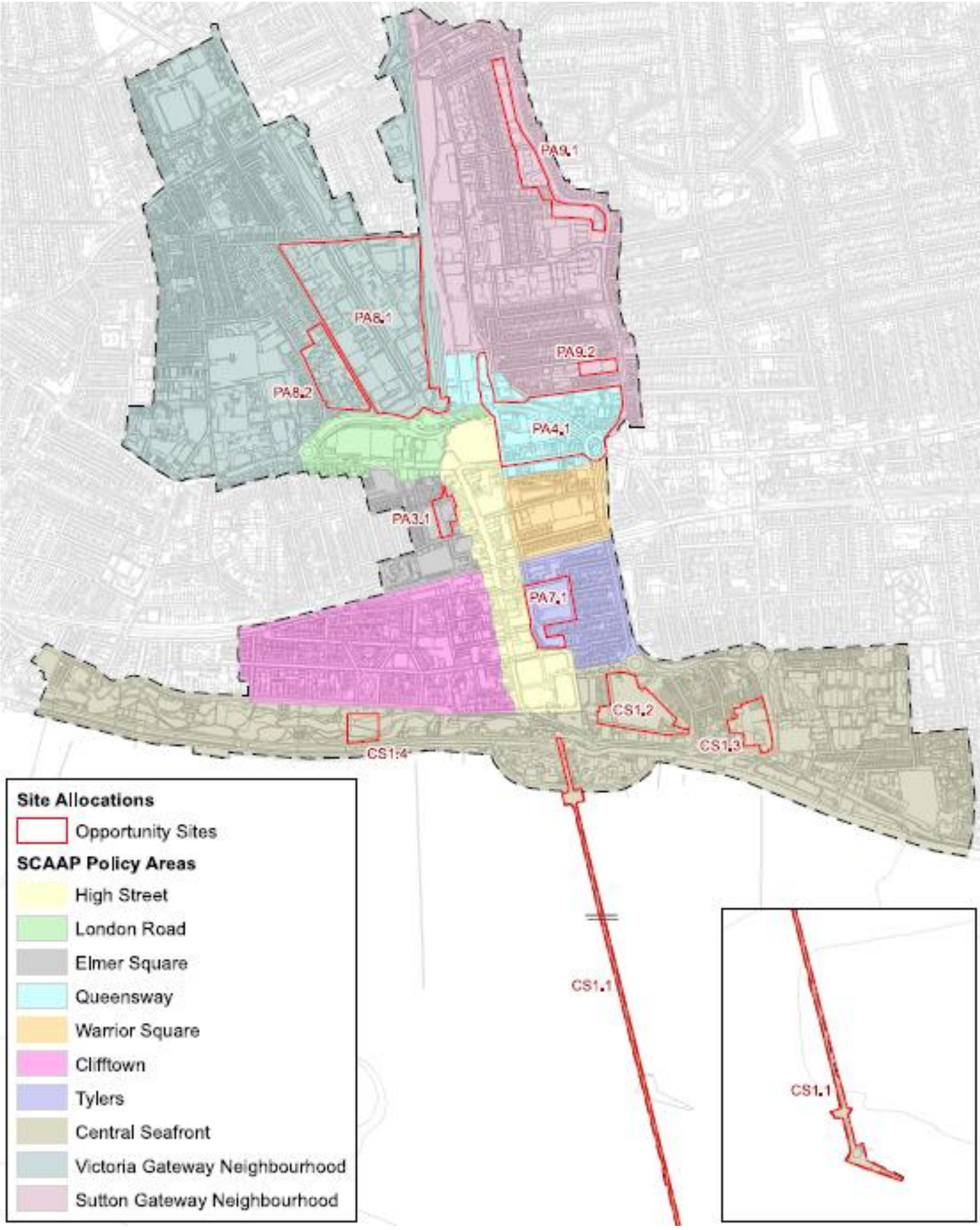
2.39 Beyond the PSA and as shown in Figure 2.6 below, there are several significant leisure allocations:

- Central Seafront Policy Area CS1.1 Southend Pier (leisure & cultural uses, including cafes, restaurants, small shops
- Central Seafront Policy Area CS1.2 Seaways (leisure, tourism, restaurants, cinema, hotel, public parking
- Central Seafront Policy Area CS1.3 Marine Plaza (residential, leisure, restaurants, local shops

[9] Explored in detail in the SESRS Part 1

- Central Seafront Policy Area CS1.4 New Southend Museum (cultural, leisure, public parking, supporting café, restaurant and shops)

Figure 2.6 SCAAP policy areas and opportunity sites extract



Source: SCAAP (Map 7)

2.40 Progress has been made on a number of these sites. There is a planning permission at Marine Plaza for 687 sqm (gross) comparison retail, together with a further c. 2,000 sqm of A3 and D2 uses. While an application has not been submitted, a screening request has been made on Seaways for a leisure scheme to include a cinema (4,032 sqm), other D2 uses (3,240 sqm), food and drink uses (5,177 sqm) and an 80-bed hotel (2,966 sqm) (all figures GIA).

2.41 This indicates that leisure-led schemes are being pursued in the town but that rather than being focused on the primary shopping area, it is the Central Seafront part of the town that investment is being focused.

2.42 Outside the town centre, there has been a historic permission for a new football stadium which included substantial comparison retail development at Fossetts Farm (see also paragraph 2.25 above). This has now lapsed but, as set out above[10], a new application has been submitted for a revised scheme which the Part 1 study considered in a further capacity sensitivity.

Environmental quality

2.43 Southend town centre is a mix of modern (the most modern buildings being the University of Essex teaching facilities and student accommodation and the Forum facilities) and heritage buildings, with a number of local and national designations (including frontages of townscape merit and listed buildings). While the quality of the buildings in the town centre are juxtaposed in places, a number of buildings continue to make an important contribution to the character and context of the High Street. Where there are examples of poorer quality building stock, there may be scope for enhancement through renovation or redevelopment to improve the quality of the frontage – and there are already instances of this taking place in the town centre. Although a little dated, the maintenance of the shopping centres was of a high standard.

2.44 The environmental quality of parts of the centre is considered poor due to the quality of elements of the built environment, including poor quality shopfronts, coupled with the quality of the surrounding hard and soft landscape which could be sensitively enhanced to improve the setting of buildings and the wider high street experience for shoppers and visitors. Parts of the primary shopping frontages between the Victoria shopping centre at the northern end of the High Street and The Royals at the south were of poor environmental quality with little in the way of soft landscaping and limited street furniture. This, combined with the pedestrianised nature of those parts of the centre and mixed quality of the buildings, means that shoppers are not encouraged to dwell in this part of the centre and instead are funnelled southwards down towards the sea front.

2.45 As shown in Figure 2.7 below, inter-connectivity within the centre is aided by the way-finding signage and maps. While street furniture is generally coordinated its appears dated in places, and an updated approach to the quality and location of street furniture, including seating and lighting for example, could be used to improve the High Street experience. Examples include modern street furniture used at The Forum development, adjacent to the High Street.

[10] Footnote 6

Figure 2.7 Southend town centre environmental quality

Source: PBA (2016) signposts for directions on the High Street

2.46 While Southend Town Centre is in proximity to a number of green and open spaces, including Warrior Square Gardens, Elmer Square green and public spaces, and Southend Cliff Gardens, green spaces/landscaping is lacking in the High Street and a number of the adjoining side streets, and there may be scope to further enhance the area to create an attractive environment, through the introduction of street trees, planters, pocket parks, and public open spaces.

Accessibility and pedestrian flows

2.47 Southend town centre can be accessed via a range of public transport facilities, including two railway stations, travel centre and bus interchange. Southend Central railway station is in the middle of the town centre adjacent the west side of the High Street on Clifftown Road, and it provides regular connections to local stations within the Borough and to Basildon and London Fenchurch Street. Southend Victoria train station is located at the north end of the High Street, and it provides links to other stations in the Borough, the Rochford district, including London Southend Airport, other stations within South Essex, and onto Stratford and London Liverpool Street.

2.48 Bus services provide local services within the Borough, to London Southend Airport, and connections to the surrounding local towns, including Rayleigh, Basildon, Canvey, Hadleigh and Chelmsford. There is also a long distance service X30 to Stansted Airport. The main bus terminus is the travel centre located in the southern part of the town centre on Chichester Road, adjacent the east side of the High Street.

2.49 The town centre is highly accessible by car via the A13 and A127 although the network is operating near capacity. There are a large number of private and public car parks and off street parking facilities located throughout the town centre.

2.50 With the exception of a small service road area in the southern part of the High Street, the High Street is fully pedestrianised from the Victoria shopping centre in the north to the Royals in the south providing a safe environment for shoppers. Two east-west highway routes cross the High Street in its southern section at Tylers Avenue and Alexandra Street. These are managed through a traffic light system.

2.51 While cyclists are not permitted to ride their bikes on the pedestrianised areas of the High Street alternative designated routes are provided linking the north of the High Street to the seafront areas to the south. Cycle parking facilities are provided in or adjacent the High Street. Southend also currently has three bike hire options, Motion Hub, Bike and Go and Comfy Saddle with bike stations at the Civic Centre, Victoria and Central railway stations.

Perceptions of safety

2.52 At the time of the survey[11], there is a relatively high footfall within the town centre, creating a positive perception of safety; however, it is noted that the Council have suggested that pedestrian activity is more limited in the evenings. The pedestrianised area protects the shoppers from the main traffic flows and there are plenty of CCTV cameras throughout the centre for added security.

Table 2.3 Southend Central annual average number of crimes

2011	2012	2013	2014	2015	% change (2011 – 2015)
789	758	734	701	750	-4.9

Source: Ukcrimestats.com - Essex Police (2016)

2.53 Table 2.3 shows the average number of crimes committed in Southend Central (this area includes Southend and Westcliff). The crime rates experienced a steady decline between 2011 and 2014; however, there was a sharp increase in 2015. Despite this increase, the percentage of crimes committed has decreased by 4.9% in total since 2011.

2.54 In the survey discussed in the following section, there were some concerns regarding security measures. Amongst these concerns were the general need to improve security, such as more police and CCTV, and more specifically control on anti-social behaviour.

Customer views

2.55 The household survey undertaken in support of this study[12] included questions designed to understand residents' opinions of the town centres in SSBC. The study specifically sought to understand how people who currently use the town centres felt they could be improved.

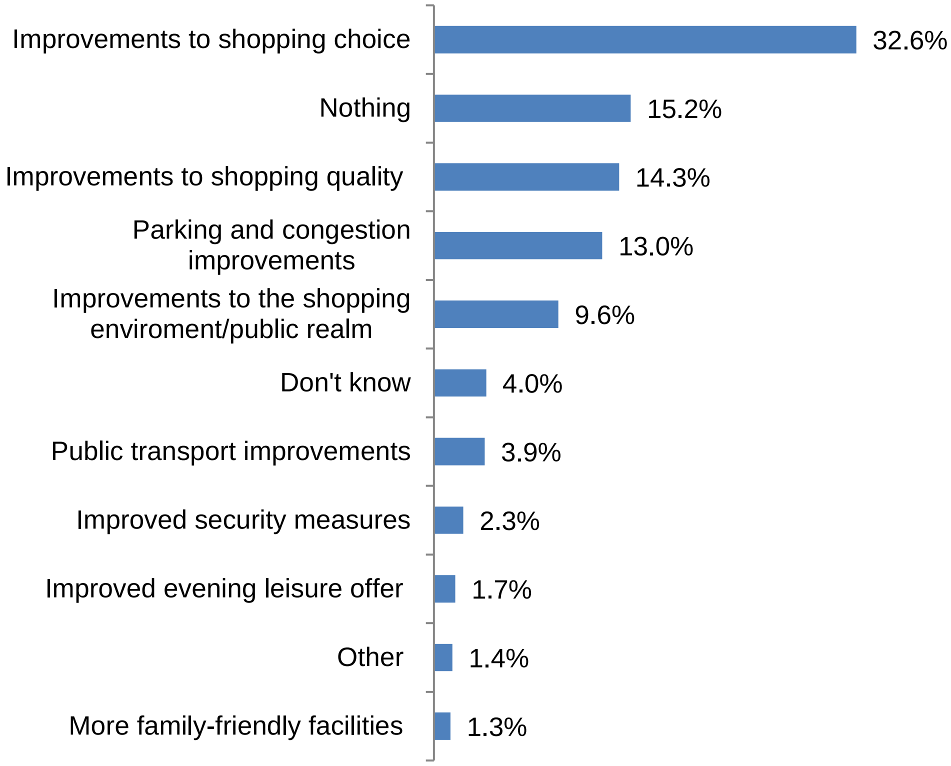
2.56 Figure 2.8 2.8 illustrates how residents felt Southend town centre could be improved. 32.6% of respondents wanted to see improvements to shopping choice in the centre. Within this, 18.7% wanted a better choice of shops in general; and while 6% wished

[11] 11am-2pm, weekday

[12] For further detail, please refer to SESRS Part 1

for more national multiple retailers, 7.4% wanted more independent shops. Thus, implying the selection of both independent and national multiples is inadequate.

Figure 2.8 Scope for improvements to Southend town centre



Source: NEMS household survey (2016) Q32A

2.57 Additionally, 14.3% of the respondents wanted improvements to the quality of shopping, with the largest request to have better quality shops. Other requests include fewer empty shops and fewer charity shops, which are considered to lower the quality of the town centre.

2.58 Respondents commented on improvements to the shopping environment and public realm. This includes cleaner streets and improvements to the appearance of the town centre. Parking improvements was also a point of interest with 13% wanting cheaper, or free, parking and more spaces made available in the centre.

2.59 Such comments are not untypical of these types of surveys and do not necessarily point to there being significant deficiencies. However, over 15% of respondents commented that there was nothing they would seek to improve. In PBA's experience, this is a relatively low proportion of responses; implying that users' expectations of the centre are higher than it is performing at present.

Summary

2.60 Southend plays an important role as both a convenience and comparison shopping destination for Borough residents, and people living in adjoining areas. The convenience offer is anchored by a large Sainsbury's store, but the town centre faces fierce competition from significant out-of-centre floorspace, including a large Tesco, Waitrose and a handful of discounters.

2.61 In relation to comparison provision, the majority of retailers in Southend are value to mid-market. There is little evidence of demand from further comparison retailers, despite falling rents in the prime areas, nor has there been any substantial investment in the town centre in the period since the last study was undertaken.

2.62 This could be a consequence of macroeconomic factors i.e. the structural changes in town centres described in some detail in the Part 1 study. Alternatively, it could be a product of local factors such as the longer-term uncertainty the Fossetts Farm permission (and now current application) has created for the future prospects of the town centre; or the investment that has taken place in Chelmsford with the recent Bond Street development, anchored by John Lewis. It is likely to have been a combination of these factors.

2.63 Access to the town centre, both via car and public transport, is of good standard, and the pedestrianisation of the High Street improves the overall town centre environment in part, although the poor quality of some shopfronts and buildings, and of the surrounding public realm, together with the impact of vacant units detracts from this in some locations.

2.64 At present, despite the cultural and heritage assets in the town centre, the leisure offer is limited; however, there is evidence of investment in the town, with a number of leisure-led schemes either with permission or being promoted.

