Southend-on-Sea

Integrated Needs Assessment, Part C: Retail and Leisure Needs Assessment

Southend-on-Sea City Council

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Executive Summary

Southend-on-Sea City Council ("Southend") has commissioned Lichfields to prepare a Retail and Leisure Needs Assessment as part of an Integrated Needs Assessment to provide the evidence base to inform the emerging Local Plan. This includes an assessment of future retail and leisure development needs within Southend, as well as the District Centres of Westcliff and Leigh and the District's seven Neighbourhood Centres.

Since the Council's previous 2022 Study, key trends including cost of living pressures and the long-term effects of Covid-19 have continued to affect town centres, which have had to change and diversify over the five past years. Amendments to national planning policies under the National Planning Policy Framework (NPPF) and Use Class Order (UCO) have allowed for greater flexibility of uses within town centres and are continuing to affect the high street and demand for town centre uses. Shopping behaviour will continue to change, subject to other emerging trends and economic uncertainties, and town centres will need to respond by providing a more diversified retail and leisure experience.

This study adopts a standard and widely recognised methodology including a household telephone survey to establish existing shopping and leisure expenditure patterns within the Southend Study Area. Population and expenditure projections sourced from Experian and informed by Lichfields analysis have been adopted to forecast future high- and low-growth levels of available expenditure for comparison retail goods, convenience retail goods, food/beverage and leisure/entertainment/cultural activities. Expenditure projections have been compared with the projected turnover of existing facilities to quantify future levels of surplus or deficit expenditure. Surplus expenditure is converted into potential new floorspace capacity projections, based on average sales densities; similarly, deficit expenditure is converted into over-supply floorspace estimates. A qualitative needs assessment for new facilities is based on a detailed audit of town centre uses.

Southend has a relatively low shop vacancy rate (8.4%), below the UK average which according to Goad, has increased to over 14.7%. Cyclical trends in vacancy rates reflect macroeconomic trends, requiring a cautious approach to future development needs. Southend has a good restaurant/café offer, but its nightlife is limited with a lower provision of bars/pubs in designated centres. It features a higher than average provision of hot food takeaways, which may reflect local demand. The centre has a good range of non-retail services, meaning it meets the immediate convenience and service needs of its catchment area. In addition, Southend City Centre has a higher proportion of comparison retail floorspace than the UK average, partly attributed to the presence of two indoor Shopping Centres: The Victorias Shopping Centre at the north end of High Street and The Royals Shopping Centre at the south end of High Street.

The combined cumulative total floorspace capacity projections for retail and food and beverage uses in Southend is 41,180 sq.m gross to 2045 under the high-growth option and 25,830 sq.m gross under the low-growth option. These figures do not represent targets or supersede the evidence underpinning the Local Plan but suggests how Southend might best respond to emerging trends and opportunities from an updated position. This capacity is mainly for comparison and food/beverage categories, with limited capacity identified for additional convenience retail floorspace. Some of this requirement could be accommodated within existing vacant floorspace; however, there may be an opportunity for additional comparison retail provision in the catchment. For food and beverage requirements, there is likely to be a shift from retail space to more food/beverage and leisure / entertainment / cultural uses, with vacant shop premises converting to these uses. Not all vacant units will be suitable for conversion to these uses; therefore, new development may be required to accommodate some new uses.

A review of commercial leisure / entertainment / cultural floorspace identified capacity for between 1,200 sq.m and 1,900 sq.m by 2045. A detailed review of each category identified the potential for future demand for the following, but there is no current qualitative or quantitative need to provide for this in the short term and would be subject to securing operator interest:

- one or two cinemas;
- one venue for theatres or live music;
- two large or four medium sized health and fitness facilities (around 440 to 560 stations);
- one bowling facility;
- new leisure innovations e.g. indoor climbing, escape rooms, virtual sport activities; and
- four bingo facilities (albeit the relatively low participation rate for bingo activities is likely to restrict local demand) or one casino.

These quantitative floorspace projections should not be adopted as rigid targets, nor as maximum or minimum requirements, but be viewed as broad guidance and as a starting point for approaches to seeking or responding to operator interest.

In summary, the capacity projections suggest that there is no pressing need to promote major retail or commercial leisure development to accommodate projected growth in the short term. Longer-term projections are subject to uncertainty and forecasts will need to be amended to reflect emerging changes, as and when new information becomes available. Accordingly, projections beyond 2035 should be treated with caution and regarded as broad guidance only.

This study has identified potential approaches and recommendations, including the following:

1 Southend does not need to plan for additional convenience retail floorspace, as emerging population and spending projections can be absorbed by the current provision. Notwithstanding these findings, any future planning applications will need to be assessed on their own planning merits on a case-by-case basis against the relevant policy position.

2 Southend could increase its comparison goods market share through the provision of additional retail floorspace, as reflected in the capacity projections. This could be met within the town centre and edge-of-centre and may attract a national multiple, as demonstrated by recent operator interest.

3 Despite high floorspace projections, there is no need for Southend to actively plan for new food and beverage floorspace. This use is likely to naturally expand to fill town centre vacancies in line with national trends.

4 For commercial leisure, the Council should be flexible to accommodate emerging operator interest and seek to identify opportunities to incorporate this into town centre investment.

This Study provides an analysis of the potential need for retail and leisure development in the immediate, as well as medium- to long-term, up to 2045. Going forward, continued monitoring is needed and the findings of this study will need to be updated to inform an ongoing strategy. The projections and recommendations within this Study will assist the Council in the review of development plan policies to inform the draft Local Plan and future development management decisions.

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Glossary

Benchmark turnover

Expected turnover of existing retail floorspace based on national averages which the identified available expenditure can be measured against.

Convenience goods

Consumer goods purchased on a regular basis e.g. food/groceries and cleaning materials.

Comparison goods

Durable goods such as clothing, household goods, furniture, DIY and electrical goods.

Experian

A data consultancy widely used for retail and leisure planning information.

Food and beverage

Former Classes A3 food and drink outlets, selling food and drinks consumed away from the home or hot food takeaway food but not food and grocery items including convenience goods.

GlobalData

A market research and data consultancy widely used for retail planning information, previously Verdict Research.

Goad Plans

Town centre plans prepared by Experian, which are based on occupier surveys of over 1,300 town centres across the UK.

Gross floorspace

Total external floorspace including exterior walls.

Market share/Penetration rate

The proportion of total consumer expenditure within a given area taken by a particular town centre, destination or shopping/leisure facility.

Multi-channel shopping

Products made available to consumers on more than one sales channel, such as ecommerce websites, brick-and-mortar stores, marketplaces, comparison shopping engines, social media platforms, and other online channels.

Multiplex cinema

A cinema complex with five or more screens.

Net (sales) floorspace

Retail floorspace devoted to the sale of goods, excluding backstage/storage space and other areas not accessible to customers.

Oxford Retail Consultants (ORC)

A data consultancy widely used for retail planning information.

Special forms of trading (SFT)

Retail sales via the internet, mail order, stalls and markets, door-to-door and telephone sales, including on-line sales by supermarkets, department stores and catalogue companies.

Use Classes Order (UCO)

A categorisation system within the planning process set out by the Government to label types of property and land based on function.

- **Use Class E**

  Commercial and service premises including retail or shop uses, restaurants and cafés, financial or professional services (e.g. banks and building societies), indoor sport and recreation, medical services, nurseries, and businesses (e.g. offices, light industry, and research and development).

- **Use Class F**

  Local Community Uses, learning and non-residential institutions including local shops (not more than 280 sq.m and within 1,000 m of a similar facility) community halls, outdoor sport or recreation, and indoor swimming pool or ice-skating rink, educational establishments, galleries, museums, libraries, public halls, places of worship and courts.

- **Sui generis**

  Uses which do not fall within any other specified use classes, including theatres, launderettes, petrol stations, hostels, nightclubs, betting offices and pay day loan shops, pubs and bars, takeaways, and cinemas.

1.0 Introduction

Overview

1.1 Lichfields was commissioned by Southend-on-Sea City Council ("the Council") to prepare a Retail, Food & Beverage and Leisure Study. This study updates the Southend-on-Sea Retail and Leisure Needs Assessment prepared for the Council in 2022, the earlier needs assessment which was set out in the South Essex Retail Study prepared in 2017 (SERS 2017), and the Southend-on-Sea Retail Leisure Study prepared in 2018 (SRLS 2018).

1.2 The updated analysis in this report will inform the preparation of the Council's new Local Plan by providing the Council with an updated evidence base for the future planning of the centres of Southend-on-Sea to 2045, including retail provision, in the context of the draft Local Plan, masterplans, and wider strategies and policies.

1.3 The study has been prepared to meet the requirements set out in the National Planning Policy Framework (NPPF), the Planning Practice Guidance (PPG). The objectives of the study are to:

a. advise on current state of the retail market and on current emerging trends and determine their implications;
b. identify how much retail floorspace and of what type is needed and could be supported in each centre over the plan period to 2045;
c. identify how much food and beverage and commercial leisure floorspace could be supported in each centre over the plan period to 2045;
d. assess the vitality and viability, role and function of Southend's centres; and to
e. review the implications or emerging planning policies.

Report structure

1.4 Section 2.0 provides a summary of current national planning policies and changes to the Use Classes Order introduced in September 2020.

1.5 Section 3.0 provides an overview of trends and recent changes that will affect the demand for retail and other relevant town centre uses. The appropriate policy and strategy approach for Southend-on-Sea should reflect these underlying trends.

1.6 Section 4.0 examines the existing hierarchy of centres within the authority area and the surrounding area. Appendix 8 provides more detailed centre health checks and audits for the key designated town, district and neighbourhood centres.

1.7 Section 5.0 sets out the retail and food/beverage floorspace capacity assessment based on the latest Experian expenditure and sales density projections. The capacity tables are shown within the Appendices.

1.8 Section 6.0 provides an assessment of other main town centre uses including the scope for leisure, entertainment and cultural uses.

1.9 Section 7.0 reviews potential implications for future development plan policy taking account of updated floorspace capacity projections and recent changes to the Use Classes Order (UCO) and permitted development rights (PDR).

2.0 National Planning Policy

National Planning Policy Framework

2.1 The latest version (December 2024) of the National Planning Policy Framework (NPPF) remains unchanged in relation to the vitality of town centres. Paragraph 90 indicates planning policies should:

a define a network and hierarchy of town centres and promote their long-term vitality and viability - by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;

b define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;

c retain and enhance existing markets and, where appropriate, re-introduce or create new ones;

d allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;

e where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and

f recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.

2.2 The rapid changes that are affecting the retail sector and town centres continue to be acknowledged and reflected in the latest NPPF. It recognises that diversification is key to the long-term vitality and viability of town centres, to 'respond to rapid changes in the retail and leisure industries'. Accordingly, planning policies should clarify 'the range of uses permitted in such locations, as part of a positive strategy for the future of each centre'.

Changes to the Use Classes Order

2.3 In September 2020, the UCO was significantly amended. Changes to town centre use classes now allow far greater flexibility for uses to change within town centres without the need to obtain planning permission. The UCO has significant implications for shop frontage planning policies, restricting the ability of local planning authorities to control the mix of uses and retain specific uses previously protected e.g. Class A1 retail.

2.4 In relation to main town centre uses, as defined in the NPPF Annex 2 glossary, the UCO changes provide for three new use classes:

- Class E (Commercial, business and service)

- Class F.1 (Learning and non-residential institutions)
- Class F.2 (Local community).

2.5 The UCO changes now combine: Shops (A1), financial/professional services (A2), cafés/restaurants (A3), indoor sports/fitness (D2 part), medical health facilities (D1 part), creche/nurseries and office/business uses (B1) into the new single Use Class E. The new Class E includes some uses that are not defined as 'main town centre uses" within the NPPF e.g. medical services and some light industrial uses.

2.6 Other changes potentially introduce more restrictions rather than flexibility. Partly in response to the impact of the Covid-19 pandemic, there is added protection against the loss of learning, non-residential and community facilities, including museums, public halls, sports facilities and local shops. These uses are now included in new Classes F.1 and F.2. Class F.2 also includes small, isolated shops (at least 1 kilometre from a similar shop) selling essential goods including food.

2.7 Other potential non-retail town centre uses have been placed in the list of Sui Generis uses, with no permitted changes of use e.g. pubs/bars (A4), takeaways (A5), cinemas and live music venues. The inclusion of these uses as Sui Generis appears to have a dual function i.e. controlling uses such as pub/bars and takeaways that may have an impact on nearby residential amenity, whilst protecting against the loss of other cultural facilities such as cinemas and music venues, most vulnerable to the impacts of Covid-19.

2.8 The previous distinction between Class A3, A4 and A5 uses has become more critical, with Class A3 uses now having more flexibility in the new Class E, but no flexibility for Class A4 and A5 uses. Many Class A3 restaurants offered a takeaway service during the Covid-19 pandemic and the categorisation of bar/restaurants has always been arguable and will be a matter of fact and degree on a case-by-case basis. In response to these changes, future land use surveys should categorise uses within centres and frontages to reflect the new UCO, which is helpful when considering appropriate policy options and change of use planning applications.

2.9 The potential implications of permitted changes in use outside town centres may also have unintended consequences. In theory large out-of-centre B1 office buildings or D2 commercial leisure uses, with no restrictive conditions, could be converted to retail use without planning permission or an assessment of the impact on the town centre or application of the sequential test. Allowing retail uses to occupy out-of-centre buildings could run counter to the objective of maintaining and enhancing town centres. This change could have implications for the effectiveness of retail impact and sequential test policies. However, to date there is limited evidence there has been an upturn in out-of-centre retail uses occupying employment or leisure buildings.

2.10 In December 2020, the Government began a consultation on a variety of further changes to permitted development rights relating to housing delivery and public service infrastructure. The consultation included a proposed Class E to Class C3 permitted development right. The outcome of several elements of this were published and the associated amendments to the Town and Country Planning (General Permitted Development) (England) Order 2015 (GPDO) which were laid before Parliament in the Town and Country Planning (General Permitted Development etc.) (England) (Amendment) Order 2021. The Government published an amendment to the General Permitted Development Order in March 2024.

2.11 A new Class MA business and commercial to residential permitted development right has introduced certain commercial to residential permitted development (PD) rights. The new class MA is different to previous retail and office to residential PD rights, with several different limitations and conditions. Delivering housing and the reuse of redundant shopping space is the Government's priority and the Class MA permitted development right emphasises this.

2.12 The new permitted development rights effectively reduce the scope of office to residential permitted development while increasing the scope of retail to residential and introduce new PD rights for other town centre uses to change to residential. The impact of these PD rights on the number of occupied retail premises in town centres is unclear at this stage, but generally the proportion of retail units have been falling over the past decade.

2.13 Class MA allows many properties within Class E to change to residential without consideration of impact on the high street where the proposal is outside of a conservation area and limited consideration if it is within a conservation area. The impact on the character and sustainability of the conservation area needs to be considered for ground floor proposals. There may also be restrictive planning conditions or legal agreements that prevent change of use via Class MA.

2.14 Subject to limitations and conditions, former uses classes Class A1 (shops); Class A2 (financial and professional services); Class A3 (food and drink); Class B1 (business); Class D1(a) (non-residential institutions – medical or health services); Class D1(b) (non-residential institutions – crèche, day nursery or day centre) and Class D2(e) (assembly and leisure – indoor and outdoor sports), other than use as an indoor swimming pool or skating rink, now benefit from the Class MA PD rights. The changes introduced in March 2024 for Class MA remove the requirement that a building must have been vacant for a continuous period of at least 3 months immediately prior to the date of an application for prior approval. Additionally, Class MA is amended to remove the floorspace upper limit for buildings changing use under the right.

2.15 In a conservation area and where the change of use is at ground floor level, the impact on the character and sustainability of the conservation area is another new prior approval matter. Addressing this matter could potentially include a limited assessment of retail impact.

2.16 The requirement to meet space standards in relevant prior approval applications came into force in April 2021. The GPDO does not grant permission for any dwelling that would be less than 37 sq.m or would not comply with the nationally described space standard. These measures have raised concerns about the potential impact on high streets and shopping parades, which are essential to support local communities.

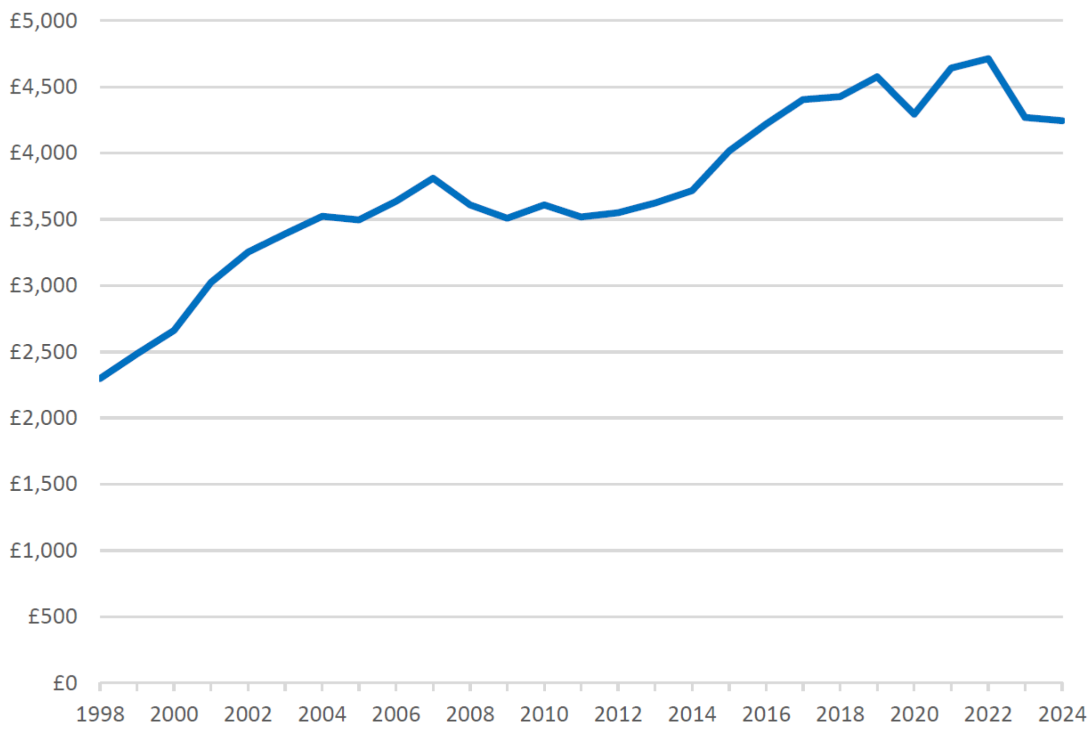
2.17 Many Local Authorities have introduced Article 4 Directions as a mechanism to protect town centres, by removing some of the PD rights. These Article 4 Directions are usually focused on a specific area rather than across the entire centre. The need for Article 4 Directions to remove permitted development rights could be considered in areas with limited vacancy rates and where there is pressure for alternative uses that could undermine the vitality and viability of the town centre.

3.0 Recent trends and key changes

Implications of Brexit, Covid-19 and other trends

3.1 Historic trends indicate that consumer expenditure has grown consistently in real terms, generally following a cyclical growth trend. The growth in expenditure per person on comparison retail goods between 1998 and 2024 is shown in Figure 3.1. Experian is a data provider most often used in evidence base studies that provides consumer expenditure data and other economic forecasts. High expenditure growth between 1998 and 2008 fuelled demand for new retail floorspace. Since the recession and credit crunch in 2009 expenditure growth has been much slower and the demand for retail floorspace has reduced, particularly comparison goods floorspace. Comparison goods expenditure per capita dropped sharply in 2020 due to the impact of Covid-19 lockdowns, but recovered to pre-Covid levels in 2022. However, expenditure per person declined in 2023 and 2024 due to the on-going cost-of-living and energy crisis.

Figure 3.1 Comparison goods expenditure average per head in the UK (constant 2023 prices)



Source: Experian Retail Planner Briefing Note 23 (March 2026)

3.2 The main implications of Brexit, Covid-19, high inflation, the cost-of-living and energy crisis for evidence base studies were as follows:

- impact on the reliability of demographic and economic projections i.e., population growth and Experian expenditure forecasts;
- short term impacts on the mix of uses and customer behaviour that distorted levels of expenditure during 2020, 2021 and 2022; and

- longer-term structural impacts that could affect the nature of town centres and the way households shop, eat/drink out and participate in leisure activities.

3.3 The key on-going uncertainties relating to the first two points are primarily the length of the cost-of-living crisis and the potential implications of ongoing geopolitical disruptions to the wider economy. The longer-term structural implications are harder to predict and quantify at this stage, but recent data provides an early indication.

3.4 Operators have continued to face elevated risks to cashflow and increased costs arising from a slump in consumer demand and disruption to supply chains. Non-essential products, hospitality and leisure services were the hardest hit during the Covid-19 pandemic. Short-term supply chain disruption led to inflationary pressure, which had an impact of consumer demand.

3.5 Retailers with infrastructure to fulfil on-line orders/home delivery benefitted during the Covid-19 pandemic. There has been a structural shift towards multi-channel shopping (home, TV and internet shopping), reducing the demand for physical space within town centres.

3.6 As a result of these trends, there has been a spike in town centre vacancies with many businesses failing, particularly non-food retail operators, restaurants and leisure uses. High levels of inflation and the cost-of-living crisis exacerbated difficult trading conditions. Many national operators have announced job losses and store closures.

3.7 Reflecting these trends, Experian's latest forecasts (published in March 2026) suggest slower expenditure growth and home shopping/internet spending is expected to grow at a much faster rate than traditional bricks and mortar shopping.

Experian's latest retail expenditure forecasts

3.8 This study adopts Experian latest expenditure information and forecasts (Retail Planning Briefing Note 23 – March 2026). The study sets out expenditure projections during five-year intervals up to 2045.

3.9 The cost-of-living crisis, including the high level of inflation, resulted in a reduction in retail expenditure per person during 2023, with many customers either trading down (buying cheaper products or using discount retailers) or cutting back (buying less products). Experian indicates a continued decline during 2024 and 2025. Low growth is predicted during 2026, but higher annual growth is expected in the longer-term.

3.10 Planning based on long-term expenditure growth projections up to and beyond ten years has always had inherent uncertainties. Despite these uncertainties, development plans should assume a return to reasonable rates of growth and relative normality, although the implications of the short-term impacts should not be ignored. It is better to plan for a return to growth and then modify the strategy later if levels of growth are lower than originally predicted, rather than not planning for growth because there are significant uncertainties. The latter approach is likely to fail to respond in time if higher levels of growth are achieved, and any growth will go elsewhere. Nevertheless, a cautious approach to expenditure growth, as now suggested by Experian, should be adopted, bearing in mind the uncertainties relating to the growth in on-line shopping.

3.11 For convenience goods, Experian's latest forecasts suggest a continued period of readjustment following high growth in expenditure experienced during the Covid-19 lockdowns in 2020. Convenience goods expenditure per capita is expected to continue to fall during 2025 and 2027. In the longer-term a small decline is forecast at -0.2% per annum thereafter. Despite this forecast reduction in total expenditure per capita, Experian expects continued growth in non-store sales. Any need for new convenience goods retail floorspace in the authority area is likely to relate to population growth, high current levels of trading or qualitative areas of deficiency.

3.12 Comparison goods expenditure per head is predicted to have fallen by -0.5% during 2024, and then have increased marginally by 1.2% during 2025, forecast to rise to 1.2% growth over 2026 and 1.8% by 2027. Modest growth is expected in the longer-term (between 2.5% to 2.6% per annum), but still at a lower rate than previous historic trends (5.8% per annum between 1998 and 2008). Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.

3.13 New forms of retailing (multi-channel and home shopping) have and will continue to grow. Home/electronic shopping and home delivery has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect / click and return shopping has become more popular. Recent trends suggest continued steady growth in multi-channel activity.

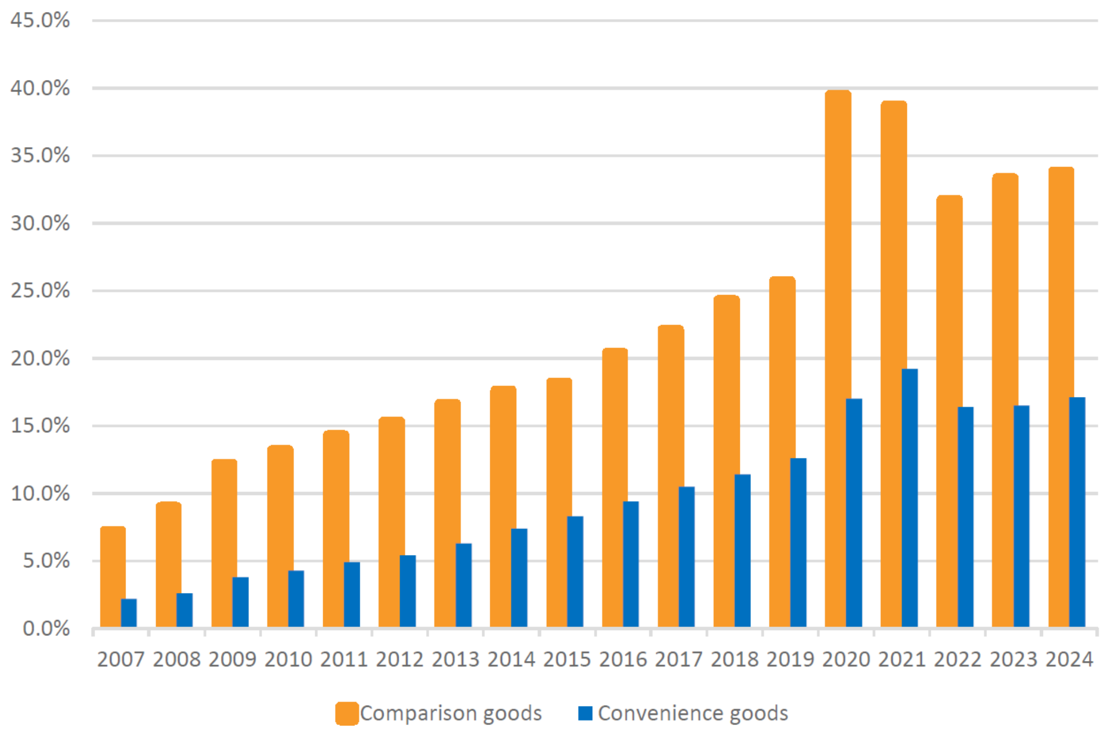
3.14 Experian's Retail Planner Briefing Note 23 (March 2026) suggests non-store retailing's market share increased from 20.6% in 2019 to 30.8% in 2021. Non-store sales include all on-line sales and other forms of sales not generated from physical retail floorspace e.g. vending machines, markets and deliveries. Comparison non-store sales increased from 25.7% to 38.7% and convenience good sales increased from 12.6% to 19.2% between 2019 and 2021. However, Experian indicates comparison goods non-store sales figure fell during the post Covid lockdown period in 2022, reducing to 31.7%. Convenience goods non-store sales also fell to 16.4%. Nevertheless, the following years' figures remain significantly higher than the pre-Covid market shares in 2019. The growth in non-store retail sales for comparison and convenience goods between 2007 and 2024 in the UK is shown in Figure 3.2.

3.15 Between 2007 and 2024 the proportion of comparison goods non-store sales increased by over 25 percentage points from 7.2% to 33.8%. The proportion of convenience goods non-store sales increased by 15 percentage points, but increased by almost 8 times, starting from a lower 2007 base of only 2.2%. Experian data shows the sharp increase in non-store convenience goods sales during the Covid lockdowns during 2020 and 2021, but a decline in 2022. 2024 showed the first signs of a recovery for online convenience shopping, with rates rising back up to 2020 levels.

3.16 This data suggests the proportion of retail sales spent on-line will continue to grow, albeit at a slower rate than previously forecast, which will have an impact on traditional bricks and mortar retailing. Conversely the introduction of return fees for on-line shopping and increased minimum spend thresholds for free deliveries may benefit traditional retailing.

3.17 Reflecting these trends, Experian's latest projections recommend relatively modest levels of growth in on-line shopping when compared with previous trends. It is too early to plan for a significant shift towards on-line shopping, over and above the levels of growth already predicted by Experian, but a higher shift to on-line shopping is possible. These longer-term forecasts should be monitored and kept under review.

Figure 3.2 Non-store sales as a percentage of total sales in the UK



Source: Experian Retail Planner Briefing Note 23 (March 2026) - Appendix 3

3.18 The floorspace capacity assessment in this study goes on to make an allowance for future growth in e-tailing based on Experian's latest projections, with internet spending stripped out of the assessment for robustness.

3.19 Given the likelihood that multi-channel expenditure will continue to grow at a faster pace than other consumer expenditure, the need assessment adopts relatively cautious growth projections for expenditure and an allowance is made for operators to increase their turnover/sales density, due to growth in home shopping and click and collect.

Demand for Town Centre Uses

3.20 In the past, lower expenditure growth and deflationary pressures (i.e. price cutting) in the non-food sector have had an impact on the high street. Because of these trends, the UK average shop vacancy rate (based on Goad Plan data for retail, food/beverage and service units) increased from around 10% in 2005 to about 14% in 2012. Vacancy rates gradually improved to 12% in 2018 but increased back to over 14% in 2023. The current UK vacancy rate is 14.7%. There has been a sharp increase in shop vacancies in many town centres due to the impacts of the Covid-19 pandemic, the cost-of-living crisis and the growth in on-line shopping. The more recent impact of higher inflation and the cost-of-living crisis is also likely to constrain consumer demand, which may affect the demand for floorspace at least in the short term.

3.21 Despite the generally rising vacancy rates nationally, vacancy levels across Southend-on-Sea's Town, District and Neighbourhood Centres are significantly lower than the current UK average. The authority-wide vacancy rate is 8.4%, compared to 14.7% across the UK. Southend City Centre records a vacancy rate of 11.0%, which is also below the national average. This relatively strong performance suggests that, overall, the supply of premises across the Council's centres aligns with demand for town centre uses, and with operator requirements in terms of unit size, quality and location.

3.22 Southend's vacancy rates also indicate a generally healthy level of market demand. However, there are variations across the authority's centres, with Southend city centre, and Leigh and Westcliff District Centres generally recording higher vacancy rates than neighbourhood centres. This reflects a combination of factors, including higher rental values in larger centres and differences in centre functions and catchment areas. There is also variation within larger centres, where units in prime locations tend to perform more strongly, while those on secondary frontages, or secondary streets where frontages have not been defined, generally experience higher vacancy rates. In line with national trends, centres across Southend report a higher proportion of food and beverage uses, with restaurants and cafes accounting for 16.2% of units, compared to 11.4% nationally. This indicates an ongoing diversification of uses within Southend's centres, reflecting a shift towards service, leisure and experiential town centre uses.

3.23 Property owners, landlords and funds have come under increasing pressure with struggling occupiers seeking to renegotiate terms through a company voluntary arrangement (CVA) i.e., an insolvency process designed to let a firm with debt problems reach an agreement with creditors to help pay off part or all debts. Elsewhere, retailers have been continuing to 'right size' their portfolios, with operators announcing store closures. These trends have impacted on rental income and the capital value of retail/leisure assets. These trends were exacerbated by Covid-19 and the cost-of-living crisis and will continue in the short-term.

3.24 Whilst the CVA process has created difficulties for landlords in terms of rent negotiations, at the same time newly freed-up space has provided new opportunities. Vacated premises have been reconfigured and reused for non-retail uses i.e. food/beverage and leisure uses e.g. trampolines, escape rooms, climbing and indoor golf.

Food store operators

3.25 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. Retailers have also changed their trading formats to include smaller convenience store formats capable of being accommodated within town and local centres (such as the Tesco Express/ Metro, Sainsbury's Local, Little Waitrose and Marks & Spencer's Simply Food formats).

3.26 Across the UK the number of Tesco Express, Sainsbury's Local and Little Waitrose stores increased significantly during the last decade. The number of Tesco Express stores increased by 35%, from 1,427 stores in 2012 to 1,920 stores in 2020 (source: Mintel). During the same period Sainsbury's Local stores increased by 83% and the number of Little Waitrose stores doubled. The number of Asda Express and Morrisons Daily stores has also increased.

3.27 Several proposed larger food superstores have not been implemented across the country. There has been a move away from larger superstores to smaller formats, reflecting changes in some customers' shopping habits, i.e. more frequent but smaller food and grocery shopping trips. This trend may have increased with more homeworking during the pandemic lockdowns, which may not move back to pre-Covid levels in the future.

3.28 The expansion of European discount food operators Aldi and Lidl has been rapid during the last decade. These operators are now competing more directly for market share with other main food store operators. Home Bargains and B&M have also expanded rapidly in recent years.

3.29 Convenience uses comprise 9.9% of units across Southend’s centres, with smaller format convenience stores present in most centres (with the notable exceptions of Southchurch Avenue and Bridgewater Drive South). Some of these are provided as part of petrol filling stations. Large centres are generally more suited to accommodate food superstores, where out-of-centre locations are not pursued, and this is evidenced by Southend city centre, where there is a large-scale Sainsburys supermarket.

Comparison retailers

3.30 Comparison retailers responded to difficult market conditions before the Covid-19 pandemic. The bulky goods warehouse sector (i.e. DIY, furniture, floor coverings and electrical goods) had already rationalised, including mergers and failures, and scaled down store sizes. Other traditional high street retailers previously sought large out-of-centre stores, for example Next, TK Maxx and M&S. Matalan also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon and Sports Direct had expanded out-of-centre. These trends have slowed significantly, and in some cases reversed, and are unlikely to re-emerge for the foreseeable future.

3.31 The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods, has been particularly weak in recent years. This has led to voids on some retail warehouse parks and proposals to extend the range of goods sold to non-bulky comparison goods. This trend has also led to the relocation of retailers to out-of-centre locations, creating more vacant units in town centres. The discount sector has occupied many units on retail parks e.g. Home Bargains, Poundland and B&M Bargains. Southend’s retail parks accommodate a range of retailers, however, discount retail provision in Southend is not confined to out-of-centre locations, with similar operators also represented in centres alongside smaller-format bulky goods stores. For example, Poundland operates two units within Southend city centre, and B&M and Dunelm are also present.

3.32 Within centres, many high street multiple comparison retailers have changed their format. For over two decades, high street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation into the larger regional and sub-regional centres. Many multiple retailers now require representation in fewer locations to service catchment areas. Southend City Centre functions as the focal point for national multiple retailers within the authority area, with New Look, Next and H&M all operating in the centre. This function is further supported by the presence of two covered shopping centres, which tend to provide units fitting the operational needs of such retailers. Marks & Spencer also occupy a large unit on Southend city centre’s High Street, which provides a wider range of their products, but also operate Marks & Spencer 'Food Halls' and 'Simply Food' stores within the authority area's district and neighbourhood centres.

3.33 In general, operator demand for space has decreased significantly during the last five years and, of those national multiples looking for space, many prefer to locate in centres where there is an existing precedent for national multiple comparison provision, such as Southend city centre. This is supported by a generally higher proportion of independent comparison goods retailers within district and neighbourhood centres in Southend.

3.34 The continuation of these trends will influence future operator space requirements in Southend-on-Sea with smaller vacant units continuing to be less attractive for new multiple occupiers, and retailers increasingly looking to locate into larger units in larger centres. However, smaller vacant units could still be attractive to independent traders and non-retail services looking to serve local catchment areas.

Charity and discount shops

3.35 The charity shop sector has grown steadily over the past 30 years and there is no sign this trend will change soon. This trend has raised concerns in some areas regarding over concentrations of charity shops at the expense of other retail uses. Nevertheless, these outlets do provide an important role in offering affordable goods and a service to those wanting to recycle goods.

3.36 Planning policies cannot control the amount of charity shops because they fall within the same use class as other shops (now Class E). In many centres, charity shops have occupied vacated shop premises during previous recessions. Southend's centres have a strong provision of charity shops, which account for approximately 7.0% of comparison goods units in Southend city centre. A strong representation is also evident across the authority area's district and neighbourhood centres.

3.37 Charity shops can often afford higher rents than small independent occupiers because of business rate discounts. It does not follow that these charity shops will be replaced by traditional shops when the market recovers.

Non-retail services

3.38 Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. The non-retail service uses include the following Class E and Sui Generis uses:

- hairdressers, dry cleaners, travel agents, some sandwich shops (those not categorised as hot food takeaways), funeral parlours and post offices;
- banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies;
- restaurants, cafés and hot food takeaways; and
- pubs/bars.

3.39 The number of bank/building society outlets has decreased significantly during the last two decades, with banks looking to reduce costs and the increase in on-line banking. Nationally, the proportion of town centre units occupied by banks/building societies was 4.6% of all units in 2005. This proportion had reduced to 2.8% in 2017 and was only 1.8% in 2023. Across the country banks/building societies tend to concentrate their outlets in the largest centres in local areas. This trend is also demonstrated across Southend's centres. There are no bank outlets in the neighbourhood centres and there is only one bank outlet across the authority area's district centres, which is located in Leigh. However, banks/building societies do occupy approximately 2.3% of Southend city centre's retail units, whilst both Leigh and Westcliff District Centres feature post offices (two, in the case of Leigh) that provide access to banking services.

3.40 Banking hubs enable major banks to maintain a high street presence whilst reducing costs, with different banks and post office sharing the same unit and operating on alternating days. Continued rationalisation of banks and financial services could lead to an increase in town centre vacancies but is an important route for preserving town centre service offerings.

3.41 The growth of money lending/pay day loan shops, betting shops and hot food takeaways has raised concerns amongst many local planning authorities and has resulted in a change to permitted development rights (PDR) to control the growth of these uses in town centres. Hot food takeaways occupy 6.3% of units across Southend, which is similar to the national average (6.5%). Betting shops occupy approx. 2.0% of units within Southend City Centre and are also present in district centres, as well as some of the larger neighbourhood centres in Southend.

3.42 Changes to the GPDO has had an impact on some town centres but the more recent changes to the Use Classes Order (UCO) and permitted development rights (PDR) are likely to lead to more significant changes in the future. These measures allow for much greater flexibility for changes of use from retail to non-retail uses. To date, these measures have not significantly changed the composition of most town centres, which may have been supressed by the Covid pandemic. The impact of these changes will need to be carefully monitored by undertaking regular town centre land uses surveys. The cost-of-living crisis may increase demand for change from retail to other uses.

3.43 An 11th August 2026 press release by the Prime Minister's Office announced the intention for further changes, confirming that Adult Gaming Centres (AGCs) would outside of the UCO and be defined as sui generis (endorsing the approach that a number of authorities had previously taken when assessing such applications), alongside a change to specifically define vape (or e-cigarette) shops and tobacconist uses as sui generis. This would allow the Council to control such uses through determination of planning permissions, including on the basis of individual or cumulative (to prevent clusters) impact on neighbouring amenity such as noise and odours, preventing breaks in active frontages, and impacts on the nature and character of the retail frontages.

The evening economy

3.44 Food/beverage, leisure and entertainment are fast moving and creative sectors, with a steady flow of new concepts emerging. Within these sectors there has been a significant increase in the number of national multiple chains which have sought to increase their geographical coverage, but primarily in larger centres.

3.45 The hospitality sector has experienced difficulties resulting in closures, which suggests operators may have over-stretched. Demand continued to increase for coffee shops, such as Starbucks, Costa Coffee and Café Nero. National branded pub/restaurant chains invested heavily and not exclusively in larger centres. Themed restaurants also expanded rapidly but have experienced difficulties more recently. This sector in town centres was most adversely affected by the Covid-19 pandemic and the potential for growth in less certain than before the pandemic. The key categories for the food and beverage offer are:

- *Impulse*: characterised by their produce range that is typically highly visual and hand-held so that it can be eaten "on the go";
- *Speed eating fast food*: food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector is dominated by traditional high volume fast food offers such as burgers and fried chicken;
- *Refuel and relax*: a drink, snack and a short break in a pleasant environment rather than focusing on eating a main meal; and
- *Casual dining/leisure dining*: incorporating several food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.

3.46 The proportion of non-retail uses, excluding banks and building societies, within town centres across the UK increased significantly before the Covid-19 pandemic. Such uses account for 17.4% of retail units across Southend, which is slightly higher than the national average of 16.4%.

Pop-up spaces

3.47 The increase in vacant space across the UK has led to an increase in premises available for temporary uses or pop-up uses including temporary restaurants, bars, shops and galleries. Some landlords have opted for flexible leases, with changing attitudes towards short-term spaces. New independent brands have benefitted despite the lack of brand recognition. E-commerce brands have also sought physical presence, as an essential part of their marketing strategy and an effective way to engage with existing and new customers off-line. Brands have opened pop-up outlets in different locations to test and learn before committing to permanent stores. This trend may increase during the cost-of-living crisis.

Summary

3.48 The trends and changes highlighted in this section, including the growth of home shopping, are not new and have been affecting the high street for many years. In response to these trends, most town centres have changed and diversified. The food/beverage, leisure and non-retail service sectors have to some extent been successful in occupying space no longer attractive to retail tenants. Relatively low vacancy rates across Southend, coupled with higher food/beverage and non-retail occupancy rates, when compared to the national average, indicate that an ongoing diversification in town centre uses in Southend successfully contributes to reducing vacancy rates. Nonetheless, Southend is not immune to the wider trends and pockets of higher vacancies do exist within the city centre, notably within The Royals and The Victorias Shopping Centres. The single ownership structure of these centres provides an opportunity for a curated occupation strategy, placing compatible and complementary uses in close proximity to encourage greater uptake of vacant units.

