



Basildon Retail and Commercial Leisure Capacity Study 2021 Update

Addendum Report

On behalf of **Basildon Council**

Basildon Council
BASILDON • BILLERICAY • WICKFORD

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1 Introduction

- 1.1.1 Stantec UK Ltd (Stantec) has been commissioned by Basildon Council (the Council) to update the retail and commercial leisure evidence base for the submission draft Local Plan 2014-2034.
- 1.1.2 The Local Plan was submitted in draft to the Planning Inspectorate in March 2019 however the Examination in Public however has been on hold since June 2019¹. In the intervening period, new evidence base documents have been added to the examination library including documents which may affect the retail strategy for the borough.
- 1.1.3 This report provides a partial update of the Council's retail and leisure evidence to ensure consistency with other evidence base documents within the updated examination library.
- 1.1.4 The existing retail and leisure evidence base for the submitted draft Local Plan comprises the 2015 Retail, Commercial Leisure and Town Centres Study (the 2015 Study) prepared by Peter Brett Associates (now Stantec) and the 2017 South Essex Retail Study (the 2017 Study) which included Basildon as one of five participating local authorities.
- 1.1.5 Since those studies were completed the Council has prepared the Basildon Town Centre Regeneration Strategy, approved in September 2020, and comprising part of the draft Local Plan's evidence base.
- 1.1.6 Our terms of reference for this Report are set out below:
 - Review the national and local planning policy context as it relates to planning for town centres and retail and consider the implications of changes to the planning system introduced in 2020 for town centres generally. This report will supersede the policy review contained in the 2015 and 2017 Studies.
 - Review the current retail and leisure context as it relates to Basildon's network of centres. This Section will identify broader structural changes in the economy such as the growing popularity of online shopping and consider the medium and long-term implications for town centres generally and Basildon's designated centres. This review will supersede the consideration of retail trends contained in the 2015 and 2017 Studies.
 - Update the quantitative retail and commercial leisure capacity forecasts contained in the 2017 Study taking account of the latest local population projections, empirical retail forecasts provided by Experian, forecast retail floorspace losses in designated centres and past delivery of retail floorspace in designated centres. The capacity figures in this report will supersede those in the 2017 Study.
 - Update the recommendations of both the 2015 and 2017 Studies including retail and commercial leisure floorspace capacity and the spatial distribution of retail floorspace taking account of current housing allocations and regeneration objectives for Basildon town centre. The recommendations in this report will supersede those in the 2015 and 2017 Studies.
- 1.1.7 Responding to these terms of reference, the report is structured as follows
 - Section 2 sets out the planning policy context, summarises the findings of the 2015 and 2017 Studies and identifies changes to the planning system
 - Section 3 identifies key trends in the retail and leisure sector and updates to data inputs
 - Section 4 presents the results of our assessment of quantitative need for additional convenience (food) and comparison (non-food) retail floorspace and commercial leisure floorspace

¹ The Council received a Direction from the Minister for the Environment in June 2019 requiring the Council to improve air quality.

- Section 5 considers if Basildon's housing growth strategy generates need for additional retail or leisure floorspace in specific locations
- Section 6 sets out our recommendations on how to distribute any additional retail and leisure floorspace over the plan period having regard to Basildon's housing growth strategy and regeneration objectives.

2 Planning context

2.1.1 This Section identifies changes to retail planning policy at the national and local level since the 2017 Study, summarises the existing retail evidence base for Basildon and considers the implications of recent changes to the planning system on town centres.

2.2 National Planning Policy Framework

2.2.1 The National Planning Policy Framework (NPPF) was first published on 27 March 2012 and the latest revision was published in July 2021. The NPPF sets out the Government's planning policies for England and must be taken into account in preparing the development plan. The main changes between the 2019 and 2021 versions relate to the areas of Design and Environmental Protection. No significant amendments were made in relation to town centres, employment and retail matters.

Plan making

2.2.2 Chapter 3 of the NPPF (July 2021) state that the planning system should be genuinely planned. Succinct and up-to-date plans should provide a positive vision for the future of each area; a framework for addressing housing needs and other economic, social and environmental priorities; and a platform for local people to shape their surroundings. Plans should:

- be prepared with the objective of contributing to the achievement of sustainable development
- be prepared positively, in a way that is aspirational but deliverable
- be shaped by early, proportionate and effective engagement between plan-makers and communities, local organisations, businesses, infrastructure providers and operators and statutory consultees
- contain policies that are clearly written and unambiguous, so it is evident how a decision maker should react to development proposals
- be accessible through the use of digital tools to assist public involvement and policy presentation
- serve a clear purpose, avoiding unnecessary duplication of policies that apply to a particular area (including policies in the NPPF, where relevant).

2.2.3 Chapter 3 of the NPPF (July 2021) states that the preparation and review of all policies should be underpinned by relevant and up-to-date evidence. The evidence should be adequate and proportionate, focused tightly on supporting and justifying the policies concerned and take into account relevant market signals.