2.65 On balance, while the centre is performing adequately, its role is focused on value and it competes primarily with Basildon in terms of role and function; it does not provide competition to Chelmsford, where the retail and leisure offer is focused at the higher end of the market. Added to this, there is evidence of weakness in terms of low demand from comparison and leisure operators and difficulties in retaining tenants in the town which could be exacerbated if out-of-centre competition is increased. The leisure-led development proposals coming forward are encouraging and should be supported but there is a concern that deterioration of the retail offer could undermine Southend's role as a major centre.

Westcliff-on-Sea

2.66 Westcliff is one of two district centres in SSBC, and it is located approximately 1.5 km to the west of Southend town centre. It is identified in the Core Strategy and Development Management DPD as a centre which should provide local comparison shopping alongside convenience shopping and services for the local and neighbouring communities.

Figure 2.9 Westcliff district centre map

Source: Appendix D Shopping Frontage Management Technical Report (2013)

2.67 Westcliff is mostly a linear centre located along Hamlet Court Road, running southwards from the A13. A small section of the centre extends along London Road at the north. As shown in the map extract in Figure 2.9, the primary shopping frontage is located in the centre of Hamlet Court Road, with the Secondary Frontage at either end of the district centre. Westcliff consists of around 48,800 sqm of retail floorspace.

2.68 Hamlet Court Road contains a mix of building styles, including a number of heritage buildings (including designated Frontages of Townscape Merit and a Grade II listed building, former Havens Department Store) juxtaposed with some more modern replacements. The quality of the street scene is mixed, with a number of the heritage buildings and shopfronts retaining historic features and integrity, where in other places this character has been eroded. The centre was subject to public realm enhancement works a number of years ago, and generally benefits from a coordinated streetscape, although there may be scope for further enhancements to help lift the quality of the area.

Diversity of uses

2.69 Table 2.4 compares the proportion of different types of units found in Westcliff, and their floorspace, against the national average figures. This provides an indication of under provision or over provision of certain uses. The plan enclosed at Appendix C shows the distribution of uses throughout the centre.

Table 2.4 Westcliff diversity of uses compared to national average

Use	Westcliff units		UK units average	Westcliff sqm		UK sqm average
	No.	%	%	No.	%	%
Convenience goods	44	13.2	9.3	8,110	16.6	18.4

Use	Westcliff units		UK units average	Westcliff sqm		UK sqm average
	No.	%	%	No.	%	%
Comparison goods	104	31.2	39.7	17,380	35.6	44.9
Food and drink	73	21.9	17.1	9,500	19.5	12.7
Service retailers	69	20.7	20.6	7,720	15.8	12.8
Miscellaneous	4	1.2	1.2	600	1.2	1.0
Vacant units	39	11.7	12.2	5,530	11.3	10.2
Total	333	-	-	48,840	-	-

Source: Experian GOAD and PBA (2016)

2.70 Westcliff contains three of the current 28 GOAD key attractors. The only key attractor present in the comparison sector is Boots and the other remaining attractors are Sainsbury's and Tesco.

Convenience goods

2.71 The Table 2.4 shows that there is an above average supply of convenience goods units, at 13.2% in Westcliff compared to the national average of 9.3%. However, in terms of floorspace, there is 1.8% less in the centre than the national average. This suggests that although there is an ample supply of convenience units, these are all small scale. The largest convenience store is the Sainsbury's Local, and there are other national operators in the form of a Tesco Express, Co-op and Londis. There is also a significant supply of independent convenience operators, which occupy the smaller units.

Comparison goods

2.72 The table shows that there is an undersupply of comparison good units and floorspace, with units at 31.2% compared to the average of 39.7%, and floorspace at 35.6% compared to 44.9%. Few clothing and footwear retailers occupy the centre and those that do are smaller independent retailers such as D-Marie, Mystique and Anaya Boutique. The Havens Department Store, which was once an important retail offer in the centre, has recently closed.

2.73 The remaining comparison offer is dominated by a selection of homeware goods, stationery and art stores, and a selection of charity and second hand units. There are limited national multiples, with shops including, Boots and Bathstore at the forefront of those existing. The general comparison retail offer is value to mid-market.

Service retailers

2.74 Table 2.4 also shows the proportion of service retailers and food and drink facilities compared to the national average. The food and drink offer in Westcliff is above the national average for units and floorspace. There are virtually no national multiples in the food and drink offer in Westcliff, with only Pizza Hut delivery present. All other units are independent or small scale franchises. There is a balanced mix between fast food and take away units and cafes and restaurants, although the majority are at the value end of the market.

2.75 Table 2.4 illustrates that the number of service retailer units (20.7%) is equal to the UK average of 20.6%; however, the proportion of floorspace is approximately 3% more than the national average. Most these services are in the health & beauty sector, such as Manhattan Nails and Halo hair and beauty salon. Additionally, there are a number of estate agents in the centre.

2.76 D2 leisure facilities in the Westcliff area (located outside of the district centre) include the Palace Theatre and Cliffs Pavilion regional entertainment venue which are located outside the northern and southern edges of the shopping centre. Within the centre uses include the Elite Gamer video game centre. The evening economy mainly consists of several pubs, including The Hamlet Court and The Melrose.

Proportion of vacant street level property

2.77 Table 2.4 also shows the proportion of vacant units and floorspace in Westcliff district centre, revealing that the percentage of vacant units and floorspace is in line with the national averages at 11.7%% and 11.3% respectively. This 2016 vacancy rate is significantly less than the 2011 vacancy rate of 18.5%.

2.78 There is a balanced mix of vacant units dispersed throughout the Westcliff district centre, with approximately 56% on London Road and 44% on Hamlet Court Road. The spread of vacancies shows that the majority are located in the Secondary Retail Frontages of London Road.

2.79 To illustrate the change in vacancy rate over time, data provided by CoStar has been used in the production of Figure 2.10. This graph shows the vacancy rate for Westcliff district centre between 2009 and 2016. The district centre boundary used for the calculation of the vacancy rate by PBA and CoStar will be different, and therefore so will the vacancy rate for 2016. Nevertheless, this CoStar data is useful in displaying the rate at which the vacancy rate has changed, revealing a general trend over time.

Figure 2.10 Vacancy rates in Westcliff 2009-2016

Source: CoStar (2016)

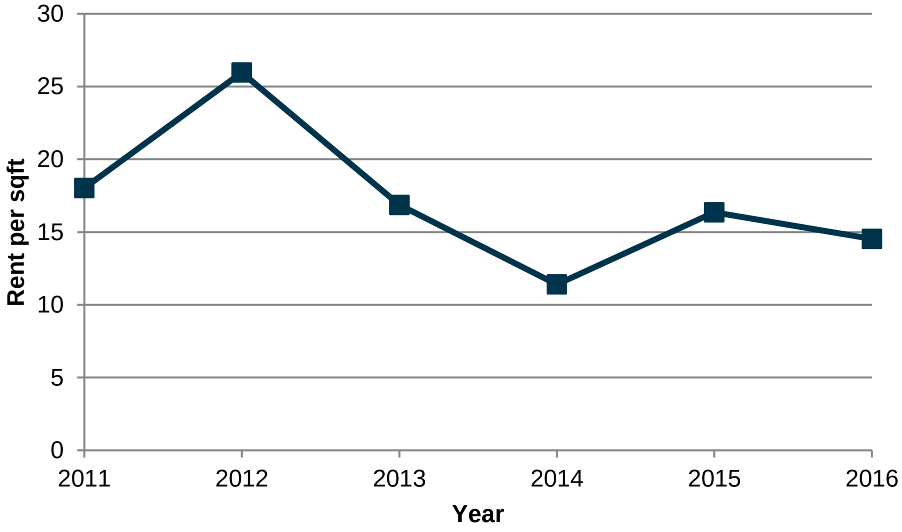
2.80 The data in the above graph shows that the vacancy rate in Westcliff was at its highest in 2012, where it reached 10%. Before this date the vacancy rate remained low, at approximately 2%. Between 2012 and 2016 the vacancy rate has fluctuated between a maximum of 8% and a minimum of 4%, ending at the second quarter of 2016 at 6%.

Commercial rents and yields

2.81 The level of rent that businesses are prepared to pay for retail space in a centre provides a further indication of the relative strength of its retail offer. Using data provided by CoStar, the graph in Figure 2.11 shows the average achieved rent per sqft in Westcliff between 2011 and 2016. The achieved rent figure also includes effective rents; these are rents which have had an incentive, such as a discount for the first few months.

2.82 The below graph shows that the highest achieved rent in Westcliff was in 2012, at almost £26 per sqft. Despite a slight uplift in 2015, the rents have been decreasing since 2012, with the lowest rental figure in 2014 being £11 per sqft. In 2016, the rental figures were achieving approximately £15 per sqft. Analysis of Leigh, provided later in the section, shows that Westcliff has lower rents, suggesting lower retailer demand.

Figure 2.11 Average achieved rents per sqft in Westcliff 2011-2016



Source: CoStar (2016)

Retailer requirements

2.83 The level of retailer demand provides a further indication of the market strength of a centre. There are currently no published requirements for retailers or food and drink operators for Westcliff district centre. This reflects the function of the centre which predominantly provides for local shopping needs with a high proportion of service uses and a low proportion of national multiples.

New tenants

2.84 The quantity and type of new tenants choosing to locate in a centre can provide a perspective on the type of operators attracted to a centre. According to data from CoStar there have been four new tenants in Westcliff district centre in 2016. There is no published evidence of who these occupiers are.

Environmental quality

2.85 The Westcliff district centre comprises a range of building styles, including a number of heritage buildings (including designated Frontages of Townscape Merit and the Grade II listed former Havens Department Store) juxtaposed with some more modern replacements.

2.86 The quality of the streetscene is mixed, with a number of the heritage buildings and shopfronts retaining historic features and integrity, where in other places this character has been eroded, including for example through the replacement of shopfronts.

2.87 Hamlet Court Road was subject to public realm enhancement works a number of years ago, and generally benefits from a coordinated streetscape, although there may be scope for further enhancements to help lift the quality of the area, including through the provision of quality street furniture such as seating and pedestrian lighting.

2.88 The south of the district centre generally has a more pleasant shopping environment than the north, due to the wider pavements and presence of street trees on either side of the street (as well as to the central reservation).

2.89 The district centre is not in immediate proximity to any public parks/green space.

2.90 A number of the vacant units had graffiti and posters on their windows; this was particularly noticeable to those vacant units to the London Road part of the centre.

Figure 2.12 Westcliff environmental quality

Source: PBA (2016), trees on Hamlet Court Road (left), vacant retail unit (right), modern retail in historic buildings on Hamlet Court Road (below)

Accessibility and pedestrian flows

2.91 Westcliff district centre is accessible via public transport. Westcliff-on-Sea train station is located to the south of the centre and it provides good connections to stations within the Borough, London Fenchurch Street and to other local towns in the east. Numerous bus stops are positioned throughout the centre on London Road and Hamlet Court Road, providing links to neighbouring towns such as Basildon, and Canvey.

2.92 The A13 (London Road) runs through the top of the centre and there are small off-street car parks located on the edge of and northern end of Hamlet Court Road. Short-stay on-street parking seems to be the most popular options for parking.

2.93 There are no pedestrianised zones within the centre and only a number of traffic lights for pedestrian crossings. The heavy traffic flow present on the day of the survey and the lack of zebra crossings make crossing the road challenging in parts. The centre appears to give preference to vehicular traffic, detracting from the centre's experience for visitors.

2.94 There are cycle parking facilities located throughout the centre, with clusters near the train station.

Perceptions of safety

2.95 The crime statistics for Westcliff are the same for Southend as they are both included in the Southend Central neighbourhood. There are CCTV cameras throughout the centre, although significantly less than in Southend town centre. The lack of crossings and high volume of cars also provides a safety concern for pedestrians.

Customer views

2.96 The household survey undertaken in support of this study included questions designed to understand residents' opinions of the centres in the Borough. The study specifically sought to understand how people who currently use the Borough's centres felt they could be improved.

2.97 Of the respondents, there were very few who regarded their nearest centre as Westcliff. Those that did respond didn't mention any improvements they would make to the district centre. It is expected that the low response rate could be due to participants of the survey not considering Westcliff as a centre, but instead choosing Southend to be their nearest centre.

Summary

2.98 The retail offer in Westcliff district centre is dominated by convenience operators, and the comparison offer is lacking in variety and quality. The lack of national multiples, and above-average vacancy levels, provides an opportunity for improvement; however, there is limited sign of demand from retailers and other service providers.

2.99 There are good transport links within and on the outskirts of the centre, as well as good car accessibility. There are no pedestrian zones and also a lack of pedestrian crossings in the centre creating issues with safety and the quality of the shopping environment. However, within the centre, the overall environment is enhanced by the quality of building stock along Hamlet Court Road which provides a good basis upon which to improve the centre.

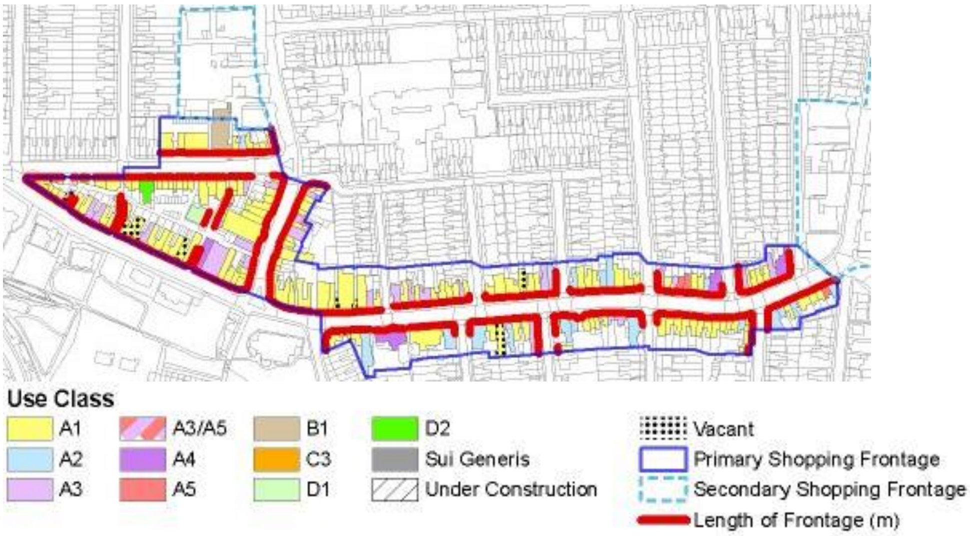
2.100 Overall, the centre is in adequate health when considered against the PPG indicators, with signs that its health has improved (e.g. falling vacancy levels) in the years since the previous health check.

2.101 Given the subdued demand for additional operators in the town centre, the Council may wish to encourage additional residential at the fringes of the existing centre. This could either be done through a formal review of designations, particularly in terms of the extent of secondary frontages, or through a policy to promote mixed-use development in these locations.

Leigh-on-Sea

2.102 Leigh is the second of the two district centres in the Borough, and it is located approximately 3 km to the west of Westcliff district centre. It is identified in the Core Strategy and Development Management DPD as a centre which should provide local comparison shopping alongside convenience shopping and services for the local and neighbouring communities.

Figure 2.13 Leigh district centre plan



Source: Appendix D Shopping Frontage Management Technical Report (2013)

2.103 The centre is linear, extending east to west along Leigh Road, Broadway, Broadway West, and Rectory Grove. A small section extends northwards up Elm Road. As shown in the map extract in Figure 2.13, the secondary shopping frontage is located at the eastern end of Broadway and onto Leigh Road, as well as Elm Road. The remaining parts of the district centre are primary shopping frontages. There is approximately 33,500 sqm of retail floorspace.