3.49 There have been cyclical trends in vacancy rates reflecting the macro-economic trends, but in most cases, centres recovered during periods of stronger growth. Many commentators believe the most recent decline is structural rather than cyclical and a more flexible approach to town centre uses is required.

3.50 The most recent trends suggest vacancy rates have been slow to recover in weaker centres, and many high street retailers are still experiencing difficulties. The Goad national vacancy rate has increased to over 14% and therefore a cautious approach to future development needs is required. The implications of the cost-of-living crisis also endorse a cautious approach to providing additional retail floorspace, particularly in out-of-centre locations.

3.51 Shopping behaviour will continue to change, and town centres will need to respond. All centres will need to focus on their advantages over other forms of multi-channel shopping, for example using the internet as an extended shop window, click and collect facilities and providing a combined retail, leisure and cultural experience for those looking for a "day out" or "evening out".

4.0 Hierarchy of centres

National Policy

4.1 The NPPF (paragraph 90) indicates planning policies should define a network and hierarchy of town centres and promote their long-term vitality and viability by allowing them to grow and diversify. Town centres as defined in the NPPF comprise a range of locations where main town centre uses are concentrated, including city and town centres, district and local centres. Local centres exclude small parades of shops of purely neighbourhood significance. The NPPF and PPG provide limited guidance on how to categorise town, district and local centres.

Designated Centres in Southend-on-Sea

4.2 The designated centres in Southend-on-Sea City, are defined by the Retail Hierarchy set out in Policy Table DM6.4a of the Southend-on-Sea Regulation 18 Draft Local Plan. Southend City Centre is identified as the only *Town Centre* in the authority area and remains the first preference for retail and other main town centre uses, seeking to attract large numbers of people in both the daytime and evening economies.

4.3 Westcliff and Leigh are identified as *District Centres,* where the Council will seek to support footfall and offer a range of shops and services to the local communities, while maintaining a strong provision of Class E uses.

4.4 Seven *Neighbourhood Centres* are also identified in Policy Table DM6.4a, along with 32 *Local Centres,* which provide for more local needs and accessible services.

4.5 'Health check' audits of Southend-on-Sea's Town, District and Neighbourhood Centres have been undertaken, and are provided at Appendix 8. The audits exclude upper floors, residential and office uses from the totals, and classifies development sites and stores undergoing alterations as vacant for the purpose of the mix of uses. The seven designated neighbourhood centres have been summarised in Table 4.1, based on the Council's land use data in November 2025.

4.6 Southend is the largest centre, with a wide choice of retail outlets, food/beverage and service uses, followed by Westcliff and Leigh District Centres. Leigh is significantly larger than Westcliff in terms of number of retail units, as Leigh covers a significantly larger area. All neighbourhood centres are significantly smaller than the district centres in terms of retail units, with the largest being London Road (Thames Drive – Hadleigh Road) with 98 units. The neighbourhood centres vary significantly in size. West Road (Shoebury) is the smallest, comprising 31 units.

4.7 Figure 4.1 shows the composition of the authority area's town, district and neighbourhood centres (combined), in terms of the mix and proportion of different uses. This is compared with the authority area and Goad Plan average mix for centres across the UK. More detail is provided in the health check analysis in Appendix 8.

4.8 All centres have a reasonable mix of retail and service uses, however, the neighbourhood centres have a lower proportion of comparison goods than the national average. The centres all have a reasonable provision of non-retail services. The food/beverage offer varies significantly, with relatively poor provision of bars & pubs across the authority area.

4.9 Shop unit vacancy rates, on average, are lower than the current UK average (14.7%), however, Sutton Road South Neighbourhood Centres has notably high vacancy rates (18.2%).

4.10 The 2018 Southend Retail and Leisure Study indicated that there were 68 vacant units in Southend. The vacancy rate was 15.9%, higher than the national average at that time (12.2%). The 2022 update indicated a similar number of vacant units (67) in Southend and a vacancy rate of 16.3%. There has been a notable reduction in vacancies since that period, albeit there are pockets of higher vacancies in the city's Shopping Centres, as referenced in the previous section.

4.11 Neighbourhood centres generally have higher proportions of convenience goods retail uses and non-retail services e.g. hair/beauty salons and hot food takeaways than the district and city centre.

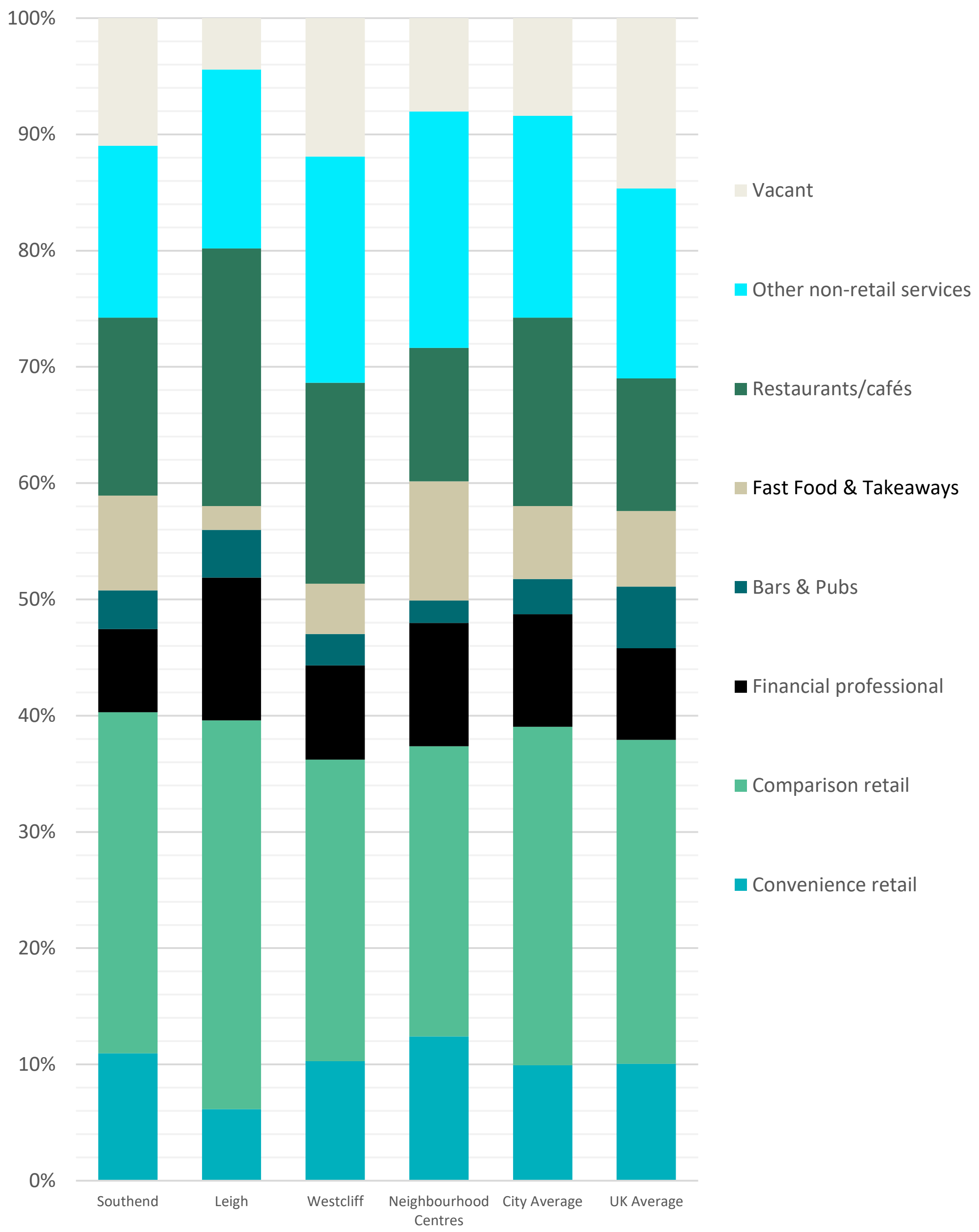
4.12 The overall mix of uses in the authority area is broadly in line with the UK average in terms of comparison and convenience goods retail, financial and professional services, and hot food takeaways. The authority area has a higher proportion of restaurants and cafes, and a significantly lower provision of pubs and bars; although, outside the designated centres there are a number of public houses.

Table 4.1 Town, district and neighbourhood centres in Southend-on-Sea – mix of uses (%)

	Total	Comparison goods retail	Convenience goods retail	Food/ beverage	Other services*	Vacant
Southend	392	115	43	105	86	43
Westcliff	185	48	19	45	51	22
Leigh	293	98	18	83	81	13
District centre sub-total	**478**	**146**	**37**	**128**	**132**	**35**
Neighbourhood centres (combined)	**357**	**96**	**42**	**80**	**114**	**25**
Total	**1,227**	**357**	**122**	**313**	**332**	**103**
Total (%)	**100**	**29.1**	**9.9**	**25.5**	**27.1**	**8.4**

Source: SoSCC land use survey, November 2025
*excluding Class B, office, D1/D2 and residential uses

Figure 4.1 Mix of retail and service uses (excluding Class B, D1/D2 and residential uses) - % of all units



Source: SoSCC land use survey January 2025 and Goad Plan UK averages

Retailer Representation

4.13 Most of the authority area's comparison goods retail units are focused in Southend City Centre and the district centres. In general, larger centres tend to have a higher proportion of comparison goods shop units than smaller centres. Larger centres focus on fashion shopping and therefore have a higher proportion of comparison shops.

4.14 Smaller (neighbourhood) centres have a higher proportion of convenience goods units and non-retail units, catering for the day-to-day needs of their local catchment area. Convenience goods retail and non-retail services perform an important role in all centres, serving relatively localised needs.

4.15 A more detailed analysis of the mix of retail units in each centre is shown in the centre health checks at Appendix 8.

Service Uses

4.16 Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. The service uses are categorised as follows:

- Financial and professional services including banks, building societies, financial services, estate agents and employment agencies;
- Food/beverage uses, including restaurants, cafes, pubs, bars and hot food takeaways;
- Other non-retail services including a wide range of uses, such as hairdressers, dry-cleaners, travel agents, beauty salons and post offices.

4.17 Leigh District Centrehas the highest concentration of food/beverage outlets, particularly restaurants/cafes. Southend City Centre and Westcliff District Centre have a reasonable choice of facilities. Most of the authority area’s hot food takeaways are in neighbourhood centres.

4.18 Southend City Centre and the district centres have a reasonable range of other non-retail centres. The neighbourhood centre average for such uses is higher than the UK average. The provision of banks/building societies is concentrated in Southend city centre. Whilst medical and healthcare services are not included within the Experian Goad town centre definitions and categories (except for opticians, categorised as a comparison use) there were notably fewer such facilities in Westcliff, likely as a result of the centres’ overlapping catchment areas.

4.19 A more detailed analysis of the mix of service uses in each centre is shown in the centre health checks at Appendix 8.

Summary

4.20 The analysis of the hierarchy of centres in this section indicates that the authority area has a well-established network of centres that serve their respective areas. Southend is the only centre with an authority area wide catchment area, although the authority area generally has a significantly lower vacancy rate than the national average. Whilst Southend City Centre as a whole shows a healthy vacancy rate of 11.0%, this is in contrast to The Royals (21.4%) and The Victorias (20.3%) Shopping Centres.

4.21 Whilst the authority area has a generally good food and beverage offer, particularly for restaurants/cafes, it does have a notably lower proportion of public houses and bars, in comparison to the UK average, albeit there are a number of facilities located beyond the centres in accessible residential locations. The catchment areas of centres overlap to an extent, particularly Southend, Westcliff and Leigh, all located in the south of the authority area. Whilst there is likely to be a degree of internal competition between the centres, vacancy rates remain relatively low in all three centres. As such, there is limited cause for concern in this regard.

4.22 Identifying the hierarchy of centres in future development plans will be important in terms of:

- Ensuring the vitality and viability of centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
- Directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and
- Identifying a viable and complementary role and strategy for each centre, recognising their different strengths and potential.

4.23 The network of centres should be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping and leisure patterns.

5.0 Retail and food/beverage capacity

Introduction

5.1 This section assesses the quantitative and qualitative need for retail and food/beverage uses in Southend-on-Sea. The NPPF indicates that local planning authorities should positively seek opportunities to meet the development needs of their area, and Local Plans should meet objectively assessed needs. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping and food/beverage (eating and drinking away from the home).

Assumptions and base data

5.2 All monetary values expressed in this study are at 2023 prices, consistent with Experian's base year expenditure figures for 2023, which are based on actual recorded expenditure levels rather than projections.

Study area zones

5.3 A household telephone survey was undertaken during February 2026. The primary catchment areas for Southend-on-Sea extend beyond the authority boundary, particularly to the north and west. The study area, shown in Appendix 1, is the primary catchment area for Southend-on-Sea, comprised of six zones. These zones have been derived through a consolidation of the 23 zones used in the most recent Retail and Main Town Centre Use Study (2022) that makes up Southend-on-Sea's core retail and leisure catchment. This consolidation reflects the narrower focus of the current study on Southend-on-Sea and provides a more strategic, overarching understanding of the town's catchment context.

5.4 Two population projections have been prepared for the purpose of this study, a low-growth and a high-growth option, reflecting the analysis within Part A (Housing Needs) of the Integrated Needs Assessment. Both growth options begin with a base year 2023 population within the study area of 360,749. The low-growth option projects populations to increase to 383,738 by 2045, an increase of +6.4%, compared to the high-growth option which projects populations to increase to 395,224 over the same period, an increase of +9.6%. The projected population within each zone between 2025-2045 is set out in Table 1 in Appendices 2-5.

Retail expenditure

5.5 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the base year 2023 have been obtained.

5.6 Experian's latest national expenditure information (Experian Retail Planner Briefing Note 23, March 2026) has been used to forecast expenditure within the study area. Experian's short-term growth forecast rates during 2024, 2025 and 2026 reflect current economic circumstances, including Covid-19 and the cost-of-living crisis. The forecast changes during this period are as follows:

- convenience goods: -4.9%
- comparison goods: +0.2%
- leisure: +0.2%

5.7 These short-term forecasts reflect the on-going cost-of-living crisis that began in 2024. Convenience goods expenditure had increased during the lockdowns with households eating out less often than before the pandemic. Convenience goods expenditure is forecast to have since declined during 2024, 2025 and 2026. Comparison goods and leisure expenditure, including eating and drinking out, reduced significantly during the lockdowns. The leisure sector was projected to recover during 2022. The comparison good retail sector is expected to have declined during 2022 and 2023, and recovered slightly over 2024.

5.8 In the longer-term it is more difficult to forecast year-on-year changes in expenditure. Experian's medium and long-term growth average forecasts have been adopted, as follows:

- convenience: -0.5% reduction per annum over 2025-2032, and -0.2% per annum beyond 2033;
- comparison: +1.9% growth per annum over 2025-2032, and +2.6% per annum beyond 2033; and
- leisure: +0.9% growth per annum over 2025-2032, and +2.6% per annum beyond 2033.

5.9 These growth figures relate to real growth and exclude inflation. The current high levels of inflation should not affect Experian’s long-term expenditure projections that are over and above inflation.

5.10 Experian's latest adjusted deductions for SFT (i.e. home and online shopping through non-retail businesses) in 2025 are:

- 5.2% of convenience goods expenditure; and
- 24.1% of comparison goods expenditure.

5.11 Experian’s projections suggest that these SFT percentages will increase to 6.6% and 27.6% in 2035, respectively. The long-term Experian projections suggest an increase to 7.3% and 29.3% in 2040, respectively.

High Growth Option

5.12 Table 2 in Appendix 2 sets out the updated forecasts for spending per head on convenience goods within each zone in the study area up to 2045, excluding SFT/on-line sales through non-retail businesses. Forecasts for comparison goods spending per capita are shown in Table 2 in Appendix 4 and food/beverage expenditure is shown in Table 2 in Appendix 6.

5.13 Based on forecast changes in population and per capita spending (excluding SFT), total convenience goods spending within the study area is forecast to increase by +0.98% from £966.05 million in 2025 to £975.47 million in 2045, as shown in Table 3 (Appendix 2). This expenditure increase is due to population growth. As noted above, expenditure per capita is forecast to decrease slightly due to the growth in special forms of trading which offsets any expenditure growth.

5.14 Comparison goods spending is forecast to increase by +61.94% between 2025 and 2045, increasing from £1,107.91 million in 2025 to £1,794.10 million in 2045, as shown in Table 3 (Appendix 4).

5.15 Food and beverage spending is forecast to increase by +24.22% between 2025 and 2045, increasing from £362.88 million in 2025 to £478.83 million in 2045, as shown in Table 3 (Appendix 6).

Low Growth Option

5.16 Table 2 in Appendix 3 sets out the updated forecasts for spending per head on convenience goods within each zone in the study area up to 2045, excluding SFT/on-line sales through non-retail businesses. Forecasts for comparison goods spending per capita are shown in Table 2 in Appendix 5 and food/beverage expenditure is shown in Table 4 in Appendix 7.

5.17 Based on forecast changes in population and per capita spending (excluding SFT), total convenience goods spending within the study area is forecast to decrease by -1.89% from £966.05 million in 2025 to £947.75 million in 2045, as shown in Table 3 (Appendix 3). This expenditure increase is due to a lower level of projected population growth. As noted above, individual expenditure per capita is forecast to decrease slightly due to the growth in special forms of trading which offsets any expenditure growth.

5.18 Comparison goods spending is forecast to increase by +57.38% between 2025 and 2045, increasing from £1,107.91 million in 2025 to £1,743.59 million in 2045, as shown in Table 3 (Appendix 5).

5.19 Food and beverage spending is forecast to increase by 21.95% between 2025 and 2045, increasing from £362.88 million in 2025 to £464.91 million in 2045, as shown in Table 3 (Appendix 7).

Growth in turnover densities

5.20 Experian's Retail Planner Briefing Note 23 (March 2026) indicates that convenience goods retail sales floorspace is not expected to grow between 2026 and 2032, after which a -0.1% per annum decline is forecast beyond 2033.

5.21 Experian indicates that comparison goods retail sales floorspace is expected to increase its average sales density by 1.3% per annum during 2026, and 1.8% in 2027, representing a slow recovery from the cost-of-living crisis, but higher growth is envisaged thereafter in the medium and long-term (+2.3% per annum beyond 2028). These forecast increases have been adopted and will absorb much of the future expenditure growth. These growth rates are consistent with the expected increase in on-line/home shopping through retail businesses i.e., the total sales of retail businesses will increase at a much higher rate than the amount of physical sales floorspace they provide.

5.22 For leisure facilities, including food/beverage floorspace, Experian indicates a -0.2% per annum decline in sales densities during 2026 and 2027, followed by a small average increase of +0.2% per annum beyond 2028..

Base year market shares

5.23 The turnover of facilities within the study area are estimated based on the market shares or penetration rates. To assess the capacity for new floorspace, penetration rates have been estimated for convenience and comparison shopping and food/beverage facilities based on a household shopper survey undertaken in 2026. The market shares for convenience goods and comparison goods shopping are shown in Table 4 in Appendices 2 and 3 and Table 4 in Appendices 4 and 5, respectively. The market shares for food and beverage expenditure are shown in Table 4 in Appendices 6 and 7.

Convenience

5.24 The results of the household shopper survey regarding main and top-up food and grocery shopping have been used to estimate existing convenience goods shopping patterns. The market shares in Table 4 in Appendices 2 and 3 are a combined rate for both main and top up shopping based on a 70:30 split. This 70:30 split is based on Lichfields' experience and is widely accepted in retail studies of this kind.

Table 5.1 Food and grocery trip retention in Southend-on-Sea (% of all trips in each zone)

Zone	Main – last trip	Main – other trip	Top up – last trip	Top up – other trip	Combined weighted
Zone 1 - Southend-on-Sea West	80.6	73.8	93.0	91.8	**81.7**
Zone 2 - Southend-on-Sea Central	96.4	96.1	96.5	97.3	**96.4**
Zone 3 - Southend-on-Sea East	97.3	96.7	100	99.5	**97.8**
Zone 4 - Rochford East	83.2	84.7	24.7	26.5	**66.4**
Zone 5 - Rochford West	27.0	28.0	15.7	14.9	**23.9**
Zone 6 - Castle Point	12.0	7.3	4.8	7.1	**8.6**

Source: NEMs Household Survey (2026); Lichfields analysis

5.25 As shown in Table 4 in Appendices 2 and 3, Southend-on-Sea retains the highest share of convenience goods shopping trips in the central area of Southend-on-Sea (Zones 1, 2 and 3). It has a low share within Zone 6 where Canvey Island and Hadleigh are the dominant destinations (45.3% and 23.9% respectively). In Zones 4 and 5, Southend-on-Sea competes primarily with Rochford and Thundersley (26.5% and 22.2% respectively).

5.26 These figures indicate that most residents undertake their food and grocery shopping close to where they live.

5.27 Overall, Southend-on-Sea authority area retained 58.1% of spending from residents of the Study Area, an increase from 45.7% based on the equivalent zones from the 2016 survey that informed the 2018 South Essex Strategic Retail Study (SESRS). Spending to Southend City Centre fell slightly from 8.5% in 2016 to 7.2% in 2026, while the proportion of spend across Southend’s designated centres remained broadly the same at 10.2%. Spend to other out-of-centre destinations across Southend has grown by almost half, from 27.6% in 2016 to 40.7% in 2026. Of this, retail parks attracts 23.6% of study area residents’ spending in 2026.

Comparison

5.28 The market shares for comparison goods shopping in Table 4 in Appendices 4 and 5 are based on a weighted average for each comparison goods category included within the household survey e.g. clothing/footwear, electrical, furniture, floorcoverings, DIY and health and beauty products. The survey results suggest lower levels of comparison goods expenditure retention for all goods categories within Southend-on-Sea (Zones 1, 2 and 3), but higher levels in the wider study area (Zones 4, 5 and 6). The results are summarised in Table 5.2 below.

Table 5.2 Comparison goods trip retention in Southend-on-Sea (% of all trips in each zone)

Zone	Clothing	Furniture	Domestic Appliances	Electrical Goods	Other	DIY	Health	Hobby	Combined Weight
Zone 1 - Southend-on-Sea West	63.7	51.0	81.5	66.4	70.1	58.7	74.7	92.9	**70.6**
Zone 2 - Southend-on-Sea Central	85.4	67.3	89.4	95.1	65.5	70.7	92.6	96.8	**85.6**
Zone 3 - Southend-on-Sea East	69.7	64.2	94.1	75.0	57.6	82.8	96.7	77.9	**77.3**
Zone 4 - Rochford East	63.2	59.9	94.6	90.2	57.2	67.0	58.7	81.1	**69.9**
Zone 5 - Rochford West	42.6	17.5	43.4	51.4	22.9	24.1	9.1	27.4	**29.3**
Zone 6 - Castle Point	14.6	16.3	26.7	15.3	7.6	12.4	8.0	11.2	**13.0**

Source: NEMs Household Survey (2026); Lichfields analysis

5.29 As with convenience shopping, Southend-on-Sea retains the highest share of comparison goods shopping trips in the central area of Southend-on-Sea (Zones 1, 2 and 3).

5.30 It has a low share within Zone 6 where other destinations are the most dominant (18.6%), such as Basildon Town Centre, Chelmsford City Centre, Pipps Hill Retail Park in Basildon and Lakeside Shopping Centre & Retail Park in West Thurrock. Similarly, other destinations compete against Southend-on-Sea in Zones 4 and 5 (15.4% and 11.1% respectively).

5.31 Leakage of comparison goods spend from study area residents to destinations beyond the Southend-on-Sea authority area fell from 62.0% in 2016 to 47.5% in 2026, with facilities in the authority area collectively attracting a much higher proportion of study area spending. The proportion of spending to Southend City Centre fell from 34.9% to 21.1%, while the proportion of spending at other designated centres grew from 4.8% to 8.0%. Out-of-centre destinations across Southend-on-Sea attracted 22.3% of study area spending, almost double the 11.5% recorded in 2016.

Food and Beverage

5.32 The results of the household shopper survey regarding eating and drinking away from the home have been used to estimate existing food and beverage expenditure patterns. The market shares in Table 4 in Appendices 6 and 7 are a combined rate for both eating out and drinking at pubs/bars are based on an 80:20 split, based on Experian's local expenditure data.

Table 5.3 Food and beverage market share patterns (%) - excluding internet spending

Zone	Eating out	Drinking away from home	Combined market weighted share
Zone 1 - Southend-on-Sea West	81.2	97.6	**84.5**
Zone 2 - Southend-on-Sea Central	91.3	79.1	**88.8**
Zone 3 - Southend-on-Sea East	78.0	79.7	**78.3**
Zone 4 - Rochford East	50.7	29.6	**46.5**
Zone 5 - Rochford West	20.4	13.1	**18.9**
Zone 6 - Castle Point	25.4	26.2	**25.5**

Source: NEMs Household Survey (2026); Lichfields analysis

5.33 The survey results suggest reasonably high levels of expenditure retention within the study area, as shown in Table 5.3. These high retention rates suggest that food/beverage facilities in Southend-on-Sea are generally meeting the needs of most residents and are competing effectively with other destinations.

5.34 The survey results suggest lower levels of food/beverage expenditure market share than for convenience goods shopping, but higher levels of market share than comparison goods shopping.

5.35 Food and beverage locations across the Southend-on-Sea authority area retained 55.3% of spending from residents of the Study Area, an increase from 45.7% in 2016. The proportion of spending in Southend City Centre fell from 26.8% to 14.9% over the same period, while facilities across Leigh-on-Sea attracted 15.4% in 2026, a small increase from 14.4% in 2016.

Updated capacity for convenience goods retail

5.36 Based on the market shares calculated from the 2026 household survey results, available convenience goods expenditure attracted to Southend-on-Sea in 2025 is shown in Table 4 in Appendices 2 and 3. This expenditure has been projected forward to 2030, 2035, 2040 and 2045, and is summarised in Table 12 in Appendices 2 and 3. Convenience goods expenditure available to facilities in the authority area is expected to increase from £562.71 million in 2025 to £555.44 million in 2045. This increase is due to population growth. A breakdown of turnover for facilities in the study area is set out in Table 5.4.

Table 5.4 Convenience goods base year turnover in 2025 (household survey based turnover)

	Turnover £M
Southend	115.46
Leigh-on-Sea	49.92
Westcliff-on-Sea	20.17
Prittlewell	10.54
Eastwood	1.44
Southchurch	4.06
Thorpe Bay	9.54

	Turnover £M
Shoeburyness	3.01
Other out-of-centre destinations across Southend	348.57
Total	**562.71**

Source: Table 12 in Appendices 2 and 3

High Growth Option

5.37 Table 11 in Appendix 2 subtracts the current survey identified turnover from available expenditure to calculate the amount of surplus/deficit expenditure that may be available for new development in the future. The deficit/surplus expenditure projections are converted into floorspace estimates in Table 12 in Appendix 2 based on a combined approximate company average sales density of £12,000 per sq.m net of the main food store operators. The results are summarised in Table 5.5.

Table 5.5 Convenience goods floorspace capacity (sq.m gross) - cumulative

	2030	2035	2040	2045
Southend	-40	10	170	400
Leigh-on-Sea	-30	0	60	140
Westcliff-on-Sea	-10	0	30	70
Prittlewell	0	0	10	40
Eastwood	0	0	0	0
Southchurch	0	0	0	10
Thorpe Bay	0	0	10	30
Shoeburyness	0	0	0	10
Other Southend	-90	110	570	1,260
Total	**-170**	**120**	**850**	**1,960**

Source: Table 12 in Appendix 2

Low Growth Option

5.38 Table 11 in Appendix 3 subtracts the current survey identified turnover from available expenditure to calculate the amount of surplus/deficit expenditure that may be available for new development in the future. The deficit/surplus expenditure projections are converted into floorspace estimates in Table 13 in Appendix 3 based on a combined approximate company average sales density of £12,000 per sq.m net of the main food store operators. The results are summarised in Table 5.6.

Table 5.6 Convenience goods floorspace capacity (sq.m gross) - cumulative

	2030	2035	2040	2045
Southend	-240	-370	-400	-330
Leigh-on-Sea	-110	-170	-190	-160
Westcliff-on-Sea	-40	-70	-90	-70
Prittlewell	-30	-40	-40	-40
Eastwood	0	0	0	0
Southchurch	-10	-10	-10	-10
Thorpe Bay	-30	-30	-40	-30

	2030	2035	2040	2045
Shoeburyness	0	-10	-10	-10
Other Southend	-570	-800	-760	-470
Total	**-1,030**	**-1,500**	**-1,540**	**-1,120**

Source: Table 13 in Appendix 3

5.39 Notably, a negative figure suggests a deficit of expenditure to support new convenience goods floorspace but does not imply a reduction in floorspace is required or forecast. The negative capacity identifies that emerging population and spending projections can be absorbed by the current provision, based on existing market share patterns. The distribution of capacity is based on a market share assessment that assumes consistent market shares and a proportionate level of growth across the respective areas.

Qualitative need

5.40 Convenience goods retail provision in the study area totals nearly 32,000 sq.m net sales floorspace (ORC Storepoint, 2026). Collectively, the study area has 44 convenience goods outlets including food stores operated by multiple retailers and smaller independent shops. Residents across Southend-on-Sea have reasonable access to a range and choice of food stores and there are no obvious areas of deficiency in food store provision, which reflects the high expenditure retention rates highlighted in Table 5.1.

5.41 Main shopping trips traditionally are generally made once a week or less often, although recently households have increasing undertaken top-up shopping trips. The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips. Large superstores, defined as over 2,500 sq.m net or more, are the usual destination for these types of shopping trip. There are four superstores (over c. 2,500 sq.m net) in the study area, as follows:

- Tesco Extra, Prince Avenue, Westcliff-on-Sea (3,948 sq.m net);
- Waitrose, Fossetts Park, Southend-on-Sea (3,557 sq.m net);
- Asda, North Shoebury Road, Southend-on-Sea (3,412 sq.m net); and
- Sainsburys, London Road, Southend-on-Sea (3,348 sq.m net).

5.42 Other mid-sized food stores in the authority area are smaller but provide a good range and choice of products and are also suitable for main and bulk food shopping. The discount sector is represented in Southend-on-Sea, with two Aldi stores and five Lidl stores.

5.43 There is a Sainsbury's Superstore (listed above) which serves Southend-on-Sea city centre. This has the highest market share within Zone 2 (12%).

5.44 Residents across the authority area have good access to a choice of food stores and there are no obvious areas of deficiency in food store provision, which reflects the relatively high expenditure retention rates highlighted in Table 5.1.

Updated capacity for comparison goods retail

5.45 Available comparison goods expenditure has been projected to 2030, 2035, 2040 and 2045 and is summarised in Table 11 in Appendices 4 and 5. Comparison goods expenditure available to facilities in the study area is expected to increase from £582.74 million in 2025 to £904.89 million in 2045. A breakdown of turnover for facilities in the study area is set out in Table 5.7.

Table 5.7 Comparison goods base year turnover in 2025 (household survey based turnover)

	Turnover £M
Southend	320.15
Leigh-on-Sea	38.69
Westcliff-on-Sea	15.93
Prittlewell	0.71
Eastwood	3.64
Southchurch	13.81
Thorpe Bay	0.91
Shoeburyness	14.94
Other Southend	173.97
Total	**582.74**

Source: Table 11 in Appendices 4 and 5

5.46 Table 11 in Appendices 4 and 5 subtracts the turnover of existing facilities, including an allowance for growth in turnover densities. The projections suggest future growth in available expenditure will be partially offset by expected growth in turnover densities i.e. existing retail businesses will absorb expenditure growth.

5.47 This assumption is consistent with Experian's projected growth in non-store sales taken by retail businesses. The growth in retail operator's turnover densities will in part be fuelled by on-line sales and click and collect (from stores or collection points), which will not directly affect the need for additional retail sales floorspace. The deductions already made for SFT only relate to non-store sales through non-retail businesses.

High Growth Option

5.48 In 2030 there is a projected small expenditure deficit of -£1.97 million, increasing to a surplus of +£44.45 million in 2045. The expenditure projections have been converted into floorspace estimates Table 13 in Appendix 4. The results are summarised in Table 5.8.

Table 5.8 Comparison goods floorspace capacity (sq.m gross) - cumulative

	2030	2035	2040	2045
Southend	-260	660	1,510	3,660
Leigh-on-Sea	-30	70	170	430
Westcliff-on-Sea	-10	30	70	190
Prittlewell	0	0	0	10
Eastwood	0	10	10	40
Southchurch	-10	30	70	160
Thorpe Bay	0	0	0	10
Shoeburyness	-10	30	70	170
Other Southend	-90	460	970	2,140
Total	**-410**	**1,290**	**2,870**	**6,810**

Source: Table 13 in Appendix 4

Low Growth Option

5.49 In 2030 there is a projected expenditure deficit of -£9.47 million, increasing to a surplus of +£5.48 million in 2045. These projections suggest growth in turnover densities will absorb most of the future expenditure growth. The expenditure projections have been converted into floorspace estimates Table 13 in Appendix 5. The results are summarised in Table 5.9.

Table 5.9 Comparison goods floorspace capacity (sq.m gross) - cumulative

	2030	2035	2040	2045
Southend	-1,160	-1,070	-990	370
Leigh-on-Sea	-160	-170	-170	-30
Westcliff-on-Sea	-70	-90	-90	-30
Prittlewell	0	0	0	0
Eastwood	-10	-10	-10	0
Southchurch	-60	-70	-70	-30
Thorpe Bay	0	0	0	0
Shoeburyness	-70	-70	-90	-30
Other Southend	-510	-360	-210	600
Total	**-2,040**	**-1,840**	**-1,630**	**850**

Source: Table 13 in Appendix 5

5.50 Notably, a negative figure suggests a deficit of expenditure to support new comparison goods floorspace but does not imply a reduction in floorspace. The negative capacity identifies that emerging population and spending projections can be absorbed by the current provision, based on existing market share patterns. The distribution of capacity is based on a market share assessment that assumes consistent market shares and a proportionate level of growth across the respective areas.

Qualitative need

5.51 Collectively the study area features 357 comparison goods outlets, including national retailers and independent shops, 115 of which are located within Southend-on-Sea city centre.

5.52 The limited provision in Southend-on-Sea's city centre means that a significant proportion of comparison goods expenditure is directed to other centres and out-of-town retail parks, including Thanet Grange Retail Park, Airport Retail Park, Fossetts Park Retail Park and North Shoebury Retail Park.

5.53 Across Southend-on-Sea's town, district and neighbourhood centres, comparison goods outlets account for 29.1% of all retail units, with this figure standing at 29.3% within Southend-on-Sea city centre. This is just above the national average of 27.8%. Leigh District Centre, along with West Road (Shoebury) and Southchurch neighbourhood centres, also record a higher proportion of comparison retail units than the national average.

5.54 Overall, the floorspace projections illustrate limited expenditure to support additional comparison floorspace within Southend-on-Sea. Population growth closer to the high growth scenario could generate a greater capacity, while further development could also help to attract a higher market share.

Capacity for food/beverage floorspace

5.55 The results of the household shopper survey regarding eating and drinking away from the home have been used to estimate existing food and beverage expenditure patterns. The market shares in Table 4 in Appendix 4 are a combined rate for both eating out and drinking at pubs/bars are based on an 80:20 split, based on Experian's local expenditure data. The survey results suggest reasonably high levels of expenditure retention within the study area, as shown in Table 5.10.

Table 5.10 Food and beverage base year turnover in 2025 (household survey based turnover)

	Turnover £M
Southend	56.07
Southend out-of-centre	12.56
Leigh-on-Sea	57.69
Westcliff-on-Sea	16.24
Prittlewell	1.55
Eastwood	6.76
Southchurch	4.84
Thorpe Bay	3.63
Shoeburyness	11.60
Other Southend	36.64
Total	**207.58**

Source: Table 11 in Appendices 6 and 7

5.56 Table 11 in Appendices 6 and 7 subtracts the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure available for new development.

High Growth Option

5.57 In 2030 there is an expenditure surplus of £13.67 million. Continued population and expenditure growth creates an expenditure surplus of £27.22 million in 2035 increasing to £41.95 million by 2040 and £58.62 by 2045. Floorspace capacity projections are shown in Table 12 in Appendix 6 and summarised in Table 5.11 below.

Table 5.11 Food and beverage floorspace capacity (sq.m gross) - cumulative

	2030	2035	2040	2045
Southend	2,130	4,190	6,390	8,830
Southend out-of-centre	490	960	1,460	2,010
Leigh-on-Sea	2,140	4,210	6,430	8,900
Westcliff-on-Sea	610	1,210	1,840	2,560
Prittlewell	60	110	190	240
Eastwood	260	510	790	1,070
Southchurch	190	360	540	760

	2030	2035	2040	2045
Thorpe Bay	140	290	430	590
Shoeburyness	440	870	1,330	1,840
Other Southend	1,340	2,660	4,060	5,610
Total	**7,800**	**15,370**	**23,460**	**32,410**

Source: Table 12 in Appendix 6

Low Growth Option

5.58 In 2030 there is an expenditure surplus of £11.03 million. Continued population and expenditure growth creates an expenditure surplus of £21.83 million in 2035 increasing to £33.63 million by 2040 and £47.15 by 2045. Floorspace capacity projections are shown in Table 12 in Appendix 7 and summarised in Table 5.12 below.

Table 5.12 Food and beverage floorspace capacity (sq.m gross) - cumulative

	2030	2035	2040	2045
Southend	1,730	3,400	5,190	7,190
Southend out-of-centre	400	770	1,170	1,630
Leigh-on-Sea	1,740	3,430	5,230	7,240
Westcliff-on-Sea	470	910	1,390	1,930
Prittlewell	60	100	160	210
Eastwood	210	410	640	870
Southchurch	140	270	400	570
Thorpe Bay	110	230	360	500
Shoeburyness	340	670	1,030	1,430
Other Southend	1,090	2,130	3,240	4,530
Total	**6,290**	**12,320**	**18,810**	**26,100**

Source: Table 12 in Appendix 7

Qualitative needs

5.59 Collectively the town, district and neighbourhood centres in Southend-on-Sea have over 310 food/beverage outlets including 199 restaurants/cafés; 37 pubs/bars and 77 hot food takeaways. These centres provide a good range and choice of outlets. Overall, the accessibility for residents in Southend-on-Sea to a range and choice of food/beverage outlets is good.

Operator Space Requirements

5.60 The Requirement List publishes potential space requirements for multiple retail and food/beverage operators. Operators often express an interest in expanding to a particular region, naming several potentially suitable centres, meaning it does not necessarily indicate firm interest in a particular centre. The following operators indicated interest in expanding to Southend-on-Sea in 2026:

Convenience Goods Retail Operators

- Aldi (tbc)

- Grape Tree (tbc)
- Lidl (1,672-2,462 sq.m gross)
- M&S Food (6,000-25,000 sq.m gross)
- Sam Pound Stores (278-557 sq.m gross)
- Wilko (tbc)

Comparison Goods Retail Operators

- Bensons for beds (4,000-8,000 sq.m gross)
- Menkind (1,200-4,000 sq.m gross)
- PDSA (139-232 sq.m gross)
- Salvation Army (over 185 sq.m gross)
- Screwfix City (116-232 sq.m gross)
- Sleep 8 (185-743 sq.m gross)
- The Range (1,858-7432 sq.m gross)
- Wilko (tbc)

Food/Beverage Operators

- KFC (tbc)
- Taco Bell (167-232 sq.m gross)
- Turtle Bay (418 sq.m gross)
- Wok&Go (tbc)

Leisure Operators

- Clip 'n Climb (5,000 sq.m gross)

5.61 Some of these requirements are likely to be generic interest in centres of a similar size across the south east region rather than Southend-on-Sea specifically, therefore the total number of requirements and amount of floorspace outlined above should be treated with caution.

5.62 Nonetheless, there appears to be a reasonable level of interest across convenience, comparison, food and beverage retail and leisure uses focussed on Southend-on-Sea.

6.0 Leisure, entertainment and cultural uses

6.1 This section assesses the need for other main town centre uses including commercial leisure, entertainment and cultural uses i.e. cinema/multiplex, tenpin bowling, bingo, theatres, nightclubs and private health and fitness clubs. Main town centre uses, as defined within the NPPF glossary, exclude less intensive sports and recreation uses such as swimming pools, sports halls and sports pitches, and therefore the need for these uses has not been assessed in this study.

6.2 Residents in Southend-on-Sea have a relatively good range of commercial leisure and entertainment uses and within neighbouring authorities.

Leisure, entertainment and cultural expenditure

6.3 Experian's projections and local expenditure data for the study area indicates the resident population generates £123.48 million in 2025 (an average of about £338 per person) on selected cultural, recreational and sporting services, including:

- cinema admissions £4.27 million
- live entertainment i.e. theatre/concerts/shows £16.95 million
- museums, theme parks, houses and gardens £7.99 million
- admissions to clubs, dances, discos, bingo £10.57 million
- other miscellaneous entertainment £26.81 million
- subscriptions to sports and social clubs £28.69 million
- leisure class fees £28.21 million

6.4 Leisure, entertainment and cultural expenditure has been projected to 2030, 2035, 2040 and 2045 adopting Experian's recommended leisure expenditure growth rates (Retail Planning Briefing Note 23, March 2026). Taking population growth into account, leisure expenditure is projected to increase by 10.5% from £123.48 million in 2025 to £138.00 million in 2045 (high growth option) or by 7.8% from £123.48 million in 2025 to £133.99 million in 2045 (low growth option).