2.104 A large proportion of the Leigh district centre is designated as part of the Leigh and the Leigh Cliff Conservation Areas, there are also a number of locally listed buildings within the centre.

Diversity of uses

2.105 Table 2.5 compares the proportion of different types of units found in Leigh district centre, and their floorspace, against the national average figures. This provides an indication of under provision or over provision of certain uses. The map enclosed at Appendix C shows the distribution of uses throughout the centre.

Table 2.5 Leigh district centre diversity of uses compared to national average

Use	Leigh units		UK units average	Leigh sqm		UK sqm average
	No.	%	%	No.	%	%
Convenience goods	30	10.3	9.3	3,910	11.7	18.4
Comparison goods	130	44.8	39.7	14,740	44.1	44.9
Food and drink	39	13.4	17.1	4,590	13.7	12.7
Service retailers	78	26.9	20.6	8,240	24.6	12.8
Miscellaneous	3	1.0	1.2	570	1.7	1.0
Vacant units	10	3.4	12.2	1,380	4.1	10.2
Total	290	-	-	33,430	-	-

Source: Experian GOAD and PBA (2016); and, Experian GOAD (2016)

2.106 Leigh district centre contains three of the current 28 GOAD key attractors which are defined as those multiple retailers which are most likely to improve the consumer appeal of a centre. The key attractors present in the comparison sector are Boots and Superdrug and the remaining attractor in the convenience sector is Tesco.

Convenience goods

2.107 The table above shows that the number of convenience units in Leigh (10.3%) is slightly above the national average (9.3%). However, the floorspace figure is 6.7% less than the national average, indicative of the convenience stores available generally being small scale units. The majority of convenience retailers are independent such as butchers, green grocers, off licenses or specialty food venders. A Co-op supermarket is located on The Broadway in the middle of the centre. In addition, there is a Tesco Express on The Broadway and a small Co-op store at the edge of the centre on Leigh Road.

Comparison goods

2.108 Table 2.5 shows that the comparison goods floorspace in Leigh is in line with the national average at 44%. It also reveals that the number of units is higher than the national average, 44.8% and 39.7% respectively. There are no national multiple retailers representing comparison goods. Many of the retailers are small and independent mainly offering ladies and men’s fashion items.

2.109 The vast range of quality, independent stores, art galleries, antique shops, craft shops and jewellers creates a strong centre character. There is an eclectic mix of retailers which all provide a mid-market to quality retail offer and represents the highest quality offer in the Borough.

Service retailers

2.110 The above table also shows the proportion of service retailers and food and drink facilities compared to the national average. The percentage of food and drink units by number in Leigh is 3.7% less than the national average, whereas the floorspace figure is 1% more than the national average. The majority of the food suppliers are small, good quality, independent cafes and restaurants. Of the national multiplies, only Costa, Wimpy and Subway are present in the food services. There is a balanced mix between cafes and restaurants and takeaway and fast food services.

2.111 Of the service retailers, Leigh district centre has significantly more units and floorspace in this use than the national average. There are numerous independent hairdressers and health and beauty units such as The Ark, Mengo and Jon Sturgeon. There are also some more unique services such as a dog grooming parlour and ladies only tattoo parlours. Other services include retail banks and many estate agents.

2.112 The D2 leisure offer comprises several gyms and fitness facilities, such as Club One Hundred and a yoga studio, together with the facilities provided at Leigh Community Centre, which includes a range of local classes. The evening economy offer is varied for a centre of its size, attracting a mix of locals and visitors, with several wine bars and pubs, such as Ten Green Bottles and The Sarah Moore.

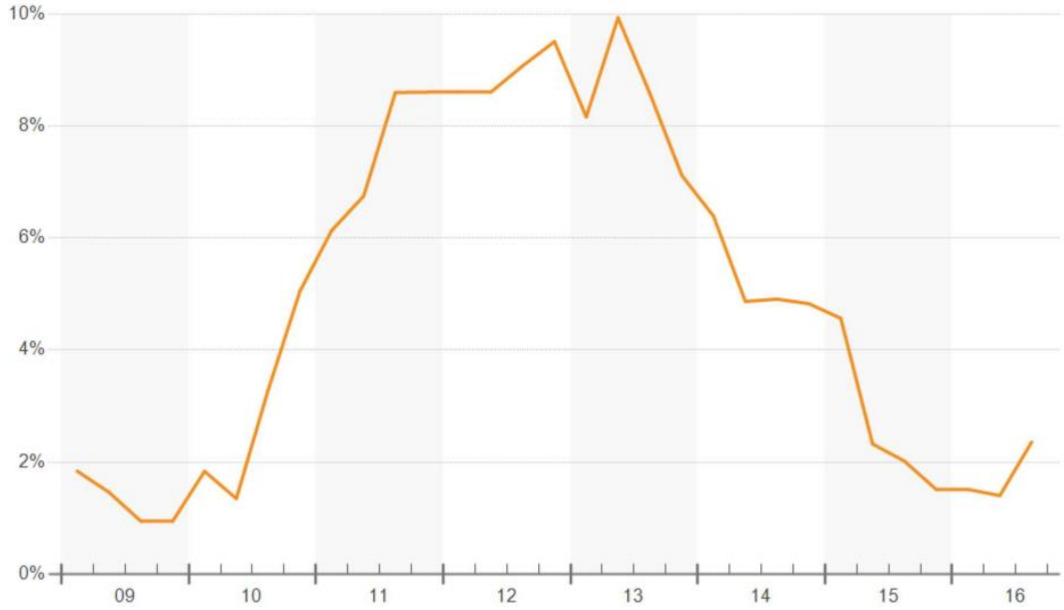
Proportion of vacant street level property

2.113 Table 2.5 also shows the proportion of vacant units and floorspace in Leigh. The vacancy rate is significantly below the national average, with only 3.4% of units vacant in Leigh compared to the national average of 12.2%. In the 2011 retail study, vacant units were also below average at 8.05%; this indicates a fall in the quantity of vacant units over the last five years and is indicative of the strength of the centre.

2.114 There were no vacant units within the primary shopping frontages of The Broadway at the time of survey. Vacant units were located on the edge of the centre to its east or west, with a cluster of vacancies near the junction of Carlton Drive and Leigh Road.

2.115 To illustrate the change in vacancy rate over time, data provided by CoStar has been used in the production of Figure 2.14. This graph shows the vacancy rate for Leigh district centre between 2009 and 2016. The district centre boundary used for the calculation of the vacancy rate by PBA and CoStar will be different, and therefore so will the vacancy rate for 2016. Nevertheless, this CoStar data is useful in displaying the rate at which the vacancy rate has changed, revealing a general trend over time.

Figure 2.14 Vacancy rate in Leigh 2009-16



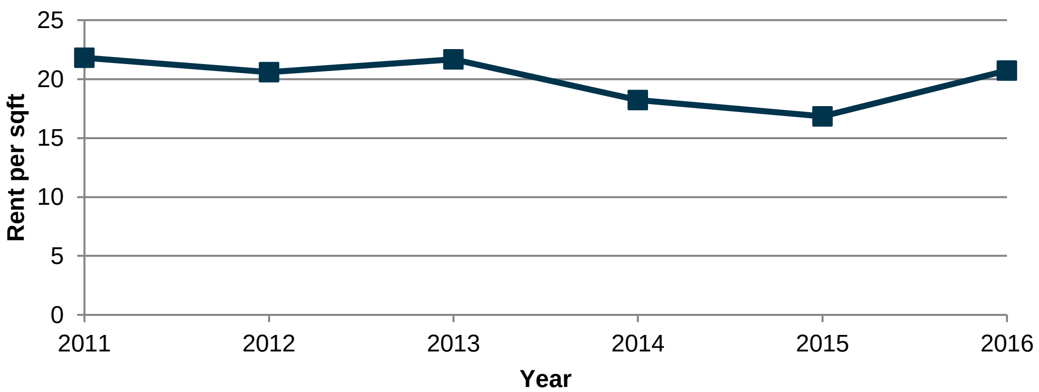
Source: CoStar (2016)

2.116 The data in the above graph shows that the vacancy rate in Leigh peaked at above 8% between 2011 and 2013. Since then, the vacancy rate has been declining, reaching a low of approximately 1.5% at the end of 2015. This demonstrates that the health of the centre was improving as the vacancy rate was falling. However, the CoStar data also shows that from the start of 2016 the vacancy rate started to increase again.

Commercial rents and yields

2.117 The level of rent that businesses are prepared to pay for retail space in a centre provides a further indication of the relative strength of its retail offer. Using data provided by CoStar, the graph in Figure 2.15 shows the average achieved rent per sqft in Leigh between 2011 and 2016. The achieved rent figure also includes effective rents; these are rents which have had an incentive, such as a discount for the first few months

Figure 2.15 Average achieved rents per sqft in Leigh 2011-2016



Source: CoStar (2016)

2.118 The above chart shows that average achieved rents in Leigh are relatively stable in comparison to the other centres of Southend and Westcliff. The highest rent was achieved in 2011 at almost £22 per sqft. There has been a gradual decrease in rental prices in Leigh since 2011, with the lowest figure of £17 per sqft occurring in 2015. Nevertheless, 2016 has seen the rental prices rise once again, up to £20 per sqft. This is well above the levels recorded in Westcliff (c.£15 per sqft) and reflects the greater level of demand in Leigh

Retailer requirements

2.119 The level of retailer demand provides a further indication of the market strength of a centre. Table 2.6 shows the current list of published retailer requirements for Leigh provided by Shopproperty.

2.120 Published retailer requirements do not provide a comprehensive picture of retailer demand since operators are becoming less inclined to seek space in this way and as a result fewer requirements are publically available. Nevertheless, it is useful to see the type of operators seeking space in Leigh.

2.121 There are four published retailer requirements for Leigh. The two food and drink retailers looking to locate in Leigh are independent operators, and as such are seeking a small quantum of space. The most significant retailer requirement comes from Aldi, as they are seeking a maximum of 1,440 sqm of A1 floorspace for a new foodstore.

Table 2.6 Leigh retailer requirements

Operator	Class	Date	Min (sqm)	Max (sqm)
GK Coffee Group Ltd	A1	18/07/2016	139	186
Aldi Foodstore Ltd	A1	09/05/2016	418	1,440
Doughocracy	A3	18/04/2016	93	186
Al's Beef	A3	09/05/2016	93	186

Source: Shopproperty (2016)

New tenants

2.122 The quantity and type of new tenants choosing to locate in a centre can provide a perspective on the type of operators attracted to a centre. According to data from CoStar there have been two new tenants in Leigh district centre in 2016. Considering the low vacancy rate in Leigh, it is unsurprising that there have been so few new tenants. There is no published evidence of who these occupiers are.

Environmental quality

2.123 The quality of Leigh centre was generally good. The shop fronts were well maintained, and the variety of units added to the local character, much of which forms part of the Leigh and Leigh Cliff Conservation Areas and includes a number of locally listed buildings (including Clements Arcade and 2-4 Broadway). Although there was a limited selection of street seating, the centre was clean and relatively tidy. At the Broadway West/Elm Road junction, there are plants near the pedestrian crossings, with planters distributed throughout the centre to improve general appearances.

2.124 Leigh Library Gardens is south of Broadway West, providing accessible green space, and the Belton Hills Nature Reserve is only 200 m to the west of the centre, providing a larger area of green space, and connecting the centre to the estuary.

Accessibility and pedestrian flows

2.125 Leigh district centre is well served by public transport. There are two train stations within walking distance to the centre: Leigh-on-sea and Chalkwell, both of which are just less than 1 km to the Broadway and provide connections to local destinations, other towns in South Essex, and to London Fenchurch Street. Bus stops are located throughout the centre, with good connections to Southend and other neighbouring towns.

2.126 There is good car access via the A13 and other local roads. There are a number of car parks, including Council car parks at Elm Road, North Street, and a privately managed car park at the junction with the Broadway/Leigh Road. There are also a number of on-street parking bays to Broadway/Broadway West/Rectory Grove/Elm Road/Leigh Road, together with nearby on street parking at Belton Way and Leigh on Sea station.

2.127 Despite the lack of pedestrianised zones, there are several pedestrian crossings, with zebra crossings being the most prominent. There are no cycle lanes; however, spaces for parking bikes are available throughout the centre.

Figure 2.16 Pedestrian accessibility in Leigh

Source: PBA (2016), zebra crossing in Leigh district centre (2016)

Perceptions of safety

2.128 According to the data from the Essex Police, crime in Leigh has slowly been on the rise, with an increase of 7.5% between 2011 and 2015, although it continues to remain low in comparison with the figures for Southend and Westcliff. During the site visit, the centre felt safe, with ample CCTV cameras and streets which appeared to always be busy with people.

Table 2.7 Average annual number of crimes committed in Leigh

2011	2012	2013	2014	2015	% change (2011-2015)
190.7	189	207	193	205	+7.5

Source: Ukcrimestats.com - Essex Police (2016)

Customer views

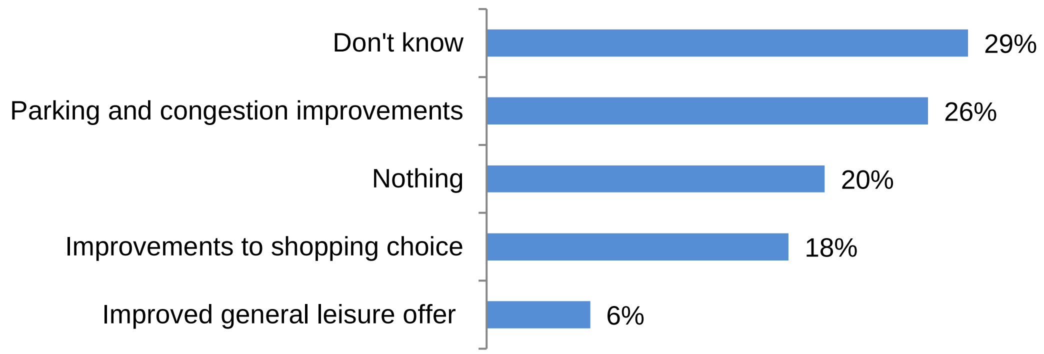
2.129 The household survey undertaken in support of this study included questions designed to understand residents' opinions of the centres in the Borough. The study specifically sought to understand how people who currently use the centres felt they could be improved.

2.130 Figure 2.17 illustrates how residents felt Leigh could be improved. 26% of respondents wanted to see parking and congestion improvements, primarily more parking spaces within the centre. This is in common with comments received on both Westcliff and Southend.

2.131 Respondents have also commented that they would like to see improvements to shopping choice in Leigh. Within this category, there is support for more independent shops and a better choice of shops in general.

2.132 In terms of leisure provision, there is support for a wider range of general leisure facilities and an increase in their quality. However, such comments must be seen in the context of the role and function of Leigh as a centre subordinate to Southend.

Figure 2.17 Customer views on improvements to Leigh



Source: NEMS household survey (2016) Q32A

Summary

2.133 Overall, there is an excellent range of good quality retailers, both comparison and service outlets. In contrast to the other centres in the Borough, it also has a strong evening economy. There are a small number of vacant units which show the strength of the centre. Despite the lack of pedestrianised zones, there are numerous zebra crossings which increase pedestrian safety.

2.134 Given the role and function of Leigh, against the PPG indicators, the centre is in good health.

Retail provision elsewhere in the Borough

2.135 Not all of the retail provision in the Borough is concentrated in the network of town and district centres. This section discusses the retail provision outside the three main centres of Southend, Westcliff and Leigh. The local centres are discussed, followed by out-of-centre retail.

Local centres

2.136 SSBC has five local centres: West Leigh, Thorpe Bay, Eastwood, North Shoebury and Shoeburyness. A desktop review of each centre, drawing on data from Southend-on-Sea's Shopping Frontages Technical Reports of 2013, 2014 and 2016, has been conducted and the main findings are outlined below.

West Leigh

2.137 West Leigh local centre has 42 units and is situated approximately 1.2 km west of Leigh district centre, on London Road. The primary shopping frontage area extends from Sutherland Boulevard to Stirling Avenue, with secondary shopping frontage sandwiching the main portion of the centre.

2.138 According to the 2016 report, approximately 74% of West Leigh's primary shopping frontage is A1 retail units. There were no vacancies within the primary shopping frontage. The majority of the retailers are independent; however, a Tesco Express is located in the secondary shopping frontage area. According to the 2014 report, both of the secondary shopping frontages have 19 retail units, and a 0% vacancy rate.

2.139 The nearest train station is located 1.3 km to the south east of the centre at Leigh-on-Sea. There are ample bus stops throughout the centre providing connections to neighbouring towns.

Thorpe Bay

2.140 Thorpe Bay local centre contains 44 retail units within its primary shopping area and located approximately 3 km east of Southend town centre. The centre is designated as a primary shopping frontage which runs along The Broadway. According to the 2016 report, it is 59% (by unit) occupied by A1 retail uses and there were only two vacant units. The majority of the A1-A5 retailers are independent but there are a few national multiples including Hallmark and Tesco Express.

2.141 Thorpe Bay train station is located just 50 metres north of the shopping centre and is on the c2c line with good connections to other locations in the Borough, neighbouring towns and London Fenchurch Street. There is good parking within the centre, both free and paid options available.

Eastwood

2.142 Eastwood local centre is located on Western Approaches to the west of the Borough. It is located approximately 4 km north-west of Southend town centre and is designated as a primary shopping frontage. According to the 2016 report, the centre comprises of five units, 80% of which are in A1 use. The centre is dominated by a large Morrison supermarket, and has a vacancy rate of 20%. With regards to public transport, most buses have direct links to Rayleigh and Southend, and pass through the north of the centre on Western Approaches.

North Shoebury

2.143 North Shoebury local centre is located on North Shoebury Road and is located approximately 4.5 km east of Southend town centre. The centre is designated as a primary shopping frontage, and according to the 2016 report it contains 12 units, 80% of which are in A1 use. There is an 8% vacancy rate (by unit) in North Shoebury i.e. one unit is vacant.

2.144 Superstore Asda takes up a large proportion of the centre along with its adjoining 530 space car park. The remainder of the units are located at the north of the site; George, McCoys Fish Bar and Havens Hospices are amongst the occupiers of these sites. A bus stop is located opposite Asda where route numbers 1, 7, 8 and 9 pass through allowing for easy access to and from North Shoebury. Car accessibility is good as the site is located on the A13 commuter road.

Shoeburyness

2.145 Shoeburyness local centre is located on West Road, and is designated as primary shopping frontage. The centre is approximately 5 km east of Southend town centre. According to the 2013 report, the centre has 44 retail units, 69% of which are in A1 use. The vacancy rate is 11% and the centre is dominated by small independent retailers such as Craftys Craft Shop and Santa Lucia pizza delivery. The centre has convenience store The Co Op within its primary shopping frontage.

2.146 Shoeburyness local centre is approximately 1.3 km to the west of Shoeburyness train station, which has connections to other locations in the Borough, neighbouring towns and London. There are many bus stops within walking distance from the centre, providing links to neighbouring towns.

Out-of-centre provision

2.147 The established town, district, and local centres all compete with out-of-centre retail and leisure destinations, including: retail parks, free-standing warehouses and large format convenience superstores for expenditure.

2.148 Typically, this floorspace offers ‘bulky goods’ retail, such as DIY goods and furniture, although there is increasing demand from ‘high street’ retailers for units in such developments where planning restrictions allow.

2.149 The borough has a selection of out-of-centre retail facilities, especially in the northern part. This offer is dominated by convenience retailers, who have large standalone sites. Many of the retail parks also offer some comparison retailers, which mainly provide DIY or furniture stores. The table below summarises out-of-centre retail provision.

Table 2.8 Southend-on-Sea out-of-centre retail provision

Centre	Location	Store/facility
Southend-on-Sea	Thanet Grange	Tesco Extra
	Fossetts Park	Waitrose, B&Q
	London Road Retail Park	Homebase, Currys
	Greyhound Retail Park	Matalan, Lidl, Iceland
	Airport Retail park	Argos, Carpetright, Staples
	Southchurch Avenue	Tesco Express
	Woodgrange Drive	Lidl
	Eastern Avenue	Aldi
Leigh-on-Sea	Elmsleigh Drive	Waitrose
Westcliff	London Road	Aldi
North Shoebury	North Shoebury Road	Asda
Eastwood	Western Approach	Morrisons
	Progress Road	Lidl

Source: PBA (2016)

2.150 The out-of-centre leisure offer in the Borough is limited. There is a Mecca Bingo at the Greyhound Retail Park, as well as a variety of leisure centres and playing pitches throughout the Borough, three golf courses, and the leisure offer of the seafront which includes a number of casinos, an amusement park, as well as soft play and bowling at the Kursaal.

Key findings

The Borough contains three main centres which each perform a different role in the retail hierarchy with a distinct retail offer:

- Southend is the only town centre in the Borough and it provides a mixed comparison and convenience retail offer along a linear High Street and with two indoor shopping centres. Its main strengths include the varied selection of comparison national retailers, as well as the diversity in food and drink offer. Southend's retail offer is value to mid-market, and could be improved to provide a selection of better quality stores; however, there is little evidence of demand from comparison retailers and rents have been falling. This is in part likely to be reflection of the wider retail market, and potentially the increased strength of Chelmsford as a sub-regional centre and magnet for investment. The pedestrianisation of the High Street is a positive attribute, as it creates a more pleasant shopping environment, although the quality of the public realm is lacking in places and exacerbated by vacant premises. There is also a high vacancy rate within the Victoria shopping centre which also has scope for improvement. While leisure provision is relatively limited at present, measures within the SCAAP, including a reduction in the primary shopping frontages, are a positive signal to the town centre diversifying beyond retail.
- Westcliff is one of two district centres and it mainly performs a convenience retail role for the local population. The comparison retail offer in Westcliff is limited, and mainly consists of value to mid-market local independent operators. The food and drink offer in the centre is very diverse and there are almost no national multiples. The vacancy rate in Westcliff is broadly in line with national averages; however, the quality of some of the retail frontages could easily be improved to make the most of the historic buildings in the centre and attract new tenants, whether retail or service, into the centre.
- Leigh is the second of the district centres and it provides a unique selection of local independent convenience and comparison retail operators. This is a highly attractive centre, with a well-maintained shopping environment and attractive shop frontages, many of which are within the Leigh and Leigh Cliff Conservation Areas and retain their historic character and appeal. Of the main centres, the retail offer in Leigh is of a significantly higher quality compared to the others. This is also helped by an eclectic selection of service retailers. The vacancy rate in Leigh is very low, suggesting it is popular with retail operators, and that it is a well-used by the local population.
- In addition to competition from outside the Borough (Basildon, Chelmsford, Lakeside), the above centres face competition from out-of-centre retail parks and standalone convenience superstores. These are mainly located in the north of the Borough and the comparison offer tends to involve large warehouse style DIY and furniture stores, which cannot be accommodated in the smaller units within the centres.

3 SPENDING PATTERNS

Introduction

3.1 This section sets out the study area which has been used as the basis of our assessment and then identifies the level of expenditure growth in the retail and leisure sectors which can be expected to come forward over the course of the study period. An assessment of spending patterns is undertaken to identify where residents across the study area are currently undertaking their convenience (food), comparison (non-food) and leisure spending. This exercise is important to establish how much money is spent in centres within SSBC and how much 'leaks' to other destinations in South Essex and further afield.

3.2 The spending patterns assessment is based on a household survey undertaken in July 2016[13]. The map enclosed at Appendix E shows the household survey study area and Part 1 study includes details the postcode sectors contained within in each zone. The survey includes a number of detailed questions on residents' convenience, comparison and leisure spending habits and the full survey results are provided as an appendix to the Part 1 study.

3.3 The study area has been divided into 23 study zones which are based on postcode sector boundaries and also relate to the boundaries of the authorities. The study area covered in the household survey includes the five South Essex authorities and parts of the wider Essex region to the north, Greater London to the east and Kent to the south.

3.4 The larger zones on the periphery of the study area (Zones 19-23) have been incorporated in the survey to understand the influence of those larger destinations in South Essex (Lakeside, Basildon and Southend) on shopping patterns across the wider region. However, the size of these outer zones will distort the spending patterns analysis results to a degree since the analysis is based on total spending derived from each zone. When considering 'expenditure inflow' these larger zones will generate a greater amount of expenditure since they have a greater population. When considering 'expenditure outflow' these zones will have greater potential to attract expenditure relative to smaller zones since they contain a greater number of destinations.

Table 3.1 Study area zones and geography

Geography	Study zones
Basildon	1, 2, 3, 4
Castle Point	5, 6
Rochford	7, 8, 9, 10
Southend-on-Sea	11, 12, 13
Thurrock	14, 15, 16

[13] SESRS Part 1 Volume 3

Outside South Essex	17, 18, 19, 20, 21, 22, 23

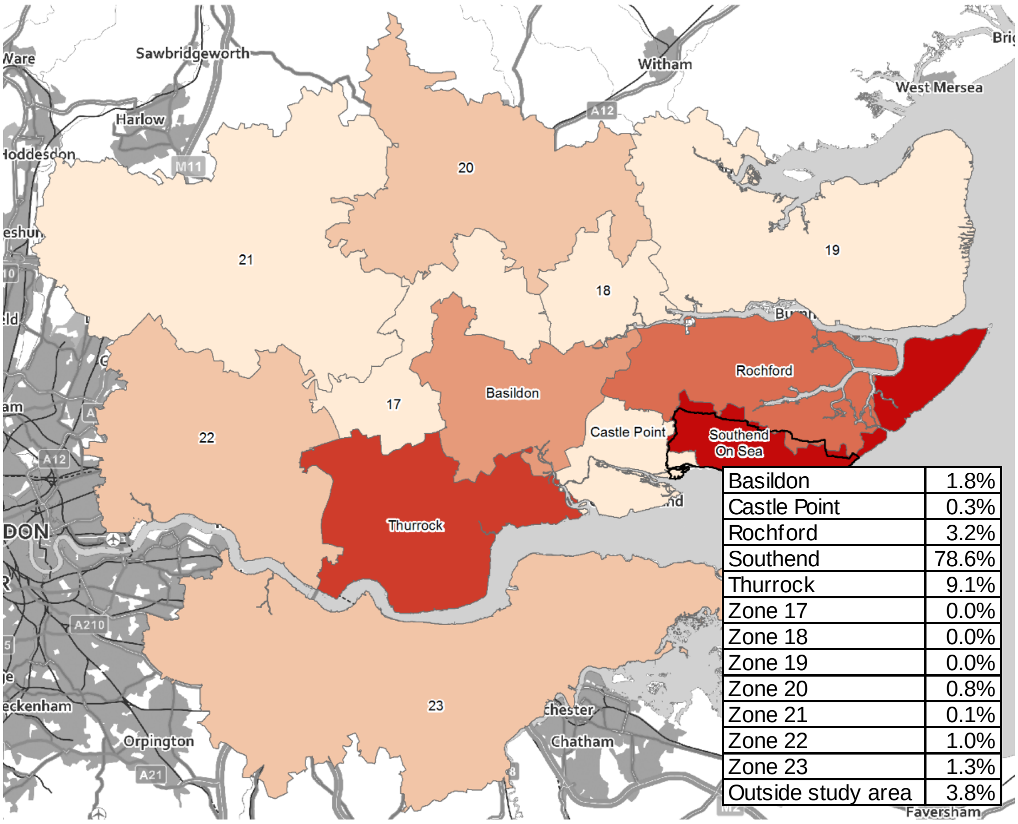
Source: PBA (2016)

3.5 The Borough boundary relates most closely to zones 11, 12 and 13. The table above summarises the zones as they relate to the geography of the study area. Zones 17, 21 and 22 cover the wider Essex area including Barking and Dagenham, Brentwood, Epping Forest, Waltham Abbey as well as the London Borough of Newham. Study zones 18, 19 and 20 cover Chelmsford and Malden and study zone 23 covers parts of Kent including Dartford, Gravesham, Medway and Sevenoaks.

Comparison sector

3.6 The figure below shows the proportion of the total comparison spending generated by SSBC which is retained by each study zone across the study area. This map represents the locations where borough residents are undertaking spending in 2016 according to the survey results.

Figure 3.1 Southend-on-Sea outflow spending patterns



Source: PBA (2016)

3.7 The map shows that the B~~e~~orough retains 78.6% of its comparison spending. This is followed by Thurrock (9.1%), Rochford (3.2%) and Basildon (1.8%). The Borough therefore manages to retain the vast majority of its spending, suggesting that its comparison offer can compete with the town centres in the surrounding authorities.

3.8 The most popular comparison shopping destinations for Borough residents are all located in either the Borough, together with a small percentage flowing to Thurrock and are summarised below with their respective market share:

- Southend town centre (53.3%)
- Southend out-of-centre (15.3%)
- Leigh district centre (4.6%%)
- Lakeside retail parks (4.6%)
- Lakeside shopping centre (4.5%)

3.9 The table below summarises the proportion of turnover of borough facilities which is derived from residents (retained expenditure) and from other zones in the study area (inflow expenditure) as well as how much expenditure is directed to competing destinations beyond the borough zones (expenditure leakage). As can be seen from this table, ~~a~~ just over 20% of comparison expenditure is directed to competing destinations outside the borough.