6.5 Not all leisure/cultural expenditure from study area residents is spent in Southend-on-Sea. The household survey results have been adopted to estimate the household participation rates and the retention of leisure trips within the study area. A comparison between overall participation rate and retention in Southend-on-Sea is assessed below at Table 6.1. Around 10% of households do not participate in any of the leisure activities explored by the household survey. The participation and retention rates vary significantly for each leisure activity. Participation rates for theatres were the highest, with 70% of trips being attracted to Southend-on-Sea.

6.6 The higher retention rates for Bingo, indoor/ soft play and nightclubs/ live music venues are accompanied by a low participation rates, suggesting that limited local demand is well-served by local provision, supplemented by visitor trips.

6.7 Many residents travel outside the study area to Central London, Basildon, Hadleigh, Hockley and Rochford for some leisure activities. Central London/West End attracts a high proportion of museum/art gallery (39%), theatres (22%) and nightclub/live music venue trips (19%). It did not attract any trips for trampoline parks, indoor/ soft play, tenpin bowling / gaming, health and fitness facilities or bingo.

Table 6.1 Selected leisure uses – retention and provision in Southend-on-Sea

Activity	% study area households participating	% trips attracted to Southend-on-Sea
Cinema	35.8	47.4
Theatre	46.9	70.2
Nightclubs / live music venues	8.8	50.9
Bingo	4.2	72.0
Health / fitness club / gym / leisure centre	19.8	39.5
Tenpin bowling / gaming	9.3	26.8
Indoor/ soft play	6.5	46.2
Trampoline park	3.5	9.5
Museums/ art galleries	27.1	38.6

Source: NEMS Household Survey (2026)

Expenditure to Southend-on-Sea

High growth option

6.8 The household survey results and Experian's expenditure figures suggest facilities in Southend-on-Sea attract an average of 47% of leisure, entertainment and cultural expenditure within the study area, which is about £57.9 million in 2025. This retained leisure expenditure is projected to increase to £59.2 million in 2030; £60.9 million in 2035; £62.7 million in 2040 and £64.7 million in 2045.

6.9 Based on Lichfields' experience, leisure floorspace normally trades on average around £2,500 per sq.m gross, which is projected to increase to £2,505 per sq.m gross in 2030; £2,530 per sq.m gross in 2035; £2,556 in 2040 and then to £2,581 per sq.m in 2045, based on Experian's projected growth in leisure sales densities.

6.10 Based on projected population growth, if leisure/cultural expenditure attracted to Southend-on-Sea increased by £1.3 million by 2030; £3.0 million by 2035, £4.8 million by 2040 and then £6.8 million in 2045, as indicated above, then this additional expenditure could support about 500 sq.m gross of new commercial leisure and cultural floorspace by 2030, increasing to about 900 sq.m gross by 2035; 1,400 sq.m by 2040 and then to 1,900 sq.m gross by 2045.

Low Growth Option

6.11 Based on the lower population growth option, if leisure/cultural expenditure attracted to Southend-on-Sea increased by £0.8 million by 2030; £2.0 million by 2035, £3.4 million by 2040 and then £4.9 million in 2045, as indicated above, then this additional expenditure could support about 300 sq.m gross of new commercial leisure and cultural floorspace by

2030, increasing to about 500 sq.m gross by 2035; 800 sq.m by 2040 and then to 1,200 sq.m gross by 2045.

6.12 A more detailed sector by sector assessment is set out in the remainder of this section. Overall findings are however consistent with this additional floorspace requirement. Generally, existing facilities in Southend-on-Sea are achieving healthy retention rates, and there is some quantitative basis for the provision of new facilities, where supported by operator interest.

Cinemas

6.13 Cinema admissions in the UK reached a peak of 1.6 billion trips in 1946, but the number of trips declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s dropping to only 54 million trips in 1984 but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. Total admissions reduced to 157.5 million in 2014 but increased slowly to 176 million in 2019 (Source: British Film Institute). Cinema trips did not increase significantly between 2002 and 2019, despite population growth of 9.6% during this period (59.4 million to 66.6 million). The national average visitation rate was about 2.6 trips per person per annum, before Covid-19.

6.14 The number of trips during the Covid-19 pandemic reduced significantly. The latest 2024 figures indicate 126.5 million cinema trips were made in the UK (about 1.8 trips per person), which remains 28% below pre-Covid levels (176 million).

6.15 The UK Film Distributors' Association identities 977 cinema facilities with 4,578 screens in the UK in 2023. Lichfields' national CINeSCOPE model assesses the provision of cinema screens against projected customer cinema trips across the country, to identify areas of under and over-provision. The national average (based on pre-Covid trips rates) was about 38,000 cinema trips per annum for each cinema screen.

6.16 The study area's population is 365,103 in 2025, which based on the national averages above, would generate 657,185 cinema trips, which could theoretically support 17.3 cinema screens in 2025.

6.17 Cinema provision in the study area is 12 screens across 2 cinemas (2,083 seats), as follows:

1 Odeon Southend, Southend (8 screens /1,627 seats); and
2 Movie Starr, Canvey Island (4 screens/456 seats).

6.18 Notably, there are two further cinemas within Basildon, beyond the Study Area. Cineworld Basildon features 16 screens (2,316), while Vue Basildon features 10 screens (1,039 seats).

6.19 In line with the low-growth option, population within the study area is projected to increase 4.9% from 365,103 in 2025 to 383,738 by 2045. The population estimate at 2045 is projected to generate between 690,728 to 997,729 cinema trips, based on the national averages above (1.8 to 2.6 trips per person per annum).

6.20 In line with the high-growth option, population within Southend-on-Sea is projected to increase 7.6% from 365,103 in 2025 to 395,224 by 2045. The population estimate at 2045 is projected to generate between 711,403 to 1,027,582 cinema trips, based on the national averages above (1.8 to 2.6 trips per person per annum).

6.21 These additional trips could in theory support between 6 to 15 additional screens, supporting 1-2 cinemas, albeit this demand should be balanced against the existing provision in Basildon.

6.22 The longer-term impact of Covid-19 and growth in home viewing on the number of cinema trips may reduce this theoretical capacity if the average visitation rate declines below 1.8 trips per person, and any consideration of new facilities should be assessed against operator interest, impacts on existing facilities and local provision, and any other relevant material considerations.

Theatres, nightclubs, live music and other cultural activities

6.23 The household survey results indicate a relatively high proportion (about 47%) of respondents in the study area visit theatres. About 27% visit museums/art galleries and nearly 9% visit nightclubs/live music venues.

6.24 The UK Theatre and Society of London Theatres (SOLT) indicated their member organisations (over 200) pre-Covid presented nearly 63,000 performances attracting over 34.35 million tickets visits, generating ticket revenue of £1.28 billion in 2018. The average ticket revenue per venue was £5.7 million. The UK average attendance per performance was 545.

6.25 Experian's local expenditure data indicates the study area generated £16.9 million on live theatre, concerts and shows in 2025, which is projected to increase to between £18.4 million (low-growth option) and £18.9 million (high-growth option) in 2045. Based on the average ticket revenue per venue (£5.7 million) the study area population currently generates theoretical demand for two venues. This theoretical demand could increase to three venues in 2045. This demand is anticipated to be supported by residents within the study area, with Southend-on-Sea attracting around 70% of theatre trips. However, about 22% of participating households visit theatres in Central London/the West End.

6.26 Southend has two main theatre venues:

- Cliffs Pavilion in Westcliff-on-Sea; and
- Palace Theatre in Westcliff-on-Sea.

6.27 This provision appears to align with the theoretical demand generated by the study area's population. Based on the anticipated increase in demand, this could in theory support an additional venue.

6.28 The nightclub sector has struggled in recent years and has been significantly affected by the Covid-19 pandemic. Even before Covid-19, IBISWorld (providers of global industry research) suggested these venues have lost their competitive advantage over pubs and bars, with lower prices and a more relaxed atmosphere. Approximately one-quarter of nightclubs have closed in the past decade as operators have struggled to respond to new challenges from regulation, licensing, planning, business rates and policing.

6.29 The household survey results suggest about 9% of households visit nightclubs/music venues and of these 51% of trips generated by the study area are attracted to facilities in

Southend-on-Sea. Central London/the West End was the second most popular destination, attracting around 19% of trips.

6.30 Experian suggests leisure expenditure on admissions to clubs, dances, discos etc is £10.6 million in 2025 within the study area, growing to between £11.5 (low-growth option) £11.8 million (high-growth option) in 2045.

6.31 Nonetheless, current access to nightclub/live music venues in Southend-on-Sea is likely to limit demand for additional facilities, with this additional spending better directed to supporting existing facilities.

6.32 Experian's local expenditure data indicates the study area generated £8.0 million on museums, theme parks, houses and gardens in 2025, which is projected to increase slightly to between £8.7 million (low-growth option) and £8.9 million (high-growth option) in 2045.

6.33 The household survey results suggest 27% of households visit museums/ art galleries. Of those participating 39% of trips generated by the study area are attracted to Southend-on-Sea. Central London/the West End is the most significant destination, attracting around 40% of visitors.

6.34 There may be potential quantitative capacity for additional cultural facilities in Southend on-Sea. The development strategy needs to be flexible to respond to emerging opportunities for new facilities of this kind.

Health and fitness clubs

6.35 The latest UK Active and Sport England Market Report (2026) report illustrates a growing industry following a decline associated with Covid-19. Membership income has increased from £4.54 billion in 2023 to £5.70 billion in 2025.

6.36 In 2019 there were more than 10.4 million fitness members in the UK and the industry was worth £5 billion, with a participation rate of 15.6%. The number of members dropped to 9.9 million in 2022, with a participation rate of 14.6% compared with 15.6% in 2019.

6.37 By 2024 the participation had grown to exceed 2019 levels, with the 18.0% rate amongst the highest in Europe. The number of clubs has increased by 4.2% from 2024.

6.38 The household survey results indicate 19.8% of households in the study area visit health and fitness gyms, which is higher than the national average participation rate of 18.0%.

6.39 The Sport England/Active Places data indicates that there are 805 registered health and fitness facilities in the East Region, with 47,604 fitness stations, an average of 59 fitness station per facility. This provision equates to 7.6 fitness station per 1,000 people across the region.

6.40 There are 25 facilities in Southend-on-Sea, with an additional 25 facilities in the surrounding study area. This comprises a total of 3,627 fitness stations, as shown in Table 6.2. There are 25 facilities in Southend-on-Sea with 1,827 fitness stations. The remaining study area has 25 facilities with 1,800 fitness stations.

6.41 Qualitatively, the current provision across the study area provides a broad mix and offer from discount 24/7 clubs such as PureGym, to private uses including schools and Southend

RFC.

Table 6.2 Health and fitness facilities in Southend-on-Sea

Facility	Number of fitness stations	Type of access
Welcome Gym (Southend)	250	Registered Membership use
PureGym (Southend Fossetts Park)	220	Registered Membership use
The Gym Group (Southend)	220	Registered Membership use
TruGym (Thorpe Bay)	200	Registered Membership use
Anytime Fitness (Leigh-on-Sea)	200	Registered Membership use
Southend Leisure and Tennis Centre	150	Registered Membership use
Stack House Gym (Westcliff)	100	Registered Membership use
David Lloyd (Southend)	77	Registered Membership use
ABC Fitness Southend	60	Registered Membership use
SPT Fitness	50	Registered Membership use
Thorpe Hall School	40	Private Use
Shoeburyness Leisure Centre	30	Registered Membership use
Westcliff High School for Boys	28	Sports Club / Community Association
Southchurch High School	24	Private Use
Southend High School for Boys	22	Private Use
Leigh Fitness Centre	21	Pay and Play
Chase High School	21	Registered Membership use
South Essex College (Wellstead Gardens Sports Ground)	21	Private Use
Belfairs Academy	17	Private Use
Southend High School for Girls	16	Private Use
Cecil Jones Academy	15	Private Use
Westcliff High School for Girls	15	Private Use
St Bernards High School	13	Private Use
The St Christopher’s School	11	Private Use
Southend RFC	6	Private Use
Southend-on-Sea sub-total	**1,827**	
Virgin Active (Thundersley)	320	Registered Membership use
JD Gyms (Southend)	250	Registered Membership use
PureGym (Rayleigh)	220	Registered Membership use
Island Gym	150	Registered Membership use
Anytime Fitness (Canvey Island)	100	Registered Membership use
Waterside Farm Leisure Centre	80	Registered Membership use
Elite Fitness 24 (Hockley)	75	Registered Membership use
Elite Fitness 24 (Southend)	70	Registered Membership use
Hockley Gym	60	Registered Membership use
Stack House Gym (Rayleigh)	50	Registered Membership use
Rayleigh Leisure Centre	50	Registered Membership use
Athenaeum Club Ltd	44	Registered Membership use
Flex Gym	40	Registered Membership use
Leeman Fitness	40	Registered Membership use
Runnymede Leisure Centre	30	Pay and Play
Clements Hall Leisure Centre	30	Registered Membership use

Facility	Number of fitness stations	Type of access
Lift Greensward	27	Registered Membership use
Castle View School	25	Private Use
Deanes School Sports Centre	25	Sports Club / Community Association
USP College (Seevic Campus)	24	Registered Membership use
The King John School	22	Sports Club / Community Association
King Edmund Business & Enterprise School	20	Sports Club / Community Association
FitzWimarc School	18	Private Use
Bodycare Personal Fitness Club	16	Registered Membership use
Westcliff RFC (Cherry Orchard)	14	Private Use
Surrounding Study Area sub-total	**1,800**	
Total	**3,627**	

Source: Sport England 2026; Lichfields; NEMS Household Survey

6.42 Experian's local expenditure data indicates the study area generates £28.7 million on subscriptions to sports/social clubs and a further £28.2 million on leisure class fees, totalling £56.9 million. This total is projected to increase to between £61.7 million (low-growth option) and £63.6 million (high-growth option) in 2045. Facilities in the study area attract about £56.9 million in 2025, which based on the 39.5% market share, equates to about £12,300 per fitness station in Southend-on-Sea. Expenditure growth between 2025 to 2045, based on a constant market share of 39.5%, generates between an additional £1.9 million (low-growth option) and £2.6 million (high-growth option), which could support between 147 and 203 additional fitness stations (based on one fitness station per £13,000). Based on this approach there could be scope for one large or three medium-sized health and fitness facilities in Southend-on-Sea.

6.43 An alternative approach could be adopted based on the regional average. Within the East of England region there are 1,121 Sport England registered health and fitness facilities with 66,964 fitness stations (average of 60 stations per facility). This existing provision equates to about 10.6 registered fitness stations per 1,000 people in the East of England region (ONS 2021 census, 6,335,074 population). The 2025 population figures for the study area is 365,103. This population could generate demand for 3,870 fitness stations, based on this regional average. These figures suggest the study area may have a current under provision of health and fitness facilities i.e. 243 fitness stations. This additional under-supply could support one large facility (150 fitness stations) and one medium sized facility (80 fitness stations) or three medium sized facilities (80 fitness stations each).

6.44 Notwithstanding the extent of the current under-supply of fitness stations, demand for additional facilities within Southend should also arise from future population growth. Population within the study area is projected to increase to between 383,738 (low-growth option) and 395,224 (high-growth option) by 2045. Based on the regional average of 10.6 registered fitness stations per 1,000 people, this population growth could support around 198 to 319 fitness stations, of which around 40% could be provided in Southend-on-Sea based on the current market share. Assuming a minimum current under-provision of 243 fitness stations within the study area there could be demand for between 441 and 562 fitness stations by 2045, about two to three large facilities or five to seven medium sized facilities.

Tenpin bowling and other indoor leisure innovations

6.45 Repurposed space in centres has provided new opportunities for new leisure innovations. Vacated premises have been reconfigured and reused for trampolines, climbing, indoor golf, escape rooms etc. These and other innovations are likely to continue in the future because landlords will adopt a flexible approach to respond to arising opportunities

6.46 The household survey results indicate about 9% of households visit ten-pin bowling/ gaming facilities, but many of these trips are attracted to bowling facilities outside the authority area. The authority area's market share of tenpin bowling trips is around 27%. The main destinations for tenpin bowling mentioned by household survey respondents were:

- CJs Bowling, Hockley (26.8%)
- Hollywood Bowl, Basildon (17.9%)
- Kingpins Bowl, Southend-on-Sea (17.9%)

6.47 The study area's future 2045 population of between 383,738 (low-growth option) and 395,224 (high-growth option) can theoretically support between 31 and 33 lanes, based on the national average of one lane per 12,000 people. If Southend-on-Sea continued to retain around 27% of trips generated by the study area population, then around an additional 8 lanes could be supported in the form of an additional bowling venue. However, given the overarching economics of such facilities, and the constantly evolving landscape, we would caution a specific focus on any one format of indoor leisure provision and encourage a flexible approach to support innovative and emerging formats.

Indoor trampoline centres and soft play

6.48 Indoor trampoline centres are a relatively new leisure activity in the UK. In America outdoor trampoline centres were popular in the late 1950s and 1960s. This has been adopted and modernised and is now becoming a popular indoor leisure activity for a variety of age groups in the UK. The UK's first indoor trampoline centre was opened by Bounce in 2014.

6.49 Trampoline centres offer a new, recreational experience for both children and adults. They typically have over 100 interconnected trampolines on site, consisting of differing courts for all ages and abilities, as well as an arcade and party rooms.

6.50 The household survey results indicate 3.5% of respondents in the study area visit trampoline centres which is the lowest participation rate of all surveyed leisure activities. Indoor soft play had a slightly higher participation rate at 6.5%, and this is higher than for bingo (4.2%).

6.51 Trampoline destinations mentioned by households participating in this activity were as follows:

- Oxygen (Trampoline Park), Rayleigh (47.6%)
- Oxygen (Trampoline Park), Croydon (4.8%)

6.52 In addition, households listed the following indoor soft play destinations when asked about trampoline centres, indicating that the respondents do not consider there to be much distinction in terms of indoor recreation:

- Adventure Island, Southend-on-Sea (9.5%)
- 360 Play, Basildon (9.5%)
- Monkey Bizness, Rochford (4.8%)
- Monkey Bizzness Adventure Play, Hockley (4.8%)
- The Megacentre, Rayleigh (4.8%)

6.53 When asked directly about indoor soft play destinations in the study area, participating households identified the following:

- Kids Kingdom, Southend (17.9%)
- Adventure Island, Southend-on-Sea (12.8%)
- Monkey Bizness, Rochford (12.8%)
- Monkey Bizzness Adventure Play, Hockley (10.3%)
- FunParx, Basildon (7.8%)
- The Megacentre, Rayleigh (5.1%)

6.54 The household survey results suggest around 6.5% of households visit indoor/ soft play, and 46.2% visited destinations within Southend-on-Sea, primarily located in the centre and north east of the authority area, with limited provision to the west.

6.55 The distribution suggests a more local focus to this type of activity, with participation split between several facilities. Soft play facilities therefore have a smaller catchment area than trampoline parks, suggesting those within the study area are less willing to travel for this activity given the market focus for young families. This suggests existing provision within Southend-on-Sea is likely to continue to serve its local catchment.

6.56 Overall, there may be potential scope for further provision of these types of leisure facilities in Southend-on-Sea. This could include Clip 'n Climb who listed as having potential space requirements in Southend-on-Sea. However, it should be noted that these relatively new innovations are still evolving and the potential for continued growth is unclear. Participation levels based on the household survey are relatively low in comparison to other leisure activities. The strategy for Southend-on-Sea should be flexible to respond to emerging demand from leisure operators.

Bingo, games of chance and gambling

6.57 Gala (now Buzz Bingo) and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose-built units. Bingo clubs have become increasingly sophisticated and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. However, the significant increase in on-line gambling has, and will continue to affect this sector.

6.58 The Gambling Commission indicates there are 646 bingo facilities in Great Britain (2020) and 156 casinos. This equates to approximately one bingo facility per 75,000 adults, and one casino per 330,000 adults.

6.59 The household survey results indicate only 4.2% of respondents in the study area visit bingo facilities, below the UK average participation rates of around 5%. Most of these participating households visit Mecca Bingo in Southend (68%) or Buzz Bingo in Basildon (8%). Of these participating households, 72% of trips are to Southend-on-Sea.

6.60 The adult population in the study area (about 365,000 in 2025) in the study area is theoretically capable of supporting about 4 bingo facilities or one casino, based on the UK averages. The relatively low participation rate (4.2%) and the continued growth in online bingo and gambling will restrict operator demand in the study area, which suggests there is no need to identify a site for a new facility.

Conclusions on commercial leisure and other town uses

6.61 The leisure, entertainment and cultural sectors are fragmented and innovative. There are many activities that could be promoted to capture more expenditure within Southend-on-Sea, e.g. health and fitness clubs, cinemas, theatres and music venues, tenpin bowling and other indoor leisure innovations. The analysis suggests the scope for some other leisure activities, e.g. trampoline parks, soft play and nightclubs, may be limited, but new emerging leisure activities such as escape rooms and virtual golf centres could provide more potential. The representation of these emerging uses is likely to increase. Given the fragmented nature of these leisure sectors, it is difficult to precisely quantify the potential demand for these uses over the next 20 years.

6.62 In global terms future leisure expenditure growth, Southend-on-Sea could support new commercial leisure and cultural floorspace (cumulative) in Southend-on-Sea of between 1,200 sq.m and 1,900 sq.m by 2045.

6.63 Southend-on-Sea's strategy should be flexible to emerging operator interest. Detailed analysis across each leisure type suggests there may be future demand for the following, but there is no current qualitative or quantitative need to provide for this in the short term:

- one or two cinemas;
- one venue for theatres or live music;
- two large or four medium sized health and fitness facilities;
- one bowling facility;
- new leisure innovations e.g. indoor climbing, escape rooms, virtual sport activities; and
- four bingo facilities or one casino.

6.64 The development strategy should be flexible to respond to emerging opportunities for new leisure, entertainment and tourist related facilities. The opportunities to reoccupy vacated retail space should be considered where this falls within Class E use.

7.0 Policy implications

National guidance

7.1 For planning policies, local authorities are required to support the role of town centres and the three main areas policies should focus on:

- defining a network and hierarchy of centres, allowing then to grow and diversify;
- defining the extent of centre boundaries and primary shopping areas, making clear the uses permitted in these locations; and
- allocating a range of suitable sites to meet the scale and type of development needed for at least 10 years ahead, sites should be allocated consistent with the sequential approach i.e. town centre, then edge-of-centre followed by accessible out-of-centre sites.

7.2 The NPPF acknowledges the rapid changes that are affecting town centres. It recognises that diversification is key to the long-term vitality and viability of town centres, including the need for residential development. Accordingly, planning policies should clarify the range of uses permitted in such locations, as part of a positive strategy for the future of each centre. However, as indicated in Section 2, the recent changes to the Use Classes Order (UCO) and Permitted Development Rights (PDR) significantly restrict the council's ability to control the mix of uses within centres through a plan-led approach.

7.3 The importance of a mix of retail and other town centre activity has increased in recent years and town centres increasingly need to compete with on-line shopping. Town centres need to focus on providing a better service and experience. This enhanced experience could be improvements to the range of activities on offer (including innovative activities), the built environment and green infrastructure. The potential to provide a better mix of uses that extend activity throughout the daytime and into the evenings may also contribute to the viability and attraction of town centres.

7.4 The NPPF's presumption in favour of sustainable development remains. For plan-making this means that plans should positively seek opportunities to meet the development needs of their area and be sufficiently flexible to adapt to rapid change. It is widely accepted that very long-term projections have inherent uncertainties. In response to these uncertainties, local planning authorities are no longer required to allocate sites to meet the need for town centre uses over the full plan period. The need for new town centre uses over a minimum ten-year period reflects the complexities in bringing forward town centre development sites. In line with the Government's economic growth agenda, a positive approach to meeting community needs is still required.

7.5 Applications for retail and town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan will need to be assessed against the sequential and impact tests.

7.6 The sequential test in the NPPF indicates main town centre uses should locate in town centres, then in edge-of-centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out-of-centre sites be considered (para. 91). When considering edge-of-centre and out-of-centre proposals, preference should be given to accessible sites that are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale, so that opportunities to utilise suitable town centre or edge-of-centre sites are fully explored (para. 92).

7.7 The NPPF states that local planning authorities should require an impact assessment for applications for retail and leisure development outside of town centres, which are not in accordance with an up-to-date development plan and are over a proportionate, locally set floorspace threshold. If there is not a locally set threshold, the default threshold is 2,500 sq.m (para. 94). Where an application fails to satisfy the sequential test or is likely to have a significant adverse impact, it should be refused (para. 95).

7.8 The appropriate balance between retail and other town centre activity has been debated in recent years, as town centres increasingly need to compete with on-line shopping. On-line shopping is likely to grow faster than previously expected due to shifts in customer behaviour accelerated by the Covid-19 pandemic. The need for a better mix of uses within town centres has become increasingly important. A broader mix of uses should extend activity throughout the daytime and into the evenings.

7.9 As set out in Section 2.0, the UCO was significantly amended in September 2020 and changes to permitted development rights were introduced in August 2021. These changes have had significant implications for shop frontage planning policies, restricting the ability of local planning authorities to control the mix of uses.

Floorspace capacity projections

7.10 The expenditure projections in this study take into account home shopping made through non-retail businesses, because special forms of trading (sales via the internet, mail order, stalls and markets) have been excluded. The assessment adopts Experian information and projections and assumes that special forms of trading will increase in the future, including the growth of internet shopping.

7.11 The assessment of the potential for new retail and food/beverage floorspace within the previous sections suggests there is modest medium-term scope for new development within the study area, based on existing market share patterns. Tables 7.1-7.4 below summarise the floorspace projections in Southend-on-Sea up to 2045 (cumulative) based on the high-growth option. Tables 7.5-7.8 below summarise the floorspace projections in Southend-on-Sea up to 2045 (cumulative) based on the low-growth option.

7.12 Table 7.1 indicates that there is a combined projected requirement for Southend-on-Sea for 7,220 sq.m gross in 2030. By 2035, the combined cumulative requirement increases to around 16,780 sq.m gross (Table 7.2), 27,180 sq.m gross in 2040 (Table 7.3) and then to 41,180 sq.m gross in 2045 (Table 7.4).

7.13 This compares to the low growth option, where Table 7.5 indicates that there is a combined projected requirement for Southend-on-Sea for 3,220 sq.m gross in 2030. By 2035, the combined cumulative requirement increases to around 8,980 sq.m gross (Table 7.6), 15,640 sq.m gross in 2040 (Table 7.7) and then to 25,830 sq.m gross in 2045 (Table 7.8).

High Growth Option

Table 7.1 Retail and food/beverage floorspace projections up to 2030 (sq.m gross) – cumulative

Location	Convenience goods retail	Comparison goods retail	Food/ beverage	High Growth Total
Southend (including Southend out-of-centre)	-40	-260	2,630	2,330
Leigh-on-Sea	-30	-30	2,140	2,080
Prittlewell	0	0	60	60
Westcliff-on-Sea	-10	-10	610	590
Eastwood	0	0	260	260
Southchurch	0	-10	190	180
Thorpe Bay	0	0	140	140
Shoeburyness	0	-10	440	430
Other Southend	-90	-90	1,340	1,160
Total	**-170**	**-410**	**7,800**	**7,220**

Table 7.2 Retail and food/beverage floorspace projections up to 2035 (sq.m gross) – cumulative

Location	Convenience goods retail	Comparison goods retail	Food/ beverage	High Growth Total
Southend (including Southend out-of-centre)	10	660	5,150	5,820
Leigh-on-Sea	0	70	4,210	4,280
Prittlewell	0	0	110	110
Westcliff-on-Sea	0	30	1,210	1,240
Eastwood	0	10	510	520
Southchurch	0	30	360	390
Thorpe Bay	0	0	290	290
Shoeburyness	0	30	870	900
Other Southend	110	460	2,660	3,230
Total	**120**	**1,290**	**15,370**	**16,780**

Table 7.3 Retail and food/beverage floorspace projections up to 2040 (sq.m gross) – cumulative

Location	Convenience goods retail	Comparison goods retail	Food/ beverage	High Growth Total
Southend (including Southend out-of-centre)	170	1,510	7,850	9,530
Leigh-on-Sea	60	170	6,430	6,660
Prittlewell	10	0	190	200
Westcliff-on-Sea	30	70	1,840	1,940
Eastwood	0	10	790	800
Southchurch	0	70	540	610
Thorpe Bay	10	0	430	440
Shoeburyness	0	70	1,330	1,400
Other Southend	570	970	4,060	5,600
Total	**850**	**2,870**	**23,460**	**27,180**

Table 7.4 Retail and food/beverage floorspace projections up to 2045 (sq.m gross) – cumulative

Location	Convenience goods retail	Comparison goods retail	Food/ beverage	High Growth Total
Southend (including Southend out-of-centre)	400	3,660	10,840	14,900
Leigh-on-Sea	140	430	8,900	9,470
Prittlewell	40	10	240	290
Westcliff-on-Sea	70	190	2,560	2,820
Eastwood	0	40	1,070	1,110
Southchurch	10	160	760	930
Thorpe Bay	30	10	590	630
Shoeburyness	10	170	1,840	2,020
Other Southend	1,260	2,140	5,610	9,010
Total	**1,960**	**6,810**	**32,410**	**41,180**

Source: Tables 12 in Appendix 2, 4 and 6

Low Growth Option

Table 7.5 Retail and food/beverage floorspace projections up to 2030 (sq.m gross) – cumulative

Location	Convenience goods retail	Comparison goods retail	Food/ beverage	Low Growth Total
Southend (including Southend out-of-centre)	-240	-1,160	2,130	730
Leigh-on-Sea	-110	-160	1,740	1,470
Prittlewell	-30	0	60	30
Westcliff-on-Sea	-40	-70	470	360
Eastwood	0	-10	210	200
Southchurch	-10	-60	140	70
Thorpe Bay	-30	0	110	80
Shoeburyness	0	-70	340	270
Other Southend	-570	-510	1,090	10
Total	**-1,030**	**-2,040**	**6,290**	**3,220**

Table 7.6 Retail and food/beverage floorspace projections up to 2035 (sq.m gross) – cumulative

Location	Convenience goods retail	Comparison goods retail	Food/ beverage	Low Growth Total
Southend (including Southend out-of-centre)	-370	-1,070	4,170	2,730
Leigh-on-Sea	-170	-170	3,430	3,090
Prittlewell	-40	0	100	60
Westcliff-on-Sea	-70	-90	910	750
Eastwood	0	-10	410	400
Southchurch	-10	-70	270	190
Thorpe Bay	-30	0	230	200
Shoeburyness	-10	-70	670	590
Other Southend	-800	-360	2,130	970

Location	Convenience goods retail	Comparison goods retail	Food/ beverage	Low Growth Total
Total	**-1,500**	**-1,840**	**12,320**	**8,980**

Table 7.7 Retail and food/beverage floorspace projections up to 2040 (sq.m gross) – cumulative

Location	Convenience goods retail	Comparison goods retail	Food/ beverage	Low Growth Total
Southend (including Southend out-of-centre)	-400	-990	6,360	4,970
Leigh-on-Sea	-190	-170	5,230	4,870
Prittlewell	-40	0	160	120
Westcliff-on-Sea	-90	-90	1,390	1,210
Eastwood	0	-10	640	630
Southchurch	-10	-70	400	320
Thorpe Bay	-40	0	360	320
Shoeburyness	-10	-90	1,030	930
Other Southend	-760	-210	3,240	2,270
Total	**-1,540**	-1,630	**18,810**	**15,640**

Table 7.8 Retail and food/beverage floorspace projections up to 2045 (sq.m gross) – cumulative

Location	Convenience goods retail	Comparison goods retail	Food/ beverage	Low Growth Total
Southend (including Southend out-of-centre)	-330	370	8,820	8,860
Leigh-on-Sea	-160	-30	7,240	7,050
Prittlewell	-40	0	210	170
Westcliff-on-Sea	-70	-30	1,930	1,830
Eastwood	0	0	870	870
Southchurch	-10	-30	570	530
Thorpe Bay	-30	0	500	470
Shoeburyness	-10	-30	1,430	1,390
Other Southend	-470	600	4,530	4,660
Total	**-1,120**	**850**	**26,100**	**25,830**

Source: Tables 12 in Appendix 3, 5 and 7

7.14 These projections assume facilities in Southend-on-Sea will maintain their market share of expenditure in the future. This approach recognises that emerging development within the study area could increase the area's market share, but this increase will be counter-balanced by development within competing centres.

7.15 The household survey results indicate that Southend-on-Sea retains a reasonably high level of expenditure and a significant increase in market shares is unrealistic and unnecessary. Conversely a significant reduction in market share could undermine the vitality and viability of town centres. A balanced and sustainable approach has been adopted.

7.16 Development plans should identify the scale of need for main town centre uses and assess whether the need can be met on town centre sites or through the expansion of centres. The NPPF indicates that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres for at least 10 years. In this case projections up to 2035 may need to be considered. To accommodate growth, local planning authorities should keep town centre boundaries under review.

7.17 The floorspace projections should not be adopted as rigid targets or maximum or minimum requirements but viewed as broad guidance. The floorspace projections in this report provide a starting point for the review of site-specific allocations and development management policies. The initial projections do not take account extant planning permission or pipeline proposals or the reoccupation of vacant floorspace which are considered below and is sufficient to accommodate all of the growth in terms of the identified retail capacity and a significant proportion of the food and beverage capacity.

7.18 These combined floorspace capacity projections also need to be considered in terms of the availability of existing vacant floorspace that may be suitable to accommodate this projected growth as discussed in the following section.

Vacant shop premises

7.19 The existing stock of premises could also help to accommodate projected growth. The need assessment in this report assumes that existing retail and service floorspace can, on average, increase its turnover to sales floorspace densities. In addition to the growth in sales densities, vacant shop premises should help to accommodate future growth.

7.20 The Council's Land Use Survey (January 2025) indicated there were 103 vacant shop units within the Southend's town, district and neighbourhood centres, resulting in an average vacancy rate of 8.4%, which is significantly below the UK average (14.7%).

7.21 Vacant floorspace across Southend-On-Sea city centre alone totalled about 12,300 sq.m gross.

7.22 As a strategic objective, it is reasonable to assume the shop vacancy rate could reduce to about 5% across the City. Based on Lichfields' experience 5% is a reasonable minimum vacancy rate, allowing for the natural churn of occupiers in successful centres. This reduction in the shop vacancy rate could theoretically accommodate about 7,750 sq.m of new uses. In practical terms, this vacant floorspace would provide more than enough provision to meet the retail (both convenience and comparison goods) capacity for new floorspace identified under both high and low growth scenarios, as well as around half of the identified capacity for food and beverage floorspace.

7.23 The floorspace capacity projections suggest the priority in the short to medium term will be the reoccupation of vacant shop units, including for non-retail uses such as food/ beverage outlets, leisure, entertainment and cultural uses. During this period (and depending on the population scenario) there is likely to be a shift from comparison goods retail space to food/beverage and leisure/cultural uses, with some vacant shop premises also converting to these uses.

7.24 Not all vacant shop units will be suitable for conversion to leisure/cultural uses and the future strategy should be flexible to respond to new investment that cannot be accommodated in vacant units. Some development, redevelopment, refurbishment, and expansion may be required to accommodate new uses in addition to the reoccupation of vacant units, ideally within town centres to accommodate future investment opportunities.

The floorspace projections suggest there is a need to retain the existing stock of shop premises within centres to accommodate future growth particularly in the convenience goods retail and food/beverage sectors.

7.25 Projected capacity for new floorspace generally relates to population growth rather than growth in expenditure from the existing population. Major housing developments, potentially including urban extensions and/or new settlements, are like to be required to meet the higher growth scenario. An element of the residual retail, food/beverage and leisure floorspace capacity is likely to be accommodated within these large residential developments in the form of new town, district or local centres to support sustainable communities. Future allocations (and subsequent masterplans and/ or outline applications) would need to assess the specific need for a mix of retail, food/ beverage and leisure floorspace, as well as the potential for the catchment population to utilise existing centres, depending on the respective locations of new major housing sites.

7.26 Future planning policy should seek to ensure new developments are flexible. The design and configuration of buildings should allow for the merger and sub-division of units, offering maximum flexibility to respond to changing operator requirements. Where provided as part of any new town/district/local/neighbourhood centres, it is particularly important that new floorspace is designed to be delivered flexibly to ensure that it is deliverable and attractive to future operators yet suitably controlled to compliment and not compete with the existing retail hierarchy.

Hierarchy of centres

7.27 The hierarchy of centres is currently set out in the Southend-on-Sea Regulation 18 Draft Local Plan Policy DM6.4a of the Local Plan identifies Southend as the sole *Town Centre*, two *District Centres*, seven *Neighbourhood Centres,* and 32 *Local Centres*. The centres are indicated at Figure SP6 of the Plan. Identifying the hierarchy of centres in the Local Plan will be important in terms of:

1 Ensuring the vitality and viability of town and local centres is maintained and enhanced as important hubs for the community, through the application of the impact test;

2 Directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and

3 Identifying a viable role and strategy for each centre.

7.28 The analysis of centres in Section 4 and Appendix 8 indicates that no amendments to the hierarchy of centres are necessary. However, new local centres may be necessary to serve strategic housing allocations. The boundaries of the authority area's centres should continue be defined on a retail centres map.

7.29 Southend City Centre is the only town centre and is the most dominant centre in the authority area. It should continue to be identified as the main comparison good shopping destination, although Leigh District Centre also attracts a high level of comparison good shopping trips and has a proportionately stronger food and beverage offer than Southend. Westcliff District Centre's comparison and food/beverage offer is generally strong, although lower than that of Southend and Leigh. Notwithstanding this, the town and district centres will continue to provide the focus for retail and leisure development in the authority area, serving communities within the wider area. Whilst the food/beverage offer in Southend City Centre is generally strong, improvements to its pub/bar offer should help to increase the centre's market share of leisure and nighttime economy expenditure and redistribute growth potential.

7.30 Leigh and Westcliff District Centres play an important role as a focal point in their respective areas, despite not offering the same range and choice of shops and services available within Southend City Centre (i.e. national multiple retailers). However, these centres should continue to be designated as District Centres that should provide retail, service and leisure uses for their communities and surrounding areas, reducing the need for shoppers and users to travel longer distances.

7.31 The authority area's Neighbourhood Centres also play an important role as a focal point in their communities. These centres should continue to be designated and protected as Neighbourhood Centres that provide access to retail and services for a smaller catchment area. This will reduce the need for residents to travel and increases opportunities for social interaction and supports local jobs.

7.32 Similarly, the 32 designated Local Centres are critical in supporting their local communities. These should continue to be designated and protected as Local Centres, that provide local access to lower order retail and essential services. However, some of the smaller Local Centres in the authority area have very limited facilities and will likely be under threat if shop closures occur. Local centres should continue to be protected due to the essential role they perform for smaller communities.

7.33 Southend's retail parks attract 31.7% of Southend residents' convenience spending (from Zones 1-3), with Thanet Grange alone attracting almost as much of residents' spend (11.2%) as Southend City Centre (13.7%). In terms of comparison goods spending, the retail parks collectively attract 22.9% of residents' spending, compared to 30.9% directed towards the city centre. The retail parks compete with Southend City Centre (and other defined centres) to a degree but generally provide a different format of both convenience and comparison goods stores to the centres, made up of larger floorplates featuring warehouse style retailing that cannot be accommodated in the smaller units within the centres. The Regulation 18 Draft Local Plan Policy DM6.4a does not include the retail parks within the retail hierarchy, confirming that relevant proposals for additional or amended floorspace will be subject to the impact and sequential tests. Accordingly, parts 5 and 6 of Draft Policy DM6.4 confirms that applications will be considered on a case-by-case basis reflecting the nature of the goods sold. This is considered an appropriate approach.

Impact and sequential tests

7.34 Local Plan policy should set out the sequential and impact tests, and which designated centres need to be considered. The NPPF states that, when assessing applications for retail and leisure development outside of town centres and not in accordance with an up-to-date local plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set threshold (if there is no locally set threshold, the default threshold is 2,500 sq.m). Impact assessments should consider:

- the impact of the proposal on existing, committed and planned public and private investment in centres in the catchment area of the proposal; and
- the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider retail catchment (as applicable to the scale and nature of the scheme).

7.35 The NPPF (paragraph 91) indicates local planning authorities should apply a sequential test for main town centre uses outside of designated centres. The impact test should only apply to retail and leisure development outside of centres.

7.36 The NPPF minimum threshold of 2,500 sq.m gross may be inappropriate for Southend-on Sea. This scale of development would still represent a significant proportion of the overall retail and food/beverage projections for the authority area and the cumulative impact of commitments also needs to be considered. Southend-on-Sea's centres are identified as healthy with a relatively low level of vacancies that could accommodate the extent of the capacity for new retail floorspace. In the circumstances, a proportionate impact threshold of 1,000 sq.m gross, could be considered in order to require an assessment for a range of retail formats including convenience discounters that have the potential to divert trade from existing facilities and centres.

7.37 Some of the capacity for new retail, food/beverage and leisure floorspace is driven by new population rather than growth in expenditure per capita. Any large-scale residential developments are likely to require local facilities to ensure new residents have appropriate access to day-to-day shops and services. The scale of facilities should be commensurate to the number of new homes proposed, and in this case, a location specific need can be established that will satisfy the sequential test i.e. the town centre uses proposed would not necessarily need to be located in existing centres. The impact of new facilities on existing designated centres will need to be considered.

Implications of UCO changes for the impact and sequential tests

7.38 Retail and leisure uses previously related to use classes A1 to A5 and D2 leisure uses. Changes to the UCO may lead to confusion. For example, not all uses within the new Class E are retail or leisure uses, requiring an impact assessment i.e. offices and medical uses. Bearing in mind the potential for confusion arising from the UCO changes and for consistency with the NPPF, new Local Plan policies relating to the impact test should, as indicated above, refer to retail and leisure uses rather than Class E within the new UCO. The sequential test should continue to refer to all main town centre uses as described in the NPPF glossary.

Sequential test floorspace threshold

7.39 The NPPF does not refer to a minimum floorspace threshold where the sequential test will be applied to main town centre uses in the same way as the impact test. All main town centre uses regardless of scale are required to comply with the sequential test. However, the PPG suggests some certain main town centre uses have *"particular market and locational requirements that mean they may only be accommodated in specific locations,"* but robust justification must be provided to satisfy the sequential test in this respect. This approach may allow smaller scale local facilities outside designated local centres to be provided in areas that may be poorly served and/or within mixed use development to provide facilities catering for the local needs of the development, without needing to consider the sequential test.

Town centre boundaries and shopping frontages

7.40 The New Local Plan should continue to define clear boundaries for town and local centres on the Proposals Map and should remain the focus for retail, leisure and other main town centre uses. The continued need for both centre boundaries and primary shopping areas (PSA) needs to be considered.

7.41 The relatively low retail floorspace capacity projections suggest there may be no need to extend centre or PSA boundaries to accommodate future growth, but the longer term projected under-supply of floorspace implies the contraction of most centre boundaries is also unnecessary.

7.42 Given the boundaries continue to serve their purpose, we only recommend relatively minor alternations for a couple of centres as follows:

- Rayleigh Road Neighbourhood Centre

  The Lidl foodstore and Formula One Autocentres car garage are directly adjacent to the western boundary of the centre and would benefit from inclusion in the defined centre. Accordingly, these sites would be removed from the existing Progress Road Employment Area designation.

- London Road (Thames Drive/Hadleigh Road) Neighbourhood Centre

  The Centre is currently divided into two parts, separated by the Chartwell Hospital, Highlands Doctors Surgery, Leigh Service Station car garage, and a Co-op foodstore to the north, and Leigh timber merchants and The Estuary Club private members' club to south. With exception of the Co-op, these are not main town centre uses as defined by the NPPF, but they will draw residents and visitors and contribute to the centre's vitality and viability. For consistency and completeness, the Council may wish to expand the designation to cover this gap.

Future Monitoring

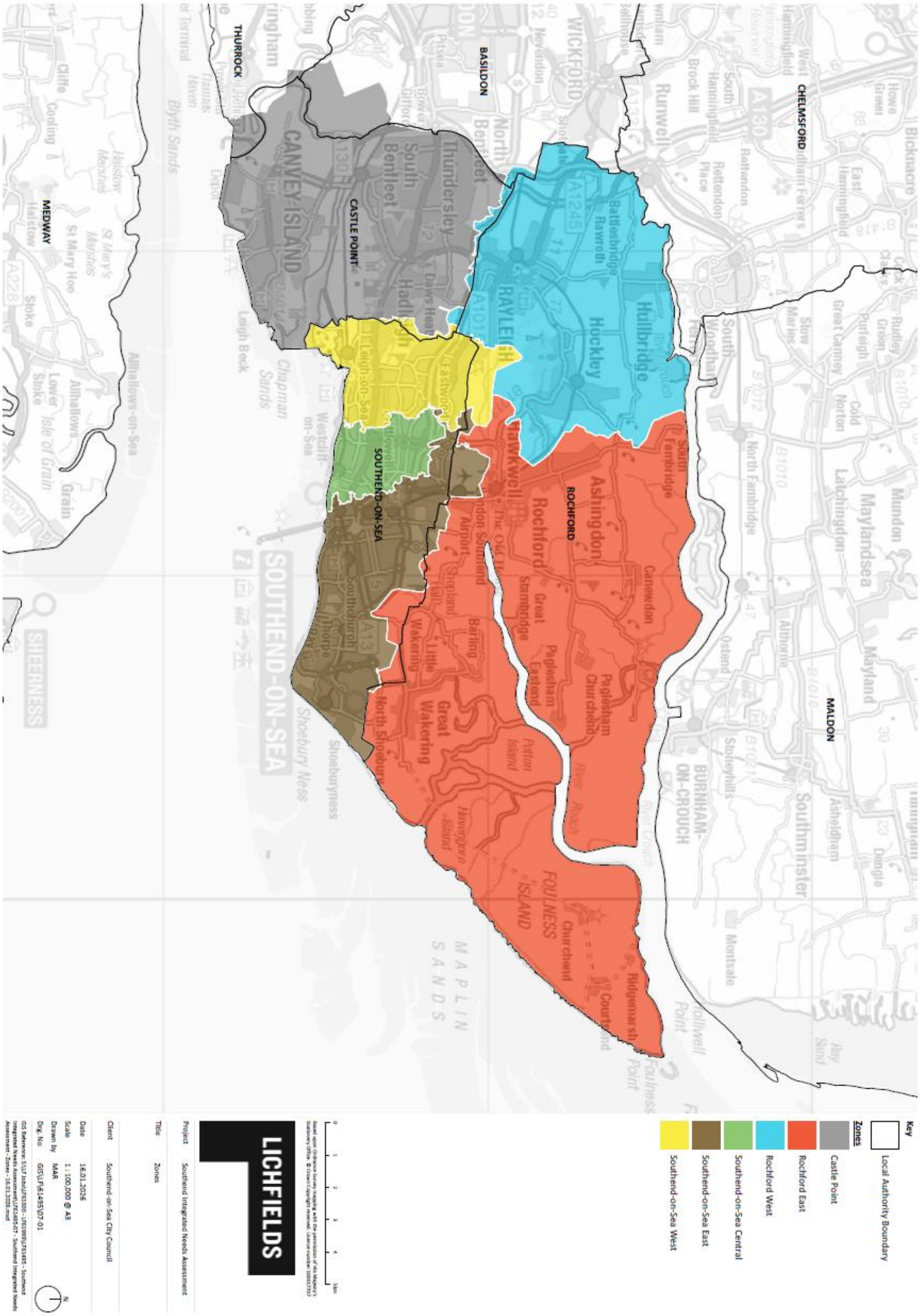
7.43 The recommendations and projections within this study will assist the Council in reviewing development plan policies over the coming years and to assist future development management decisions. The study provides an overview of the potential need for further retail and leisure development in the medium-term to 2035, and long-term up to 2045. Longer-term projections are subject to uncertainty and forecasts will need to be amended to reflect emerging changes, as and when new information becomes available. These uncertainties include the longer-term implications of the cost-of-living crisis that will need to be monitored. Longer-term projections after 2035 should be treated with caution and provide broad guidance only. Projections should be monitored and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

- population projections;
- local expenditure estimates (information from Experian or other recognised providers);

- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
- the impact of potential increases in home and internet shopping (Experian regularly provides projections for internet shopping and these projections will need to be updated at the same time as expenditure and population figures);
- existing retail floorspace and average turnover to floorspace densities; and
- implemented development within and around the study area.

7.44 These key inputs into the retail/leisure capacity assessment can be amended to provide revised capacity projections.

Appendix 1 Study Area


Key
Local Authority Boundary
Zones
Castle Point
Rochford East
Rochford West
Southend-on-Sea Central
Southend-on-Sea East
Southend-on-Sea West
LICHFIELDS
Project Southend Integrated Needs Assessment
Title Zones
Client Southend-on-Sea City Council
Date 16.01.2026
Scale 1:100,000 @ A3
Drawn by MAR
Drg. No GIS\LF\61495\07-01
CASTLE POINT
SOUTHEND-ON-SEA
ROCHFORD
BASILDON
THURROCK
CHELMSFORD
MALDON
MEDWAY

Appendix 2 Convenience goods assessment (high-growth option)

Table 1 - Study area population projections (high growth)

Zone	2023	2025	2030	2035	2040	2045
1 - Southend-on-Sea West	51,316	52,106	53,219	54,198	55,322	56,663
2 - Southend-on-Sea Central	42,284	42,943	43,866	44,669	45,610	46,737
3 - Southend-on-Sea East	90,331	91,740	93,713	95,428	97,439	99,844
4 - Rochford East	30,638	31,007	31,900	32,703	33,629	34,471
5 - Rochford West	56,696	57,379	58,865	60,228	61,404	62,622
6 - Castle Point	89,483	89,929	90,964	92,004	93,302	94,886
Total	**360,749**	**365,103**	**372,527**	**379,230**	**386,706**	**395,224**

Source: Population for Zones 1-3 derived from ONS provided by Lichfields analysis and Zones 4-6 from Experian population projections (2025)

Table 2 - Convenience goods expenditure per person per annum (£)

Zone	2023	2025	2030	2035	2040	2045
1 - Southend-on-Sea West	2,856	2,723	2,657	2,611	2,571	2,540
2 - Southend-on-Sea Central	2,604	2,483	2,423	2,381	2,344	2,316
3 - Southend-on-Sea East	2,685	2,560	2,498	2,455	2,417	2,388
4 - Rochford East	2,840	2,708	2,643	2,597	2,557	2,526
5 - Rochford West	2,903	2,767	2,700	2,654	2,613	2,581
6 - Castle Point	2,799	2,668	2,604	2,559	2,519	2,489

Sources:
Experian Local Expenditure 2023 (2023 prices)
Experian growth rates - Retail Planner Briefing Note 23 (March 2026)
Excludes Special Forms of Trading (SFT)

Table 3 - Total convenience goods expenditure (£m) - high growth

Zone	2023	2025	2030	2035	2040	2045
1 - Southend-on-Sea West	146.57	141.89	141.42	141.53	142.25	143.93
2 - Southend-on-Sea Central	110.10	106.61	106.27	106.34	106.92	108.23
3 - Southend-on-Sea East	242.55	234.85	234.11	234.26	235.53	238.42
4 - Rochford East	87.02	83.97	84.30	84.92	85.99	87.07
5 - Rochford West	164.57	158.79	158.96	159.83	160.45	161.65
6 - Castle Point	250.43	239.95	236.84	235.40	235.06	236.16
Total	**1,001.25**	**966.05**	**961.91**	**962.28**	**966.18**	**975.47**

Sources: Tables 1 and 2

Table 4 - Base year convenience goods market shares (%)

Destination Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6
Southend-on-Sea						
Southend City Centre	6.0%	19.5%	15.7%	3.7%	0.2%	0.1%
London Road Retail Park	0.0%	12.8%	1.0%	2.6%	2.1%	0.0%
Greyhound Retail Park	0.4%	2.3%	8.5%	0.4%	0.5%	0.0%
Leigh-on-Sea	25.8%	2.8%	2.5%	0.0%	0.0%	1.9%
Prittlewell	0.0%	0.2%	4.3%	0.2%	0.0%	0.0%
Westcliff-on-Sea	0.3%	5.9%	5.6%	0.0%	0.0%	0.1%
Eastwood	0.7%	0.0%	0.0%	0.0%	0.3%	0.0%
Southchurch	0.0%	1.0%	1.3%	0.0%	0.0%	0.0%
Thorpe Bay	0.0%	0.0%	4.1%	0.0%	0.0%	0.0%
Shoeburyness	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%
Eastwood (Western Approaches) Retail Park	5.3%	1.5%	3.7%	8.0%	1.8%	0.0%
Thanet Grange Retail Park	14.2%	18.9%	5.8%	25.8%	11.4%	0.0%
Airport Retail Park	0.0%	0.2%	0.1%	1.1%	0.0%	0.0%
Fossetts Park Retail Park	1.1%	1.8%	5.0%	5.5%	0.6%	0.3%
North Shoebury Retail Park	1.4%	1.7%	9.9%	6.9%	0.0%	2.4%
Other Southend	26.6%	27.7%	29.1%	12.3%	7.0%	3.8%
Southend-on-Sea total	**81.7%**	**96.4%**	**97.8%**	**66.4%**	**23.9%**	**8.6%**
Other Destinations						
Rochford	0.0%	0.0%	0.0%	26.5%	0.1%	0.0%
Rayleigh	0.4%	2.2%	0.2%	0.8%	31.8%	3.3%
Hockley	0.0%	0.0%	0.0%	0.9%	5.8%	0.0%
Benfleet	0.0%	0.0%	0.0%	2.4%	2.2%	7.5%
Canvey Island	0.0%	0.2%	0.0%	0.0%	0.0%	45.3%
Thundersley	3.1%	0.8%	0.1%	0.3%	22.2%	2.8%
Hadleigh	14.6%	0.3%	2.0%	0.0%	2.0%	23.9%
Other Destinations	0.2%	0.1%	0.0%	2.7%	12.0%	8.6%
Other Destinations total	**18.3%**	**3.6%**	**2.2%**	**33.6%**	**76.1%**	**91.4%**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Household Survey (2026)

Table 5 - Base year convenience goods shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2023	**146.57**	**110.10**	**242.55**	**87.02**	**164.57**	**250.43**	**1001.25**
Southend-on-Sea							
Southend City Centre	8.74	21.46	38.12	3.19	0.28	0.16	71.97
London Road Retail Park	0.00	14.13	2.34	2.28	3.46	0.00	22.22
Greyhound Retail Park	0.65	2.55	20.65	0.36	0.89	0.00	25.10
Leigh-on-Sea	37.82	3.13	5.98	0.00	0.00	4.69	51.62
Prittlewell	0.00	0.22	10.53	0.14	0.00	0.00	10.88
Westcliff-on-Sea	0.41	6.48	13.61	0.00	0.00	0.33	20.83
Eastwood	1.05	0.00	0.00	0.00	0.43	0.00	1.49
Southchurch	0.00	1.12	3.07	0.00	0.00	0.00	4.19
Thorpe Bay	0.00	0.00	9.85	0.00	0.00	0.00	9.85
Shoeburyness	0.00	0.00	3.11	0.00	0.00	0.00	3.11
Eastwood (Western Approaches) Retail Park	7.71	1.65	9.02	6.96	2.98	0.00	28.33
Thanet Grange Retail Park	20.87	20.83	14.06	22.46	18.69	0.00	96.90
Airport Retail Park	0.00	0.22	0.18	0.96	0.00	0.00	1.36
Fossetts Park Retail Park	1.57	1.96	12.07	4.74	1.00	0.72	22.06
North Shoebury Retail Park	2.02	1.86	24.12	6.00	0.00	6.11	40.11
Other Southend	38.96	30.54	70.55	10.71	11.53	9.44	171.74
Southend-on-Sea total	**119.81**	**106.17**	**237.25**	**57.81**	**39.27**	**21.44**	**581.75**
Other Destinations							
Rochford	0.00	0.00	0.00	23.04	0.24	0.00	23.28
Rayleigh	0.52	2.43	0.38	0.72	52.27	8.21	64.54
Hockley	0.00	0.00	0.00	0.76	9.49	0.00	10.25
Benfleet	0.00	0.00	0.00	2.08	3.58	18.88	24.54
Canvey Island	0.00	0.21	0.00	0.00	0.00	113.42	113.63
Thundersley	4.54	0.87	0.19	0.26	36.58	7.10	49.54
Hadleigh	21.42	0.32	4.74	0.00	3.31	59.79	89.57
Other Destinations	0.28	0.10	0.00	2.37	19.82	21.59	44.15
Other Destinations total	**26.76**	**3.93**	**5.30**	**29.22**	**125.29**	**228.99**	**419.50**
TOTAL	**146.57**	**110.10**	**242.55**	**87.02**	**164.57**	**250.43**	**1001.25**

Source: Tables 3 and 4

Table 6 - 2025 convenience goods shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2025	**141.89**	**106.61**	**234.85**	**83.97**	**158.79**	**239.95**	**966.05**
Southend-on-Sea							
Southend City Centre	8.46	20.78	36.91	3.08	0.27	0.15	69.67
London Road Retail Park	0.00	13.69	2.27	2.20	3.34	0.00	21.49
Greyhound Retail Park	0.63	2.47	19.99	0.35	0.86	0.00	24.30
Leigh-on-Sea	36.62	3.03	5.79	0.00	0.00	4.49	49.92
Prittlewell	0.00	0.21	10.19	0.14	0.00	0.00	10.54
Westcliff-on-Sea	0.40	6.28	13.18	0.00	0.00	0.32	20.17
Eastwood	1.02	0.00	0.00	0.00	0.42	0.00	1.44
Southchurch	0.00	1.09	2.97	0.00	0.00	0.00	4.06
Thorpe Bay	0.00	0.00	9.54	0.00	0.00	0.00	9.54
Shoeburyness	0.00	0.00	3.01	0.00	0.00	0.00	3.01
Eastwood (Western Approaches) Retail Park	7.46	1.60	8.73	6.72	2.87	0.00	27.39
Thanet Grange Retail Park	20.20	20.17	13.61	21.67	18.04	0.00	93.68
Airport Retail Park	0.00	0.21	0.17	0.93	0.00	0.00	1.31
Fossetts Park Retail Park	1.52	1.90	11.68	4.58	0.97	0.69	21.33
North Shoebury Retail Park	1.96	1.81	23.35	5.79	0.00	5.85	38.75
Other Southend	37.72	29.57	68.31	10.33	11.13	9.05	166.11
Southend-on-Sea total	**115.98**	**102.80**	**229.72**	**55.77**	**37.89**	**20.54**	**562.71**
Other Destinations							
Rochford	0.00	0.00	0.00	22.23	0.23	0.00	22.46
Rayleigh	0.51	2.36	0.36	0.69	50.44	7.87	62.23
Hockley	0.00	0.00	0.00	0.73	9.15	0.00	9.89
Benfleet	0.00	0.00	0.00	2.01	3.46	18.09	23.55
Canvey Island	0.00	0.20	0.00	0.00	0.00	108.67	108.87
Thundersley	4.40	0.84	0.18	0.25	35.30	6.80	47.77
Hadleigh	20.73	0.31	4.59	0.00	3.19	57.28	86.11
Other Destinations	0.27	0.10	0.00	2.29	19.12	20.68	42.46
Other Destinations total	**25.91**	**3.81**	**5.13**	**28.19**	**120.89**	**219.40**	**403.34**
TOTAL	**141.89**	**106.61**	**234.85**	**83.97**	**158.79**	**239.95**	**966.05**

Source: Tables 3 and 4

Table 7 – Future 2030 convenience goods shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2030	**141.42**	**106.27**	**234.11**	**84.30**	**158.96**	**236.84**	**961.91**
Southend-on-Sea							
Southend City Centre	8.43	20.71	36.80	3.09	0.27	0.15	69.47
London Road Retail Park	0.00	13.64	2.26	2.21	3.34	0.00	21.46
Greyhound Retail Park	0.63	2.46	19.93	0.35	0.86	0.00	24.23
Leigh-on-Sea	36.49	3.02	5.77	0.00	0.00	4.43	49.72
Prittlewell	0.00	0.21	10.16	0.14	0.00	0.00	10.51
Westcliff-on-Sea	0.40	6.26	13.14	0.00	0.00	0.31	20.10
Eastwood	1.02	0.00	0.00	0.00	0.42	0.00	1.44
Southchurch	0.00	1.08	2.96	0.00	0.00	0.00	4.05
Thorpe Bay	0.00	0.00	9.51	0.00	0.00	0.00	9.51
Shoeburyness	0.00	0.00	3.00	0.00	0.00	0.00	3.00
Eastwood (Western Approaches) Retail Park	7.44	1.60	8.71	6.75	2.88	0.00	27.36
Thanet Grange Retail Park	20.13	20.10	13.57	21.75	18.06	0.00	93.61
Airport Retail Park	0.00	0.21	0.17	0.93	0.00	0.00	1.31
Fossetts Park Retail Park	1.51	1.90	11.65	4.59	0.97	0.68	21.29
North Shoebury Retail Park	1.95	1.80	23.28	5.81	0.00	5.77	38.61
Other Southend	37.59	29.48	68.09	10.37	11.14	8.93	165.61
Southend-on-Sea total	**115.60**	**102.47**	**228.99**	**55.99**	**37.94**	**20.28**	**561.27**
Other Destinations							
Rochford	0.00	0.00	0.00	22.32	0.23	0.00	22.55
Rayleigh	0.51	2.35	0.36	0.69	50.50	7.77	62.17
Hockley	0.00	0.00	0.00	0.73	9.16	0.00	9.90
Benfleet	0.00	0.00	0.00	2.01	3.46	17.86	23.33
Canvey Island	0.00	0.20	0.00	0.00	0.00	107.27	107.47
Thundersley	4.38	0.84	0.18	0.25	35.34	6.72	47.71
Hadleigh	20.66	0.31	4.57	0.00	3.19	56.54	85.29
Other Destinations	0.27	0.10	0.00	2.29	19.14	20.42	42.22
Other Destinations total	**25.82**	**3.80**	**5.12**	**28.30**	**121.03**	**216.57**	**400.63**
TOTAL	**141.42**	**106.27**	**234.11**	**84.30**	**158.96**	**236.84**	**961.91**

Source: Tables 3 and 4

Table 8 – Future 2035 convenience goods shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2035	**141.53**	**106.34**	**234.26**	**84.92**	**159.83**	**235.40**	**962.28**
Southend-on-Sea							
Southend City Centre	8.44	20.73	36.82	3.12	0.28	0.15	69.53
London Road Retail Park	0.00	13.65	2.26	2.23	3.36	0.00	21.50
Greyhound Retail Park	0.63	2.47	19.94	0.35	0.86	0.00	24.25
		0.00	0.00	0.00	0.00	0.00	0.00
Leigh-on-Sea	36.52	3.02	5.77	0.00	0.00	4.41	49.72
Prittlewell	0.00	0.21	10.17	0.14	0.00	0.00	10.51
Westcliff-on-Sea	0.40	6.26	13.15	0.00	0.00	0.31	20.11
Eastwood	1.02	0.00	0.00	0.00	0.42	0.00	1.44
Southchurch	0.00	1.08	2.96	0.00	0.00	0.00	4.05
Thorpe Bay	0.00	0.00	9.51	0.00	0.00	0.00	9.51
Shoeburyness	0.00	0.00	3.01	0.00	0.00	0.00	3.01
Eastwood (Western Approaches) Retail Park	7.44	1.60	8.71	6.80	2.89	0.00	27.44
Thanet Grange Retail Park	20.15	20.11	13.58	21.92	18.15	0.00	93.91
Airport Retail Park	0.00	0.21	0.17	0.94	0.00	0.00	1.32
Fossetts Park Retail Park	1.51	1.90	11.65	4.63	0.97	0.67	21.34
North Shoebury Retail Park	1.95	1.80	23.29	5.85	0.00	5.74	38.64
Other Southend	37.62	29.50	68.14	10.45	11.20	8.87	165.78
Southend-on-Sea total	**115.69**	**102.54**	**229.14**	**56.41**	**38.14**	**20.15**	**562.07**
Other Destinations							
Rochford	0.00	0.00	0.00	22.48	0.23	0.00	22.71
Rayleigh	0.51	2.35	0.36	0.70	50.77	7.72	62.41
Hockley	0.00	0.00	0.00	0.74	9.21	0.00	9.95
Benfleet	0.00	0.00	0.00	2.03	3.48	17.75	23.26
Canvey Island	0.00	0.20	0.00	0.00	0.00	106.61	106.81
Thundersley	4.39	0.84	0.18	0.25	35.53	6.67	47.86
Hadleigh	20.68	0.31	4.58	0.00	3.21	56.20	84.98
Other Destinations	0.27	0.10	0.00	2.31	19.25	20.29	42.22
Other Destinations total	**25.84**	**3.80**	**5.12**	**28.51**	**121.68**	**215.25**	**400.20**
TOTAL	**141.53**	**106.34**	**234.26**	**84.92**	**159.83**	**235.40**	**962.28**

Source: Tables 3 and 4

Table 9 – Future 2040 convenience goods shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2040	**142.25**	**106.92**	**235.53**	**85.99**	**160.45**	**235.06**	**966.18**
Southend-on-Sea							
Southend City Centre	8.48	20.84	37.02	3.15	0.28	0.15	69.93
London Road Retail Park	0.00	13.72	2.27	2.26	3.37	0.00	21.63
Greyhound Retail Park	0.63	2.48	20.05	0.35	0.87	0.00	24.38
Leigh-on-Sea	36.71	3.04	5.80	0.00	0.00	4.40	49.95
Prittlewell	0.00	0.21	10.22	0.14	0.00	0.00	10.57
Westcliff-on-Sea	0.40	6.29	13.22	0.00	0.00	0.31	20.22
Eastwood	1.02	0.00	0.00	0.00	0.42	0.00	1.45
Southchurch	0.00	1.09	2.98	0.00	0.00	0.00	4.07
Thorpe Bay	0.00	0.00	9.56	0.00	0.00	0.00	9.56
Shoeburyness	0.00	0.00	3.02	0.00	0.00	0.00	3.02
Eastwood (Western Approaches) Retail Park	7.48	1.61	8.76	6.88	2.90	0.00	27.63
Thanet Grange Retail Park	20.25	20.22	13.65	22.19	18.22	0.00	94.54
Airport Retail Park	0.00	0.21	0.18	0.95	0.00	0.00	1.33
Fossetts Park Retail Park	1.52	1.91	11.72	4.69	0.98	0.67	21.48
North Shoebury Retail Park	1.96	1.81	23.42	5.93	0.00	5.73	38.85
Other Southend	37.81	29.66	68.51	10.58	11.24	8.86	166.66
Southend-on-Sea total	**116.27**	**103.09**	**230.38**	**57.12**	**38.29**	**20.12**	**565.28**
Other Destinations							
Rochford	0.00	0.00	0.00	22.77	0.23	0.00	23.00
Rayleigh	0.51	2.36	0.37	0.71	50.97	7.71	62.62
Hockley	0.00	0.00	0.00	0.75	9.25	0.00	10.00
Benfleet	0.00	0.00	0.00	2.05	3.49	17.72	23.27
Canvey Island	0.00	0.20	0.00	0.00	0.00	106.46	106.66
Thundersley	4.41	0.84	0.18	0.26	35.67	6.66	48.02
Hadleigh	20.78	0.32	4.60	0.00	3.22	56.12	85.04
Other Destinations	0.27	0.10	0.00	2.34	19.32	20.26	42.29
Other Destinations total	**25.97**	**3.82**	**5.15**	**28.87**	**122.16**	**214.94**	**400.90**
TOTAL	**142.25**	**106.92**	**235.53**	**85.99**	**160.45**	**235.06**	**966.18**

Source: Tables 3 and 4

Table 10 – Future 2045 convenience goods shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2045	**143.93**	**108.23**	**238.42**	**87.07**	**161.65**	**236.16**	**975.47**
Southend-on-Sea							
Southend City Centre	8.58	21.10	37.48	3.19	0.28	0.15	70.78
London Road Retail Park	0.00	13.89	2.30	2.29	3.40	0.00	21.88
Greyhound Retail Park	0.64	2.51	20.30	0.36	0.87	0.00	24.68
Leigh-on-Sea	37.14	3.08	5.87	0.00	0.00	4.42	50.51
Prittlewell	0.00	0.21	10.35	0.14	0.00	0.00	10.70
Westcliff-on-Sea	0.40	6.37	13.38	0.00	0.00	0.31	20.47
Eastwood	1.04	0.00	0.00	0.00	0.43	0.00	1.46
Southchurch	0.00	1.10	3.02	0.00	0.00	0.00	4.12
Thorpe Bay	0.00	0.00	9.68	0.00	0.00	0.00	9.68
Shoeburyness	0.00	0.00	3.06	0.00	0.00	0.00	3.06
Eastwood (Western Approaches) Retail Park	7.57	1.63	8.87	6.97	2.93	0.00	27.96
Thanet Grange Retail Park	20.49	20.47	13.82	22.47	18.36	0.00	95.61
Airport Retail Park	0.00	0.21	0.18	0.96	0.00	0.00	1.35
Fossetts Park Retail Park	1.54	1.93	11.86	4.75	0.98	0.68	21.74
North Shoebury Retail Park	1.99	1.83	23.71	6.00	0.00	5.76	39.28
Other Southend	38.26	30.02	69.35	10.71	11.33	8.90	168.58
Southend-on-Sea total	**117.65**	**104.36**	**233.21**	**57.84**	**38.58**	**20.22**	**571.86**
Other Destinations							
Rochford	0.00	0.00	0.00	23.05	0.23	0.00	23.29
Rayleigh	0.51	2.39	0.37	0.72	51.35	7.74	63.09
Hockley	0.00	0.00	0.00	0.76	9.32	0.00	10.08
Benfleet	0.00	0.00	0.00	2.08	3.52	17.81	23.40
Canvey Island	0.00	0.20	0.00	0.00	0.00	106.95	107.16
Thundersley	4.46	0.85	0.18	0.26	35.94	6.70	48.39
Hadleigh	21.03	0.32	4.66	0.00	3.25	56.38	85.64
Other Destinations	0.27	0.10	0.00	2.37	19.47	20.36	42.57
Other Destinations total	**26.28**	**3.87**	**5.21**	**29.24**	**123.07**	**215.94**	**403.61**
TOTAL	**143.93**	**108.23**	**238.42**	**87.07**	**161.65**	**236.16**	**975.47**

Source: Tables 3 and 4

Table 11 - Summary of convenience goods expenditure 2023 to 2045 (£M) - high growth

	2025	2030	2035	2040	2045
Available expenditure					
Southend	115.46	115.15	115.29	115.94	117.34
Leigh-on-Sea	49.92	49.72	49.72	49.95	50.51
Prittlewell	10.54	10.51	10.51	10.57	10.70
Westcliff-on-Sea	20.17	20.10	20.11	20.22	20.47
Eastwood	1.44	1.44	1.44	1.45	1.46
Southchurch	4.06	4.05	4.05	4.07	4.12
Thorpe Bay	9.54	9.51	9.51	9.56	9.68
Shoeburyness	3.01	3.00	3.01	3.02	3.06
Other Southend	348.57	347.80	348.43	350.49	354.51
Total	**562.71**	**561.27**	**562.07**	**565.28**	**571.86**
Turnover of existing facilities					
Southend	115.46	115.46	115.11	114.54	113.97
Leigh-on-Sea	49.92	49.92	49.77	49.53	49.28
Prittlewell	10.54	10.54	10.51	10.45	10.40
Westcliff-on-Sea	20.17	20.17	20.11	20.01	19.91
Eastwood	1.44	1.44	1.44	1.43	1.42
Southchurch	4.06	4.06	4.05	4.03	4.01
Thorpe Bay	9.54	9.54	9.51	9.46	9.41
Shoeburyness	3.01	3.01	3.01	2.99	2.98
Other Southend	348.57	348.57	347.52	345.79	344.07
Total	**562.71**	**562.71**	**561.02**	**558.23**	**555.44**
Surplus/deficit expenditure £M					
Southend	0.00	-0.31	0.17	1.40	3.37
Leigh-on-Sea	0.00	-0.21	-0.05	0.42	1.24
Prittlewell	0.00	-0.03	0.01	0.12	0.30
Westcliff-on-Sea	0.00	-0.07	0.00	0.21	0.56
Eastwood	0.00	0.00	0.00	0.02	0.04
Southchurch	0.00	-0.01	0.00	0.04	0.11
Thorpe Bay	0.00	-0.03	0.00	0.10	0.27
Shoeburyness	0.00	-0.01	0.00	0.03	0.08
Other Southend	0.00	-0.77	0.90	4.70	10.45
Total	**0.00**	**-1.44**	**1.05**	**7.05**	**16.42**

Source: Tables 6-10 and Experian sales density growth rates from Retail Planner Briefing Note 23 - Figure 4a

Table 12 - Convenience goods floorspace capacity - high growth

	2025	2030	2035	2040	2045
Turnover density new floorspace (£ per sq.m)	£12,000	£12,000	£11,964	£11,904	£11,845
Sales floorspace projection (sq.m net)					
Southend	0	-30	10	120	280
Leigh-on-Sea	0	-20	0	40	100
Prittlewell	0	0	0	10	30
Westcliff-on-Sea	0	-10	0	20	50
Eastwood	0	0	0	0	0
Southchurch	0	0	0	0	10
Thorpe Bay	0	0	0	10	20
Shoeburyness	0	0	0	0	10
Other Southend	0	-60	80	400	880
Total	**0**	**-120**	**90**	**600**	**1,380**
Gross floorspace projection (sq.m gross)					
Southend	0	-40	10	170	400
Leigh-on-Sea	0	-30	0	60	140
Prittlewell	0	0	0	10	40
Westcliff-on-Sea	0	-10	0	30	70
Eastwood	0	0	0	0	0
Southchurch	0	0	0	0	10
Thorpe Bay	0	0	0	10	30
Shoeburyness	0	0	0	0	10
Other Southend	0	-90	110	570	1,260
Total	**0**	**-170**	**120**	**850**	**1,960**

Source: Table 11 and Experian sales density growth rates from Retail Planner Briefing Note 23 - Figure 4a
Figures may not sum due to rounding

Appendix 3 Convenience goods assessment (low-growth option)

Table 1 - Study area population projections (low growth)

Zone	2023	2025	2030	2035	2040	2045
1 - Southend-on-Sea West	51,316	52,106	52,377	52,563	52,921	53,512
2 - Southend-on-Sea Central	42,284	42,943	43,156	43,290	43,585	44,079
3 - Southend-on-Sea East	90,331	91,740	92,195	92,484	93,114	94,169
4 - Rochford East	30,638	31,007	31,898	32,700	33,624	34,471
5 - Rochford West	56,696	57,379	58,865	60,228	61,404	62,622
6 - Castle Point	89,483	89,929	90,964	92,004	93,302	94,886
Total	**360,749**	**365,103**	**369,455**	**373,270**	**377,950**	**383,738**

Source: Population for Zones 1-3 derived from ONS provided by Lichfields analysis and Zones 4-6 from Experian population projections (2025)

Table 2 - Convenience goods expenditure per person per annum (£)

Zone	2023	2025	2030	2035	2040	2045
1 - Southend-on-Sea West	2,856	2,723	2,657	2,611	2,571	2,540
2 - Southend-on-Sea Central	2,604	2,483	2,423	2,381	2,344	2,316
3 - Southend-on-Sea East	2,685	2,560	2,498	2,455	2,417	2,388
4 - Rochford East	2,840	2,708	2,643	2,597	2,557	2,526
5 - Rochford West	2,903	2,767	2,700	2,654	2,613	2,581
6 - Castle Point	2,799	2,668	2,604	2,559	2,519	2,489

Sources:
Experian Local Expenditure 2023 (2023 prices)
Experian growth rates - Retail Planner Briefing Note 23 (March 2026)
Excludes Special Forms of Trading (SFT)

Table 3 - Total convenience goods expenditure (£m) - low growth

Zone	2023	2025	2030	2035	2040	2045
1 - Southend-on-Sea West	146.57	141.89	139.18	137.26	136.07	135.93
2 - Southend-on-Sea Central	110.10	106.61	104.55	103.06	102.17	102.07
3 - Southend-on-Sea East	242.55	234.85	230.32	227.03	225.07	224.87
4 - Rochford East	87.02	83.97	84.29	84.91	85.98	87.07
5 - Rochford West	164.57	158.79	158.96	159.83	160.45	161.65
6 - Castle Point	250.43	239.95	236.84	235.40	235.06	236.16
Total	**1,001.25**	**966.05**	**954.15**	**947.49**	**944.79**	**947.75**

Sources: Tables 1 and 2

Table 4 - Base year convenience goods market shares (%)

Destination Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6
Southend-on-Sea						
Southend City Centre	6.0%	19.5%	15.7%	3.7%	0.2%	0.1%
London Road Retail Park	0.0%	12.8%	1.0%	2.6%	2.1%	0.0%
Greyhound Retail Park	0.4%	2.3%	8.5%	0.4%	0.5%	0.0%
Leigh-on-Sea	25.8%	2.8%	2.5%	0.0%	0.0%	1.9%
Prittlewell	0.0%	0.2%	4.3%	0.2%	0.0%	0.0%
Westcliff-on-Sea	0.3%	5.9%	5.6%	0.0%	0.0%	0.1%
Eastwood	0.7%	0.0%	0.0%	0.0%	0.3%	0.0%
Southchurch	0.0%	1.0%	1.3%	0.0%	0.0%	0.0%
Thorpe Bay	0.0%	0.0%	4.1%	0.0%	0.0%	0.0%
Shoeburyness	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%
Eastwood (Western Approaches) Retail Park	5.3%	1.5%	3.7%	8.0%	1.8%	0.0%
Thanet Grange Retail Park	14.2%	18.9%	5.8%	25.8%	11.4%	0.0%
Airport Retail Park	0.0%	0.2%	0.1%	1.1%	0.0%	0.0%
Fossetts Park Retail Park	1.1%	1.8%	5.0%	5.5%	0.6%	0.3%
North Shoebury Retail Park	1.4%	1.7%	9.9%	6.9%	0.0%	2.4%
Other Southend	26.6%	27.7%	29.1%	12.3%	7.0%	3.8%
Southend-on-Sea total	**81.7%**	**96.4%**	**97.8%**	**66.4%**	**23.9%**	**8.6%**
Other Destinations						
Rochford	0.0%	0.0%	0.0%	26.5%	0.1%	0.0%
Rayleigh	0.4%	2.2%	0.2%	0.8%	31.8%	3.3%
Hockley	0.0%	0.0%	0.0%	0.9%	5.8%	0.0%
Benfleet	0.0%	0.0%	0.0%	2.4%	2.2%	7.5%
Canvey Island	0.0%	0.2%	0.0%	0.0%	0.0%	45.3%
Thundersley	3.1%	0.8%	0.1%	0.3%	22.2%	2.8%
Hadleigh	14.6%	0.3%	2.0%	0.0%	2.0%	23.9%
Other Destinations	0.2%	0.1%	0.0%	2.7%	12.0%	8.6%
Other Destinations total	**18.3%**	**3.6%**	**2.2%**	**33.6%**	**76.1%**	**91.4%**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Household Survey (2026)

Table 5 - Base year convenience goods shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2023	**146.57**	**110.10**	**242.55**	**87.02**	**164.57**	**250.43**	**1001.25**
Southend-on-Sea							
Southend City Centre	8.74	21.46	38.12	3.19	0.28	0.16	71.97
London Road Retail Park	0.00	14.13	2.34	2.28	3.46	0.00	22.22
Greyhound Retail Park	0.65	2.55	20.65	0.36	0.89	0.00	25.10
Leigh-on-Sea	37.82	3.13	5.98	0.00	0.00	4.69	51.62
Prittlewell	0.00	0.22	10.53	0.14	0.00	0.00	10.88
Westcliff-on-Sea	0.41	6.48	13.61	0.00	0.00	0.33	20.83
Eastwood	1.05	0.00	0.00	0.00	0.43	0.00	1.49
Southchurch	0.00	1.12	3.07	0.00	0.00	0.00	4.19
Thorpe Bay	0.00	0.00	9.85	0.00	0.00	0.00	9.85
Shoeburyness	0.00	0.00	3.11	0.00	0.00	0.00	3.11
Eastwood (Western Approaches) Retail Park	7.71	1.65	9.02	6.96	2.98	0.00	28.33
Thanet Grange Retail Park	20.87	20.83	14.06	22.46	18.69	0.00	96.90
Airport Retail Park	0.00	0.22	0.18	0.96	0.00	0.00	1.36
Fossetts Park Retail Park	1.57	1.96	12.07	4.74	1.00	0.72	22.06
North Shoebury Retail Park	2.02	1.86	24.12	6.00	0.00	6.11	40.11
Other Southend	38.96	30.54	70.55	10.71	11.53	9.44	171.74
Southend-on-Sea total	**119.81**	**106.17**	**237.25**	**57.81**	**39.27**	**21.44**	**581.75**
Other Destinations							
Rochford	0.00	0.00	0.00	23.04	0.24	0.00	23.28
Rayleigh	0.52	2.43	0.38	0.72	52.27	8.21	64.54
Hockley	0.00	0.00	0.00	0.76	9.49	0.00	10.25
Benfleet	0.00	0.00	0.00	2.08	3.58	18.88	24.54
Canvey Island	0.00	0.21	0.00	0.00	0.00	113.42	113.63
Thundersley	4.54	0.87	0.19	0.26	36.58	7.10	49.54
Hadleigh	21.42	0.32	4.74	0.00	3.31	59.79	89.57
Other Destinations	0.28	0.10	0.00	2.37	19.82	21.59	44.15
Other Destinations total	**26.76**	**3.93**	**5.30**	**29.22**	**125.29**	**228.99**	**419.50**
TOTAL	**146.57**	**110.10**	**242.55**	**87.02**	**164.57**	**250.43**	**1001.25**