Table 3.2 Southend-on-Sea comparison spending patterns summary

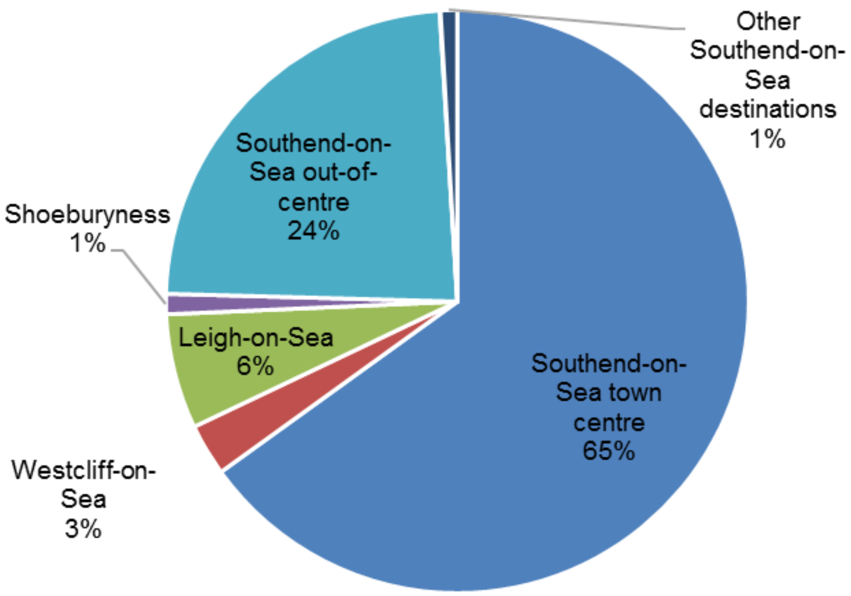
Comparison spending patterns	%
Turnover derived from Southend-on-Sea zones	65%
Turnover derived from elsewhere in study area	35%
Retention in Southend-on-Sea zones	79%
Leakage from Southend-on-Sea zones	21%

Source: PBA (2016)

Comparison spending within the Borough's centres

3.10 As set out in the table above, inflow expenditure from residents living outside the borough represents a significant proportion of the turnover of the borough's comparison offer. The figure below shows that Southend town centre is the primary comparison shopping destination and the borough's other centres play a much more limited role. Out-of-centre comparison provision is currently the second choice destination for those shopping in the borough.

Figure 3.2 Distribution of comparison spending in the Borough's centres (2016)

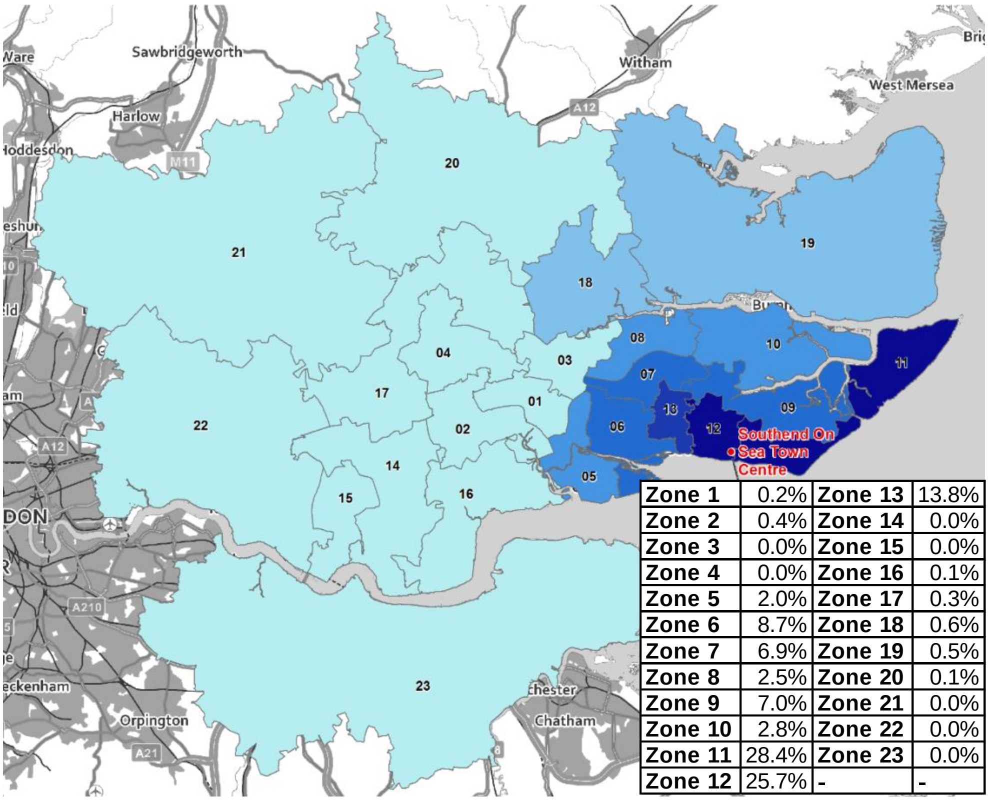


Source: Part 1

3.11 The figure below shows the comparison expenditure generated by Southend town centre, and maps this proportionally across the study area to show where this has come from.

3.12 Outside the borough, a significant proportion of the comparison expenditure comes from Castle Point and Rochford zones (6, 7, and 9). The comparison offer in Southend serves more than just the local population, as it manages to attract a significant proportion of spending from nearby authorities.

Figure 3.3 Southend-on-Sea town centre inflow spending patterns



Source: PBA (2016)

Convenience sector

3.13 Table 3.3 summarises the proportion of turnover of the borough's facilities which is derived from the borough's residents (retained expenditure) and from other zones in study area (inflow expenditure), as well as how much expenditure is directed to competing destinations beyond the borough's zones (expenditure leakage). As can be seen from this table, convenience expenditure retained in the borough totals nearly 80%, with 22% of available expenditure going to destinations outside the borough.

Table 3.3 Southend-on-Sea convenience spending patterns summary

Convenience spending patterns	%
Turnover derived from Southend-on-Sea zones	67%
Turnover derived from elsewhere in study area	33%
Retention in Southend-on Sea zone	78%
Leakage from Southend-on-Sea zones	22%

Source: PBA (2016)

3.14 Overall the Borough retains 78.5% of convenience spending locally which is the second highest retention rate across South Essex, only Basildon (88.5%) has a higher retention rate.

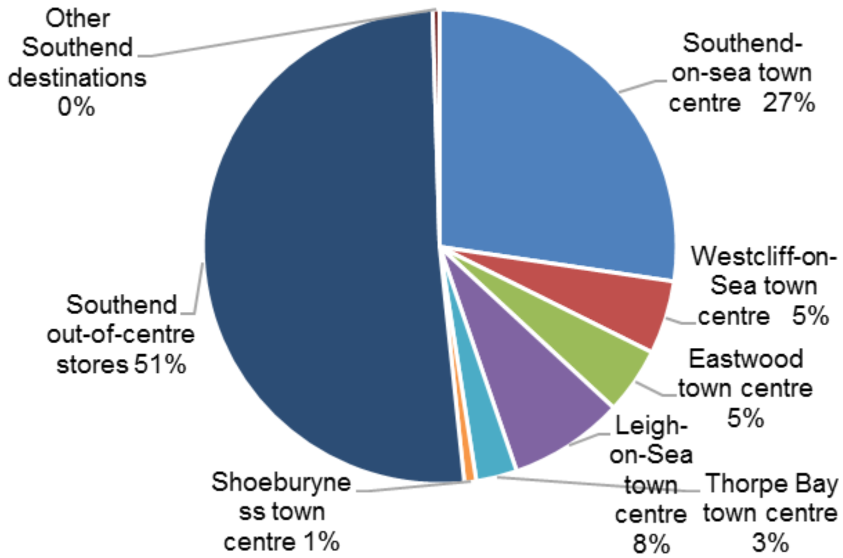
Convenience spending within the Borough's centres

3.15 The five most popular convenience shopping destinations for Borough residents are summarised below with their respective market share:

1. Southend out-of-centre stores (44.4%)
2. Leigh-on-Sea centre (20.2%)
3. Castle Point out-of-centre stores (15.4%)
4. Southend town centre (7.6%)
5. Eastwood centre (7.2%)

3.16 The figure below focuses on the overall trade draw of the Borough's centres. It therefore does not only consider resident spending but also takes account of inflow to the borough from residents living elsewhere in the wider study area i.e. the 33% identified in Table 3.3. The Borough's out-of-centre stores account for just over half of trade drawn to the borough's convenience facilities, while Southend town centre attracts only just over a quarter of convenience shopping spending in the borough.

Figure 3.4 Distribution of convenience spending in the Borough's centres (2016)



Source: Part 1

Leisure sectors

3.17 The uses assessed are those defined as leisure uses within the main town centre uses definition in Annex 2 of the NPPF, namely '*leisure, entertainment facilities and more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls)'.*

3.18 Table 3.4 summarises the proportion of leisure spending in the main leisure categories which is derived from the borough's residents (retained expenditure) and from other zones in study area (inflow expenditure) as well as how much expenditure from the borough is directed to competing destinations (expenditure leakage).

Table 3.4 Southend on Sea leisure spending patterns summary

	Residential expenditure as a proportion of total	Inflow expenditure as a proportion of total	Expenditure retention	Expenditure leakage
Food and drink (A3-5)	62%	38%	87%	13%
Cinema and theatres	62%	38%	81%	19%
Recreation	56%	44%	83%	17%
Games of chance	26%	74%	99%	1%

Source: Part 1

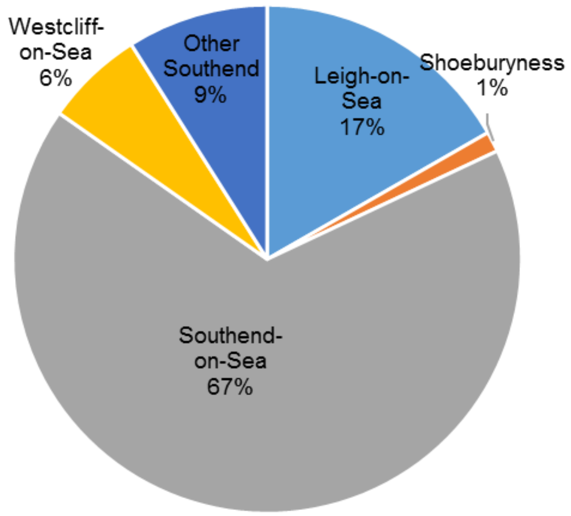
3.19 As can be seen from this table, the Borough retains a relatively high proportion of spending on all leisure categories. However, there is scope to claw back expenditure in the cinema and recreation categories through the provision of additional higher quality or more choice of facilities.

3.20 The Borough attracts a significant proportion of spending from zones outside of the borough, mainly from Castle Point and Rochford which both have limited commercial leisure provision. Added to this, the tourist role of Southend town centre is likely to mean that the level of inflow is higher than found in the household survey. We have not made any specific allowance for it in our analysis though because there is likely to be some tourist/day-trip spending captured by the extensive household survey area. In quantifying needs, we give further consideration to the role of tourist spending.

Leisure spending within the Borough's centres

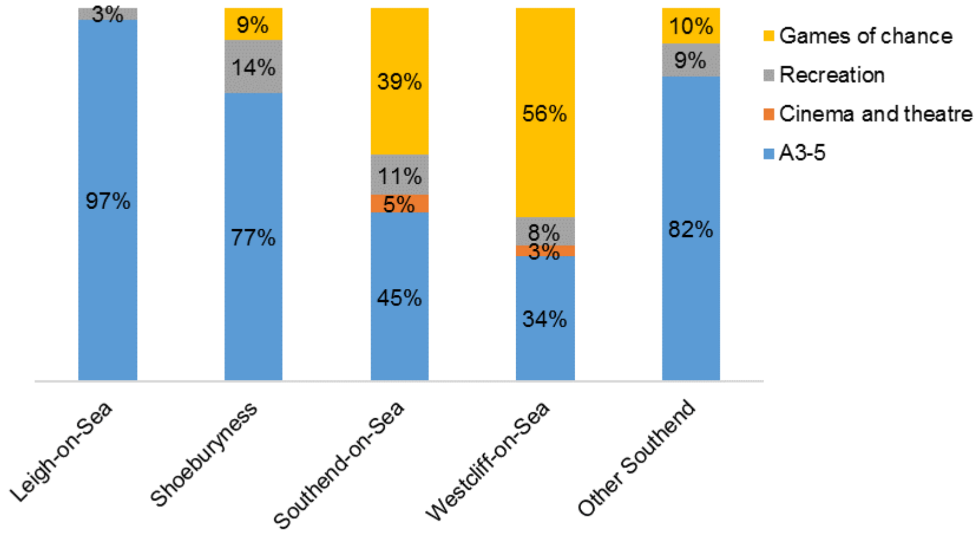
3.21 The figures below show the share of leisure spending in the Borough by centre and the relative importance of each of the above categories in the leisure function of the main centres in the borough. These include inflow expenditure from people living outside the borough.

Figure 3.5 Share of leisure spending in Southend centres



Source: Appendix F

Figure 3.6 Breakdown of leisure destinations' market shares by category



Source: Appendix F

3.22 These show that:

- Southend is the most significant leisure destination, accounting for two thirds of leisure spending in the Borough. It also has the widest leisure offer of the Borough's centres.
- Leigh has the second largest leisure turnover of the Borough's centres, accounting for 17% of overall spending. This comprises almost entirely spending on A3-5 uses.
- Westcliff accounts for 6% of leisure spending made in the Borough. Unlike the other locations, games of chance attract the largest proportion of leisure spending in the centre; A3-5 uses play a secondary role. Alongside Southend, Westcliff is the only centre that attracts any cinema/theatre expenditure (Palace Theatre).

- Shoeburyness has a very limited leisure function, in large part made up of spending on A3-5 uses.
- Out-of-centre destinations attract 9% of leisure expenditure made in the Borough. This is made up of over 80% of A3-5 uses, with the remaining proportions accounted for by recreation and games of chance.

Key findings

Retail

- Southend town centre is the most substantial comparison destination in the Borough. It exerts influence across much of South Essex and, while there is competition from out-of-centre facilities, their role is subordinate to the town centre.
- Leigh town centre meets some comparison needs of Borough residents' and, to some extent, those from Castle Point and Rochford, but this represents a fraction relative to Southend town centre. Similarly, while Westcliff does meet some comparison needs, these are largely limited to the town's home zone.
- Southend-on-Sea's convenience facilities retain 78% of available residents' spending; this is a reasonable level of retention. The performance of those facilities is then bolstered by inflow from outside the Borough. This underlines the role Southend plays in meeting convenience shopping needs of a larger-than-local population. While a significant proportion flows to out-of-centre facilities, the network of foodstores within the town centres ensure they play an important role in meeting convenience shopping needs.

Leisure

- Food and drink spending, which accounts for the vast majority of leisure spending, is largely retained within the Borough. All of the Borough's main centres play a role in meeting food and drink needs and for most of the centres, accounts for the largest share of leisure turnover.
- Because the Borough includes an Odeon cinema in Southend and the Palace theatre and Cliffs Pavilion in Westcliff, the Borough retains a reasonable proportion of resident-generated expenditure and also attracts inflow from adjoining Boroughs, particularly Castle Point and Rochford which have little or no facilities.
- At present, most leisure facilities are located within the Borough's network of centres and as a result, out-of-centre retail destinations do not play an important role in meeting leisure needs of Borough residents or attract much inflow spending to the borough.

4 RETAIL NEED

Introduction

4.1 The Part 1 report for South Essex established the overall quantitative needs for the five authorities. In identifying quantitative needs, while two population scenarios (baseline and housing-led) were tested, for the purposes of this report, we focus on the preferred housing-led scenario (the main case).

4.2 However, as set out in Section 10 of the Part 1 report, because the distribution of housing growth across the five authorities has yet to be confirmed, the figures we discuss below should be treated as a starting point.

4.3 We also consider qualitative needs. Both the NPPF and PPG are silent on the weight to be attached to qualitative needs, and how such needs should be assessed. While recognising that it has been revoked for some years, we make reference to the last set of published guidance provided as a supporting document to the revoked PPS4. This advised that the qualitative factors to account of include:

- Identifying gaps in local provision;
- Consumer choice and competition;
- Overtrading;
- Location-specific issues; and
- Quality of existing provision.

4.4 These overlapping criteria are considered in relation to comparison and convenience needs, taking account of the findings of the health checks set out in Section 2.

Comparison goods

4.5 Because of the substantial comparison commitments outside the Borough, there is limited short-term capacity. The Part 1 report identified overall comparison need for the five authorities of between 153,200 sqm to 185,500 sqm net by 2037. The former calculates capacity by deducting commitments; the latter number is based on the impact sensitivity which specifically modelled the diversion effects of the Lakeside and Bluewater extensions.

4.6 The implications for the Borough, as well as the overall South Essex context, are set out in the table below.

Table 4.1 Comparison goods need for Southend (net sqm)

Scenario	Area	2021	2026	2031	2034	2037
Main case	Southend	2,408	14,753	28,563	38,508	49,297
	South Essex	-30,997	25,278	90,953	137,234	185,485

Scenario	Area	2021	2026	2031	2034	2037
Impact sensitivity	Southend	2,408	-408	11,991	20,772	30,133
	South Essex	-30,997	-8,613	57,758	104,515	153,226

Source: Part 1

4.7 While the impact sensitivity is the starting point for identifying need in the Borough over the study period, this must be set into a qualitative context. Under the impact sensitivity, quantitative need in the Borough is lower than in the main case because Lakeside's draw over the Borough's residents is expected to increase, resulting in a slight fall in comparison retention.

4.8 The health checks of the main centres highlighted qualitative deficiencies in the comparison offer in Southend town centre. Given the planned expansion at Lakeside and the improvements to Chelmsford's comparison offer, there is justification for supporting enhancements to Southend's comparison function in order for the town to maintain its current role and function as a major centre and facilitate sustainable spending trips/patterns. However, this in itself does not necessarily point to the need for quantitative uplift in comparison floorspace. We discuss the point further in the next section.

Convenience goods

4.9 Unlike comparison goods, there is some convenience goods capacity in the short term, which is reduced to just over 200 sqm (net) by a number of small commitments across the Borough. Over the whole period, there is sufficient to accommodate a number of new foodstores, having regard to the smaller-format stores (1,000 to 2,500 sqm net) which are now typical.

Table 4.2 Convenience goods need for Southend (net sqm)

Scenario	Area	2021	2026	2031	2034	2037
Main case	Southend	237	1,469	3,052	4,106	5,184
	South Essex	-7,560	-3,759	3,029	7,536	12,342

Source: Part 1

4.10 In addition to quantitative needs, it is also relevant to consider qualitative needs. While the Part 1 study did not make any specific adjustments to take account of overtrading. However, we have considered it as part of this report. The table below shows that on average, the Borough's main stores are trading at an above benchmark level. While some stores are undertrading, for example M&S in Southend town centre, others are substantially overtrading, including the in-centre Sainsbury's and several of the out-of-centre discounters.

Table 4.3 Benchmark vs implied turnover of selected convenience stores in the Borough (2016)

Location	Store	Net sales (sqm)	Sales density (£/sqm)	Benchmark turnover (£M)	Implied turnover (£M)	Over/under trading
Southend town centre	Iceland, York Road	522	£6,458	£3.37	£9.04	268%
	Marks & Spencer, High Street	1,015	£10,871	£11.03	£5.75	52%
	Sainsbury's, London Road	3,719	£9,542	£35.48	£61.47	173%
Eastwood	Morrisons, Western Approaches	1,345	£17,897	£24.08	£16.64	69%
Leigh-on-Sea	Waitrose, London Road	1,169	£15,894	£18.58	£17.98	97%
Out-of-centre	Lidl, Woodgrange Drive	1,063	£7,015	£7.46	£8.95	120%
	Tesco, Southchurch Avenue	146	£11,166	£1.63	£4.96	304%
	Waitrose, Fossetts Way	2,448	£15,894	£38.91	£39.28	101%
	Aldi, Eastern Avenue	987	£10,735	£10.60	£25.56	241%
	Aldi, London Road, Westcliff-on-Sea	1,020	£10,735	£10.95	£20.88	191%
	Lidl, Greyhound Retail Park	1,185	£7,015	£8.31	£9.55	115%
	Tesco, Prince Avenue	4,759	£11,166	£53.14	£57.35	108%
	Lidl, Progress Road/Rayleigh Road	948	£7,015	£6.65	£26.96	406%
Total				£230.19	£304.38	132%

Source: Appendix F

4.11 In terms of identifying convenience needs, while many of the out-of-centre stores appear to be overtrading, this does not justify additional convenience floorspace. However, overtrading in the Sainsbury’s store in the Southend town centre, as the only large foodstore, is substantial and an improvement in the town centre’s convenience offer may be beneficial to alleviate that overtrading.

Key findings

- There is no comparison need in the short term primarily because of comparison commitments elsewhere in South Essex and a small amount of additional comparison floorspace as part of the Marine Plaza scheme in Southend; however, some need begins to emerge in the longer term.
- While caution is recommended in looking at these longer-term needs because of the uncertainty associated with forecasting beyond 2026, there may be merit in supporting comparison enhancements particularly to Southend town centre to ensure the centre’s position as a major town centre in South Essex is not undermined by improvements to destinations elsewhere in South Essex, particularly Lakeside that may lead to more longer distance/ unsustainable comparison shopping trips, as well as potentially significant changes in the out-of-centre offer.
- In convenience terms, there is some identified over the study period. While this remains limited in the short term, there is overtrading in the main foodstores in Southend town centre which may warrant additional short-term provision. However, it will be important to factor in future residential growth in planning for convenience needs; we explore this further in our recommendations.

5 LEISURE NEED

Introduction

5.1 Leisure uses are a key component of vital and viable town centres as they drive footfall and linked retail trips.

5.2 As with retail, we focus on the findings of the housing-led or main case population scenario outlined in the Part 1 report. The table below sets out an overview of the leisure spending growth, generated by residents in the Borough, by sector for the main case.

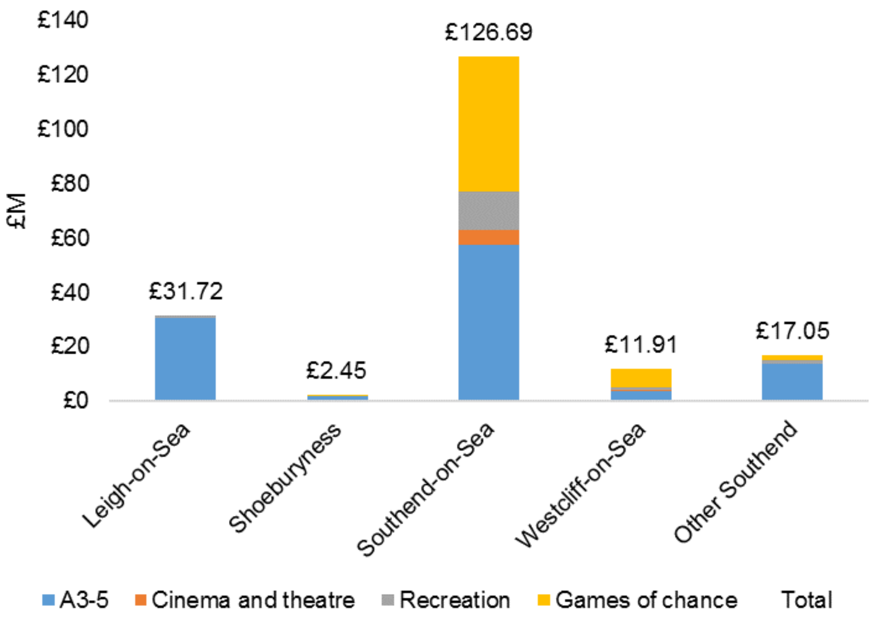
Table 5.1 Leisure expenditure growth generated by Borough residents 2016-2037 (£M)

	2016	2021	2026	2031	2034	2037	Change 2016-2037
A3-A5	£127.64	£138.89	£156.71	£175.11	£187.74	£200.35	£72.71
Cinema & theatre	£7.93	£8.62	£9.65	£10.82	£11.58	£12.44	£4.51
Recreation	£19.17	£20.86	£23.35	£26.17	£28.02	£30.09	£10.92
Games of chance	£26.16	£28.47	£31.87	£35.71	£38.24	£41.06	£14.90

Source: Part 1

5.3 The figure below takes account of leisure expenditure patterns, both of Borough residents and those living outside the Borough. This shows that over the period 2016 to 2037, an additional £190m is expected to flow to leisure destinations in the borough.

Figure 5.1 Growth in leisure spending in the Borough's centres 2016-37



Source: Appendix F

Need for additional leisure floorspace

5.4 In this section, we focus on food and drink uses, as the most significant component of leisure spending, and cinema uses in identifying the scope for additional floorspace. As with retail need, we also take account of qualitative needs.

5.5 As acknowledged earlier in the study, these figures do not make an explicit allowance for visitor spending associated with tourist daytrips and overnight stays in the Borough. While a proportion may have already been captured in the household survey data, it is likely that the additional spending (and therefore spending growth) will accrue to Southend town centre. This is reflected in the enhancement of leisure facilities and developer interest in the town centre. The capacity figures identified below should therefore be treated as a lower threshold.

Food and drink

5.6 The capacity calculations below are only indicative because food and drink businesses' turnovers differ greatly. For example, national chains are expected to achieve much greater turnovers than smaller independent businesses. None the less a high-level capacity figure has been identified at Appendix F.

Table 5.2 Cumulative food and drink capacity

	2021	2026	2031	2034	2037
Food and drink floorspace need (sqm gross	2,532	5,557	8,262	9,844	10,940

Source: Appendix F

5.7 The figures above include any A3 which may come forward as part of the Marine Plaza scheme (up to c. 2,000 sqm) and which would absorb the majority of short term capacity.

Cinema

5.8 A high-level capacity assessment for cinema screens has also been undertaken. The cumulative findings are summarised below and show that an additional five screens could be sustained by the Borough's residents.

Table 5.3 Cinema screen capacity

	2016	2021	2026	2031	2034	2037
Cinema screen potential	11	11	12	12	13	13
Existing cinema screen	8	8	8	8	8	8
Cinema screen capacity	3	3	4	4	5	5

Source: Appendix F

5.9 The household survey results do not distinguish between cinema and theatre trips; however, it is reasonable to assume that there is inflow expenditure going to the

Borough's existing level of cinema provision, particularly given the few options available to residents in surrounding authorities which lack a major centre which might reasonably include a cinema. The capacity of additional screens in the Borough may therefore be higher than set out above.

5.10 While there are currently no cinema commitments that need to be factored in, the Seaways site is allocated for cinema use in the SCAAP and the forthcoming application is expected to include a cinema use, and it is understood the Fossetts Farm application includes a large multiplex cinema The above analysis suggests that, even taking account of some degree of inflow expenditure, there is unlikely to be theoretical capacity to support more than one additional cinema complex development, even in the long term.

Key findings

- Southend town centre is the primary leisure destination in the Borough. Leisure turnover of the town is expected to increase by £127m in the period to 2037, with the majority of this growth in the food and drink sector.
- Capacity for further food and drink, which accounts for 70% of leisure spending, is forecast to be 11,000 sqm by 2037. In the short term, commitments in Southend will absorb identified capacity.
- There is some capacity for additional cinema screens over the period to 2037; however, that capacity is not of the order to support, in quantitative terms, more than one new cinema complex.
- As lower order centres, there is more limited need in Westcliff and Leigh. However, the health checks identified scope for improvement in the food and drink offer in particularly Westcliff so such development should be supported. Similarly in Leigh, while the existing level of provision is good, further leisure space should be considered on its merits, having regard to Southend as the preferred focus for higher-order leisure uses.

6 RECOMMENDATIONS

Introduction

6.1 In making recommendations, this section draws together the relevant sections of the Part 1 study and Sections 1-5 of this report. These recommendations focus on the distribution of identified need within the Borough and a number of recommendations to inform SSBC's emerging policy.

6.2 As set out in Appendix A, the development management policies for SSBC were adopted recently (2015) and therefore provide a suitable starting point. Added to this, the adoption of the SCAAP means that the Council has a set of detailed up-to-date policies, including in relation to retail and leisure strategy, for Southend town centre.

Retail and leisure strategy

6.3 The Part 1 study set out recommendations for the town centre hierarchy in South Essex. This included designating Southend as a major town centre, Leigh and Westcliff as town centres and Eastwood, North Shoebury, Shoeburyness, Thorpe Bay and West Leigh as local centres. Our recommendations for the distribution of retail and leisure need have regard to this hierarchy.

Comparison goods

Southend town centre

6.4 Southend town centre is the primary comparison and leisure destination in the Borough. While the health check found the centre to be in moderate health, there were signs of weakness, including high vacancies, limited investment in the retail offer and threat of increased competition from outside the town, which point to the need to use policy tools to bolster the centre's health and ensure it continues to fulfil a major centre function.

6.5 In factoring in qualitative need, there is evidence to suggest that Southend's comparison offer could be improved, particularly given the greater competition expected from Lakeside and Chelmsford. Accordingly, while there is little or no comparison need identified in the short term, it may be sensible to plan for enhancement of Southend's town centre offer.

6.6 However, given the higher than average vacancies in the town centre and the evidence of limited demand, combined with the wider structural shifts which have combined to curtail occupiers' physical requirements it may not be appropriate to allocate additional comparison space in the short term but instead focus policy objectives on improving the role and function of the existing quantum of comparison floorspace within the town centre.

6.7 Additionally, it must be recognised that as a major centre, Southend town centre is expected to play an important role in meeting the leisure needs of the Borough's residents and those living outside the Borough but who look to the town as the main leisure destination. The Council's approach to planning applications which potentially seek to convert existing comparison floorspace to other town centre uses should not necessarily be discounted, particularly if it is considered that such proposals would secure a qualitative uplift. We consider leisure uses in Southend town centre in further detail below.

Elsewhere in Southend

6.8 Westcliff and Leigh district centres, together with the network of lower order centres, perform a primarily everyday role in meeting convenience, some lower-value comparison functions and some leisure needs. While the health checks and results of the household survey did identify some scope for improvement to the comparison offer, when this is balanced with the deliverability of such growth in market terms, we do not consider this represents a clear qualitative need for enhancement.

6.9 Overall, we do not consider there is a need to plan for additional comparison space elsewhere in the Borough.

Convenience goods

6.10 In quantitative terms, there is capacity for a further 7,400 sqm (gross) of additional convenience floorspace over the study period.

Table 6.1 Cumulative convenience capacity in the borough

	2021	2026	2031	2034	2037
Net quantitative need (sqm)	237	1,469	3,052	4,106	5,184
Gross quantitative need (sqm)	339	2,098	4,360	5,866	7,405

6.11 While caution is recommended in planning based on the figures beyond 2026, in the case of convenience goods it is likely to be future population growth that establishes the need for additional convenience retail space. As such, provision should be made in more strategic residential expansions to provide a sustainable level of convenience shopping provision.

6.12 Such provision may therefore be in excess of capacity, given how significant the current out-of-centre convenience offer is, the implications of allowing further convenience floorspace on the role of town centres will be more limited. When further detail is known on the scale and location of planned residential growth it is recommended that the above figures are reviewed and an indication of an appropriate level of floorspace established at that point.

6.13 Proposals for further convenience provision in Southend town centre should also be considered favourably as this may relieve some identified overtrading. However, given the already extensive nature of current out-of-centre provision, this qualitative need can only be addressed in the town centre.