Source: Tables 3 and 4

Table 6 - 2025 convenience goods shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2025	**141.89**	**106.61**	**234.85**	**83.97**	**158.79**	**239.95**	**966.05**
Southend-on-Sea							
Southend City Centre	8.46	20.78	36.91	3.08	0.27	0.15	69.67
London Road Retail Park	0.00	13.69	2.27	2.20	3.34	0.00	21.49
Greyhound Retail Park	0.63	2.47	19.99	0.35	0.86	0.00	24.30
Leigh-on-Sea	36.62	3.03	5.79	0.00	0.00	4.49	49.92
Prittlewell	0.00	0.21	10.19	0.14	0.00	0.00	10.54
Westcliff-on-Sea	0.40	6.28	13.18	0.00	0.00	0.32	20.17
Eastwood	1.02	0.00	0.00	0.00	0.42	0.00	1.44
Southchurch	0.00	1.09	2.97	0.00	0.00	0.00	4.06
Thorpe Bay	0.00	0.00	9.54	0.00	0.00	0.00	9.54
Shoeburyness	0.00	0.00	3.01	0.00	0.00	0.00	3.01
Eastwood (Western Approaches) Retail Park	7.46	1.60	8.73	6.72	2.87	0.00	27.39
Thanet Grange Retail Park	20.20	20.17	13.61	21.67	18.04	0.00	93.68
Airport Retail Park	0.00	0.21	0.17	0.93	0.00	0.00	1.31
Fossetts Park Retail Park	1.52	1.90	11.68	4.58	0.97	0.69	21.33
North Shoebury Retail Park	1.96	1.81	23.35	5.79	0.00	5.85	38.75
Other Southend	37.72	29.57	68.31	10.33	11.13	9.05	166.11
Southend-on-Sea total	**115.98**	**102.80**	**229.72**	**55.77**	**37.89**	**20.54**	**562.71**
Other Destinations							
Rochford	0.00	0.00	0.00	22.23	0.23	0.00	22.46
Rayleigh	0.51	2.36	0.36	0.69	50.44	7.87	62.23
Hockley	0.00	0.00	0.00	0.73	9.15	0.00	9.89
Benfleet	0.00	0.00	0.00	2.01	3.46	18.09	23.55
Canvey Island	0.00	0.20	0.00	0.00	0.00	108.67	108.87
Thundersley	4.40	0.84	0.18	0.25	35.30	6.80	47.77
Hadleigh	20.73	0.31	4.59	0.00	3.19	57.28	86.11
Other Destinations	0.27	0.10	0.00	2.29	19.12	20.68	42.46
Other Destinations total	**25.91**	**3.81**	**5.13**	**28.19**	**120.89**	**219.40**	**403.34**
TOTAL	**141.89**	**106.61**	**234.85**	**83.97**	**158.79**	**239.95**	**966.05**

Source: Tables 3 and 4

Table 7 – Future 2030 convenience goods shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2030	**139.18**	**104.55**	**230.32**	**84.29**	**158.96**	**236.84**	**954.15**
Southend-on-Sea							
Southend City Centre	8.30	20.38	36.20	3.09	0.27	0.15	68.40
London Road Retail Park	0.00	13.42	2.22	2.21	3.34	0.00	21.20
Greyhound Retail Park	0.62	2.42	19.61	0.35	0.86	0.00	23.86
Leigh-on-Sea	35.92	2.97	5.67	0.00	0.00	4.43	49.00
Prittlewell	0.00	0.21	10.00	0.14	0.00	0.00	10.34
Westcliff-on-Sea	0.39	6.16	12.93	0.00	0.00	0.31	19.78
Eastwood	1.00	0.00	0.00	0.00	0.42	0.00	1.42
Southchurch	0.00	1.07	2.91	0.00	0.00	0.00	3.98
Thorpe Bay	0.00	0.00	9.35	0.00	0.00	0.00	9.35
Shoeburyness	0.00	0.00	2.96	0.00	0.00	0.00	2.96
Eastwood (Western Approaches) Retail Park	7.32	1.57	8.57	6.74	2.88	0.00	27.08
Thanet Grange Retail Park	19.82	19.78	13.35	21.75	18.06	0.00	92.75
Airport Retail Park	0.00	0.21	0.17	0.93	0.00	0.00	1.31
Fossetts Park Retail Park	1.49	1.86	11.46	4.59	0.97	0.68	21.05
North Shoebury Retail Park	1.92	1.77	22.90	5.81	0.00	5.77	38.18
Other Southend	37.00	29.00	66.99	10.37	11.14	8.93	163.43
Southend-on-Sea total	**113.77**	**100.81**	**225.28**	**55.99**	**37.94**	**20.28**	**554.07**
Other Destinations							
Rochford	0.00	0.00	0.00	22.32	0.23	0.00	22.55
Rayleigh	0.50	2.31	0.36	0.69	50.50	7.77	62.12
Hockley	0.00	0.00	0.00	0.73	9.16	0.00	9.90
Benfleet	0.00	0.00	0.00	2.01	3.46	17.86	23.33
Canvey Island	0.00	0.20	0.00	0.00	0.00	107.27	107.46
Thundersley	4.31	0.83	0.18	0.25	35.34	6.72	47.62
Hadleigh	20.34	0.31	4.50	0.00	3.19	56.54	84.88
Other Destinations	0.26	0.09	0.00	2.29	19.14	20.42	42.21
Other Destinations total	**25.41**	**3.74**	**5.03**	**28.30**	**121.03**	**216.57**	**400.08**
TOTAL	**139.18**	**104.55**	**230.32**	**84.29**	**158.96**	**236.84**	**954.15**

Source: Tables 3 and 4

Table 8 – Future 2035 convenience goods shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2035	**137.26**	**103.06**	**227.03**	**84.91**	**159.83**	**235.40**	**947.49**
Southend-on-Sea							
Southend City Centre	8.19	20.09	35.69	3.11	0.28	0.15	67.50
London Road Retail Park	0.00	13.23	2.19	2.23	3.36	0.00	21.01
Greyhound Retail Park	0.61	2.39	19.33	0.35	0.86	0.00	23.54
		0.00	0.00	0.00	0.00	0.00	0.00
Leigh-on-Sea	35.42	2.93	5.59	0.00	0.00	4.41	48.35
Prittlewell	0.00	0.20	9.85	0.14	0.00	0.00	10.19
Westcliff-on-Sea	0.38	6.07	12.74	0.00	0.00	0.31	19.50
Eastwood	0.99	0.00	0.00	0.00	0.42	0.00	1.41
Southchurch	0.00	1.05	2.87	0.00	0.00	0.00	3.92
Thorpe Bay	0.00	0.00	9.22	0.00	0.00	0.00	9.22
Shoeburyness	0.00	0.00	2.91	0.00	0.00	0.00	2.91
Eastwood (Western Approaches) Retail Park	7.22	1.55	8.44	6.79	2.89	0.00	26.90
Thanet Grange Retail Park	19.54	19.49	13.16	21.91	18.15	0.00	92.26
Airport Retail Park	0.00	0.20	0.17	0.94	0.00	0.00	1.31
Fossetts Park Retail Park	1.47	1.84	11.30	4.63	0.97	0.67	20.87
North Shoebury Retail Park	1.89	1.75	22.58	5.85	0.00	5.74	37.80
Other Southend	36.49	28.59	66.04	10.45	11.20	8.87	161.63
Southend-on-Sea total	**112.20**	**99.38**	**222.07**	**56.40**	**38.14**	**20.15**	**548.34**
Other Destinations							
Rochford	0.00	0.00	0.00	22.48	0.23	0.00	22.71
Rayleigh	0.49	2.28	0.35	0.70	50.77	7.72	62.31
Hockley	0.00	0.00	0.00	0.74	9.21	0.00	9.95
Benfleet	0.00	0.00	0.00	2.03	3.48	17.75	23.26
Canvey Island	0.00	0.20	0.00	0.00	0.00	106.61	106.81
Thundersley	4.25	0.81	0.18	0.25	35.53	6.67	47.70
Hadleigh	20.06	0.30	4.43	0.00	3.21	56.20	84.21
Other Destinations	0.26	0.09	0.00	2.31	19.25	20.29	42.21
Other Destinations total	**25.06**	**3.68**	**4.96**	**28.51**	**121.68**	**215.25**	**399.15**
TOTAL	**137.26**	**103.06**	**227.03**	**84.91**	**159.83**	**235.40**	**947.49**

Source: Tables 3 and 4

Table 9 – Future 2040 convenience goods shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2040	**136.07**	**102.17**	**225.07**	**85.98**	**160.45**	**235.06**	**944.79**
Southend-on-Sea							
Southend City Centre	8.12	19.91	35.38	3.15	0.28	0.15	66.99
London Road Retail Park	0.00	13.11	2.17	2.26	3.37	0.00	20.92
Greyhound Retail Park	0.61	2.37	19.16	0.35	0.87	0.00	23.36
Leigh-on-Sea	35.11	2.91	5.54	0.00	0.00	4.40	47.96
Prittlewell	0.00	0.20	9.77	0.14	0.00	0.00	10.11
Westcliff-on-Sea	0.38	6.02	12.63	0.00	0.00	0.31	19.34
Eastwood	0.98	0.00	0.00	0.00	0.42	0.00	1.40
Southchurch	0.00	1.04	2.85	0.00	0.00	0.00	3.89
Thorpe Bay	0.00	0.00	9.14	0.00	0.00	0.00	9.14
Shoeburyness	0.00	0.00	2.89	0.00	0.00	0.00	2.89
Eastwood (Western Approaches) Retail Park	7.16	1.53	8.37	6.88	2.90	0.00	26.85
Thanet Grange Retail Park	19.37	19.32	13.04	22.19	18.22	0.00	92.15
Airport Retail Park	0.00	0.20	0.17	0.95	0.00	0.00	1.32
Fossetts Park Retail Park	1.45	1.82	11.20	4.69	0.98	0.67	20.81
North Shoebury Retail Park	1.88	1.73	22.38	5.92	0.00	5.73	37.64
Other Southend	36.17	28.34	65.47	10.58	11.24	8.86	160.66
Southend-on-Sea total	**111.23**	**98.52**	**220.15**	**57.11**	**38.29**	**20.12**	**545.42**
Other Destinations							
Rochford	0.00	0.00	0.00	22.76	0.23	0.00	22.99
Rayleigh	0.49	2.26	0.35	0.71	50.97	7.71	62.48
Hockley	0.00	0.00	0.00	0.75	9.25	0.00	10.00
Benfleet	0.00	0.00	0.00	2.05	3.49	17.72	23.27
Canvey Island	0.00	0.19	0.00	0.00	0.00	106.46	106.65
Thundersley	4.22	0.81	0.17	0.26	35.67	6.66	47.79
Hadleigh	19.88	0.30	4.40	0.00	3.22	56.12	83.92
Other Destinations	0.26	0.09	0.00	2.34	19.32	20.26	42.28
Other Destinations total	**24.84**	**3.65**	**4.92**	**28.87**	**122.16**	**214.94**	**399.37**
TOTAL	**136.07**	**102.17**	**225.07**	**85.98**	**160.45**	**235.06**	**944.79**

Source: Tables 3 and 4

Table 10 – Future 2045 convenience goods shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2045	**135.93**	**102.07**	**224.87**	**87.07**	**161.65**	**236.16**	**947.75**
Southend-on-Sea							
Southend City Centre	8.11	19.90	35.35	3.19	0.28	0.15	66.97
London Road Retail Park	0.00	13.10	2.17	2.29	3.40	0.00	20.96
Greyhound Retail Park	0.61	2.37	19.14	0.36	0.87	0.00	23.35
Leigh-on-Sea	35.08	2.90	5.54	0.00	0.00	4.42	47.94
Prittlewell	0.00	0.20	9.76	0.14	0.00	0.00	10.10
Westcliff-on-Sea	0.38	6.01	12.62	0.00	0.00	0.31	19.32
Eastwood	0.98	0.00	0.00	0.00	0.43	0.00	1.41
Southchurch	0.00	1.04	2.85	0.00	0.00	0.00	3.89
Thorpe Bay	0.00	0.00	9.13	0.00	0.00	0.00	9.13
Shoeburyness	0.00	0.00	2.89	0.00	0.00	0.00	2.89
Eastwood (Western Approaches) Retail Park	7.15	1.53	8.36	6.97	2.93	0.00	26.94
Thanet Grange Retail Park	19.35	19.31	13.03	22.47	18.36	0.00	92.52
Airport Retail Park	0.00	0.20	0.17	0.96	0.00	0.00	1.33
Fossetts Park Retail Park	1.45	1.82	11.19	4.75	0.98	0.68	20.87
North Shoebury Retail Park	1.88	1.73	22.36	6.00	0.00	5.76	37.72
Other Southend	36.13	28.32	65.41	10.71	11.33	8.90	160.80
Southend-on-Sea total	**111.11**	**98.43**	**219.95**	**57.84**	**38.58**	**20.22**	**546.12**
Other Destinations							
Rochford	0.00	0.00	0.00	23.05	0.23	0.00	23.29
Rayleigh	0.49	2.26	0.35	0.72	51.35	7.74	62.90
Hockley	0.00	0.00	0.00	0.76	9.32	0.00	10.08
Benfleet	0.00	0.00	0.00	2.08	3.52	17.81	23.40
Canvey Island	0.00	0.19	0.00	0.00	0.00	106.95	107.15
Thundersley	4.21	0.81	0.17	0.26	35.94	6.70	48.08
Hadleigh	19.86	0.30	4.39	0.00	3.25	56.38	84.18
Other Destinations	0.26	0.09	0.00	2.37	19.47	20.36	42.55
Other Destinations total	**24.82**	**3.65**	**4.92**	**29.24**	**123.07**	**215.94**	**401.63**
TOTAL	**135.93**	**102.07**	**224.87**	**87.07**	**161.65**	**236.16**	**947.75**

Source: Tables 3 and 4

Table 11 - Summary of convenience goods expenditure 2023 to 2045 (£M) - low growth

	2025	2030	2035	2040	2045
Available expenditure					
Southend	115.46	113.46	112.05	111.26	111.28
Leigh-on-Sea	49.92	49.00	48.35	47.96	47.94
Prittlewell	10.54	10.34	10.19	10.11	10.10
Westcliff-on-Sea	20.17	19.78	19.50	19.34	19.32
Eastwood	1.44	1.42	1.41	1.40	1.41
Southchurch	4.06	3.98	3.92	3.89	3.89
Thorpe Bay	9.54	9.35	9.22	9.14	9.13
Shoeburyness	3.01	2.96	2.91	2.89	2.89
Other Southend	348.57	343.79	340.78	339.43	340.18
Total	**562.71**	**554.07**	**548.34**	**545.42**	**546.12**
Turnover of existing facilities					
Southend	115.46	115.46	115.11	114.54	113.97
Leigh-on-Sea	49.92	49.92	49.77	49.53	49.28
Prittlewell	10.54	10.54	10.51	10.45	10.40
Westcliff-on-Sea	20.17	20.17	20.11	20.01	19.91
Eastwood	1.44	1.44	1.44	1.43	1.42
Southchurch	4.06	4.06	4.05	4.03	4.01
Thorpe Bay	9.54	9.54	9.51	9.46	9.41
Shoeburyness	3.01	3.01	3.01	2.99	2.98
Other Southend	348.57	348.57	347.52	345.79	344.07
Total	**562.71**	**562.71**	**561.02**	**558.23**	**555.44**
Surplus/deficit expenditure £M					
Southend	0.00	-2.00	-3.06	-3.28	-2.69
Leigh-on-Sea	0.00	-0.93	-1.42	-1.56	-1.34
Prittlewell	0.00	-0.20	-0.31	-0.35	-0.30
Westcliff-on-Sea	0.00	-0.39	-0.61	-0.67	-0.59
Eastwood	0.00	-0.02	-0.03	-0.03	-0.02
Southchurch	0.00	-0.08	-0.12	-0.14	-0.12
Thorpe Bay	0.00	-0.18	-0.29	-0.32	-0.28
Shoeburyness	0.00	-0.06	-0.09	-0.10	-0.09
Other Southend	0.00	-4.78	-6.75	-6.36	-3.89
Total	**0.00**	**-8.64**	**-12.68**	**-12.81**	**-9.32**

Source: Tables 6-10 and Experian sales density growth rates from Retail Planner Briefing Note 23 - Figure 4a

Table 12 - Convenience goods floorspace capacity - low growth

	2025	2030	2035	2040	2045
Turnover density new floorspace (£ per sq.m)	£12,000	£12,000	£11,964	£11,904	£11,845
Sales floorspace projection (sq.m net)					
Southend	0	-170	-260	-280	-230
Leigh-on-Sea	0	-80	-120	-130	-110
Prittlewell	0	-20	-30	-30	-30
Westcliff-on-Sea	0	-30	-50	-60	-50
Eastwood	0	0	0	0	0
Southchurch	0	-10	-10	-10	-10
Thorpe Bay	0	-20	-20	-30	-20
Shoeburyness	0	0	-10	-10	-10
Other Southend	0	-400	-560	-530	-330
Total	**0**	**-730**	**-1,060**	**-1,080**	**-790**
Gross floorspace projection (sq.m gross)					
Southend	0	-240	-370	-400	-330
Leigh-on-Sea	0	-110	-170	-190	-160
Prittlewell	0	-30	-40	-40	-40
Westcliff-on-Sea	0	-40	-70	-90	-70
Eastwood	0	0	0	0	0
Southchurch	0	-10	-10	-10	-10
Thorpe Bay	0	-30	-30	-40	-30
Shoeburyness	0	0	-10	-10	-10
Other Southend	0	-570	-800	-760	-470
Total	**0**	**-1,030**	**-1,500**	**-1,540**	**-1,120**

Source: Table 11 and Experian sales density growth rates from Retail Planner Briefing Note 23 - Figure 4a
Figures may not sum due to rounding

Appendix 4 Comparison goods assessment (high-growth option)

Table 1 - Study area population projections (high growth)

Zone	2023	2025	2030	2035	2040	2045
1 - Southend-on-Sea West	51,316	52,106	53,219	54,198	55,322	56,663
2 - Southend-on-Sea Central	42,284	42,943	43,866	44,669	45,610	46,737
3 - Southend-on-Sea East	90,331	91,740	93,713	95,428	97,439	99,844
4 - Rochford East	30,638	31,007	31,900	32,703	33,629	34,471
5 - Rochford West	56,696	57,379	58,865	60,228	61,404	62,622
6 - Castle Point	89,483	89,929	90,964	92,004	93,302	94,886
Total	**360,749**	**365,103**	**372,527**	**379,230**	**386,706**	**395,224**

Source: Population for Zones 1-3 derived from ONS provided by Lichfields analysis and Zones 4-6 from Experian population projections (2025)

Table 2 - Comparison goods expenditure per person per annum (£)

Zone	2023	2025	2030	2035	2040	2045
1 - Southend-on-Sea West	3,236	3,169	3,413	3,798	4,214	4,740
2 - Southend-on-Sea Central	2,908	2,848	3,067	3,413	3,787	4,260
3 - Southend-on-Sea East	2,916	2,856	3,076	3,423	3,798	4,272
4 - Rochford East	3,206	3,140	3,382	3,763	4,176	4,697
5 - Rochford West	3,394	3,324	3,580	3,984	4,420	4,972
6 - Castle Point	3,069	3,006	3,237	3,602	3,997	4,496

Sources:
Experian Local Expenditure 2023 (2023 prices)
Experian growth rates - Retail Planner Briefing Note 23 (March 2026)
Excludes Special Forms of Trading (SFT)

Table 3 - Total comparison goods expenditure (£m) - high growth

Zone	2023	2025	2030	2035	2040	2045
1 - Southend-on-Sea West	166.05	165.14	181.62	205.84	233.14	268.60
2 - Southend-on-Sea Central	122.94	122.30	134.52	152.44	172.71	199.08
3 - Southend-on-Sea East	263.41	262.02	288.22	326.62	370.05	426.53
4 - Rochford East	98.24	97.38	107.88	123.07	140.43	161.92
5 - Rochford West	192.44	190.76	210.73	239.94	271.44	311.38
6 - Castle Point	274.62	270.32	294.43	331.41	372.92	426.60
Total	**1,117.70**	**1,107.91**	**1,217.40**	**1,379.32**	**1,560.68**	**1,794.10**

Sources: Tables 1 and 2

Table 4 - Base year comparison goods market shares (%)

Destination Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6
Southend-on-Sea						
Southend City Centre	20.3%	39.7%	33.5%	22.0%	12.1%	7.1%
Southend out-of-centre	2.0%	1.8%	2.4%	0.8%	0.0%	0.2%
London Road Retail Park	6.8%	11.3%	5.9%	7.9%	3.2%	2.4%
Greyhound Retail Park	1.5%	2.2%	2.1%	0.9%	0.5%	0.0%
Leigh-on-Sea	16.3%	3.9%	0.4%	1.5%	1.1%	0.9%
Prittlewell	0.2%	0.1%	0.1%	0.2%	0.0%	0.0%
Westcliff-on-Sea	1.7%	5.3%	2.3%	0.1%	0.2%	0.0%
Eastwood	1.1%	1.2%	0.0%	0.0%	0.2%	0.0%
Southchurch	1.3%	0.1%	4.2%	0.5%	0.0%	0.0%
Thorpe Bay	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%
Shoeburyness	0.0%	2.5%	4.3%	0.5%	0.0%	0.0%
Eastwood (Western Approaches) Retail Park	1.0%	0.0%	0.1%	1.0%	0.0%	0.0%
Thanet Grange Retail Park	5.7%	4.2%	0.4%	6.5%	3.1%	0.9%
Airport Retail Park	8.4%	6.2%	3.5%	19.8%	6.8%	0.7%
Fossetts Park Retail Park	3.1%	4.5%	4.5%	5.7%	1.6%	0.5%
North Shoebury Retail Park	0.0%	0.3%	1.5%	1.9%	0.0%	0.0%
Other Southend	1.4%	2.1%	11.7%	0.7%	0.5%	0.1%
Southend-on-Sea total	**70.6%**	**85.6%**	**77.3%**	**69.9%**	**29.3%**	**13.0%**
Other Destinations						
Rochford	0.0%	0.1%	0.9%	9.7%	0.8%	0.0%
Rayleigh	5.7%	1.6%	0.3%	3.0%	29.6%	3.0%
Hockley	0.0%	0.1%	0.0%	0.9%	4.4%	0.3%
Benfleet	0.0%	0.0%	2.0%	0.0%	0.4%	0.7%
Canvey Island	0.2%	0.0%	0.0%	0.0%	0.0%	25.2%
Thundersley	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%
Hadleigh	2.8%	0.6%	2.1%	0.7%	0.0%	8.0%
Rayleigh Weir Retail Park	2.2%	0.9%	2.0%	1.3%	7.3%	9.0%
Other Destinations	18.6%	11.1%	15.4%	14.5%	28.1%	40.2%
Other Destinations total	**29.4%**	**14.4%**	**22.7%**	**30.1%**	**70.7%**	**87.0%**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Household Survey (2026)

Table 5 - Base year comparison goods shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2023	**166.05**	**122.94**	**263.41**	**98.24**	**192.44**	**274.62**	**1117.70**
Southend-on-Sea							
Southend City Centre	33.68	48.86	88.34	21.58	23.36	19.63	235.44
Southend out-of-centre	3.30	2.24	6.42	0.75	0.00	0.57	13.28
London Road Retail Park	11.24	13.94	15.51	7.78	6.08	6.64	61.19
Greyhound Retail Park	2.48	2.72	5.50	0.84	0.89	0.00	12.43
Leigh-on-Sea	26.99	4.81	1.13	1.43	2.21	2.37	38.94
Prittlewell	0.25	0.11	0.16	0.19	0.00	0.00	0.71
Westcliff-on-Sea	2.82	6.51	6.05	0.12	0.40	0.12	16.02
Eastwood	1.80	1.47	0.00	0.00	0.39	0.00	3.66
Southchurch	2.18	0.17	11.00	0.54	0.00	0.00	13.89
Thorpe Bay	0.00	0.00	0.91	0.00	0.00	0.00	0.91
Shoeburyness	0.00	3.12	11.43	0.47	0.00	0.00	15.02
Eastwood (Western Approaches) Retail Park	1.63	0.00	0.23	1.02	0.09	0.00	2.97
Thanet Grange Retail Park	9.43	5.15	1.00	6.43	6.00	2.54	30.55
Airport Retail Park	13.89	7.59	9.22	19.42	13.09	2.05	65.27
Fossetts Park Retail Park	5.20	5.59	11.80	5.59	3.01	1.28	32.47
North Shoebury Retail Park	0.00	0.39	3.91	1.85	0.00	0.00	6.14
Other Southend	2.35	2.57	30.91	0.64	0.91	0.39	37.77
Southend-on-Sea total	**117.24**	**105.22**	**203.52**	**68.66**	**56.43**	**35.57**	**586.66**
Other Destinations							
Rochford	0.00	0.08	2.32	9.51	1.48	0.00	13.39
Rayleigh	9.40	2.00	0.80	2.93	56.97	8.22	80.32
Hockley	0.00	0.17	0.13	0.91	8.52	0.77	10.51
Benfleet	0.00	0.00	5.35	0.00	0.86	1.95	8.15
Canvey Island	0.27	0.00	0.00	0.00	0.00	69.13	69.40
Thundersley	0.00	0.00	0.00	0.00	0.00	1.81	1.81
Hadleigh	4.60	0.71	5.56	0.71	0.00	22.00	33.58
Rayleigh Weir Retail Park	3.63	1.16	5.23	1.28	14.12	24.74	50.16
Other Destinations	30.90	13.60	40.50	14.23	54.06	110.42	263.71
Other Destinations total	**48.81**	**17.72**	**59.89**	**29.57**	**136.00**	**239.04**	**531.03**
TOTAL	**166.05**	**122.94**	**263.41**	**98.24**	**192.44**	**274.62**	**1117.70**

Source: Tables 3 and 4

Table 6 - 2025 comparison goods shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2025	**165.14**	**122.30**	**262.02**	**97.38**	**190.76**	**270.32**	**1107.91**
Southend-on-Sea							
Southend City Centre	33.49	48.60	87.87	21.39	23.16	19.32	233.83
Southend out-of-centre	3.29	2.23	6.39	0.74	0.00	0.56	13.20
London Road Retail Park	11.18	13.86	15.43	7.72	6.03	6.54	60.75
Greyhound Retail Park	2.47	2.70	5.47	0.84	0.88	0.00	12.36
Leigh-on-Sea	26.85	4.79	1.12	1.42	2.19	2.33	38.69
Prittlewell	0.25	0.11	0.16	0.19	0.00	0.00	0.71
Westcliff-on-Sea	2.80	6.47	6.02	0.12	0.39	0.12	15.93
Eastwood	1.79	1.46	0.00	0.00	0.39	0.00	3.64
Southchurch	2.17	0.17	10.94	0.53	0.00	0.00	13.81
Thorpe Bay	0.00	0.00	0.91	0.00	0.00	0.00	0.91
Shoeburyness	0.00	3.10	11.37	0.47	0.00	0.00	14.94
Eastwood (Western Approaches) Retail Park	1.62	0.00	0.23	1.01	0.09	0.00	2.95
Thanet Grange Retail Park	9.38	5.12	1.00	6.38	5.95	2.50	30.32
Airport Retail Park	13.81	7.55	9.17	19.25	12.98	2.02	64.78
Fossetts Park Retail Park	5.18	5.56	11.74	5.54	2.98	1.26	32.25
North Shoebury Retail Park	0.00	0.39	3.89	1.83	0.00	0.00	6.10
Other Southend	2.33	2.56	30.75	0.64	0.90	0.39	37.56
Southend-on-Sea total	**116.60**	**104.67**	**202.45**	**68.06**	**55.94**	**35.02**	**582.74**
Other Destinations							
Rochford	0.00	0.08	2.31	9.42	1.47	0.00	13.28
Rayleigh	9.35	1.99	0.80	2.91	56.47	8.09	79.61
Hockley	0.00	0.17	0.13	0.90	8.45	0.76	10.41
Benfleet	0.00	0.00	5.32	0.00	0.85	1.92	8.09
Canvey Island	0.27	0.00	0.00	0.00	0.00	68.05	68.32
Thundersley	0.00	0.00	0.00	0.00	0.00	1.78	1.78
Hadleigh	4.58	0.71	5.53	0.70	0.00	21.66	33.17
Rayleigh Weir Retail Park	3.61	1.15	5.21	1.27	13.99	24.35	49.58
Other Destinations	30.73	13.53	40.28	14.11	53.59	108.69	260.93
Other Destinations total	**48.54**	**17.63**	**59.57**	**29.31**	**134.82**	**235.30**	**525.17**
TOTAL	**165.14**	**122.30**	**262.02**	**97.38**	**190.76**	**270.32**	**1107.91**

Source: Tables 3 and 4

Table 7 – Future 2030 comparison goods shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2030	**181.62**	**134.52**	**288.22**	**107.88**	**210.73**	**294.43**	**1217.40**
Southend-on-Sea							
Southend City Centre	36.83	53.46	96.66	23.70	25.58	21.04	257.27
Southend out-of-centre	3.61	2.45	7.03	0.82	0.00	0.61	14.52
London Road Retail Park	12.30	15.25	16.97	8.55	6.66	7.12	66.84
Greyhound Retail Park	2.71	2.97	6.02	0.93	0.97	0.00	13.61
Leigh-on-Sea	29.53	5.26	1.23	1.57	2.42	2.54	42.55
Prittlewell	0.27	0.12	0.18	0.21	0.00	0.00	0.78
Westcliff-on-Sea	3.08	7.12	6.62	0.13	0.43	0.13	17.52
Eastwood	1.97	1.61	0.00	0.00	0.43	0.00	4.01
Southchurch	2.39	0.18	12.03	0.59	0.00	0.00	15.20
Thorpe Bay	0.00	0.00	1.00	0.00	0.00	0.00	1.00
Shoeburyness	0.00	3.41	12.51	0.52	0.00	0.00	16.44
Eastwood (Western Approaches) Retail Park	1.78	0.00	0.25	1.12	0.10	0.00	3.26
Thanet Grange Retail Park	10.31	5.63	1.10	7.06	6.57	2.72	33.40
Airport Retail Park	15.19	8.31	10.09	21.33	14.34	2.20	71.45
Fossetts Park Retail Park	5.69	6.12	12.91	6.14	3.29	1.37	35.52
North Shoebury Retail Park	0.00	0.42	4.28	2.03	0.00	0.00	6.73
Other Southend	2.57	2.81	33.82	0.71	0.99	0.42	41.32
Southend-on-Sea total	**128.24**	**115.13**	**222.69**	**75.40**	**61.80**	**38.14**	**641.40**
Other Destinations							
Rochford	0.00	0.08	2.54	10.44	1.62	0.00	14.69
Rayleigh	10.29	2.19	0.88	3.22	62.38	8.81	87.77
Hockley	0.00	0.19	0.14	1.00	9.33	0.83	11.49
Benfleet	0.00	0.00	5.85	0.00	0.94	2.09	8.88
Canvey Island	0.29	0.00	0.00	0.00	0.00	74.12	74.42
Thundersley	0.00	0.00	0.00	0.00	0.00	1.94	1.94
Hadleigh	5.04	0.78	6.08	0.77	0.00	23.59	36.26
Rayleigh Weir Retail Park	3.97	1.27	5.73	1.41	15.46	26.52	54.35
Other Destinations	33.80	14.88	44.31	15.63	59.20	118.39	286.21
Other Destinations total	**53.38**	**19.39**	**65.53**	**32.47**	**148.93**	**256.29**	**576.00**
TOTAL	**181.62**	**134.52**	**288.22**	**107.88**	**210.73**	**294.43**	**1217.40**

Source: Tables 3 and 4

Table 8 – Future 2035 comparison goods shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2035	**205.84**	**152.44**	**326.62**	**123.07**	**239.94**	**331.41**	**1379.32**
Southend-on-Sea							
Southend City Centre	41.75	60.58	109.53	27.04	29.13	23.68	291.71
Southend out-of-centre	4.10	2.78	7.96	0.94	0.00	0.68	16.46
London Road Retail Park	13.94	17.28	19.23	9.75	7.59	8.01	75.80
Greyhound Retail Park	3.08	3.37	6.82	1.06	1.11	0.00	15.43
		0.00	0.00	0.00	0.00	0.00	0.00
Leigh-on-Sea	33.46	5.97	1.40	1.79	2.75	2.86	48.23
Prittlewell	0.31	0.14	0.20	0.24	0.00	0.00	0.88
Westcliff-on-Sea	3.49	8.07	7.51	0.15	0.49	0.15	19.86
Eastwood	2.23	1.82	0.00	0.00	0.49	0.00	4.54
Southchurch	2.71	0.21	13.64	0.67	0.00	0.00	17.22
Thorpe Bay	0.00	0.00	1.13	0.00	0.00	0.00	1.13
Shoeburyness	0.00	3.86	14.17	0.59	0.00	0.00	18.63
Eastwood (Western Approaches) Retail Park	2.02	0.00	0.28	1.28	0.11	0.00	3.70
Thanet Grange Retail Park	11.69	6.38	1.24	8.06	7.48	3.06	37.91
Airport Retail Park	17.21	9.41	11.43	24.34	16.32	2.47	81.19
Fossetts Park Retail Park	6.45	6.94	14.63	7.00	3.75	1.54	40.31
North Shoebury Retail Park	0.00	0.48	4.85	2.31	0.00	0.00	7.64
Other Southend	2.91	3.19	38.33	0.80	1.13	0.47	46.83
Southend-on-Sea total	**145.34**	**130.47**	**252.36**	**86.02**	**70.36**	**42.93**	**727.49**
Other Destinations							
Rochford	0.00	0.09	2.88	11.91	1.85	0.00	16.73
Rayleigh	11.66	2.48	0.99	3.68	71.03	9.91	99.75
Hockley	0.00	0.21	0.16	1.14	10.63	0.93	13.07
Benfleet	0.00	0.00	6.63	0.00	1.07	2.35	10.05
Canvey Island	0.33	0.00	0.00	0.00	0.00	83.43	83.76
Thundersley	0.00	0.00	0.00	0.00	0.00	2.19	2.19
Hadleigh	5.71	0.88	6.89	0.88	0.00	26.55	40.91
Rayleigh Weir Retail Park	4.50	1.44	6.49	1.60	17.60	29.86	61.48
Other Destinations	38.31	16.87	50.21	17.83	67.41	133.25	323.88
Other Destinations total	**60.50**	**21.97**	**74.26**	**37.05**	**169.58**	**288.48**	**651.83**
TOTAL	**205.84**	**152.44**	**326.62**	**123.07**	**239.94**	**331.41**	**1379.32**

Source: Tables 3 and 4

Table 9 – Future 2040 comparison goods shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2040	**233.14**	**172.71**	**370.05**	**140.43**	**271.44**	**372.92**	**1560.68**
Southend-on-Sea							
Southend City Centre	47.28	68.63	124.10	30.85	32.96	26.65	330.47
Southend out-of-centre	4.64	3.15	9.02	1.07	0.00	0.77	18.65
London Road Retail Park	15.79	19.58	21.78	11.13	8.58	9.02	85.87
Greyhound Retail Park	3.48	3.82	7.73	1.21	1.26	0.00	17.49
Leigh-on-Sea	37.90	6.76	1.58	2.04	3.11	3.22	54.62
Prittlewell	0.35	0.16	0.23	0.27	0.00	0.00	1.00
Westcliff-on-Sea	3.96	9.14	8.51	0.17	0.56	0.16	22.50
Eastwood	2.53	2.06	0.00	0.00	0.56	0.00	5.14
Southchurch	3.07	0.23	15.45	0.77	0.00	0.00	19.52
Thorpe Bay	0.00	0.00	1.28	0.00	0.00	0.00	1.28
Shoeburyness	0.00	4.38	16.06	0.68	0.00	0.00	21.11
Eastwood (Western Approaches) Retail Park	2.29	0.00	0.32	1.46	0.13	0.00	4.20
Thanet Grange Retail Park	13.24	7.23	1.41	9.20	8.46	3.44	42.98
Airport Retail Park	19.50	10.67	12.96	27.77	18.47	2.78	92.13
Fossetts Park Retail Park	7.31	7.86	16.58	7.99	4.24	1.73	45.70
North Shoebury Retail Park	0.00	0.54	5.49	2.64	0.00	0.00	8.67
Other Southend	3.29	3.61	43.42	0.92	1.28	0.53	53.06
Southend-on-Sea total	**164.61**	**147.82**	**285.91**	**98.15**	**79.60**	**48.31**	**824.41**
Other Destinations							
Rochford	0.00	0.11	3.27	13.59	2.09	0.00	19.05
Rayleigh	13.20	2.81	1.13	4.20	80.35	11.16	112.85
Hockley	0.00	0.24	0.18	1.30	12.02	1.05	14.79
Benfleet	0.00	0.00	7.51	0.00	1.21	2.65	11.37
Canvey Island	0.38	0.00	0.00	0.00	0.00	93.88	94.26
Thundersley	0.00	0.00	0.00	0.00	0.00	2.46	2.46
Hadleigh	6.46	1.00	7.81	1.01	0.00	29.88	46.15
Rayleigh Weir Retail Park	5.09	1.63	7.35	1.83	19.91	33.60	69.41
Other Destinations	43.39	19.11	56.89	20.35	76.25	149.94	365.93
Other Destinations total	**68.53**	**24.89**	**84.14**	**42.27**	**191.84**	**324.61**	**736.27**
TOTAL	**233.14**	**172.71**	**370.05**	**140.43**	**271.44**	**372.92**	**1560.68**

Source: Tables 3 and 4

Table 10 – Future 2045 comparison goods shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2045	**268.60**	**199.08**	**426.53**	**161.92**	**311.38**	**426.60**	**1794.10**
Southend-on-Sea							
Southend City Centre	54.47	79.11	143.04	35.57	37.81	30.49	380.49
Southend out-of-centre	5.35	3.63	10.40	1.24	0.00	0.88	21.49
London Road Retail Park	18.19	22.57	25.11	12.83	9.84	10.32	98.85
Greyhound Retail Park	4.01	4.40	8.91	1.39	1.44	0.00	20.15
Leigh-on-Sea	43.67	7.79	1.83	2.35	3.57	3.68	62.89
Prittlewell	0.40	0.18	0.26	0.31	0.00	0.00	1.16
Westcliff-on-Sea	4.56	10.54	9.80	0.19	0.64	0.19	25.92
Eastwood	2.91	2.38	0.00	0.00	0.64	0.00	5.93
Southchurch	3.53	0.27	17.81	0.88	0.00	0.00	22.50
Thorpe Bay	0.00	0.00	1.47	0.00	0.00	0.00	1.47
Shoeburyness	0.00	5.04	18.51	0.78	0.00	0.00	24.34
Eastwood (Western Approaches) Retail Park	2.64	0.00	0.37	1.69	0.14	0.00	4.84
Thanet Grange Retail Park	15.25	8.34	1.62	10.60	9.71	3.94	49.46
Airport Retail Park	22.46	12.29	14.93	32.02	21.18	3.18	106.07
Fossetts Park Retail Park	8.42	9.06	19.11	9.21	4.87	1.98	52.64
North Shoebury Retail Park	0.00	0.63	6.33	3.04	0.00	0.00	10.00
Other Southend	3.79	4.16	50.05	1.06	1.47	0.61	61.15
Southend-on-Sea total	**189.65**	**170.39**	**329.55**	**113.17**	**91.31**	**55.26**	**949.34**
Other Destinations							
Rochford	0.00	0.12	3.76	15.67	2.40	0.00	21.95
Rayleigh	15.21	3.24	1.30	4.84	92.18	12.76	129.53
Hockley	0.00	0.27	0.21	1.50	13.79	1.20	16.98
Benfleet	0.00	0.00	8.66	0.00	1.38	3.03	13.07
Canvey Island	0.44	0.00	0.00	0.00	0.00	107.39	107.83
Thundersley	0.00	0.00	0.00	0.00	0.00	2.82	2.82
Hadleigh	7.45	1.15	9.00	1.16	0.00	34.18	52.94
Rayleigh Weir Retail Park	5.87	1.87	8.48	2.11	22.84	38.43	79.60
Other Destinations	49.98	22.03	65.57	23.46	87.48	171.53	420.05
Other Destinations total	**78.95**	**28.69**	**96.98**	**48.74**	**220.07**	**371.33**	**844.76**
TOTAL	**268.60**	**199.08**	**426.53**	**161.91**	**311.38**	**426.60**	**1794.10**

Source: Tables 3 and 4

Table 11 - Summary of comparison goods expenditure 2023 to 2045 (£M) - high growth