Leisure needs

6.14 Southend town centre is the main leisure destination within the Borough and it is here that additional leisure development should be focused. At present, the town centre is subject to relatively limited out-of-centre competition, particularly in the higher-order leisure uses such as cinemas, and this position should be protected.

6.15 The SCAAP identifies a range of sites in the town centre suitable for accommodating both retail and leisure needs. In addition, the document articulates a more relaxed position on the proportion of leisure uses within the centre which represents a positive response to the current role and function of town centres of the scale of Southend.

6.16 The other centres in the Borough also play a role in meeting leisure needs, primarily in relation to food and drink provision. In relation to Leigh and Westcliff, these uses are an important part of the service offer of these centres, particularly in the context where such centres are facing threats from the factors such as the contraction of high street banking. A flexible approach to leisure uses in these centres is therefore recommended.

Monitoring recommendations

6.17 This study provides the Council with its floorspace needs requirements to 2037. To establish whether the requirements for new floorspace (by type) are being met and more generally to monitor the performance, the Council should monitor:

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

6.18 The monitoring recommended above is relatively straightforward and should be conducted on a rolling basis for the first two items and annually or every two years for the latter two items.

6.19 Time series data can thus be produced and continually updated, starting with this study or possibly with earlier work undertaken by the Council e.g. the shopping frontages assessments. Contingent on the timetabling of the Local Plan, such updating will prove to be valuable when this evidence is tested at examination in public.

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

APPENDIX A POLICY SUMMARY

Table 1: Relevant adopted policies

Document	Policy	Description
Development Management Document (DPD 2) (2015)	DM13: Shopping Frontage Management Outside the Town Centre	This policy is in line with the retail guidance in the NPPF (2012). It also states that the proportion of A1 frontages in a centre should not fall below 60%. Where an empty unit has little prospect of being occupied by a retail use, the owner is encouraged to display local art within the windows to create visual interest for the public.
Core Strategy (DPD 1) (2007)	CP2: Town Centre and Retail Development	This policy has been superseded by the retail guidance in the NPPF (2012). It sets out that Southend town centre is the first preference for all forms of retail development.
Southend Central Area Action Plan (2018)	DS1: A Prosperous Retail Centre	This policy is in line with CP2 of the Core Strategy (2007). It seeks to ensure that at least 60% of the primary shopping frontage is in A1 use, although alternative uses (particularly A3) will be supported if they contribute to the vitality of the centre.
	PA1 – PA8 and CS1: Policy Areas	These policies provide areas specific guidance, including details of future retail development. The High Street (PA1), London Road (PA2), Queensway (PA4), and Clifftown (PA6) are the main locations for retail development and improvement.

Table 2: Emerging policy

Document	Policy	Description
Southend New Local Plan	-	The evidence base for the Southend on Sea New Local Plan is being prepared. It is planned for adoption in Summer 2021.

APPENDIX B GOAD 2016 UPDATE TABLES

Southend Town Centre GOAD Update May 2016

		UNITS	%	% UK	Dif.	SQM	%	% UK	Dif.
Convenience	Bakers	3	0.7	2.15	-1.45	380	0.4	1.10	-0.75
	Butchers	1	0.2	0.74	-0.51	80	0.1	0.40	-0.33
	Greengrocers & Fishmongers	2	0.5	0.64	-0.17	200	0.2	1.37	-1.18
	Groceries and Frozen Food	6	1.4	2.97	-1.57	7,830	7.3	12.92	-5.64
	Officences & Home Brew	0	0.0	0.48	-0.48	0	0.0	0.29	-0.29
	CTN & Convinience	13	3.0	2.32	0.71	1,470	1.4	2.28	-0.91
	Total Convenience	**25**	**5.8**	**9.30**	**-3.47**	**9,960**	**9.3**	**18.36**	**-9.10**
Comparison	Footwear & Repairs	7	1.6	1.67	-0.04	1,220	1.1	1.22	-0.09
	Mens & boys wear	4	0.9	0.92	0.01	1,800	1.7	0.82	0.85
	Womens, girls & childrens wear	17	4.0	3.17	0.79	6,400	5.9	3.07	2.88
	Mixed & general clothing	17	4.0	4.00	-0.04	10,630	9.9	6.34	3.54
	Furniture, carpets & textiles	2	0.5	3.29	-2.82	490	0.5	3.63	-3.17
	Books, arts/craft, stationary	25	5.8	4.17	1.66	4,840	4.5	3.06	1.44
	Elec, home ent, phones,video	17	4.0	3.55	0.41	2,810	2.6	2.50	0.11
	DIY, hardware & household	3	0.7	2.39	-1.69	3,200	3.0	4.81	-1.84
	Gifts, china, glass & leather goods	7	1.6	1.71	-0.08	720	0.7	0.91	-0.24
	Cars, motor cycles & accessories	0	0.0	1.13	-1.13	0	0.0	1.77	-1.77
	Chemists, toiletries & opticians	17	4.0	3.89	0.07	6,630	6.2	3.90	2.26
	Variety, department & catalogue	10	2.3	0.61	1.72	14,180	13.2	6.29	6.89
	Florists & gardens	1	0.2	0.83	-0.60	40	0.0	0.38	-0.34
	Sports, toys, cycles & hobbies	15	3.5	1.99	1.51	4,060	3.8	2.27	1.50
	Jewellers, clocks & repairs	16	3.7	1.94	1.79	1,720	1.6	0.91	0.69
	Charity, pets & other	13	3.0	4.38	-1.35	1,690	1.6	3.07	-1.50
	Total Comparison	**171**	**39.9**	**39.65**	**0.21**	**60,430**	**56.2**	**44.94**	**11.22**
Services	Restaurant, cafés, fast food	90	21.0	17.14	3.84	13,740	12.8	12.68	0.09
	Hairdressing, beauty & health	40	9.3	10.24	-0.92	4,280	4.0	4.95	-0.97
	Laundrettes & dry cleaners	3	0.7	0.87	-0.17	300	0.3	0.39	-0.11
	Travel agents	4	0.9	1.05	-0.12	820	0.8	0.66	0.10
	Banks & financial services	17	4.0	3.92	0.04	5,820	5.4	4.20	1.21
	Building societies	1	0.2	0.51	-0.28	180	0.2	0.41	-0.24
	Estate agents & auctioneers	4	0.9	3.97	-3.04	550	0.5	2.22	-1.71
	Total Service	**69**	**16.1**	**20.56**	**-4.48**	**11,950**	**11.1**	**12.83**	**-1.72**
Misc.	Employment, careers, PO & info	6	1.4	1.19	0.21	700	0.7	0.99	-0.34
Vacant	Vacant	68	15.9	12.16	3.69	10,820	10.1	10.20	-0.14
Totals		**429 Units**				**107,600 sqm**			

Leigh-on-Sea Town Centre GOAD Update May 2016									
		UNITS	%	% UK	Dif.	SQM	%	% UK	Dif.
Convenience	Bakers	6	2.07	2.15	-0.08	660	1.97	1.10	0.87
	Butchers	2	0.69	0.74	-0.05	250	0.75	0.40	0.35
	Greengrocers & Fishmongers	3	1.03	0.64	0.39	350	1.05	1.37	-0.32
	Groceries and Frozen Food	8	2.76	2.97	-0.21	1,080	3.23	12.92	-9.69
	Officences & Home Brew	5	1.72	0.48	1.24	420	1.26	0.29	0.97
	CTN & Convinience	6	2.07	2.32	-0.25	1,150	3.44	2.28	1.16
	Total Convenience	**30**	**10.34**	**9.30**	**1.04**	**3,910**	**11.70**	**18.36**	**-6.66**
Comparison	Footwear & Repairs	2	0.69	1.67	-0.98	70	0.21	1.22	-1.01
	Mens & boys wear	4	1.38	0.92	0.46	280	0.84	0.82	0.02
	Womens, girls & childrens wear	21	7.24	3.17	4.07	1,980	5.92	3.07	2.85
	Mixed & general clothing	7	2.41	4.00	-1.59	840	2.51	6.34	-3.83
	Furniture, carpets & textiles	11	3.79	3.29	0.50	1,040	3.11	3.63	-0.52
	Books, arts/craft, stationary	22	7.59	4.17	3.42	2,330	6.97	3.06	3.91
	Elec, home ent, phones,video	7	2.41	3.55	-1.14	870	2.60	2.50	0.10
	DIY, hardware & household	8	2.76	2.39	0.37	1,050	3.14	4.81	-1.67
	Gifts, china, glass & leather goods	9	3.10	1.71	1.39	990	2.96	0.91	2.05
	Cars, motor cycles & accessories	0	0.00	1.13	-1.13	0	0.00	1.77	-1.77
	Chemists, toiletries & opticians	8	2.76	3.89	-1.13	1,470	4.40	3.90	0.50
	Variety, department & catalogue	0	0.00	0.61	-0.61	0	0.00	6.29	-6.29
	Florists & gardens	5	1.72	0.83	0.89	590	1.76	0.38	1.38
	Sports, toys, cycles & hobbies	4	1.38	1.99	-0.61	550	1.65	2.27	-0.62
	Jewellers, clocks & repairs	9	3.10	1.94	1.16	870	2.60	0.91	1.69
	Charity, pets & other	13	4.48	4.38	0.10	1,810	5.41	3.07	2.34
	Total Comparison	**130**	**44.83**	**39.65**	**5.18**	**14,740**	**44.09**	**44.94**	**-0.85**
Services	Restaurant, cafés, fast food	39	13.45	17.14	-3.69	4,590	13.73	12.68	1.05
	Hairdressing, beauty & health	47	16.21	10.24	5.97	4,490	13.43	4.95	8.48
	Laundrettes & dry cleaners	5	1.72	0.87	0.85	400	1.20	0.39	0.81
	Travel agents	2	0.69	1.05	-0.36	250	0.75	0.66	0.09
	Banks & financial services	11	3.79	3.92	-0.13	1,580	4.73	4.20	0.53
	Building societies	1	0.34	0.51	-0.17	160	0.48	0.41	0.07
	Estate agents & auctioneers	12	4.14	3.97	0.17	1,360	4.07	2.22	1.85
	Total Service	**78**	**26.90**	**20.56**	**6.34**	**8,240**	**24.65**	**12.83**	**11.82**
Misc.	Employment, careers, PO & info	3	1.03	1.19	-0.16	570	1.71	0.99	0.72
Vacant	Vacant	10	3.45	12.16	-8.71	1,380	4.13	10.20	-6.07
Totals		**290 Units**				**33,430 sqm**			

Westcliff-on-Sea Town Centre GOAD Update May 2016

		UNITS	%	% UK	Dif.	SQM	%	% UK	Dif.
Convenience	Bakers	3	0.9	2.15	-1.25	280	0.6	1.10	-0.53
	Butchers	3	0.9	0.74	0.16	420	0.9	0.40	0.46
	Greengrocers & Fishmongers	4	1.2	0.64	0.56	370	0.8	1.37	-0.61
	Groceries and Frozen Food	8	2.4	2.97	-0.57	2,720	5.6	12.92	-7.35
	Offlicences & Home Brew	6	1.8	0.48	1.32	740	1.5	0.29	1.23
	CTN & Convinience	20	6.0	2.32	3.69	3,580	7.3	2.28	5.05
	Total Convenience	**44**	**13.2**	**9.30**	**3.91**	**8,110**	**16.6**	**18.36**	**-1.75**
Comparison	Footwear & Repairs	0	0.0	1.67	-1.67	0	0.0	1.22	-1.22
	Mens & boys wear	1	0.3	0.92	-0.62	860	1.8	0.82	0.94
	Womens, girls & childrens wear	6	1.8	3.17	-1.37	1,170	2.4	3.07	-0.67
	Mixed & general clothing	12	3.6	4.00	-0.40	1,630	3.3	6.34	-3.00
	Furniture, carpets & textiles	9	2.7	3.29	-0.59	1,560	3.2	3.63	-0.44
	Books, arts/craft, stationary	13	3.9	4.17	-0.27	1,700	3.5	3.06	0.42
	Elec, home ent, phones,video	13	3.9	3.55	0.35	1,930	4.0	2.50	1.45
	DIY, hardware & household	10	3.0	2.39	0.61	1,930	4.0	4.81	-0.86
	Gifts, china, glass & leather goods	2	0.6	1.71	-1.11	720	1.5	0.91	0.56
	Cars, motor cycles & accessories	3	0.9	1.13	-0.23	1,230	2.5	1.77	0.75
	Chemists, toiletries & opticians	7	2.1	3.89	-1.79	930	1.9	3.90	-2.00
	Variety, department & catalogue	0	0.0	0.61	-0.61	0	0.0	6.29	-6.29
	Florists & gardens	3	0.9	0.83	0.07	290	0.6	0.38	0.21
	Sports, toys, cycles & hobbies	3	0.9	1.99	-1.09	230	0.5	2.27	-1.80
	Jewellers, clocks & repairs	1	0.3	1.94	-1.64	70	0.1	0.91	-0.77
	Charity, pets & other	21	6.3	4.38	1.93	3,130	6.4	3.07	3.34
	Total Comparison	**104**	**31.2**	**39.65**	**-8.42**	**17,380**	**35.6**	**44.94**	**-9.35**
Services	Restaurant, cafés, fast food	73	21.9	17.14	4.78	9,500	19.5	12.68	6.77
	Hairdressing, beauty & health	41	12.3	10.24	2.07	4,250	8.7	4.95	3.75
	Laundrettes & dry cleaners	5	1.5	0.87	0.63	410	0.8	0.39	0.45
	Travel agents	2	0.6	1.05	-0.45	190	0.4	0.66	-0.27
	Banks & financial services	6	1.8	3.92	-2.12	710	1.5	4.20	-2.75
	Building societies	0	0.0	0.51	-0.51	0	0.0	0.41	-0.41
	Estate agents & auctioneers	15	4.5	3.97	0.53	2,160	4.4	2.22	2.20
	Total Service (exc Food)	**69**	**20.7**	**20.56**	**0.16**	**7,720**	**15.8**	**12.83**	**2.98**
Misc.	Employment, careers, PO & info	4	1.2	1.19	0.01	600	1.2	0.99	0.24
Vacant	Vacant	39	11.7	12.16	-0.45	5,530	11.3	10.20	1.12
Totals		**333 Units**				**48,840 sqm**			

APPENDIX C GOAD DIVERSITY OF USE MAPS

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South Essex Retail Study

Southend
Diversity of Uses

Figure 17 | Rev A

South Essex Retail Study

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South Essex Retail Study

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APPENDIX D GOAD VACANT UNIT MAPS