	2025	2030	2035	2040	2045
Available expenditure					
Southend	320.15	352.25	399.40	452.49	520.98
Leigh-on-Sea	38.69	42.55	48.23	54.62	62.89
Prittlewell	0.71	0.78	0.88	1.00	1.16
Westcliff-on-Sea	15.93	17.52	19.86	22.50	25.92
Eastwood	3.64	4.01	4.54	5.14	5.93
Southchurch	13.81	15.20	17.22	19.52	22.50
Thorpe Bay	0.91	1.00	1.13	1.28	1.47
Shoeburyness	14.94	16.44	18.63	21.11	24.34
Other Southend	173.97	191.67	217.59	246.75	284.15
Total	**582.74**	**641.40**	**727.49**	**824.41**	**949.34**
Turnover of existing facilities					
Southend	320.15	353.46	396.02	443.71	497.14
Leigh-on-Sea	38.69	42.71	47.86	53.62	60.08
Prittlewell	0.71	0.78	0.87	0.98	1.10
Westcliff-on-Sea	15.93	17.58	19.70	22.07	24.73
Eastwood	3.64	4.02	4.50	5.05	5.65
Southchurch	13.81	15.25	17.08	19.14	21.45
Thorpe Bay	0.91	1.00	1.12	1.25	1.41
Shoeburyness	14.94	16.49	18.48	20.71	23.20
Other Southend	173.97	192.07	215.19	241.11	270.14
Total	**582.74**	**643.37**	**720.84**	**807.64**	**904.89**
Surplus/deficit expenditure £M					
Southend	0.00	-1.21	3.38	8.78	23.84
Leigh-on-Sea	0.00	-0.17	0.37	0.99	2.81
Prittlewell	0.00	0.00	0.01	0.02	0.06
Westcliff-on-Sea	0.00	-0.06	0.16	0.42	1.19
Eastwood	0.00	-0.01	0.04	0.10	0.27
Southchurch	0.00	-0.05	0.14	0.38	1.05
Thorpe Bay	0.00	0.00	0.01	0.02	0.07
Shoeburyness	0.00	-0.06	0.15	0.41	1.14
Other Southend	0.00	-0.40	2.39	5.64	14.02
Total	**0.00**	**-1.97**	**6.65**	**16.77**	**44.45**

Source: Tables 6-10 and Experian sales density growth rates from Retail Planner Briefing Note 23 - Figure 4b

Table 12 - Comparison goods floorspace capacity - high growth

	2025	2030	2035	2040	2045
Turnover density new floorspace (£ per sq.m)	£6,000	£6,624	£7,422	£8,316	£9,317
Sales floorspace projection (sq.m net)					
Southend	0	-180	460	1,060	2,560
Leigh-on-Sea	0	-20	50	120	300
Prittlewell	0	0	0	0	10
Westcliff-on-Sea	0	-10	20	50	130
Eastwood	0	0	10	10	30
Southchurch	0	-10	20	50	110
Thorpe Bay	0	0	0	0	10
Shoeburyness	0	-10	20	50	120
Other Southend	0	-60	320	680	1,500
Total	**0**	**-290**	**900**	**2,020**	**4,770**
Gross floorspace projection (sq.m gross)					
Southend	0	-260	660	1,510	3,660
Leigh-on-Sea	0	-30	70	170	430
Prittlewell	0	0	0	0	10
Westcliff-on-Sea	0	-10	30	70	190
Eastwood	0	0	10	10	40
Southchurch	0	-10	30	70	160
Thorpe Bay	0	0	0	0	10
Shoeburyness	0	-10	30	70	170
Other Southend	0	-90	460	970	2,140
Total	**0**	**-410**	**1,290**	**2,870**	**6,810**

Source: Table 11 and Experian sales density growth rates from Retail Planner Briefing Note 23 - Figure 4b
Figures may not sum due to rounding

Appendix 5 Comparison goods assessment (low-growth option)

Table 1 - Study area population projections (low growth)

Zone	2023	2025	2030	2035	2040	2045
1 - Southend-on-Sea West	51,316	52,106	52,377	52,563	52,921	53,512
2 - Southend-on-Sea Central	42,284	42,943	43,156	43,290	43,585	44,079
3 - Southend-on-Sea East	90,331	91,740	92,195	92,484	93,114	94,169
4 - Rochford East	30,638	31,007	31,898	32,700	33,624	34,471
5 - Rochford West	56,696	57,379	58,865	60,228	61,404	62,622
6 - Castle Point	89,483	89,929	90,964	92,004	93,302	94,886
Total	**360,749**	**365,103**	**369,455**	**373,270**	**377,950**	**383,738**

Source: Population for Zones 1-3 derived from ONS provided by Lichfields analysis and Zones 4-6 from Experian population projections (2025)

Table 2 - Comparison goods expenditure per person per annum (£)

Zone	2023	2025	2030	2035	2040	2045
1 - Southend-on-Sea West	3,236	3,169	3,413	3,798	4,214	4,740
2 - Southend-on-Sea Central	2,908	2,848	3,067	3,413	3,787	4,260
3 - Southend-on-Sea East	2,916	2,856	3,076	3,423	3,798	4,272
4 - Rochford East	3,206	3,140	3,382	3,763	4,176	4,697
5 - Rochford West	3,394	3,324	3,580	3,984	4,420	4,972
6 - Castle Point	3,069	3,006	3,237	3,602	3,997	4,496

Sources:
Experian Local Expenditure 2023 (2023 prices)
Experian growth rates - Retail Planner Briefing Note 23 (March 2026)
Excludes Special Forms of Trading (SFT)

Table 3 - Total comparison goods expenditure (£m) - low growth

Zone	2023	2025	2030	2035	2040	2045
1 - Southend-on-Sea West	166.05	165.14	178.75	199.63	223.02	253.66
2 - Southend-on-Sea Central	122.94	122.30	132.34	147.74	165.04	187.75
3 - Southend-on-Sea East	263.41	262.02	283.55	316.54	353.63	402.28
4 - Rochford East	98.24	97.38	107.87	123.06	140.41	161.92
5 - Rochford West	192.44	190.76	210.73	239.94	271.44	311.38
6 - Castle Point	274.62	270.32	294.43	331.41	372.92	426.60
Total	**1,117.70**	**1,107.91**	**1,207.67**	**1,358.32**	**1,526.45**	**1,743.59**

Sources: Tables 1 and 2

Table 4 - Base year comparison goods market shares (%)

Destination Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6
Southend-on-Sea						
Southend City Centre	20.3%	39.7%	33.5%	22.0%	12.1%	7.1%
Southend out-of-centre	2.0%	1.8%	2.4%	0.8%	0.0%	0.2%
London Road Retail Park	6.8%	11.3%	5.9%	7.9%	3.2%	2.4%
Greyhound Retail Park	1.5%	2.2%	2.1%	0.9%	0.5%	0.0%
Leigh-on-Sea	16.3%	3.9%	0.4%	1.5%	1.1%	0.9%
Prittlewell	0.2%	0.1%	0.1%	0.2%	0.0%	0.0%
Westcliff-on-Sea	1.7%	5.3%	2.3%	0.1%	0.2%	0.0%
Eastwood	1.1%	1.2%	0.0%	0.0%	0.2%	0.0%
Southchurch	1.3%	0.1%	4.2%	0.5%	0.0%	0.0%
Thorpe Bay	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%
Shoeburyness	0.0%	2.5%	4.3%	0.5%	0.0%	0.0%
Eastwood (Western Approaches) Retail Park	1.0%	0.0%	0.1%	1.0%	0.0%	0.0%
Thanet Grange Retail Park	5.7%	4.2%	0.4%	6.5%	3.1%	0.9%
Airport Retail Park	8.4%	6.2%	3.5%	19.8%	6.8%	0.7%
Fossetts Park Retail Park	3.1%	4.5%	4.5%	5.7%	1.6%	0.5%
North Shoebury Retail Park	0.0%	0.3%	1.5%	1.9%	0.0%	0.0%
Other Southend	1.4%	2.1%	11.7%	0.7%	0.5%	0.1%
Southend-on-Sea total	**70.6%**	**85.6%**	**77.3%**	**69.9%**	**29.3%**	**13.0%**
Other Destinations						
Rochford	0.0%	0.1%	0.9%	9.7%	0.8%	0.0%
Rayleigh	5.7%	1.6%	0.3%	3.0%	29.6%	3.0%
Hockley	0.0%	0.1%	0.0%	0.9%	4.4%	0.3%
Benfleet	0.0%	0.0%	2.0%	0.0%	0.4%	0.7%
Canvey Island	0.2%	0.0%	0.0%	0.0%	0.0%	25.2%
Thundersley	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%
Hadleigh	2.8%	0.6%	2.1%	0.7%	0.0%	8.0%
Rayleigh Weir Retail Park	2.2%	0.9%	2.0%	1.3%	7.3%	9.0%
Other Destinations	18.6%	11.1%	15.4%	14.5%	28.1%	40.2%
Other Destinations total	**29.4%**	**14.4%**	**22.7%**	**30.1%**	**70.7%**	**87.0%**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Household Survey (2026)

Table 5 - Base year comparison goods shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2023	**166.05**	**122.94**	**263.41**	**98.24**	**192.44**	**274.62**	**1117.70**
Southend-on-Sea							
Southend City Centre	33.68	48.86	88.34	21.58	23.36	19.63	235.44
Southend out-of-centre	3.30	2.24	6.42	0.75	0.00	0.57	13.28
London Road Retail Park	11.24	13.94	15.51	7.78	6.08	6.64	61.19
Greyhound Retail Park	2.48	2.72	5.50	0.84	0.89	0.00	12.43
Leigh-on-Sea	26.99	4.81	1.13	1.43	2.21	2.37	38.94
Prittlewell	0.25	0.11	0.16	0.19	0.00	0.00	0.71
Westcliff-on-Sea	2.82	6.51	6.05	0.12	0.40	0.12	16.02
Eastwood	1.80	1.47	0.00	0.00	0.39	0.00	3.66
Southchurch	2.18	0.17	11.00	0.54	0.00	0.00	13.89
Thorpe Bay	0.00	0.00	0.91	0.00	0.00	0.00	0.91
Shoeburyness	0.00	3.12	11.43	0.47	0.00	0.00	15.02
Eastwood (Western Approaches) Retail Park	1.63	0.00	0.23	1.02	0.09	0.00	2.97
Thanet Grange Retail Park	9.43	5.15	1.00	6.43	6.00	2.54	30.55
Airport Retail Park	13.89	7.59	9.22	19.42	13.09	2.05	65.27
Fossetts Park Retail Park	5.20	5.59	11.80	5.59	3.01	1.28	32.47
North Shoebury Retail Park	0.00	0.39	3.91	1.85	0.00	0.00	6.14
Other Southend	2.35	2.57	30.91	0.64	0.91	0.39	37.77
Southend-on-Sea total	**117.24**	**105.22**	**203.52**	**68.66**	**56.43**	**35.57**	**586.66**
Other Destinations							
Rochford	0.00	0.08	2.32	9.51	1.48	0.00	13.39
Rayleigh	9.40	2.00	0.80	2.93	56.97	8.22	80.32
Hockley	0.00	0.17	0.13	0.91	8.52	0.77	10.51
Benfleet	0.00	0.00	5.35	0.00	0.86	1.95	8.15
Canvey Island	0.27	0.00	0.00	0.00	0.00	69.13	69.40
Thundersley	0.00	0.00	0.00	0.00	0.00	1.81	1.81
Hadleigh	4.60	0.71	5.56	0.71	0.00	22.00	33.58
Rayleigh Weir Retail Park	3.63	1.16	5.23	1.28	14.12	24.74	50.16
Other Destinations	30.90	13.60	40.50	14.23	54.06	110.42	263.71
Other Destinations total	**48.81**	**17.72**	**59.89**	**29.57**	**136.00**	**239.04**	**531.03**
TOTAL	**166.05**	**122.94**	**263.41**	**98.24**	**192.44**	**274.62**	**1117.70**

Source: Tables 3 and 4

Table 6 - 2025 comparison goods shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2025	**165.14**	**122.30**	**262.02**	**97.38**	**190.76**	**270.32**	**1107.91**
Southend-on-Sea							
Southend City Centre	33.49	48.60	87.87	21.39	23.16	19.32	233.83
Southend out-of-centre	3.29	2.23	6.39	0.74	0.00	0.56	13.20
London Road Retail Park	11.18	13.86	15.43	7.72	6.03	6.54	60.75
Greyhound Retail Park	2.47	2.70	5.47	0.84	0.88	0.00	12.36
Leigh-on-Sea	26.85	4.79	1.12	1.42	2.19	2.33	38.69
Prittlewell	0.25	0.11	0.16	0.19	0.00	0.00	0.71
Westcliff-on-Sea	2.80	6.47	6.02	0.12	0.39	0.12	15.93
Eastwood	1.79	1.46	0.00	0.00	0.39	0.00	3.64
Southchurch	2.17	0.17	10.94	0.53	0.00	0.00	13.81
Thorpe Bay	0.00	0.00	0.91	0.00	0.00	0.00	0.91
Shoeburyness	0.00	3.10	11.37	0.47	0.00	0.00	14.94
Eastwood (Western Approaches) Retail Park	1.62	0.00	0.23	1.01	0.09	0.00	2.95
Thanet Grange Retail Park	9.38	5.12	1.00	6.38	5.95	2.50	30.32
Airport Retail Park	13.81	7.55	9.17	19.25	12.98	2.02	64.78
Fossetts Park Retail Park	5.18	5.56	11.74	5.54	2.98	1.26	32.25
North Shoebury Retail Park	0.00	0.39	3.89	1.83	0.00	0.00	6.10
Other Southend	2.33	2.56	30.75	0.64	0.90	0.39	37.56
Southend-on-Sea total	**116.60**	**104.67**	**202.45**	**68.06**	**55.94**	**35.02**	**582.74**
Other Destinations							
Rochford	0.00	0.08	2.31	9.42	1.47	0.00	13.28
Rayleigh	9.35	1.99	0.80	2.91	56.47	8.09	79.61
Hockley	0.00	0.17	0.13	0.90	8.45	0.76	10.41
Benfleet	0.00	0.00	5.32	0.00	0.85	1.92	8.09
Canvey Island	0.27	0.00	0.00	0.00	0.00	68.05	68.32
Thundersley	0.00	0.00	0.00	0.00	0.00	1.78	1.78
Hadleigh	4.58	0.71	5.53	0.70	0.00	21.66	33.17
Rayleigh Weir Retail Park	3.61	1.15	5.21	1.27	13.99	24.35	49.58
Other Destinations	30.73	13.53	40.28	14.11	53.59	108.69	260.93
Other Destinations total	**48.54**	**17.63**	**59.57**	**29.31**	**134.82**	**235.30**	**525.17**
TOTAL	**165.14**	**122.30**	**262.02**	**97.38**	**190.76**	**270.32**	**1107.91**

Source: Tables 3 and 4

Table 7 – Future 2030 comparison goods shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2030	**178.75**	**132.34**	**283.55**	**107.87**	**210.73**	**294.43**	**1207.67**
Southend-on-Sea							
Southend City Centre	36.25	52.59	95.09	23.70	25.58	21.04	254.26
Southend out-of-centre	3.56	2.41	6.91	0.82	0.00	0.61	14.31
London Road Retail Park	12.10	15.00	16.69	8.55	6.66	7.12	66.13
Greyhound Retail Park	2.67	2.92	5.92	0.93	0.97	0.00	13.42
Leigh-on-Sea	29.06	5.18	1.21	1.57	2.42	2.54	41.98
Prittlewell	0.27	0.12	0.17	0.21	0.00	0.00	0.77
Westcliff-on-Sea	3.03	7.01	6.52	0.13	0.43	0.13	17.25
Eastwood	1.94	1.58	0.00	0.00	0.43	0.00	3.95
Southchurch	2.35	0.18	11.84	0.59	0.00	0.00	14.96
Thorpe Bay	0.00	0.00	0.98	0.00	0.00	0.00	0.98
Shoeburyness	0.00	3.35	12.31	0.52	0.00	0.00	16.18
Eastwood (Western Approaches) Retail Park	1.76	0.00	0.24	1.12	0.10	0.00	3.22
Thanet Grange Retail Park	10.15	5.54	1.08	7.06	6.57	2.72	33.12
Airport Retail Park	14.95	8.17	9.93	21.33	14.34	2.20	70.91
Fossetts Park Retail Park	5.60	6.02	12.70	6.14	3.29	1.37	35.12
North Shoebury Retail Park	0.00	0.42	4.21	2.03	0.00	0.00	6.65
Other Southend	2.53	2.77	33.27	0.71	0.99	0.42	40.69
Southend-on-Sea total	**126.21**	**113.27**	**219.08**	**75.40**	**61.80**	**38.14**	**633.90**
Other Destinations							
Rochford	0.00	0.08	2.50	10.44	1.62	0.00	14.64
Rayleigh	10.12	2.16	0.86	3.22	62.38	8.81	87.55
Hockley	0.00	0.18	0.14	1.00	9.33	0.83	11.48
Benfleet	0.00	0.00	5.75	0.00	0.94	2.09	8.78
Canvey Island	0.29	0.00	0.00	0.00	0.00	74.12	74.41
Thundersley	0.00	0.00	0.00	0.00	0.00	1.94	1.94
Hadleigh	4.96	0.76	5.98	0.77	0.00	23.59	36.07
Rayleigh Weir Retail Park	3.91	1.25	5.63	1.40	15.46	26.52	54.17
Other Destinations	33.26	14.64	43.59	15.63	59.20	118.39	284.71
Other Destinations total	**52.54**	**19.07**	**64.47**	**32.47**	**148.93**	**256.29**	**573.77**
TOTAL	**178.75**	**132.34**	**283.55**	**107.87**	**210.73**	**294.43**	**1207.67**

Source: Tables 3 and 4

Table 8 – Future 2035 comparison goods shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2035	**199.63**	**147.74**	**316.54**	**123.06**	**239.94**	**331.41**	**1358.32**
Southend-on-Sea							
Southend City Centre	40.49	58.71	106.15	27.04	29.13	23.68	285.20
Southend out-of-centre	3.97	2.69	7.72	0.94	0.00	0.68	16.00
London Road Retail Park	13.52	16.75	18.63	9.75	7.59	8.01	74.25
Greyhound Retail Park	2.98	3.27	6.61	1.06	1.11	0.00	15.03
		0.00	0.00	0.00	0.00	0.00	0.00
Leigh-on-Sea	32.45	5.78	1.35	1.79	2.75	2.86	46.99
Prittlewell	0.30	0.13	0.19	0.24	0.00	0.00	0.87
Westcliff-on-Sea	3.39	7.82	7.28	0.15	0.49	0.15	19.27
Eastwood	2.16	1.76	0.00	0.00	0.49	0.00	4.42
Southchurch	2.63	0.20	13.22	0.67	0.00	0.00	16.72
Thorpe Bay	0.00	0.00	1.09	0.00	0.00	0.00	1.09
Shoeburyness	0.00	3.74	13.74	0.59	0.00	0.00	18.07
Eastwood (Western Approaches) Retail Park	1.96	0.00	0.27	1.28	0.11	0.00	3.63
Thanet Grange Retail Park	11.33	6.19	1.21	8.06	7.48	3.06	37.33
Airport Retail Park	16.69	9.12	11.08	24.33	16.32	2.47	80.03
Fossetts Park Retail Park	6.26	6.72	14.18	7.00	3.75	1.54	39.45
North Shoebury Retail Park	0.00	0.47	4.70	2.31	0.00	0.00	7.47
Other Southend	2.82	3.09	37.15	0.80	1.13	0.47	45.46
Southend-on-Sea total	**140.95**	**126.44**	**244.57**	**86.02**	**70.36**	**42.93**	**711.28**
Other Destinations							
Rochford	0.00	0.09	2.79	11.91	1.85	0.00	16.64
Rayleigh	11.31	2.41	0.96	3.68	71.03	9.91	99.30
Hockley	0.00	0.20	0.16	1.14	10.63	0.93	13.06
Benfleet	0.00	0.00	6.42	0.00	1.07	2.35	9.84
Canvey Island	0.32	0.00	0.00	0.00	0.00	83.43	83.75
Thundersley	0.00	0.00	0.00	0.00	0.00	2.19	2.19
Hadleigh	5.53	0.85	6.68	0.88	0.00	26.55	40.50
Rayleigh Weir Retail Park	4.36	1.39	6.29	1.60	17.60	29.86	61.10
Other Destinations	37.15	16.35	48.67	17.83	67.41	133.25	320.65
Other Destinations total	**58.68**	**21.29**	**71.97**	**37.04**	**169.58**	**288.48**	**647.04**
TOTAL	**199.63**	**147.74**	**316.54**	**123.06**	**239.94**	**331.41**	**1358.32**

Source: Tables 3 and 4

Table 9 – Future 2040 comparison goods shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2040	**223.02**	**165.04**	**353.63**	**140.41**	**271.44**	**372.92**	**1526.45**
Southend-on-Sea							
Southend City Centre	45.23	65.59	118.59	30.85	32.96	26.65	319.86
Southend out-of-centre	4.44	3.01	8.62	1.07	0.00	0.77	17.91
London Road Retail Park	15.10	18.71	20.82	11.12	8.58	9.02	83.35
Greyhound Retail Park	3.33	3.65	7.39	1.21	1.26	0.00	16.83
Leigh-on-Sea	36.26	6.46	1.51	2.04	3.11	3.22	52.60
Prittlewell	0.33	0.15	0.22	0.27	0.00	0.00	0.97
Westcliff-on-Sea	3.78	8.74	8.13	0.17	0.56	0.16	21.54
Eastwood	2.42	1.97	0.00	0.00	0.56	0.00	4.94
Southchurch	2.93	0.22	14.77	0.77	0.00	0.00	18.69
Thorpe Bay	0.00	0.00	1.22	0.00	0.00	0.00	1.22
Shoeburyness	0.00	4.18	15.35	0.68	0.00	0.00	20.21
Eastwood (Western Approaches) Retail Park	2.19	0.00	0.31	1.46	0.13	0.00	4.09
Thanet Grange Retail Park	12.66	6.91	1.35	9.19	8.46	3.44	42.02
Airport Retail Park	18.65	10.19	12.38	27.76	18.47	2.78	90.23
Fossetts Park Retail Park	6.99	7.51	15.84	7.99	4.24	1.73	44.30
North Shoebury Retail Park	0.00	0.52	5.25	2.64	0.00	0.00	8.41
Other Southend	3.15	3.45	41.50	0.92	1.28	0.53	50.83
Southend-on-Sea total	**157.47**	**141.26**	**273.23**	**98.14**	**79.60**	**48.31**	**798.00**
Other Destinations							
Rochford	0.00	0.10	3.12	13.59	2.09	0.00	18.90
Rayleigh	12.63	2.69	1.08	4.19	80.35	11.16	112.10
Hockley	0.00	0.23	0.17	1.30	12.02	1.05	14.77
Benfleet	0.00	0.00	7.18	0.00	1.21	2.65	11.03
Canvey Island	0.36	0.00	0.00	0.00	0.00	93.88	94.24
Thundersley	0.00	0.00	0.00	0.00	0.00	2.46	2.46
Hadleigh	6.18	0.95	7.46	1.01	0.00	29.88	45.48
Rayleigh Weir Retail Park	4.87	1.55	7.03	1.83	19.91	33.60	68.79
Other Destinations	41.50	18.26	54.37	20.35	76.25	149.94	360.67
Other Destinations total	**65.55**	**23.79**	**80.40**	**42.27**	**191.84**	**324.61**	**728.45**
TOTAL	**223.02**	**165.04**	**353.63**	**140.41**	**271.44**	**372.92**	**1526.45**

Source: Tables 3 and 4

Table 10 – Future 2045 comparison goods shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2045	**253.66**	**187.75**	**402.28**	**161.92**	**311.38**	**426.60**	**1743.59**
Southend-on-Sea							
Southend City Centre	51.44	74.61	134.91	35.57	37.81	30.49	364.83
Southend out-of-centre	5.05	3.42	9.81	1.24	0.00	0.88	20.39
London Road Retail Park	17.17	21.29	23.68	12.83	9.84	10.32	95.13
Greyhound Retail Park	3.79	4.15	8.40	1.39	1.44	0.00	19.17
Leigh-on-Sea	41.24	7.35	1.72	2.35	3.57	3.68	59.91
Prittlewell	0.38	0.17	0.25	0.31	0.00	0.00	1.11
Westcliff-on-Sea	4.30	9.94	9.25	0.19	0.64	0.19	24.51
Eastwood	2.75	2.24	0.00	0.00	0.64	0.00	5.63
Southchurch	3.34	0.25	16.80	0.88	0.00	0.00	21.27
Thorpe Bay	0.00	0.00	1.39	0.00	0.00	0.00	1.39
Shoeburyness	0.00	4.76	17.46	0.78	0.00	0.00	23.00
Eastwood (Western Approaches) Retail Park	2.49	0.00	0.35	1.69	0.14	0.00	4.67
Thanet Grange Retail Park	14.40	7.86	1.53	10.60	9.71	3.94	48.05
Airport Retail Park	21.21	11.59	14.08	32.02	21.18	3.18	103.27
Fossetts Park Retail Park	7.95	8.54	18.02	9.21	4.87	1.98	50.57
North Shoebury Retail Park	0.00	0.59	5.97	3.04	0.00	0.00	9.60
Other Southend	3.58	3.93	47.21	1.06	1.47	0.61	57.85
Southend-on-Sea total	**179.10**	**160.69**	**310.82**	**113.17**	**91.31**	**55.26**	**910.36**
Other Destinations							
Rochford	0.00	0.12	3.55	15.67	2.40	0.00	21.73
Rayleigh	14.37	3.06	1.22	4.84	92.18	12.76	128.42
Hockley	0.00	0.26	0.20	1.50	13.79	1.20	16.95
Benfleet	0.00	0.00	8.16	0.00	1.38	3.03	12.58
Canvey Island	0.41	0.00	0.00	0.00	0.00	107.39	107.81
Thundersley	0.00	0.00	0.00	0.00	0.00	2.82	2.82
Hadleigh	7.03	1.08	8.49	1.16	0.00	34.18	51.94
Rayleigh Weir Retail Park	5.54	1.77	7.99	2.11	22.84	38.43	78.69
Other Destinations	47.20	20.77	61.85	23.46	87.48	171.53	412.29
Other Destinations total	**74.56**	**27.06**	**91.46**	**48.74**	**220.07**	**371.33**	**833.22**
TOTAL	**253.66**	**187.75**	**402.28**	**161.91**	**311.38**	**426.60**	**1743.59**

Source: Tables 3 and 4

Table 11 - Summary of comparison goods expenditure 2023 to 2045 (£M) - low growth

	2025	2030	2035	2040	2045
Available expenditure					
Southend	320.15	348.12	390.48	437.95	499.52
Leigh-on-Sea	38.69	41.98	46.99	52.60	59.91
Prittlewell	0.71	0.77	0.87	0.97	1.11
Westcliff-on-Sea	15.93	17.25	19.27	21.54	24.51
Eastwood	3.64	3.95	4.42	4.94	5.63
Southchurch	13.81	14.96	16.72	18.69	21.27
Thorpe Bay	0.91	0.98	1.09	1.22	1.39
Shoeburyness	14.94	16.18	18.07	20.21	23.00
Other Southend	173.97	189.71	213.37	239.88	274.02
Total	**582.74**	**633.90**	**711.28**	**798.00**	**910.36**
Turnover of existing facilities					
Southend	320.15	353.46	396.02	443.71	497.14
Leigh-on-Sea	38.69	42.71	47.86	53.62	60.08
Prittlewell	0.71	0.78	0.87	0.98	1.10
Westcliff-on-Sea	15.93	17.58	19.70	22.07	24.73
Eastwood	3.64	4.02	4.50	5.05	5.65
Southchurch	13.81	15.25	17.08	19.14	21.45
Thorpe Bay	0.91	1.00	1.12	1.25	1.41
Shoeburyness	14.94	16.49	18.48	20.71	23.20
Other Southend	173.97	192.07	215.19	241.11	270.14
Total	**582.74**	**643.37**	**720.84**	**807.64**	**904.89**
Surplus/deficit expenditure £M					
Southend	0.00	-5.34	-5.54	-5.76	2.39
Leigh-on-Sea	0.00	-0.74	-0.87	-1.02	-0.17
Prittlewell	0.00	-0.01	-0.01	-0.01	0.01
Westcliff-on-Sea	0.00	-0.34	-0.43	-0.53	-0.22
Eastwood	0.00	-0.07	-0.08	-0.10	-0.02
Southchurch	0.00	-0.29	-0.37	-0.45	-0.17
Thorpe Bay	0.00	-0.02	-0.03	-0.03	-0.02
Shoeburyness	0.00	-0.31	-0.41	-0.50	-0.20
Other Southend	0.00	-2.35	-1.83	-1.23	3.88
Total	**0.00**	**-9.47**	**-9.56**	**-9.64**	**5.48**

Source: Tables 6-10 and Experian sales density growth rates from Retail Planner Briefing Note 23 - Figure 4b

Table 12 - Comparison goods floorspace capacity - low growth

	2025	2030	2035	2040	2045
Turnover density new floorspace (£ per sq.m)	£6,000	£6,624	£7,422	£8,316	£9,317
Sales floorspace projection (sq.m net)					
Southend	0	-810	-750	-690	260
Leigh-on-Sea	0	-110	-120	-120	-20
Prittlewell	0	0	0	0	0
Westcliff-on-Sea	0	-50	-60	-60	-20
Eastwood	0	-10	-10	-10	0
Southchurch	0	-40	-50	-50	-20
Thorpe Bay	0	0	0	0	0
Shoeburyness	0	-50	-50	-60	-20
Other Southend	0	-360	-250	-150	420
Total	**0**	**-1,430**	**-1,290**	**-1,140**	**600**
Gross floorspace projection (sq.m gross)					
Southend	0	-1,160	-1,070	-990	370
Leigh-on-Sea	0	-160	-170	-170	-30
Prittlewell	0	0	0	0	0
Westcliff-on-Sea	0	-70	-90	-90	-30
Eastwood	0	-10	-10	-10	0
Southchurch	0	-60	-70	-70	-30
Thorpe Bay	0	0	0	0	0
Shoeburyness	0	-70	-70	-90	-30
Other Southend	0	-510	-360	-210	600
Total	**0**	**-2,040**	**-1,840**	**-1,630**	**850**

Source: Table 11 and Experian sales density growth rates from Retail Planner Briefing Note 23 - Figure 4b
Figures may not sum due to rounding

Appendix 6 Food/beverage assessment (high-growth option)

Table 1 - Study area population projections (high growth)

Zone	2023	2025	2030	2035	2040	2045
1 - Southend-on-Sea West	51,316	52,106	53,219	54,198	55,322	56,663
2 - Southend-on-Sea Central	42,284	42,943	43,866	44,669	45,610	46,737
3 - Southend-on-Sea East	90,331	91,740	93,713	95,428	97,439	99,844
4 - Rochford East	30,638	31,007	31,900	32,703	33,629	34,471
5 - Rochford West	56,696	57,379	58,865	60,228	61,404	62,622
6 - Castle Point	89,483	89,929	90,964	92,004	93,302	94,886
Total	**360,749**	**365,103**	**372,527**	**379,230**	**386,706**	**395,224**

Source: Population for Zones 1-3 derived from ONS provided by Lichfields analysis and Zones 4-6 from Experian population projections (2025)

Table 2 - Food and beverage expenditure per person per annum (£)

Zone	2023	2025	2030	2035	2040	2045
1 - Southend-on-Sea West	1,000	994	1,041	1,097	1,153	1,212
2 - Southend-on-Sea Central	1,000	994	1,041	1,097	1,153	1,212
3 - Southend-on-Sea East	1,000	994	1,041	1,097	1,153	1,212
4 - Rochford East	1,000	994	1,041	1,097	1,153	1,212
5 - Rochford West	1,000	994	1,041	1,097	1,153	1,212
6 - Castle Point	1,000	994	1,041	1,097	1,153	1,212

Sources:
Experian Local Expenditure 2023 (2023 prices)
Experian growth rates - Retail Planner Briefing Note 23 (March 2026)
Excludes Special Forms of Trading (SFT)

Table 3 - Total food and beverage expenditure (£m) - high growth

Zone	2023	2025	2030	2035	2040	2045
1 - Southend-on-Sea West	51.32	51.79	55.43	59.44	63.77	68.65
2 - Southend-on-Sea Central	42.28	42.68	45.69	48.99	52.58	56.62
3 - Southend-on-Sea East	90.33	91.18	97.60	104.66	112.32	120.97
4 - Rochford East	30.64	30.82	33.22	35.87	38.77	41.76
5 - Rochford West	56.70	57.03	61.31	66.06	70.78	75.87
6 - Castle Point	89.48	89.38	94.74	100.91	107.55	114.96
Total	**360.75**	**362.88**	**387.99**	**415.94**	**445.77**	**478.83**

Sources: Tables 1 and 2

Table 4 - Base year food and beverage market shares (%)

Destination Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6
Southend-on-Sea						
Southend City Centre	12.1%	12.7%	30.5%	19.7%	6.3%	5.8%
Southend out-of-centre	1.8%	2.7%	8.0%	8.2%	0.5%	0.0%
Leigh-on-Sea	46.3%	20.4%	8.1%	6.6%	6.4%	11.3%
Prittlewell	0.0%	0.7%	0.6%	0.4%	0.9%	0.0%
Westcliff-on-Sea	2.1%	13.6%	9.0%	0.4%	0.9%	0.0%
Eastwood	6.5%	3.2%	0.0%	1.0%	2.6%	0.0%
Southchurch	0.0%	0.2%	5.1%	0.0%	0.0%	0.0%
Thorpe Bay	0.4%	1.0%	1.8%	3.9%	0.0%	0.0%
Shoeburyness	0.4%	2.6%	9.6%	3.1%	0.5%	0.0%
Other Southend	14.8%	31.7%	5.8%	3.3%	0.8%	8.4%
Southend-on-Sea total	**84.4%**	**88.8%**	**78.4%**	**46.5%**	**18.9%**	**25.5%**
Other Destinations						
Rochford	0.0%	0.0%	1.2%	9.8%	2.1%	1.0%
Rayleigh	4.6%	2.3%	3.8%	6.2%	49.2%	12.1%
Hockley	0.0%	0.0%	5.0%	10.0%	3.8%	0.0%
Benfleet	0.0%	0.0%	0.0%	0.0%	0.0%	12.5%
Canvey Island	0.0%	0.0%	0.0%	0.0%	0.2%	21.3%
Thundersley	0.4%	0.0%	0.2%	0.0%	0.0%	2.8%
Hadleigh	0.0%	0.0%	0.0%	0.6%	0.0%	4.0%
Other Destinations	10.5%	8.9%	11.5%	26.9%	25.7%	20.8%
Other Destinations total	**15.5%**	**11.2%**	**21.7%**	**53.5%**	**81.1%**	**74.5%**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Household Survey (2026)

Table 5 - Base year food and beverage shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2023	**51.32**	**42.28**	**90.33**	**30.64**	**56.70**	**89.48**	**360.75**
Southend-on-Sea							
Southend City Centre	6.20	5.37	27.56	6.02	3.57	5.17	53.89
Southend out-of-centre	0.94	1.16	7.20	2.50	0.26	0.00	12.06
Leigh-on-Sea	23.75	8.64	7.29	2.04	3.64	10.13	55.49
Prittlewell	0.00	0.30	0.54	0.13	0.51	0.00	1.49
Westcliff-on-Sea	1.08	5.75	8.11	0.13	0.51	0.00	15.59
Eastwood	3.35	1.34	0.00	0.31	1.50	0.00	6.49
Southchurch	0.00	0.09	4.56	0.00	0.00	0.00	4.65
Thorpe Bay	0.21	0.43	1.66	1.18	0.00	0.00	3.49
Shoeburyness	0.21	1.10	8.63	0.94	0.26	0.00	11.13
Other Southend	7.59	13.38	5.24	1.00	0.47	7.55	35.24
Southend-on-Sea total	**43.33**	**37.56**	**70.79**	**14.25**	**10.72**	**22.85**	**199.51**
Other Destinations							
Rochford	0.00	0.00	1.12	3.00	1.22	0.91	6.25
Rayleigh	2.35	0.97	3.39	1.88	27.91	10.78	47.28
Hockley	0.00	0.00	4.50	3.07	2.18	0.00	9.75
Benfleet	0.00	0.00	0.00	0.00	0.00	11.22	11.22
Canvey Island	0.00	0.00	0.00	0.00	0.10	19.04	19.13
Thundersley	0.21	0.00	0.19	0.00	0.00	2.47	2.88
Hadleigh	0.00	0.00	0.00	0.18	0.00	3.62	3.80
Other Destinations	5.40	3.75	10.36	8.25	14.57	18.60	60.93
Other Destinations total	**7.97**	**4.72**	**19.56**	**16.39**	**45.97**	**66.63**	**161.24**
TOTAL	**51.30**	**42.28**	**90.35**	**30.64**	**56.70**	**89.48**	**360.75**

Source: Tables 3 and 4

Table 6 - 2025 food and beverage shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2025	**51.79**	**42.68**	**91.18**	**30.82**	**57.03**	**89.38**	**362.88**
Southend-on-Sea							
Southend City Centre	6.25	5.42	27.82	6.06	3.59	5.17	54.31
Southend out-of-centre	0.95	1.17	7.27	2.52	0.26	0.00	12.16
Leigh-on-Sea	23.97	8.72	7.36	2.05	3.66	10.11	55.88
Prittlewell	0.00	0.30	0.55	0.13	0.52	0.00	1.50
Westcliff-on-Sea	1.09	5.81	8.19	0.13	0.52	0.00	15.73
Eastwood	3.38	1.35	0.00	0.31	1.51	0.00	6.55
Southchurch	0.00	0.09	4.61	0.00	0.00	0.00	4.69
Thorpe Bay	0.21	0.43	1.68	1.19	0.00	0.00	3.52
Shoeburyness	0.21	1.11	8.71	0.94	0.26	0.00	11.23
Other Southend	7.66	13.51	5.29	1.00	0.47	7.54	35.48
Southend-on-Sea total	**43.73**	**37.92**	**71.46**	**14.33**	**10.79**	**22.83**	**201.05**
Other Destinations							
Rochford	0.00	0.00	1.13	3.02	1.22	0.90	6.28
Rayleigh	2.37	0.97	3.42	1.90	28.07	10.77	47.51
Hockley	0.00	0.00	4.54	3.09	2.19	0.00	9.83
Benfleet	0.00	0.00	0.00	0.00	0.00	11.20	11.20
Canvey Island	0.00	0.00	0.00	0.00	0.10	19.02	19.11
Thundersley	0.21	0.00	0.19	0.00	0.00	2.47	2.88
Hadleigh	0.00	0.00	0.00	0.18	0.00	3.61	3.80
Other Destinations	5.45	3.79	10.45	8.29	14.66	18.58	61.23
Other Destinations total	**8.04**	**4.76**	**19.74**	**16.49**	**46.24**	**66.55**	**161.83**
TOTAL	**51.77**	**42.68**	**91.20**	**30.82**	**57.03**	**89.38**	**362.88**

Source: Tables 3 and 4

Table 7 – Future 2030 food and beverage shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2030	**55.43**	**45.69**	**97.60**	**33.22**	**61.31**	**94.74**	**387.99**
Southend-on-Sea							
Southend City Centre	6.69	5.80	29.78	6.53	3.86	5.48	58.14
Southend out-of-centre	1.02	1.25	7.78	2.71	0.28	0.00	13.04
Leigh-on-Sea	25.65	9.34	7.88	2.21	3.94	10.72	59.73
Prittlewell	0.00	0.32	0.59	0.14	0.56	0.00	1.61
Westcliff-on-Sea	1.16	6.22	8.76	0.14	0.56	0.00	16.84
Eastwood	3.61	1.45	0.00	0.34	1.62	0.00	7.02
Southchurch	0.00	0.09	4.93	0.00	0.00	0.00	5.02
Thorpe Bay	0.23	0.46	1.80	1.28	0.00	0.00	3.77
Shoeburyness	0.23	1.19	9.32	1.02	0.28	0.00	12.03
Other Southend	8.20	14.46	5.66	1.08	0.51	8.00	37.91
Southend-on-Sea total	**46.80**	**40.59**	**76.49**	**15.45**	**11.60**	**24.19**	**215.12**
Other Destinations							
Rochford	0.00	0.00	1.21	3.26	1.32	0.96	6.74
Rayleigh	2.54	1.04	3.66	2.04	30.18	11.42	50.88
Hockley	0.00	0.00	4.86	3.33	2.36	0.00	10.55
Benfleet	0.00	0.00	0.00	0.00	0.00	11.88	11.88
Canvey Island	0.00	0.00	0.00	0.00	0.10	20.16	20.26
Thundersley	0.23	0.00	0.21	0.00	0.00	2.62	3.05
Hadleigh	0.00	0.00	0.00	0.20	0.00	3.83	4.03
Other Destinations	5.84	4.06	11.19	8.94	15.76	19.69	65.48
Other Destinations total	**8.61**	**5.10**	**21.13**	**17.77**	**49.71**	**70.54**	**172.87**
TOTAL	**55.43**	**45.69**	**97.60**	**33.22**	**61.31**	**94.74**	**387.99**