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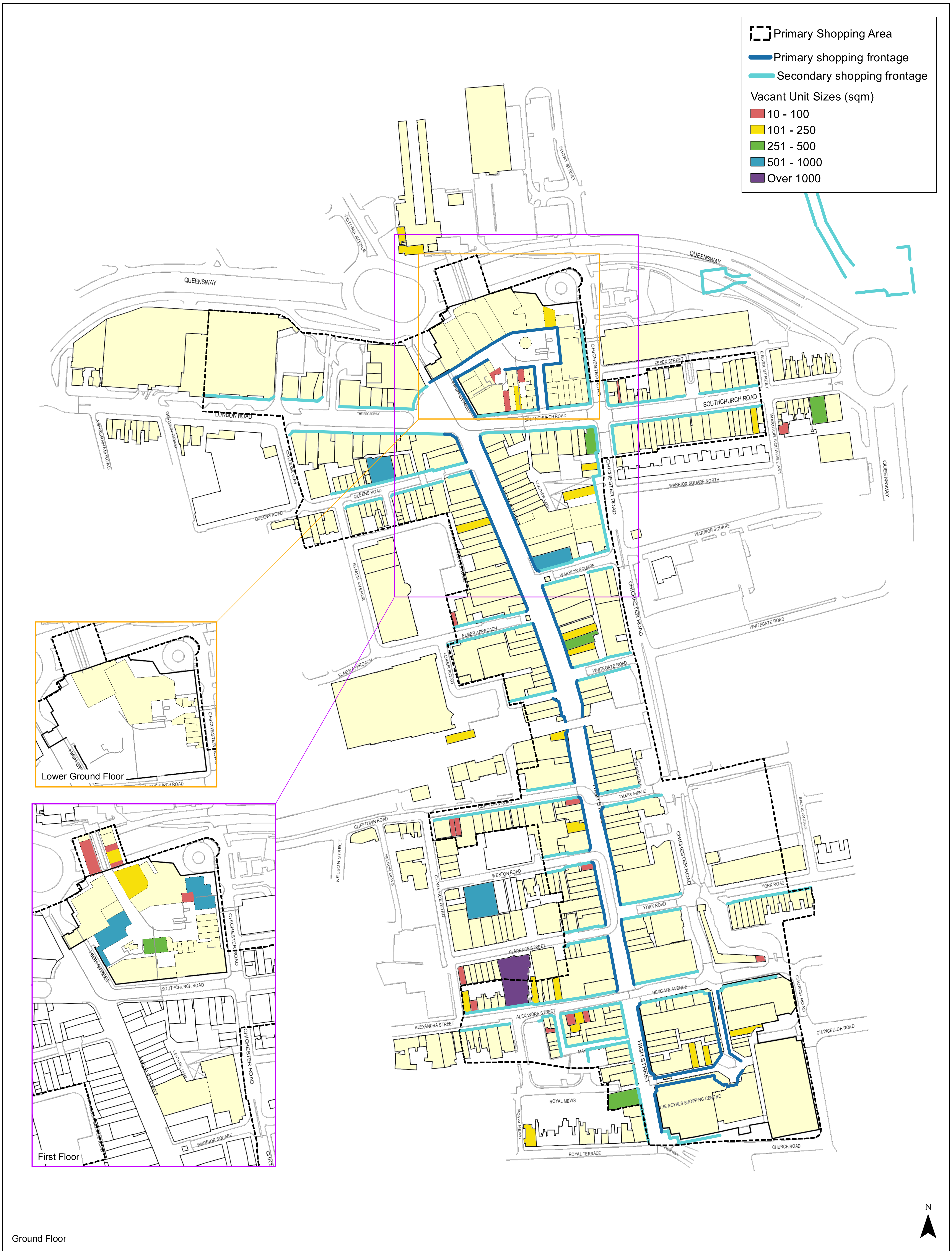

0 100 200 m Contains Ordnance Survey data © Crown copyright and database right [2016] © Castle Point Borough Council / Southend Unitary Authority	1:3,000 @ A3 09/09/2016 Drawn: DRL Checked: FR	**South Essex Retail Study** Southend Vacant units	Figure 18 · Rev A

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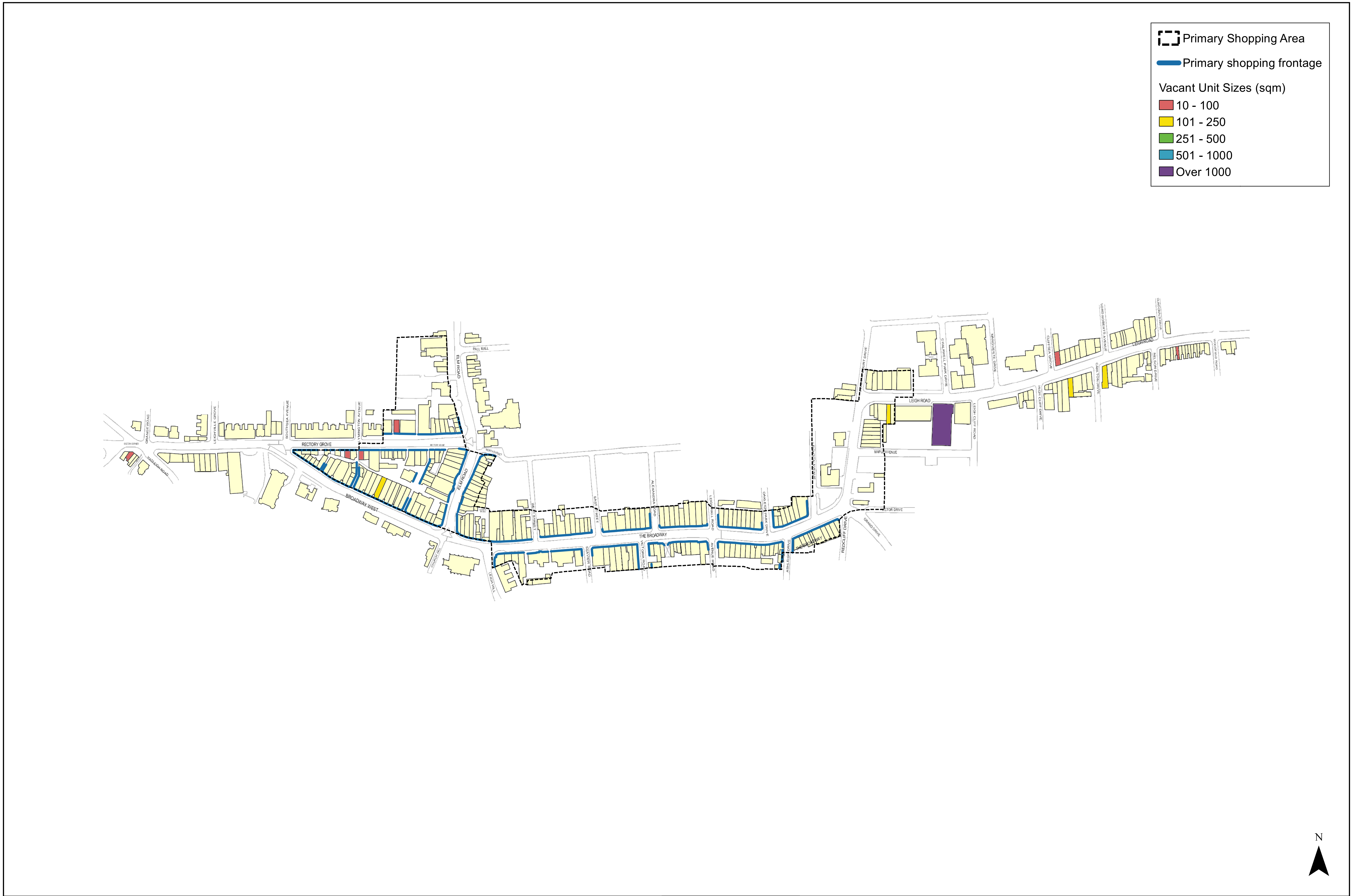

South Essex Retail Study

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Leigh-On-Sea
Vacant units

Figure 16 | Rev A

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South Essex Retail Study

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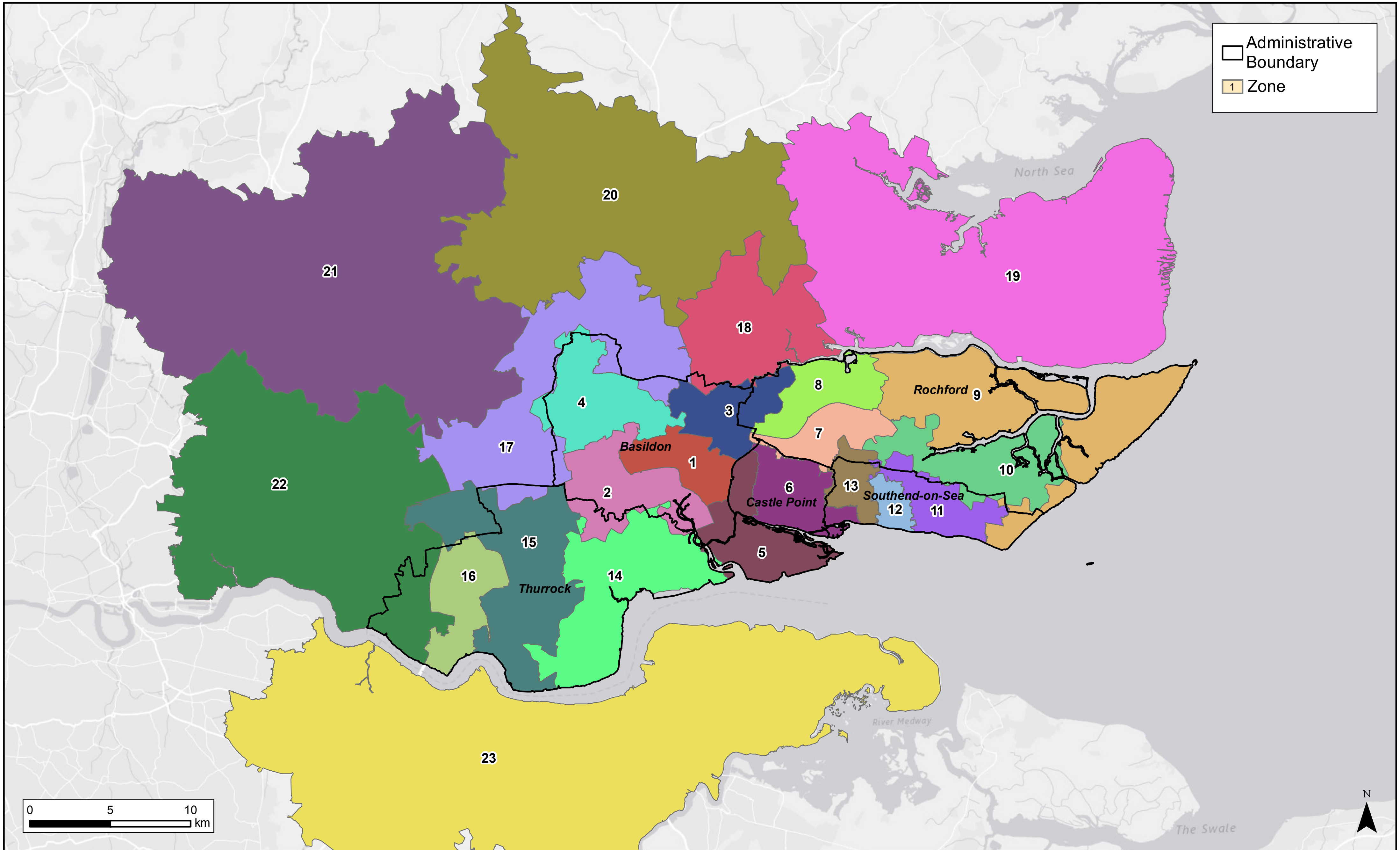
Westcliff
Vacant units

Figure 20 | Rev A

APPENDIX E STUDY AREA



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Preferred Household Survey Area Zones

Figure 1 Rev A

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APPENDIX F QUANTITATIVE SPREADSHEETS

Table A: Leisure turnover of Southend destinations (2016-37) (£M)

		2016	2021	2026	2031	2034	2037	Growth 2016-37
A3-5	Leigh-on-sea town centre	£51.47	£56.64	£64.00	£72.04	£77.48	£82.14	£30.67
	Shoeburyness	£3.17	£3.49	£3.94	£4.44	£4.77	£5.06	£1.89
	Southend-on-Sea town centre	£96.17	£105.83	£119.58	£134.60	£144.76	£153.47	£57.30
	Westcliff-on-Sea town centre	£6.71	£7.38	£8.34	£9.39	£10.10	£10.71	£4.00
	Other Southend	£23.35	£25.70	£29.04	£32.68	£35.15	£37.27	£13.91
	Total	£180.87	£199.05	£224.91	£253.15	£272.26	£288.65	£107.78
Cinema and theatre	Leigh-on-Sea town centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
	Southend-on-Sea town centre	£9.77	£10.75	£12.06	£13.58	£14.60	£15.56	£5.79
	Westcliff-on-Sea town centre	£0.54	£0.59	£0.67	£0.75	£0.81	£0.86	£0.32
	Other Southend	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
	Total	£10.31	£11.34	£12.73	£14.33	£15.41	£16.42	£6.11
Recreation	Leigh-on-Sea town centre	£1.74	£1.92	£2.15	£2.43	£2.61	£2.78	£1.05
	Shoeburyness	£0.58	£0.64	£0.72	£0.81	£0.87	£0.93	£0.35
	Southend-on-Sea town centre	£22.89	£25.23	£28.36	£31.97	£34.40	£36.66	£13.78
	Westcliff-on-Sea town centre	£1.52	£1.68	£1.88	£2.12	£2.29	£2.44	£0.92
	Other Southend	£2.51	£2.77	£3.12	£3.51	£3.78	£4.03	£1.51
	Total	£29.24	£32.23	£36.23	£40.85	£43.94	£46.84	£17.60
Games of chance	Leigh-on-Sea town centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
	Shoeburyness	£0.36	£0.39	£0.44	£0.50	£0.54	£0.57	£0.21
	Southend-on-Sea town centre	£83.75	£92.08	£103.29	£116.39	£125.16	£133.56	£49.81
	Westcliff-on-Sea town centre	£11.23	£12.35	£13.85	£15.61	£16.78	£17.91	£6.68
	Other Southend	£2.72	£3.00	£3.36	£3.79	£4.07	£4.34	£1.62
	Total	£98.06	£107.82	£120.94	£136.28	£146.55	£156.39	£58.33
Total leisure	Leigh-on-Sea town centre	£53.21	£58.56	£66.16	£74.47	£80.09	£84.93	£31.72
	Shoeburyness	£4.11	£4.52	£5.10	£5.75	£6.18	£6.56	£2.45
	Southend-on-Sea town centre	£212.57	£233.89	£263.29	£296.54	£318.91	£339.26	£126.69
	Westcliff-on-Sea town centre	£20.00	£22.00	£24.75	£27.87	£29.98	£31.91	£11.91
	Other Southend	£28.59	£31.46	£35.51	£39.98	£43.00	£45.64	£17.05
	Total	£318.48	£350.44	£394.81	£444.61	£478.16	£508.30	£189.82

Extract from SESRS Part 1 - Table 13A: SHMA population scenario: Cinema screen capacity

Southend-on-Sea (Zones 11-13)	2015	2016	2021	2026	2031	2034	2037
Total population	169,941	169,941	170,219	176,932	184,580	192,005	196,613
Retention rate	100%	100%	100%	100%	100%	100%	100%
Potential catchment	169,941	169,941	170,219	176,932	184,580	192,005	196,613
Cinema screen potential	11	11	11	12	12	13	13
Existing cinema screen	8	8	8	8	8	8	8
Committed cinema screens*	0	0	0	0	0	0	0
Cinema screen capacity	3	3	3	4	4	5	5

Note: refer to SESRS Part 1 for details of population data and assumptions of cinema capacity
*Application for 12-screen cinema submitted at Fossetts Farm,Southend-on Sea (ref: 17/00733/FULM)