Source: Tables 3 and 4

Table 8 – Future 2035 food and beverage shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2035	**59.44**	**48.99**	**104.66**	**35.87**	**66.06**	**100.91**	**415.94**
Southend-on-Sea							
Southend City Centre	7.18	6.22	31.93	7.05	4.16	5.83	62.37
Southend out-of-centre	1.09	1.35	8.34	2.93	0.30	0.00	14.01
Leigh-on-Sea	27.51	10.01	8.45	2.38	4.24	11.42	64.02
Prittlewell	0.00	0.35	0.63	0.15	0.60	0.00	1.73
Westcliff-on-Sea	1.25	6.67	9.40	0.15	0.60	0.00	18.06
Eastwood	3.88	1.55	0.00	0.36	1.75	0.00	7.54
Southchurch	0.00	0.10	5.29	0.00	0.00	0.00	5.39
Thorpe Bay	0.25	0.50	1.93	1.39	0.00	0.00	4.06
Shoeburyness	0.25	1.28	10.00	1.10	0.30	0.00	12.91
Other Southend	8.80	15.51	6.07	1.17	0.55	8.52	40.61
Southend-on-Sea total	**50.19**	**43.52**	**82.03**	**16.68**	**12.49**	**25.77**	**230.69**
Other Destinations							
Rochford	0.00	0.00	1.30	3.52	1.42	1.02	7.25
Rayleigh	2.72	1.12	3.93	2.21	32.51	12.16	54.65
Hockley	0.00	0.00	5.21	3.60	2.54	0.00	11.35
Benfleet	0.00	0.00	0.00	0.00	0.00	12.65	12.65
Canvey Island	0.00	0.00	0.00	0.00	0.11	21.47	21.58
Thundersley	0.25	0.00	0.22	0.00	0.00	2.79	3.26
Hadleigh	0.00	0.00	0.00	0.21	0.00	4.08	4.29
Other Destinations	6.26	4.35	12.00	9.65	16.98	20.98	70.22
Other Destinations total	**9.23**	**5.47**	**22.66**	**19.19**	**53.56**	**75.14**	**185.25**
TOTAL	**59.44**	**48.99**	**104.66**	**35.87**	**66.06**	**100.91**	**415.94**

Source: Tables 3 and 4

Table 9 – Future 2040 food and beverage shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2040	**63.77**	**52.58**	**112.32**	**38.77**	**70.78**	**107.55**	**445.77**
Southend-on-Sea							
Southend City Centre	7.70	6.67	34.27	7.62	4.46	6.22	66.94
Southend out-of-centre	1.17	1.44	8.95	3.17	0.32	0.00	15.05
Leigh-on-Sea	29.51	10.75	9.06	2.58	4.55	12.17	68.62
Prittlewell	0.00	0.37	0.67	0.16	0.64	0.00	1.85
Westcliff-on-Sea	1.34	7.16	10.08	0.16	0.64	0.00	19.38
Eastwood	4.16	1.66	0.00	0.39	1.87	0.00	8.09
Southchurch	0.00	0.11	5.67	0.00	0.00	0.00	5.78
Thorpe Bay	0.26	0.53	2.07	1.50	0.00	0.00	4.36
Shoeburyness	0.26	1.37	10.73	1.18	0.32	0.00	13.87
Other Southend	9.44	16.64	6.51	1.26	0.59	9.08	43.52
Southend-on-Sea total	**53.85**	**46.71**	**88.03**	**18.03**	**13.39**	**27.47**	**247.47**
Other Destinations							
Rochford	0.00	0.00	1.39	3.80	1.52	1.09	7.80
Rayleigh	2.92	1.20	4.21	2.38	34.84	12.96	58.52
Hockley	0.00	0.00	5.60	3.89	2.72	0.00	12.21
Benfleet	0.00	0.00	0.00	0.00	0.00	13.48	13.48
Canvey Island	0.00	0.00	0.00	0.00	0.12	22.88	23.00
Thundersley	0.26	0.00	0.24	0.00	0.00	2.97	3.47
Hadleigh	0.00	0.00	0.00	0.23	0.00	4.35	4.58
Other Destinations	6.72	4.67	12.88	10.43	18.19	22.36	75.24
Other Destinations total	**9.90**	**5.87**	**24.32**	**20.74**	**57.39**	**80.09**	**198.31**
TOTAL	**63.77**	**52.58**	**112.32**	**38.77**	**70.78**	**107.55**	**445.77**

Source: Tables 3 and 4

Table 10 – Future 2045 food and beverage shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2045	**68.65**	**56.62**	**120.97**	**41.76**	**75.87**	**114.96**	**478.83**
Southend-on-Sea							
Southend City Centre	8.29	7.19	36.91	8.21	4.78	6.65	72.01
Southend out-of-centre	1.26	1.55	9.64	3.41	0.34	0.00	16.21
Leigh-on-Sea	31.77	11.57	9.76	2.78	4.88	13.01	73.77
Prittlewell	0.00	0.40	0.73	0.18	0.69	0.00	1.99
Westcliff-on-Sea	1.44	7.71	10.86	0.18	0.69	0.00	20.87
Eastwood	4.48	1.79	0.00	0.42	2.01	0.00	8.70
Southchurch	0.00	0.11	6.11	0.00	0.00	0.00	6.23
Thorpe Bay	0.28	0.58	2.23	1.61	0.00	0.00	4.70
Shoeburyness	0.28	1.47	11.55	1.28	0.34	0.00	14.93
Other Southend	10.16	17.92	7.02	1.36	0.63	9.70	46.79
Southend-on-Sea total	**57.97**	**50.30**	**94.80**	**19.42**	**14.35**	**29.36**	**266.20**
Other Destinations							
Rochford	0.00	0.00	1.50	4.09	1.63	1.16	8.39
Rayleigh	3.14	1.29	4.54	2.57	37.34	13.85	62.74
Hockley	0.00	0.00	6.03	4.19	2.92	0.00	13.13
Benfleet	0.00	0.00	0.00	0.00	0.00	14.41	14.41
Canvey Island	0.00	0.00	0.00	0.00	0.13	24.46	24.59
Thundersley	0.28	0.00	0.26	0.00	0.00	3.17	3.72
Hadleigh	0.00	0.00	0.00	0.25	0.00	4.65	4.89
Other Destinations	7.23	5.03	13.87	11.24	19.50	23.90	80.76
Other Destinations total	**10.66**	**6.32**	**26.19**	**22.34**	**61.52**	**85.60**	**212.63**
TOTAL	**68.63**	**56.62**	**120.99**	**41.76**	**75.87**	**114.96**	**478.83**

Source: Tables 3 and 4

Table 11 - Summary of food and beverage expenditure 2023 to 2045 (£M) - high growth

	2025	2030	2035	2040	2045
Available expenditure					
Southend	54.31	58.14	62.37	66.94	72.01
Southend out-of-centre	12.16	13.04	14.01	15.05	16.21
Leigh-on-Sea	55.88	59.73	64.02	68.62	73.77
Prittlewell	1.50	1.61	1.73	1.85	1.99
Westcliff-on-Sea	15.73	16.84	18.06	19.38	20.87
Eastwood	6.55	7.02	7.54	8.09	8.70
Southchurch	4.69	5.02	5.39	5.78	6.23
Thorpe Bay	3.52	3.77	4.06	4.36	4.70
Shoeburyness	11.23	12.03	12.91	13.87	14.93
Other Southend	35.48	37.91	40.61	43.52	46.79
Total	**201.05**	**215.12**	**230.69**	**247.47**	**266.20**
Turnover of existing facilities					
Southend	54.31	54.41	54.96	55.51	56.07
Southend out-of-centre	12.16	12.19	12.31	12.43	12.56
Leigh-on-Sea	55.88	55.99	56.55	57.12	57.69
Prittlewell	1.50	1.50	1.52	1.53	1.55
Westcliff-on-Sea	15.73	15.76	15.92	16.08	16.24
Eastwood	6.55	6.56	6.63	6.69	6.76
Southchurch	4.69	4.70	4.75	4.80	4.84
Thorpe Bay	3.52	3.52	3.56	3.60	3.63
Shoeburyness	11.23	11.26	11.37	11.48	11.60
Other Southend	35.48	35.55	35.91	36.27	36.64
Total	**201.05**	**201.45**	**203.47**	**205.52**	**207.58**
Surplus/deficit expenditure £M					
Southend	0.00	3.72	7.41	11.43	15.95
Southend out-of-centre	0.00	0.85	1.70	2.62	3.65
Leigh-on-Sea	0.00	3.75	7.47	11.50	16.07
Prittlewell	0.00	0.11	0.21	0.32	0.45
Westcliff-on-Sea	0.00	1.08	2.14	3.31	4.63
Eastwood	0.00	0.46	0.91	1.39	1.94
Southchurch	0.00	0.32	0.64	0.98	1.38
Thorpe Bay	0.00	0.25	0.50	0.77	1.07
Shoeburyness	0.00	0.78	1.54	2.38	3.33
Other Southend	0.00	2.36	4.70	7.25	10.16
Total	**0.00**	**13.67**	**27.22**	**41.95**	**58.62**

Source: Tables 6-10 and Experian sales density growth rates from Retail Planner Briefing Note 23 - Figure 4b

Table 12 - Food and beverage floorspace capacity - high growth

	2025	2030	2035	2040	2045
Turnover density new floorspace (£ per sq.m)	£2,500	£2,505	£2,530	£2,556	£2,581
Sales floorspace projection (sq.m net)					
Southend	0	1,490	2,930	4,470	6,180
Southend out-of-centre	0	340	670	1,020	1,410
Leigh-on-Sea	0	1,500	2,950	4,500	6,230
Prittlewell	0	40	80	130	170
Westcliff-on-Sea	0	430	850	1,290	1,790
Eastwood	0	180	360	550	750
Southchurch	0	130	250	380	530
Thorpe Bay	0	100	200	300	410
Shoeburyness	0	310	610	930	1,290
Other Southend	0	940	1,860	2,840	3,930
Total	**0**	**5,460**	**10,760**	**16,410**	**22,690**
Gross floorspace projection (sq.m gross)					
Southend	0	2,130	4,190	6,390	8,830
Southend out-of-centre	0	490	960	1,460	2,010
Leigh-on-Sea	0	2,140	4,210	6,430	8,900
Prittlewell	0	60	110	190	240
Westcliff-on-Sea	0	610	1,210	1,840	2,560
Eastwood	0	260	510	790	1,070
Southchurch	0	190	360	540	760
Thorpe Bay	0	140	290	430	590
Shoeburyness	0	440	870	1,330	1,840
Other Southend	0	1,340	2,660	4,060	5,610
Total	**0**	**7,800**	**15,370**	**23,460**	**32,410**

Source: Table 11 and Experian sales density growth rates from Retail Planner Briefing Note 23 - Figure 4b
Figures may not sum due to rounding

Appendix 7 Food/beverage assessment (low-growth option)

Table 1 - Study area population projections (low growth)

Zone	2023	2025	2030	2035	2040	2045
1 - Southend-on-Sea West	51,316	52,106	52,377	52,563	52,921	53,512
2 - Southend-on-Sea Central	42,284	42,943	43,156	43,290	43,585	44,079
3 - Southend-on-Sea East	90,331	91,740	92,195	92,484	93,114	94,169
4 - Rochford East	30,638	31,007	31,898	32,700	33,624	34,471
5 - Rochford West	56,696	57,379	58,865	60,228	61,404	62,622
6 - Castle Point	89,483	89,929	90,964	92,004	93,302	94,886
Total	**360,749**	**365,103**	**369,455**	**373,270**	**377,950**	**383,738**

Source: Population for Zones 1-3 derived from ONS provided by Lichfields analysis and Zones 4-6 from Experian population projections (2025)

Table 2 - Food and beverage expenditure per person per annum (£)

Zone	2023	2025	2030	2035	2040	2045
1 - Southend-on-Sea West	1,000	994	1,041	1,097	1,153	1,212
2 - Southend-on-Sea Central	1,000	994	1,041	1,097	1,153	1,212
3 - Southend-on-Sea East	1,000	994	1,041	1,097	1,153	1,212
4 - Rochford East	1,000	994	1,041	1,097	1,153	1,212
5 - Rochford West	1,000	994	1,041	1,097	1,153	1,212
6 - Castle Point	1,000	994	1,041	1,097	1,153	1,212

Sources:
Experian Local Expenditure 2023 (2023 prices)
Experian growth rates - Retail Planner Briefing Note 23 (March 2026)
Excludes Special Forms of Trading (SFT)

Table 3 - Total food and beverage expenditure (£m) - low growth

Zone	2023	2025	2030	2035	2040	2045
1 - Southend-on-Sea West	51.32	51.79	54.55	57.65	61.00	64.83
2 - Southend-on-Sea Central	42.28	42.68	44.95	47.48	50.24	53.40
3 - Southend-on-Sea East	90.33	91.18	96.02	101.44	107.34	114.09
4 - Rochford East	30.64	30.82	33.22	35.86	38.76	41.76
5 - Rochford West	56.70	57.03	61.31	66.06	70.78	75.87
6 - Castle Point	89.48	89.38	94.74	100.91	107.55	114.96
Total	**360.75**	**362.88**	**384.79**	**409.40**	**435.68**	**464.91**

Sources: Tables 1 and 2

Table 4 - Base year food and beverage market shares (%)

Destination Zone	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6
Southend-on-Sea						
Southend City Centre	12.1%	12.7%	30.5%	19.7%	6.3%	5.8%
Southend out-of-centre	1.8%	2.7%	8.0%	8.2%	0.5%	0.0%
Leigh-on-Sea	46.3%	20.4%	8.1%	6.6%	6.4%	11.3%
Prittlewell	0.0%	0.7%	0.6%	0.4%	0.9%	0.0%
Westcliff-on-Sea	2.1%	13.6%	9.0%	0.4%	0.9%	0.0%
Eastwood	6.5%	3.2%	0.0%	1.0%	2.6%	0.0%
Southchurch	0.0%	0.2%	5.1%	0.0%	0.0%	0.0%
Thorpe Bay	0.4%	1.0%	1.8%	3.9%	0.0%	0.0%
Shoeburyness	0.4%	2.6%	9.6%	3.1%	0.5%	0.0%
Other Southend	14.8%	31.7%	5.8%	3.3%	0.8%	8.4%
Southend-on-Sea total	**84.4%**	**88.8%**	**78.4%**	**46.5%**	**18.9%**	**25.5%**
Other Destinations						
Rochford	0.0%	0.0%	1.2%	9.8%	2.1%	1.0%
Rayleigh	4.6%	2.3%	3.8%	6.2%	49.2%	12.1%
Hockley	0.0%	0.0%	5.0%	10.0%	3.8%	0.0%
Benfleet	0.0%	0.0%	0.0%	0.0%	0.0%	12.5%
Canvey Island	0.0%	0.0%	0.0%	0.0%	0.2%	21.3%
Thundersley	0.4%	0.0%	0.2%	0.0%	0.0%	2.8%
Hadleigh	0.0%	0.0%	0.0%	0.6%	0.0%	4.0%
Other Destinations	10.5%	8.9%	11.5%	26.9%	25.7%	20.8%
Other Destinations total	**15.5%**	**11.2%**	**21.7%**	**53.5%**	**81.1%**	**74.5%**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Household Survey (2026)

Table 5 - Base year food and beverage shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2023	**51.32**	**42.28**	**90.33**	**30.64**	**56.70**	**89.48**	**360.75**
Southend-on-Sea							
Southend City Centre	6.20	5.37	27.56	6.02	3.57	5.17	53.89
Southend out-of-centre	0.94	1.16	7.20	2.50	0.26	0.00	12.06
Leigh-on-Sea	23.75	8.64	7.29	2.04	3.64	10.13	55.49
Prittlewell	0.00	0.30	0.54	0.13	0.51	0.00	1.49
Westcliff-on-Sea	1.08	5.75	8.11	0.13	0.51	0.00	15.59
Eastwood	3.35	1.34	0.00	0.31	1.50	0.00	6.49
Southchurch	0.00	0.09	4.56	0.00	0.00	0.00	4.65
Thorpe Bay	0.21	0.43	1.66	1.18	0.00	0.00	3.49
Shoeburyness	0.21	1.10	8.63	0.94	0.26	0.00	11.13
Other Southend	7.59	13.38	5.24	1.00	0.47	7.55	35.24
Southend-on-Sea total	**43.33**	**37.56**	**70.79**	**14.25**	**10.72**	**22.85**	**199.51**
Other Destinations							
Rochford	0.00	0.00	1.12	3.00	1.22	0.91	6.25
Rayleigh	2.35	0.97	3.39	1.88	27.91	10.78	47.28
Hockley	0.00	0.00	4.50	3.07	2.18	0.00	9.75
Benfleet	0.00	0.00	0.00	0.00	0.00	11.22	11.22
Canvey Island	0.00	0.00	0.00	0.00	0.10	19.04	19.13
Thundersley	0.21	0.00	0.19	0.00	0.00	2.47	2.88
Hadleigh	0.00	0.00	0.00	0.18	0.00	3.62	3.80
Other Destinations	5.40	3.75	10.36	8.25	14.57	18.60	60.93
Other Destinations total	**7.97**	**4.72**	**19.56**	**16.39**	**45.97**	**66.63**	**161.24**
TOTAL	**51.30**	**42.28**	**90.35**	**30.64**	**56.70**	**89.48**	**360.75**

Source: Tables 3 and 4

Table 6 - 2025 food and beverage shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2025	**51.79**	**42.68**	**91.18**	**30.82**	**57.03**	**89.38**	**362.88**
Southend-on-Sea							
Southend City Centre	6.25	5.42	27.82	6.06	3.59	5.17	54.31
Southend out-of-centre	0.95	1.17	7.27	2.52	0.26	0.00	12.16
Leigh-on-Sea	23.97	8.72	7.36	2.05	3.66	10.11	55.88
Prittlewell	0.00	0.30	0.55	0.13	0.52	0.00	1.50
Westcliff-on-Sea	1.09	5.81	8.19	0.13	0.52	0.00	15.73
Eastwood	3.38	1.35	0.00	0.31	1.51	0.00	6.55
Southchurch	0.00	0.09	4.61	0.00	0.00	0.00	4.69
Thorpe Bay	0.21	0.43	1.68	1.19	0.00	0.00	3.52
Shoeburyness	0.21	1.11	8.71	0.94	0.26	0.00	11.23
Other Southend	7.66	13.51	5.29	1.00	0.47	7.54	35.48
Southend-on-Sea total	**43.73**	**37.92**	**71.46**	**14.33**	**10.79**	**22.83**	**201.05**
Other Destinations							
Rochford	0.00	0.00	1.13	3.02	1.22	0.90	6.28
Rayleigh	2.37	0.97	3.42	1.90	28.07	10.77	47.51
Hockley	0.00	0.00	4.54	3.09	2.19	0.00	9.83
Benfleet	0.00	0.00	0.00	0.00	0.00	11.20	11.20
Canvey Island	0.00	0.00	0.00	0.00	0.10	19.02	19.11
Thundersley	0.21	0.00	0.19	0.00	0.00	2.47	2.88
Hadleigh	0.00	0.00	0.00	0.18	0.00	3.61	3.80
Other Destinations	5.45	3.79	10.45	8.29	14.66	18.58	61.23
Other Destinations total	**8.04**	**4.76**	**19.74**	**16.49**	**46.24**	**66.55**	**161.83**
TOTAL	**51.79**	**42.68**	**91.18**	**30.82**	**57.03**	**89.38**	**362.88**

Source: Tables 3 and 4

Table 7 – Future 2030 food and beverage shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2030	**54.55**	**44.95**	**96.02**	**33.22**	**61.31**	**94.74**	**384.79**
Southend-on-Sea							
Southend City Centre	6.59	5.70	29.30	6.53	3.86	5.48	57.45
Southend out-of-centre	1.00	1.23	7.65	2.71	0.28	0.00	12.88
Leigh-on-Sea	25.25	9.19	7.75	2.21	3.94	10.72	59.05
Prittlewell	0.00	0.32	0.58	0.14	0.56	0.00	1.59
Westcliff-on-Sea	1.15	6.12	8.62	0.14	0.56	0.00	16.58
Eastwood	3.56	1.42	0.00	0.34	1.62	0.00	6.94
Southchurch	0.00	0.09	4.85	0.00	0.00	0.00	4.94
Thorpe Bay	0.23	0.46	1.77	1.28	0.00	0.00	3.73
Shoeburyness	0.23	1.17	9.17	1.02	0.28	0.00	11.86
Other Southend	8.07	14.23	5.57	1.08	0.51	8.00	37.46
Southend-on-Sea total	**46.06**	**39.93**	**75.25**	**15.45**	**11.60**	**24.19**	**212.48**
Other Destinations							
Rochford	0.00	0.00	1.19	3.26	1.32	0.96	6.72
Rayleigh	2.50	1.03	3.60	2.04	30.18	11.42	50.76
Hockley	0.00	0.00	4.78	3.33	2.36	0.00	10.47
Benfleet	0.00	0.00	0.00	0.00	0.00	11.88	11.88
Canvey Island	0.00	0.00	0.00	0.00	0.10	20.16	20.26
Thundersley	0.23	0.00	0.20	0.00	0.00	2.62	3.05
Hadleigh	0.00	0.00	0.00	0.20	0.00	3.83	4.03
Other Destinations	5.75	3.99	11.01	8.94	15.76	19.69	65.14
Other Destinations total	**8.47**	**5.02**	**20.79**	**17.77**	**49.71**	**70.54**	**172.30**
TOTAL	**54.55**	**44.95**	**96.02**	**33.22**	**61.31**	**94.74**	**384.79**

Source: Tables 3 and 4

Table 8 – Future 2035 food and beverage shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2035	**57.65**	**47.48**	**101.44**	**35.86**	**66.06**	**100.91**	**409.40**
Southend-on-Sea							
Southend City Centre	6.96	6.02	30.95	7.05	4.16	5.83	60.98
Southend out-of-centre	1.06	1.30	8.08	2.93	0.30	0.00	13.67
Leigh-on-Sea	26.68	9.70	8.19	2.38	4.24	11.42	62.62
Prittlewell	0.00	0.34	0.61	0.15	0.60	0.00	1.70
Westcliff-on-Sea	1.21	6.46	9.11	0.15	0.60	0.00	17.53
Eastwood	3.76	1.50	0.00	0.36	1.75	0.00	7.37
Southchurch	0.00	0.10	5.12	0.00	0.00	0.00	5.22
Thorpe Bay	0.24	0.48	1.87	1.39	0.00	0.00	3.97
Shoeburyness	0.24	1.24	9.69	1.10	0.30	0.00	12.56
Other Southend	8.53	15.03	5.88	1.17	0.55	8.52	39.68
Southend-on-Sea total	**48.68**	**42.18**	**79.49**	**16.68**	**12.49**	**25.77**	**225.30**
Other Destinations							
Rochford	0.00	0.00	1.26	3.52	1.42	1.02	7.21
Rayleigh	2.64	1.08	3.81	2.21	32.51	12.16	54.41
Hockley	0.00	0.00	5.05	3.60	2.54	0.00	11.19
Benfleet	0.00	0.00	0.00	0.00	0.00	12.65	12.65
Canvey Island	0.00	0.00	0.00	0.00	0.11	21.47	21.58
Thundersley	0.24	0.00	0.22	0.00	0.00	2.79	3.24
Hadleigh	0.00	0.00	0.00	0.21	0.00	4.08	4.29
Other Destinations	6.07	4.22	11.63	9.65	16.98	20.98	69.52
Other Destinations total	**8.95**	**5.30**	**21.96**	**19.19**	**53.56**	**75.14**	**184.10**
TOTAL	**57.65**	**47.48**	**101.44**	**35.86**	**66.06**	**100.91**	**409.40**

Source: Tables 3 and 4

Table 9 – Future 2040 food and beverage shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2040	**61.00**	**50.24**	**107.34**	**38.76**	**70.78**	**107.55**	**435.68**
Southend-on-Sea							
Southend City Centre	7.37	6.38	32.75	7.62	4.46	6.22	64.78
Southend out-of-centre	1.12	1.38	8.55	3.17	0.32	0.00	14.54
Leigh-on-Sea	28.23	10.27	8.66	2.58	4.55	12.17	66.46
Prittlewell	0.00	0.36	0.64	0.16	0.64	0.00	1.81
Westcliff-on-Sea	1.28	6.84	9.64	0.16	0.64	0.00	18.56
Eastwood	3.98	1.59	0.00	0.39	1.87	0.00	7.83
Southchurch	0.00	0.10	5.42	0.00	0.00	0.00	5.52
Thorpe Bay	0.25	0.51	1.97	1.50	0.00	0.00	4.24
Shoeburyness	0.25	1.31	10.25	1.18	0.32	0.00	13.32
Other Southend	9.03	15.90	6.23	1.26	0.59	9.08	42.08
Southend-on-Sea total	**51.51**	**44.63**	**84.12**	**18.02**	**13.39**	**27.47**	**239.14**
Other Destinations							
Rochford	0.00	0.00	1.33	3.80	1.52	1.09	7.74
Rayleigh	2.79	1.15	4.03	2.38	34.84	12.96	58.15
Hockley	0.00	0.00	5.35	3.89	2.72	0.00	11.96
Benfleet	0.00	0.00	0.00	0.00	0.00	13.48	13.48
Canvey Island	0.00	0.00	0.00	0.00	0.12	22.88	23.00
Thundersley	0.25	0.00	0.23	0.00	0.00	2.97	3.45
Hadleigh	0.00	0.00	0.00	0.23	0.00	4.35	4.58
Other Destinations	6.42	4.46	12.30	10.43	18.19	22.36	74.17
Other Destinations total	**9.47**	**5.61**	**23.24**	**20.74**	**57.39**	**80.09**	**196.53**
TOTAL	**61.00**	**50.24**	**107.34**	**38.76**	**70.78**	**107.55**	**435.68**

Source: Tables 3 and 4

Table 10 – Future 2045 food and beverage shopping patterns (£M)

Destination Zone	1	2	3	4	5	6	Total
Expenditure 2045	**64.83**	**53.40**	**114.09**	**41.76**	**75.87**	**114.96**	**464.91**
Southend-on-Sea							
Southend City Centre	7.83	6.78	34.81	8.21	4.78	6.65	69.05
Southend out-of-centre	1.19	1.47	9.09	3.41	0.34	0.00	15.50
Leigh-on-Sea	30.00	10.92	9.21	2.78	4.88	13.01	70.79
Prittlewell	0.00	0.38	0.68	0.18	0.69	0.00	1.93
Westcliff-on-Sea	1.36	7.27	10.24	0.18	0.69	0.00	19.74
Eastwood	4.23	1.69	0.00	0.42	2.01	0.00	8.35
Southchurch	0.00	0.11	5.76	0.00	0.00	0.00	5.87
Thorpe Bay	0.27	0.54	2.10	1.61	0.00	0.00	4.52
Shoeburyness	0.27	1.39	10.90	1.28	0.34	0.00	14.18
Other Southend	9.60	16.90	6.62	1.36	0.63	9.70	44.81
Southend-on-Sea total	**54.74**	**47.44**	**89.41**	**19.42**	**14.35**	**29.36**	**254.73**
Other Destinations							
Rochford	0.00	0.00	1.41	4.09	1.63	1.16	8.30
Rayleigh	2.97	1.22	4.28	2.57	37.34	13.85	62.24
Hockley	0.00	0.00	5.68	4.19	2.92	0.00	12.79
Benfleet	0.00	0.00	0.00	0.00	0.00	14.41	14.41
Canvey Island	0.00	0.00	0.00	0.00	0.13	24.46	24.59
Thundersley	0.27	0.00	0.24	0.00	0.00	3.17	3.69
Hadleigh	0.00	0.00	0.00	0.25	0.00	4.65	4.89
Other Destinations	6.83	4.74	13.08	11.24	19.50	23.90	79.29
Other Destinations total	**10.07**	**5.96**	**24.70**	**22.34**	**61.52**	**85.60**	**210.19**
TOTAL	**64.83**	**53.40**	**114.09**	**41.76**	**75.87**	**114.96**	**464.91**

Source: Tables 3 and 4

Table 11 - Summary of food and beverage expenditure 2023 to 2045 (£M) - low growth

	2025	2030	2035	2040	2045
Available expenditure					
Southend	54.31	57.45	60.98	64.78	69.05
Southend out-of-centre	12.16	12.88	13.67	14.54	15.50
Leigh-on-Sea	55.88	59.05	62.62	66.46	70.79
Prittlewell	1.50	1.59	1.70	1.81	1.93
Westcliff-on-Sea	15.73	16.58	17.53	18.56	19.74
Eastwood	6.55	6.94	7.37	7.83	8.35
Southchurch	4.69	4.94	5.22	5.52	5.87
Thorpe Bay	3.52	3.73	3.97	4.24	4.52
Shoeburyness	11.23	11.86	12.56	13.32	14.18
Other Southend	35.48	37.46	39.68	42.08	44.81
Total	**201.05**	**212.48**	**225.30**	**239.14**	**254.73**
Turnover of existing facilities					
Southend	54.31	54.41	54.96	55.51	56.07
Southend out-of-centre	12.16	12.19	12.31	12.43	12.56
Leigh-on-Sea	55.88	55.99	56.55	57.12	57.69
Prittlewell	1.50	1.50	1.52	1.53	1.55
Westcliff-on-Sea	15.73	15.76	15.92	16.08	16.24
Eastwood	6.55	6.56	6.63	6.69	6.76
Southchurch	4.69	4.70	4.75	4.80	4.84
Thorpe Bay	3.52	3.52	3.56	3.60	3.63
Shoeburyness	11.23	11.26	11.37	11.48	11.60
Other Southend	35.48	35.55	35.91	36.27	36.64
Total	**201.05**	**201.45**	**203.47**	**205.52**	**207.58**
Surplus/deficit expenditure £M					
Southend	0.00	3.04	6.02	9.27	12.98
Southend out-of-centre	0.00	0.69	1.36	2.10	2.94
Leigh-on-Sea	0.00	3.06	6.07	9.34	13.09
Prittlewell	0.00	0.09	0.18	0.28	0.38
Westcliff-on-Sea	0.00	0.82	1.61	2.48	3.50
Eastwood	0.00	0.38	0.75	1.14	1.59
Southchurch	0.00	0.24	0.47	0.73	1.03
Thorpe Bay	0.00	0.21	0.41	0.64	0.89
Shoeburyness	0.00	0.60	1.19	1.83	2.58
Other Southend	0.00	1.90	3.77	5.81	8.17
Total	**0.00**	**11.03**	**21.83**	**33.63**	**47.15**

Source: Tables 6-10 and Experian sales density growth rates from Retail Planner Briefing Note 23 - Figure 4b

Table 12 - Food and beverage floorspace capacity - low growth

	2025	2030	2035	2040	2045
Turnover density new floorspace (£ per sq.m)	£2,500	£2,505	£2,530	£2,556	£2,581
Sales floorspace projection (sq.m net)					
Southend	0	1,210	2,380	3,630	5,030
Southend out-of-centre	0	280	540	820	1,140
Leigh-on-Sea	0	1,220	2,400	3,660	5,070
Prittlewell	0	40	70	110	150
Westcliff-on-Sea	0	330	640	970	1,350
Eastwood	0	150	290	450	610
Southchurch	0	100	190	280	400
Thorpe Bay	0	80	160	250	350
Shoeburyness	0	240	470	720	1,000
Other Southend	0	760	1,490	2,270	3,170
Total	**0**	**4,410**	**8,630**	**13,160**	**18,270**
Gross floorspace projection (sq.m gross)					
Southend	0	1,730	3,400	5,190	7,190
Southend out-of-centre	0	400	770	1,170	1,630
Leigh-on-Sea	0	1,740	3,430	5,230	7,240
Prittlewell	0	60	100	160	210
Westcliff-on-Sea	0	470	910	1,390	1,930
Eastwood	0	210	410	640	870
Southchurch	0	140	270	400	570
Thorpe Bay	0	110	230	360	500
Shoeburyness	0	340	670	1,030	1,430
Other Southend	0	1,090	2,130	3,240	4,530
Total	**0**	**6,290**	**12,320**	**18,810**	**26,100**

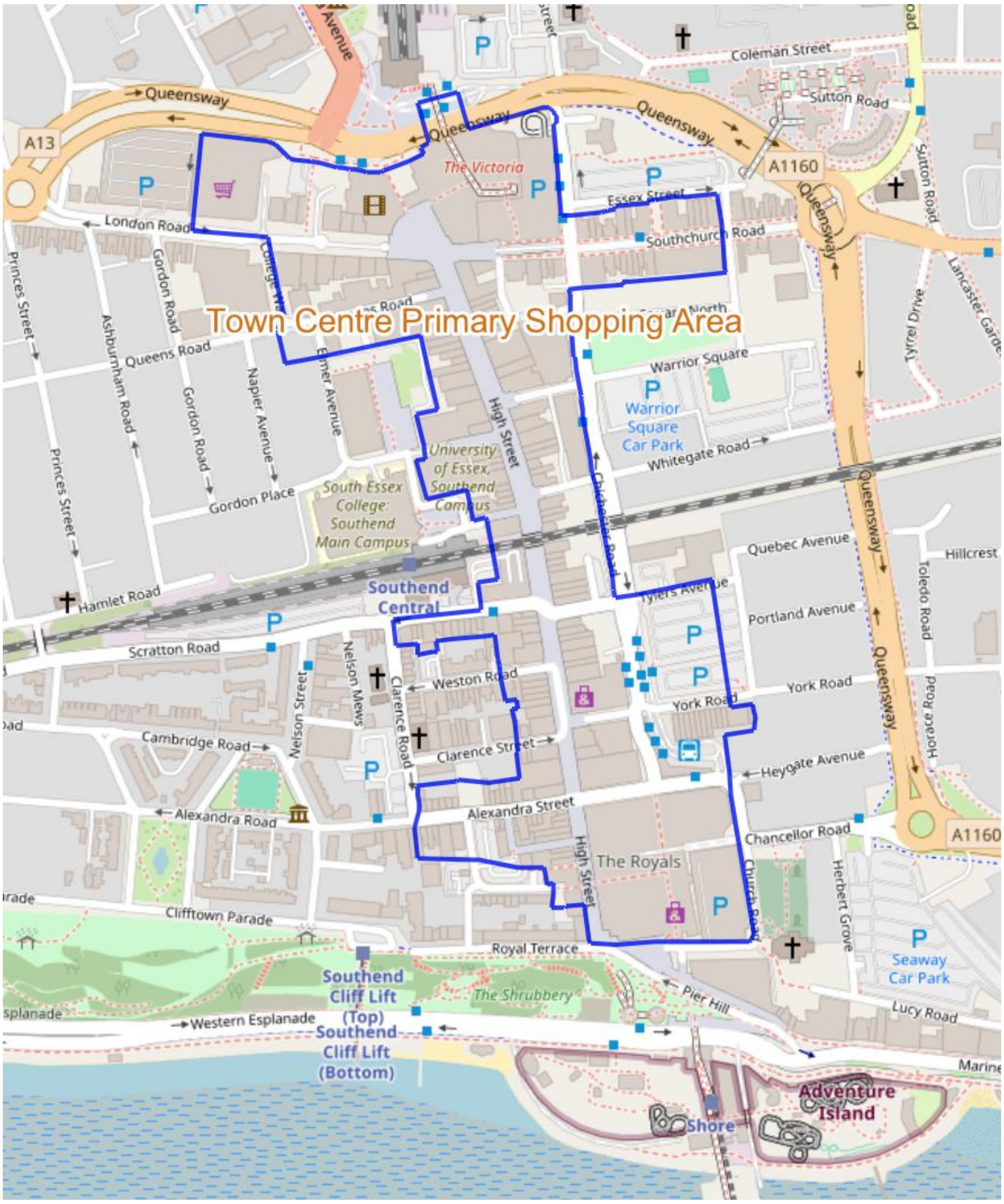
Source: Table 11 and Experian sales density growth rates from Retail Planner Briefing Note 23 - Figure 4b
Figures may not sum due to rounding

Appendix 8 Town, District and Neighbourhood Centre Health Checks

CITY CENTRE

Southend City Centre

A8.1 Southend City Centre is located in the south of Southend-on-Sea City Council's administrative area. It is the only City Centre in authority area, and serves a large catchment for convenience and comparison shopping, restaurants and services. It is the focal point for economic and cultural provision in the authority area.



A8.2 Policy CP2 of the Southend Core Strategy (adopted December 2007) states that Southend City Centre will remain the first preference for all forms of retail development and for other town centre uses. The Core Strategy also designates Primary Shopping Frontages (PSFs) within the city centre, along with Secondary Shopping Frontages (SSFs). The PSFs are mostly focused along High Street, along with an area of PSFs along London Road at the north end of High Street.

A8.3 The Southend Central Area Action Plan (SCAAP) was adopted in February 2018 and sets out area specific proposals to support the delivery of the Core Strategy development targets in Southend Central Area up to 2021. In the longer term, these development opportunities identified in the SCAAP (presented as both Policy Areas and Opportunity Sites) could accommodate residual capacity for retail, food/beverage and leisure uses. In terms of development management, SCAAP Policy DS1: A Prosperous Retail Centre seeks to ensure that at least 60% of the primary shopping frontage is in former Class A1 use, although alternative uses (particularly former Class A3) will be supported if they contribute to the vitality of the centre. These policies are to be superseded by Draft Local Plan Policy DM6.4.

A8.4 The centre is approximately linear in form, extending around 700m along High Street from Royal Terrace in the south to London Road in the north. The centre branches out along a number of secondary streets along High Street. High Street is mostly pedestrianised, with the exception of secondary streets crossing the pedestrian zones and a small section of one-way traffic between Clarence Street and Weston Road. London Road is partially pedestrianised in the area closest to High Street; however, the majority of London Road within the city centre comprises two lanes of traffic separated by a central reservation. The majority of the side streets branching off of High Street are not pedestrianised; however, they generally function in a one-way system and do not have a high level of traffic. The centre is relatively easy to navigate, featuring several pedestrian circuits.

Mix of Uses

A8.5 Southend City Centre features 392 retail and service units at ground floor level (excluding office and leisure & community uses). The mix of uses is set out in Table 1, compared with the UK averages. The total ground floor area of occupied units is 79,942 sqm gross, and the mix of floorspace is shown in Table 2.

A8.6 There were 43 vacant units within the centre at the time of the survey, equating to a shop vacancy rate of 11.0%, which is lower than the UK average, but higher than the authority area average. The vacancy rate suggests that the supply of premises currently generally meets the level of operator demand and the vacant units generally tend to meet operator requirements (e.g. size, quality).

Table 1 Mix of retail and service uses – Southend city centre

Type	Number of units	% units	% units City average	% units UK average
Convenience	43	11.0%	9.9%	10.1%
Comparison	115	29.3%	29.1%	27.8%
Financial & Business Services	28	7.1%	9.7%	7.9%
Bars & Pubs	13	3.3%	3.0%	5.3%
Fast Food & Takeaways	32	8.2%	6.3%	6.5%
Restaurants/Cafes	60	15.3%	16.2%	11.4%
Non-retail services	58	14.8%	17.4%	16.4%
Vacant	43	11.0%	8.4%	14.7%
Total	**392**	**100.0%**	**100.0%**	**100.0%**

Source: Southend-on-Sea City Council Land Use Survey 2025

Table 2 Mix of Retail and Service Floorspace – Southend city centre

Type	Area of floorspace (sqm)	% floorspace	% floorspace UK average
Convenience	10,074	10.9%	17.7%
Comparison	40,695	44.1%	32.5%
Financial & Business Services	4,795	5.2%	6.5%
Bars & Pubs	4,060	4.4%	6.6%
Fast Food & Takeaways	4,682	5.1%	3.6%
Restaurants/Cafes	9,279	10.1%	8.6%
Non-retail services	6,359	6.9%	8.5%
Vacant	12,345	13.4%	16.0%
Total	**92,288**	**100.0%**	**100.0%**

Source: Southend-on-Sea City Council Land Use Survey 2025

A8.7 The composition of uses in Southend City Centre varies from the authority area averages and includes some notable differences. The centre has a higher proportion of comparison retail units and a higher proportion of bars and pubs than the authority area average, although the proportion of bars and pubs is lower than the UK average. In addition to the number of units (individual premises and operators), the proportion of comparison retail floorspace in Southend City Centre is much higher than the UK average. This can partly be attributed to the presence of two defined indoor shopping Centres: The Victorias Shopping Centre at the north end of High Street and The Royals Shopping Centre at the south end of High Street. There is also a strong mix of national multiple retailers, as well as small independent stores.

Rental Levels

A8.8 According to the Valuation Office Agency (VOA), the prime Zone A retail rent in Southend City Centre is £540 per sqm. Zone A retail rents vary throughout the centre, ranging between £440 and £540 on the High Street. Along London Road, rents range between £380 and £430 per sqm. Across the various side streets, branching off from High Street, rents are generally lower. Along Alexandra Street, rents are around £330 per sqm and along Clarence Street they are £325 per sqm. Higher rates are broadly identified along Primary Shopping Frontages on High Street and London Road.

Accessibility

A8.9 Southend City Centre contains Southend City Bus Station and Southend Central Railway Station. Southend City Bus Station is located in the southeast of the centre, along Heygate Avenue and Chichester Road. Southend Central Railway Station is located approximately centrally within the city centre, on Clifftown Road. There are also a number of ancillary bus stops located within the centre's secondary streets, and Southend Victoria Railway Station is located just north of the centre.

A8.10 The buses operating within the centre provide links throughout Southend itself, and to various locations across Essex, including Chelmsford and Stansted Airport. Southend Central Railway Station has four platforms and provides C2C services west towards London Fenchurch Street and east to Shoeburyness. Southend Victoria is the terminus of the Greater Anglia service to London Liverpool Street.

A8.11 There are four Council-managed car parks within Southend city centre, offering approximately 419 spaces.

- Alexandra Street: 57
- London Road (North): 14
- Pitmans Close: 10
- Tyler Avenue, York Road: 338

A8.12 A further five Council-managed car parks providing 1,634 spaces are located adjacent to the defined boundary of the city centre:

- Clarence Road: 119
- Essex Street: 197
- Seaway: 658
- University Square: 304
- Warrior Square: 356

A8.13 Privately run car parking is also available at The Victorias and The Royals Shopping Centres. These car parks all provide easy access to the primary shopping area, alongside on-street parking throughout the city centre.

A8.14 Council car parking charges in Southend City Centre are shown in Table 3 below. All car parks within the city centre are located within charging Zone 2A. Car parking changes apply Monday to Sunday, with specific charging times specified within the table.

Table 3 Car Parking Charges – Southend city centre

8 am – 6 pm (£)								
Duration	Up to 1 hour	Up to 2 hours	Up to 3 hours	Up to 4 hours	Up to 6 hours	Up to 8 hours	Up to 10 hours	Up to 13 hours
Price (£)	1.40	2.60	4.00	5.20	7.80	9.00	10.00	N/A
6 pm – Midnight (£)								
Duration	Up to 1 hour				Up to 6 Hours			
Price (£)	1.40				4.00			

Source: Southend-on-Sea City Council Website

Environmental Quality

A8.15 Southend City Centre includes a mix of retail units, offices and leisure offerings. The centre is easily walkable, with well-maintained, paved pedestrian areas throughout, provides various options for circulation, and offers good transport links both by rail and bus. The location of both Southend Central and Southend Victoria Railway Stations immediately adjacent to the centre is beneficial to its vitality. There is generally a low level of vehicular traffic throughout the city centre, owing to the extent of the pedestrianisation of High Street. The secondary streets, branching off the High Street generally function in a one-way system, which makes vehicular access challenging; however, this is to the benefit of pedestrian flow.

A8.16 Southend experiences a consistent flow people walking through the centre, especially along the High Street. Secondary streets and alleys generally have lighter pedestrian flow but provide connections as circuits, or to well-sited car parks and transport hubs.

A8.17 The quality of the public realm throughout the centre is mixed, with a range of building characters observed. There are a number of attractive, well-maintained period buildings both on High Street and the various secondary streets. However, there is a presence of generally low-quality façade styles along High Street, which results in a generally disjointed and unattractive streetscape. Poorly maintained buildings of a lesser architectural quality tend to disrupt the streetscape and negatively affect the character of the centre.

A8.18 The Victorias Shopping Centre at the north end of High Street is an example of relatively recent investment, is well maintained, and makes a positive contribution towards the environmental quality of the centre. The Royals Shopping Centre at the south end of High Street is a more dated example of a covered shopping centre, and whilst it still appears to attract pedestrians and shoppers and offer a varied retail offering, would benefit from investment and maintenance work, so to boost the vitality of the southern end of the centre.

A8.19 At its southern extent, High Street offers views towards the Thames Estuary, Adventure Island and Southend Pier. This is a unique feature of Southend, and the function of High Street as a route towards these attractions contributes positively to its vitality. There may be potential to reinforce these links, including The Royals which has a frontage onto the estuary.

A8.20 Throughout the centre, there are areas of public seating and locations to meet or gather. Other infrastructure provided includes sheltered bus stops and litter bins. There is a notable lack of vegetation and planting within the centre. Planters in pedestrian areas are rare and there are little-to-no trees. There are no notable green spaces within the centre, although there are green spaces along the Western Esplanade to the southwest of the centre. The centre would benefit from the introduction of more planting, greenery and soft landscaping.

Summary and SWOT Analysis

Strengths

- Good critical mass of retail units.
- Lower vacancy rate, compared to the national average (although higher vacancy rates are identified across The Royals and The Victorias Shopping Centres).
- Healthy provision of comparison goods shops with a balance between national multiples and independent operators.
- High proportion of comparison and convenience store floorspace.
- Retail units are spread throughout the centre, with no significant concentrations observed.
- Ample car parking provision.
- Accessible, generally pedestrianised Centre with well-maintained paving.
- Good access by public transport, including bus and train, with bus interchanges and two railways stations in close proximity.
- Examples of high-quality period buildings.
- Consistent pedestrian flow of people.
- A healthy provision of pubs/bars and restaurants throughout the centre, contributing positively to the attractiveness and level of footfall within the centre outside daytime shopping hours.
- Proximity to Southend seafront, Pier and Adventure Island positively impacts the vitality of the city centre and increases pedestrian through-flow.

Weaknesses

- The mix of building characters in the town centre includes many less attractive and poorly maintained buildings, negatively impacting the general character and quality of the centre.
- Limited recent investment is evident, with the exception of The Victorias Shopping Centre.
- Poor quality and inconsistent shopfronts and signage that are beginning to suffer from a lack of investment, maintenance and upkeep, detracting from the wider environmental quality.
- The centre lacks greenery and soft landscaping.

- There has historically been a limited cultural and leisure offer throughout the centre. Such uses are focused to the south of the centre, albeit The Victorias Shopping Centre has introduced a number of uses to the north of the centre.

Opportunities

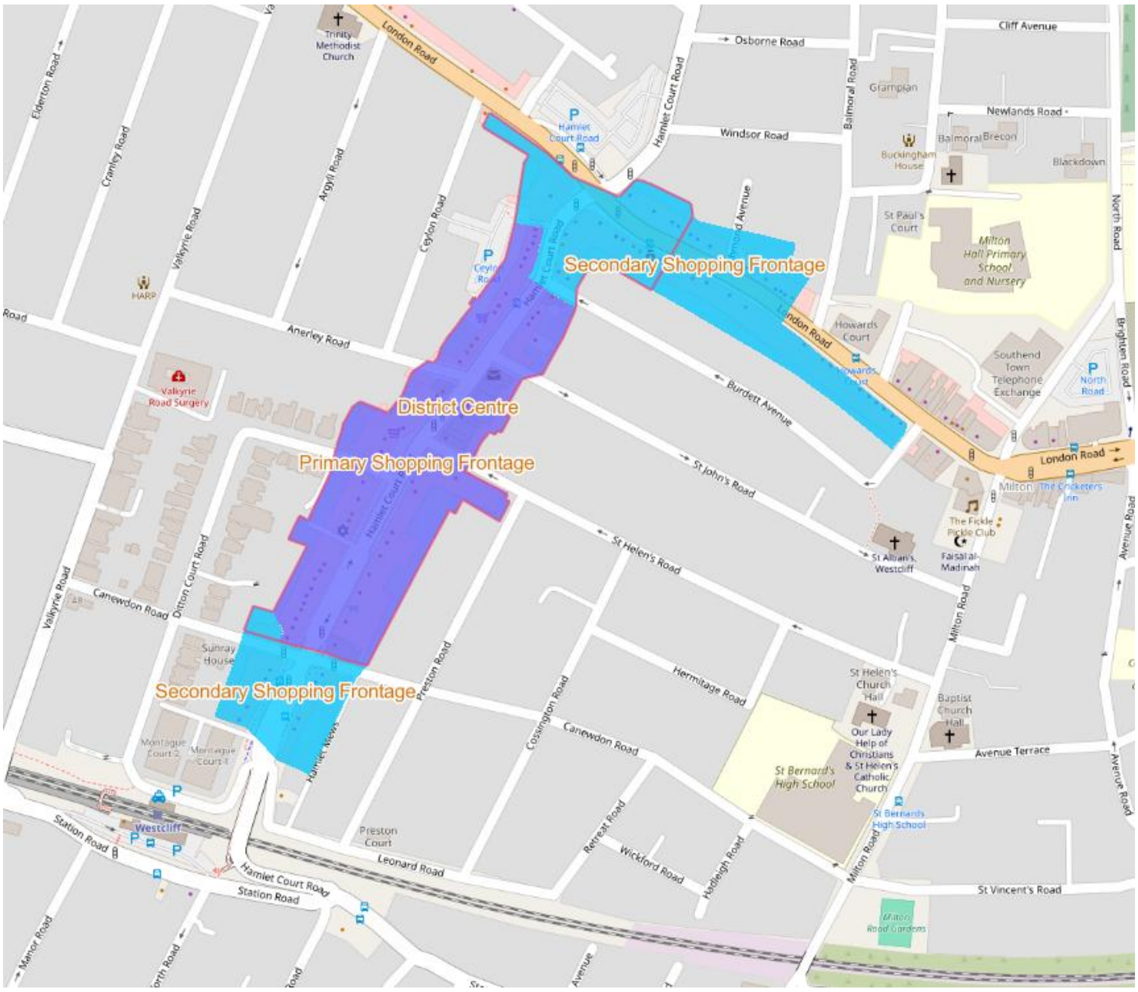
- Opportunity for the refurbishment of less attractive buildings within the centre. Some are dated, although reasonably well-maintained at ground floor level, and investment and refurbishment would significantly improve the environmental quality of the centre.
- Vacant units with reasonable retailer demand could provide opportunities for new occupiers and investors, start-ups and innovative uses. There is also an opportunity to diversify and grow the limited cultural and leisure offer within the centre.
- Building upon recent Government initiatives to use new Local Plan policies to restrict clusters of sui generis uses with associated impacts on neighbouring amenity, and that detract from the vitality and viability of the centre.
- Greater utilisation of upper floors within the centre for residential conversion, extensions, and redevelopment.
- Investment and enhancement of signage across the centre.
- Focus on enhancing, creating, and encouraging pedestrian circuits through the centre.
- Opportunity to introduce significant planting, soft landscaping, public realm and play features throughout the centre. Public realm, interactive elements and greenery would significantly improve the environmental quality and perception of the centre.

Threats

- The presence of two covered shopping Centres poses a threat to the vitality of The Royals Shopping Centre, as it is already more dated, less well-maintained and has a higher vacancy rate.
- The centre is constrained by residential development to the east and west, restricting growth.
- The length of the high street and the extensive car parking discourage pedestrian circuits.
- Smaller floorplates in the centre are more constrained and less attractive to occupiers compared to larger more flexible facilities in retail parks, with less potential for adaptation for future uses.

DISTRICT CENTRES

Westcliff District Centre



A8.21 Westcliff District Centre is located to the south of Southend-on-Sea City Council's administrative boundary, approximately 1.2km west of Southend city centre. The centre is linear in form and runs north-south along Hamlet Court Road between London Road and Canewdon Road, with a length of approximately 400m. Retail and services within Westcliff District Centre mainly front onto Hamlet Court Road, with some units in the northern end of the centre located along the A13/ London Road. There is a strong concentration of commercial units within the centre and a very limited residential dwellings present at ground floor level, with the exception of a cluster of dwellings along Hamlet Court Road South.

Mix of uses

A8.22 The centre features 185 retail and service units (excluding office and leisure & community uses), and the mix of uses is set out in Table 4, which is compared with the authority area and UK averages. There were 22 vacant units within the centre at the time of the survey, equating to a shop vacancy rate of 11.9%, which is lower than the UK average but higher than the authority area average. The District Centre has a strong provision of restaurants and cafes and non-retail services, although the proportion of bars and pubs is considerably lower than the UK average.

Table 4 Mix of retail and service uses – Westcliff District Centre

Type	Number of units	% units	% units City average	% units UK average
Convenience	19	10.3%	9.9%	10.1%
Comparison	48	25.9%	29.1%	27.8%
Financial & Business Services	15	8.1%	9.7%	7.9%
Bars & Pubs	5	2.7%	3.0%	5.3%
Fast Food & Takeaways	8	4.3%	6.3%	6.5%
Restaurants/Cafes	32	17.3%	16.2%	11.4%
Non-retail services	36	19.5%	17.4%	16.4%
Vacant	22	11.9%	8.4%	14.7%
Total	**185**	**100.0%**	**100.0%**	**100.0%**

Source: Southend-on-Sea City Council Land Use Survey 2025

Accessibility

A8.23 There are two bus stops in the northern end of the centre, serving the 817 bus route, which links Southchurch and Leigh-on-Sea, passing through Southend City Centre and alighting at Southend Central Railway Station. Westcliff Railway Station is located approximately 180m from the southern end of the District Centre, providing C2C services between Shoeburyness and London Fenchurch Street.

A8.24 There is ample on-street car parking within the centre, especially on its southern side. Although there is a lack off-street parking within the centre itself, Hamlet Court Road Car Park to the north of the centre is Council-managed and provides 155 parking spaces, with Ceylon Road car park providing a further 50 spaces, bounding the rear of properties on Hamlet Court Road to the west.

Environmental Quality

A8.25 In general, Westcliff District Centre is attractive, albeit there is a great mix of quality of frontages along Hamlet Court Road. Well-maintained historic buildings are observed throughout, contributing to the quality of the streetscape and general character of the area, with part of the centre designated as a conservation area. Although there is no clear evidence of recent investment, building facades are generally well-maintained, with decorations at upper levels adding to their architectural merit and supporting the overall quality evident across the conservation area. There are, nonetheless, several examples of poor quality replacement buildings, non-traditional facades, fascias and signage throughout the conservation area, as identified within the Hamlet Court Road Conservation Area Appraisal (2021), that would benefit from further investment and improvements. Shop frontages are generally clean and do not detract from the centre's quality. There are a few pubs/bars within the centre with outdoor seating, adding to the general ambience of the centre.

A8.26 Traffic through the centre is at a medium-high level, in part owing to the narrow nature of Hamley Court Road. However, pedestrian pavements are sufficiently wide and there are a number of defined and legible crossing points within the centre, benefitting pedestrian flow and accessibility.

A8.27 There is limited soft landscaping and planting within the centre, although there are a number of mature trees lining Hamlet Court Road in the south of the centre. Such planting positively impacts the environmental quality of the centre, and the centre would benefit from further planting or soft landscaping, especially at its northern end.

Rental Levels

A8.28 Valuation Office Agency (VOA) data indicates that rental values in Westcliff are generally around £200 per sqm along Hamlet Court Road and £250 per sqm along the limited frontage on London Road.

Leigh District Centre

A8.29 Leigh District Centre is located to the southwest of Southend-on-Sea City Council's administrative boundary, approximately 4km west of Southend city centre. The centre is approximately linear in form, centred along Broadway which runs west-east, with a length of c.700m. The centre also comprises secondary streets, including Leigh Road, Broadway West, parts of Elm Road and Rectory Grove.

Mix of uses

A8.30 The centre features 293 retail and service units (excluding office and leisure & community uses), and the mix of uses is set out in Table 5, which is compared with the authority area and UK averages. There were 13 vacant units within the centre at the time of the survey, equating to a shop vacancy rate of 4.4%, which is significantly lower than the UK and City averages, indicating a very strong demand for units within the centre, and/or that the available units meet retailer demands, with regards to size and quality. The District Centre has a very strong provision of restaurants and cafes. The proportion of bars and pubs within the centre is higher than the authority area average but lower than the UK average. The proportion of fast food and takeaway units is significantly lower than UK and City averages.

Table 5 Mix of retail and service uses – Leigh District Centre

Type	Number of units	% units	% units City average	% units UK average
Convenience	18	6.1%	9.9%	10.1%
Comparison	98	33.4%	29.1%	27.8%
Financial & Business Services	36	12.3%	9.7%	7.9%
Bars & Pubs	12	4.1%	3.0%	5.3%
Fast Food & Takeaways	6	2.0%	6.3%	6.5%
Restaurants/Cafes	65	22.2%	16.2%	11.4%
Non-retail services	45	15.4%	17.4%	16.4%
Vacant	13	4.4%	8.4%	14.7%
Total	**293**	**100.0%**	**100.0%**	**100.0%**

Source: Southend-on-Sea City Council Land Use Survey 2025

Accessibility

A8.31 There are three bus stops along Broadway within the centre, and a further stop on Rectory Grove (albeit the centre extends along Leigh Road and Elm Road), providing many services throughout the authority area, including several buses that alight at Leigh-on-Sea Railway Station, the 3 bus route to Chelmsford, the 17 to Southend-on-Sea, and the 21 to Canvey Island.

A8.32 Leigh-on-Sea Railway Station is located approx. 1km southwest of the District Centre and Chalkwell Railway Station is located approx. 900m southeast. Both stations provide C2C services towards Southend Central and Shoeburyness beyond to the east, and London Fenchurch Street to the west.

A8.33 There is on-street car parking within the centre, including along the length of Broadway and Leigh Road. North Street and Elm Road provide Council-run off-street parking close to the centre, with 34 spaces at North Street and 90 spaces at Elm Road. Many visitors to the centre make use of on-street parking in nearby residential streets which can lead to congestion at times.

Environmental Quality

A8.34 Leigh District Centre is a generally high-quality environment. Well-maintained historic buildings are observed throughout, contributing to the quality of the streetscape and character of the area. There is evidence of recent investment and refurbishment to historic buildings on the east side of Broadway, including The Grand and the former car wash site, which provide commercial ground floor uses with residential accommodation above. Throughout the centre, building facades are well-maintained and carry architectural merit. Shop frontages are generally well-presented and contribute towards the overall quality of the centre and its streetscape. There are a number of restaurants and cafes within the centre with outdoor seating, which form a positive contribution towards the environmental quality and ambience of the area.

A8.35 Secondary streets and alleys, particularly in the western side of the centre provide further pedestrian access routes through the centre. There are also retail units located within these alleys, which are well-maintained and form an interesting and relatively unique addition to the character and provision of the centre.

A8.36 Traffic through the centre is at a medium-high level. Pedestrian pavements are sufficiently wide and there are a number of defined and legible crossing points within the centre, benefitting pedestrian flow and accessibility. There are several pedestrian routes throughout the centre.

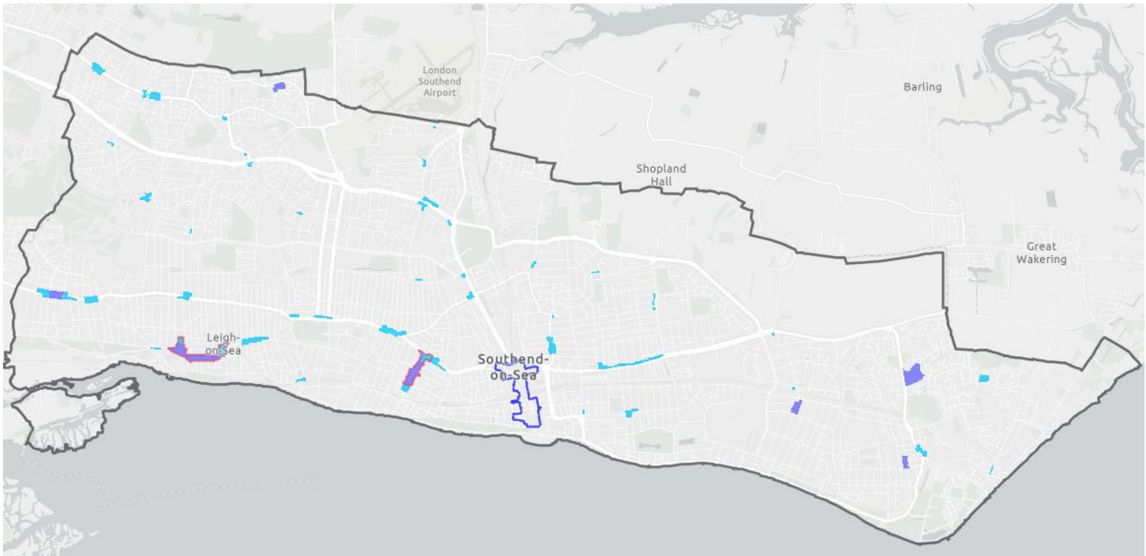
A8.37 There is limited soft landscaping and planting within the centre, although there are some mature trees on the eastern side of Broadway. Whilst the environmental quality of the centre is generally high, it would benefit from further planting or soft landscaping. There is also a lack of green spaces within the centre itself, although Leigh Library Gardens, Leigh Cliffs East and the Belton Hills Reserve are all located within walking distance.

Rental Levels

A8.38 Valuation Office Agency (VOA) data indicates that rental values in Leigh are generally around £275-400 per sqm along Broadway and £300 per sqm along the limited frontage on London Road.

NEIGHBOURHOOD CENTRES

A8.39 There are seven Neighbourhood Centres in Southend, as defined by the Retail Hierarchy set out in Policy Table DM6.4a of the Southend-on-Sea Regulation 18 Draft Local Plan. An audit of the Neighbourhood Centres has been undertaken which excludes upper floors, residential and office uses from the totals, and classifies development sites and stores undergoing alterations as vacant for the purpose of the mix of uses.



A8.40 The analysis includes a Local Needs Index (LNI), based on retail and service facilities that can be found within each local Centre, as show in Table NC1.

Rayleigh Road

A8.41 Rayleigh Road Neighbourhood Centre is located in the northwest of Southend-on-Sea City Council's administrative boundary, within the Eastwood neighbourhood, and spans a length of c. 300m along the A1015/ Rayleigh Road. The centre mostly comprises retail units and services, with the exception of some residential development along the southern side of Rayleigh Road.

A8.42 There are two bus stops within the centre, serving a number of routes with links to Leigh-on-Sea, Basildon, Southend and Shoeburyness, and through to Rayleigh to the west. There is sufficient on-street parking along Rayleigh Road, with regards to the size of the centre, and some off-street provision in a council run car park at Rayleigh Road, providing 55 spaces.

A8.43 In general, the Neighbourhood Centre does not have a high environmental quality. Unit frontages are of mixed architectural design, dated, and poorly maintained. Some units are separated by access roads, creating a relatively disconnected streetscape. There is also a lack of soft landscaping within the centre. However, there is evidence of recent investment, with a newly-built apartment block located on the south side of Rayleigh Road.

A8.44 Rayleigh Road Neighbourhood Centre comprises 33 retail and service units. These are broken down as follows:

- Convenience: 1
- Comparison: 6
- Financial/professional services: 6
- Bars/Pubs: 1
- Fast food takeaways: 5
- Restaurants/cafes: 2
- Other non-retail services: 6

A8.45 There were 6 vacant units within the centre at the time of surveying, resulting in a shop vacancy rate of 18.2%

A8.46 Valuation Office Agency (VOA) data indicated that rental values within the centre are c. £260 per sqm.

Sutton Road South

A8.47 Sutton Road South Neighbourhood Centre is located in the south of Southend-on-Sea City Council's administrative boundary, within the Southend Central neighbourhood, approximately 500m northwest of Southend city centre. The centre is approximately linear in form, located in the southern end of Sutton Road with a length of c. 250m. The centre's retail frontages are located mainly along Sutton Road and the centre does not include any secondary streets. The centre mostly comprises retail and service units, with the exception of some residential dwellings at its southern end and industrial units in the northwest.

A8.48 There are two bus stops located approximately centrally within the centre's boundary, serving the 29 and 60 bus routes and providing connections to Southend city centre, Southchurch and Canewdon. There is on-street parking available throughout the centre, but some parking on pedestrian pavements is also observed. Southend Victoria Railway Station is located within walking distance of the centre.

A8.49 Overall, the Neighbourhood Centre has a poor environmental quality. Retail units and building facades tend to be generally poorly maintained, with non-uniform signage and frontages contributing negatively to the character of the area. There is a lack of soft landscaping within the centre and pavements are not well-maintained in places. Pedestrian routes through the centre are limited to Sutton Road and there are limited crossing opportunities along the road. Sutton Road has a relatively high level of traffic flow, which further detracts from the environmental quality of the centre.

A8.50 Sutton Road South Neighbourhood Centre comprises 33 retail and service units. These are broken down as follows:

- Convenience: 7
- Comparison: 5
- Financial/professional services: 1
- Bars/Pubs: 1
- Fast food takeaways: 6
- Restaurants/cafes: 4
- Other non-retail services: 5

A8.51 There were 4 vacant units within the centre at the time of surveying, resulting in a shop vacancy rate of 12.1%

A8.52 Valuation Office Agency (VOA) data indicated that rental values within the centre are c. £230-265 per sqm.

The Broadway

A8.53 The Broadway Neighbourhood Centre is located in the southeast of Southend-on-Sea City Council's administrative boundary, within the Thorpe Bay neighbourhood. The centre is approximately linear in form, located in the northern end of The Broadway (bounded by Acacia Drive to the north and Fermoy Road to the south) with a length of c. 200m. The centre's retail frontages are located solely along Sutton Road and the centre does not include any secondary streets. The centre mostly comprises retail and service units, with the exception of residential development at its northwestern corner.

A8.54 Thorpe Bay Railway Station is located adjacent to northern end of the centre. The station serves C2C services between Shoeburyness and London Fenchurch Street. There are no bus stops within the centre, however, there are two bus stops on Acacia Drive just north of the centre. These stops serve bus routes to North Shoebury, Rayleigh and Southend-on-Sea (2 and 7). There is on-street parking available along The Broadway, as well as off-street parking adjacent to the shopping parade at the northeast end of the centre.

A8.55 Overall, the Neighbourhood Centre is relatively well-maintained and exhibits a good environmental quality. Retail unit frontages are well-maintained, and the building façades on the western side of The Broadway are historic in character and possess a degree of architectural merit.

A8.56 Pavements throughout the centre are wide and well-maintained. Some restaurants/cafes have outdoor seating which positively impacts the general ambience of the centre, and this is further helped by a low-medium traffic flow along The Broadway. With the exception of one mature tree and some planting associated with retail units, there is a lack of soft landscaping and greenery in the centre.

A8.57 Sutton Road South Neighbourhood Centre comprises 37 retail and service units. These are broken down as follows:

- Convenience: 7
- Comparison: 6
- Financial/professional services: 6
- Bars/Pubs: 1
- Fast food takeaways: 1
- Restaurants/cafes: 6
- Other non-retail services: 9

A8.58 There was only 1 vacant unit within the centre at the time of surveying, resulting in a shop vacancy rate of 2.7%

A8.59 Valuation Office Agency (VOA) data indicated that rental values within the centre are c. £360 per sqm.

West Road Shoebury

A8.60 West Road (Shoeburyness) Neighbourhood Centre is located in the southeast of Southend-on-Sea City Council's administrative boundary, within the Shoeburyness neighbourhood. The centre is linear in form, located centrally along West Road (bounded by Avon Road to the north and St. Andrews Road to the south) with a length of c. 150m. The centre's retail frontages are located along West Road with a small shopping parade on Avon Way. The centre mostly comprises retail and service units, with the exception of some residential dwellings at its southern end.

A8.61 There are no bus stops within the centre. The nearest bus stops are located on Campfield Road, approx. 200m east of the centre, and serve bus route 9 to Shoeburyness and Rayleigh. There is on-street parking available along West Road and off-street parking adjacent to Avon Way.

A8.62 Overall, the Neighbourhood Centre has a relatively poor environmental quality. Whilst the centre is clean and there is evidence of maintenance efforts, unit frontages are dated and building facades are generally unattractive and poorly maintained. The centre would benefit from refurbishment and investment.

A8.63 Pavements throughout the centre are generally well-maintained, albeit paving is not uniform. There is some planting within the centre, although this is limited to small scale planters with greenery. The centre would benefit from the introduction of further soft landscaping. West Road has a low level of traffic, which benefits the general environmental quality.

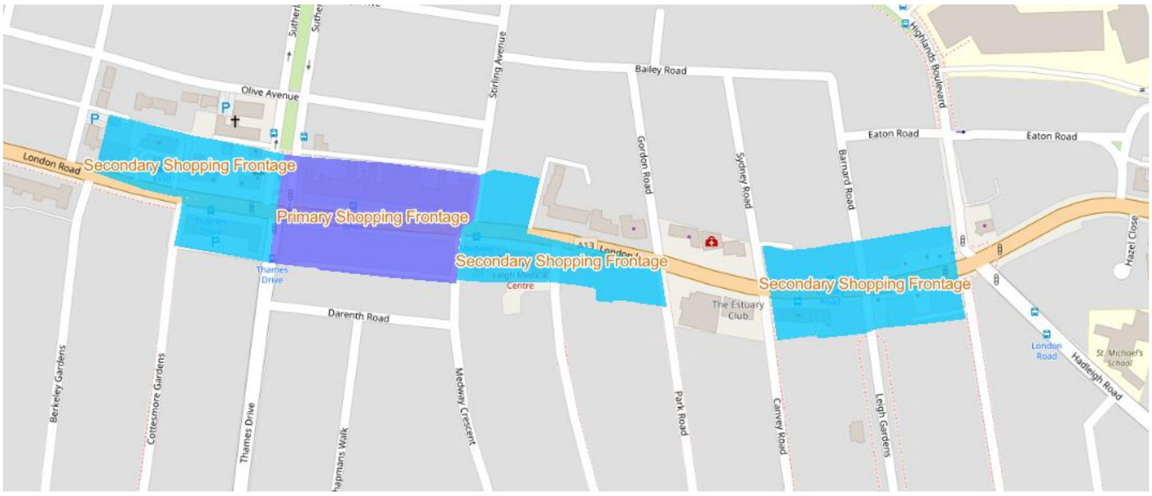
A8.64 West Road (Shoeburyness) Neighbourhood Centre comprises 31 retail and service units. These are broken down as follows:

- Convenience: 4
- Comparison: 11
- Financial/professional services: 0
- Bars/Pubs: 0
- Fast food takeaways: 4
- Restaurants/cafes: 3
- Other non-retail services: 7

A8.65 There were 2 vacant units within the centre at the time of surveying, resulting in a shop vacancy rate of 6.5%

A8.66 Valuation Office Agency (VOA) data indicated that rental values within the centre are c. £155 per sqm.

London Road (Thames Drive/Hadleigh Road)



A8.67 London Road (Thames Drive/Hadleigh Road) Neighbourhood Centre is located in the southwest of Southend-on-Sea City Council's administrative boundary, within the Leigh neighbourhood. The centre comprises two separate shopping parades located along London Road, defined by Thames Drive to the west and Hadleigh Road to the east. The centre's retail frontages are located solely along London Road. The centre mostly comprises mostly retail and service units, with the exception of some residential dwellings and industrial units in the central part of the centre.

A8.68 There are three bus stops within the centre, located in its western and eastern ends. The bus stops serve routes to Basildon, Rayleigh and Southend (1, 27, 28). There is ample on-street parking provided along London Road, although there is a lack of off-street parking.

A8.69 Overall, the Neighbourhood Centre has a relatively good environmental quality. The centre is generally clean and well-maintained. Some unit frontages are dated and building facades are not of high-quality, particularly within the eastern shopping parade (adjacent to Hadleigh Road). Shop frontages in the western end are better-maintained and the historic building facades above contribute positively to the streetscape and the centre's character.

A8.70 Planting and soft landscaping in the centre is concentrated within its western side, where trees line London Road, and planters have been installed, positively impacting the general environmental quality. Whilst there are trees and planters in the eastern end of the centre, these are more sporadically spread, and this side would benefit from further planting.

A8.71 Pavements across the centre are wide and well-maintained, with outdoor seating available in front of some cafes/restaurants. However, the general ambience and quality of the centre is negatively impacted by the relatively high level of traffic along London Road, which spans three lanes in places. Secondary pedestrian routes are not present within the centre and pedestrian flow is therefore directed along London Road.

A8.72 Pavements throughout the centre are generally well-maintained, albeit paving is not uniform. There is some planting within the centre, although this is limited to small planters with insignificant greenery. The centre would benefit from the introduction of further planting and soft landscaping. West Road has a low level of traffic flow, which benefits the general environmental quality.

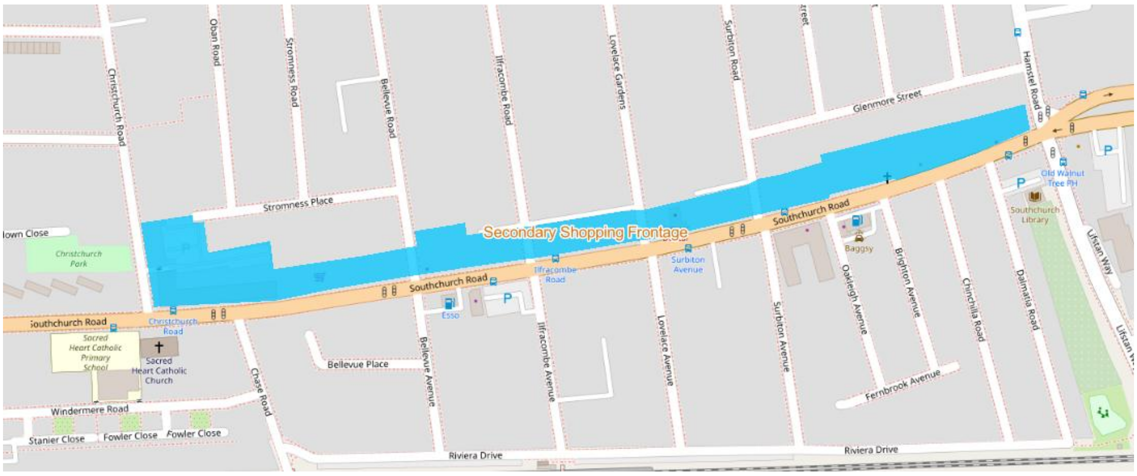
A8.73 London Road (Thames Drive/Hadleigh Road) Neighbourhood Centre comprises 98 retail and service units. These are broken down as follows:

- Convenience: 10
- Comparison: 29
- Financial/professional services: 12
- Bars/Pubs: 2
- Fast food takeaways: 5
- Restaurants/cafes: 6
- Other non-retail services: 17

A8.74 There were 6 vacant units within the centre at the time of surveying, resulting in a shop vacancy rate of 6.1%

A8.75 Valuation Office Agency (VOA) data indicated that rental values within the centre are c. £155 per sqm.

Southchurch Road



A8.76 Southchurch Neighbourhood Centre is located in the south/southeast of Southend-on-Sea City Council's administrative boundary, within the Southchurch neighbourhood. The centre comprises a linear shopping parade along Southchurch Road with a length of approx. 800m. The centre's retail offering is situated along the northern side of Southchurch Road, and the centre comprises almost exclusively retail and service uses with the exception of some residential dwellings in its eastern end. The high proportion of comparison units within the centre indicates that it is a popular comparison shopping location.

A8.77 There are six bus stops spread along the centre. The bus stops serve routes to Southend and North Shoebury (routes 2 and 14). Southend East Railway Station is located approx. 150m south of the centre (at its nearest point) and provides C2C services to Shoeburyness and London Fenchurch Street. On-street car parking is available along Southchurch Road, although there is a lack of off-street parking.

A8.78 Overall, the Neighbourhood Centre has a relatively good environmental quality and unit frontages are generally well-maintained. Building facades of varied characters are observed along Southchurch Road, contributing to a non-uniform streetscape, especially where modern residential development adjoins older, two-storey buildings. However, recent development does imply investment and refurbishment within the centre.

A8.79 Planting and soft landscaping in the centre is scarce, except for several street trees in the western end. The centre would significantly benefit from the introduction of soft landscaping and planting throughout. There are also limited areas for public seating or gathering, although outdoor seating areas associated with food/beverage units are present within the centre.

A8.80 Pavements throughout the centre are generally well-maintained, albeit relatively narrow. There is a lack of alternative pedestrian routes across the centre and pedestrian flow is therefore directed along Southchurch Road, which has a medium-high level of traffic flow, thereby negatively impacting the general accessibility and character of the centre.

A8.81 Southchurch Neighbourhood Centre comprises 75 retail and service units. These are broken down as follows:

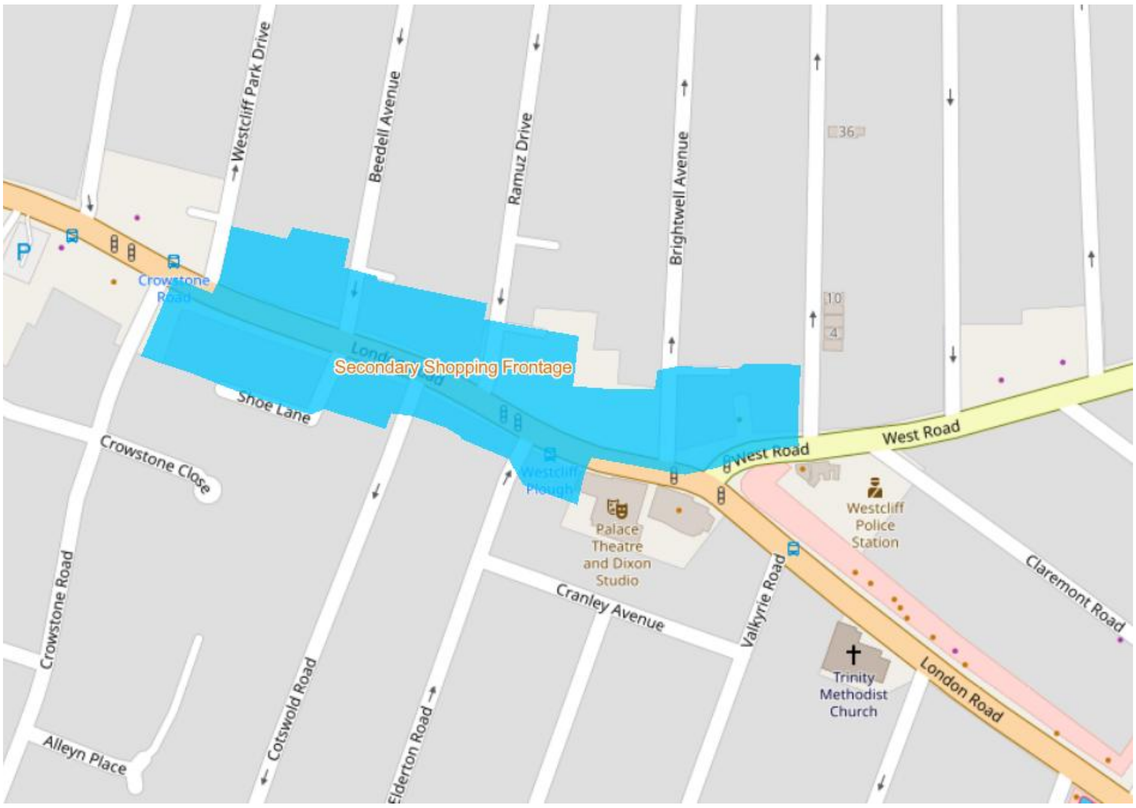
- Convenience: 8

- Comparison: 27
- Financial/professional services: 8
- Bars/Pubs: 2
- Fast food takeaways: 5
- Restaurants/cafes: 6
- Other non-retail services: 17

A8.82 There were 2 vacant units within the centre at the time of surveying, resulting in a shop vacancy rate of 2.7%

A8.83 Valuation Office Agency (VOA) data indicated that rental values within the centre vary between £190-280 per sqm.

London Road (West Road)



A8.84 London Road (West Road) Neighbourhood Centre is located in the south/southwest of Southend-on-Sea City Council's administrative boundary, within the Westcliff neighbourhood and approximately 350m northwest of Westcliff District Centre. The centre is approximately linear in shape, situated along London Road in its western part, and West Road in its eastern part. The centre is approx. 500m in length and comprises mostly retail and service units.

A8.85 There are two bus stops within the centre, serving routes to Southend, Rayleigh, Basildon and Canvey (bus routes 1, 27, 28). On-street car parking is available along London Road and there is also a limited number of spaces on West Road. There is no off-street parking within the centre.

A8.86 The Neighbourhood Centre shows a varied environmental quality. While certain retail frontages, particularly along West Road and the eastern section of London Road, are well maintained, others show signs of poor upkeep, with dated building façades detracting from the overall appearance of the centre. Overall, the centre would benefit from maintenance and refurbishment. A mix of building characters throughout the centre contributes to a disconnected streetscape, further exacerbated by poorly maintained building facades.

A8.87 There is a notable lack of planting and soft landscaping within the centre, with the exception of sporadic planters installed in front of retail units. The centre would significantly benefit from the introduction of soft landscaping and planting throughout. There is a lack of areas for public seating or gathering.

A8.88 Pavements throughout the centre are generally well-maintained and wide. There is a lack of alternative pedestrian routes across the centre and pedestrian flow is therefore directed along London Road, which has a high level of traffic flow, thereby negatively impacting the general accessibility and character of the centre.

A8.89 Southchurch Neighbourhood Centre comprises 50 retail and service units. These are broken down as follows:

- Convenience: 5
- Comparison: 12
- Financial/professional services: 7
- Bars/Pubs: 0
- Fast food takeaways: 6
- Restaurants/cafes: 7
- Other non-retail services: 9

A8.90 There were 4 vacant units within the centre at the time of surveying, resulting in a shop vacancy rate of 9.0%.

A8.91 Valuation Office Agency (VOA) data indicated that rental values within the centre vary between £170-200 per sqm.

Table NC1 Local Needs Index

	Rayleigh Road	Sutton Road South	The Broadway	West Road (Shoebury)	London Road (Thames Drive/Hadl	Southchurc h Road	London Road (West Road)
Food/Convenience							
Banks							
Post Office							
Newsagent							
Off Licence							
Chemist							
Restaurant/ café/ takeaway							
Public house							
Bookmakers							
Launderette/Dry Cleaners							
Hairdresser/Beauty Salon							
Florist							
Estate agents							
Doctor’s surgery							
Community hall							
Library							
Total LNI score (out of 16)	**7**	**5**	**10**	**6**	**10**	**7**	**7**

Source: Southend-on-Sea City Council Land Use Survey 2025

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