2.2.4 Chapter 3 of the NPPF (July 2021) states that policies in local plans and spatial development strategies should be reviewed to assess whether they need updating at least once every five years and should then be updated as necessary. Reviews should be completed no later than five years from the adoption date of a plan and should take into account changing circumstances affecting the area, or any relevant changes in national policy.

Building a strong, competitive economy

2.2.5 Chapter 6 of the NPPF (July 2021) state that planning policies and decisions should help create the conditions in which businesses can invest, expand and adapt. Significant weight should be placed on the need to support economic growth and productivity, taking into account both local business needs and wider opportunities for development. The approach taken should allow each area to build on its strengths, counter any weaknesses and address the challenges of the future. This is particularly important where Britain can be a global leader in driving innovation and in areas with high levels of productivity, which should be able to capitalise on their performance and potential.

2.2.6 Planning policies should:

- set out a clear economic vision and strategy which positively and proactively encourages sustainable economic growth, having regard to local policies for economic development and regeneration
- set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period
- seek to address potential barriers to investment
- be flexible enough to accommodate needs not anticipated in the plan, allow for new and flexible working practices and to enable a rapid response to changes in economic circumstances.

2.2.7 The new Annual Monitoring Reports (AMRs) for 2019/20 and 2020/21 highlight an overall net gain of 18,577 sq.m employment floorspace in the borough during 2019/20 and an overall net gain of 2,711 sq.m employment floorspace in the borough. This gain was predominantly in B8 Storage and Distribution and, in 2020/21, flexible employment uses.

Ensuring the vitality of town centres

2.2.8 Chapter 6 of the NPPF (July 2021) sets out that planning policies and decisions should support the role that town centres play at the heart of local communities, by taking a positive approach to their growth, management and adaptation. 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 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
- 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
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones
- 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
- 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
- recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.

2.2.9 Chapter 7 of the NPPF (July 2021) states that local planning authorities should apply a sequential test to planning applications for main town centre uses which are neither in an existing centre nor in accordance with an up-to-date plan. Main town centre uses should be located 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.

2.2.10 Chapter 7 of the NPPF (July 2021) states that when considering edge-of-centre and out-of-centre proposals, preference should be given to accessible sites which 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.

- 2.2.11 Chapter 7 of the NPPF (July 2021) states that when assessing applications for retail and leisure development outside town centres, which are not in accordance with an up-to-date plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500 sqm of gross floorspace). This should include assessment of:
- the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal
 - the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and the wider retail catchment (as applicable to the scale and nature of the scheme).
- 2.2.12 Chapter 7 of the NPPF (July 2021) states that where an application fails to satisfy the sequential test or is likely to have significant adverse impact on one or more of the considerations in paragraph 89, it should be refused.

2.3 Planning Practice Guidance

- 2.3.1 The Planning Practice Guidance ('PPG') provides guidance on planning for retail and other town centre uses. The original PPG was first online on 3 March 2014. The PPG on 'Town Centres and Retail', which was last updated in July 2019, provides guidance on:
- planning for town centre vitality and viability
 - permitted development and change of use in town centres
 - assessing proposals for out-of-centre development.

2.4 Local policy context

- 2.4.1 The adopted local plan consists of Basildon District Local Plan Saved Policies approved by the Secretary of State in 2007. These had been originally part of the Basildon District Local Plan, adopted in March 1998 with Alterations in September 1999. Policies BAS SH1 to BAS SH9 are relevant to retail and regeneration policy and strategy for the borough. For information these are replicated in Appendix A to this report.
- 2.4.2 The Saved Policies were reviewed against the NPPF published in July 2018 to assess the level of compliance that those Saved Policies have with the NPPF, and provides advice on the level of weight that should be afforded to each policy when the local planning authority determines planning applications. For ease of reference, we have copied these comments on weighting under each of the relevant policies in Appendix A. We note that the same exercise appears not to have been undertaken in the February 2019 revisions of the NPPF.
- 2.4.3 The emerging local plan is the Basildon Borough Local Plan 2014-2034, currently in its Revised Publication version. It was submitted to the Planning Inspectorate on 28 March 2019 for examination, following a period of public consultation from 1 November 2018 until 17 December 2018.
- 2.4.4 The emerging plan contains the following policies related to retail and town centre development (these policies are replicated in full in Appendix A):
- Policy R1: Retail and Commercial Leisure Strategy
 - Policy R2: Basildon Town Centre Regeneration
 - Policy R3: Laindon Town Centre Regeneration
 - Policy R4: Pitsea Town Centre Regeneration
 - Policy R5: Wickford Town Centre Regeneration
 - Policy R6: Billericay Town Centre Enhancement

- Policy R7: Town Centre Boundaries
- Policy R8: Primary Shopping Frontages
- Policy R9: Secondary Shopping Frontages
- Policy R10: Local Centres
- Policy R11: Out of Centre Retail Areas
- Policy R12: Festival Leisure Park and Surroundings
- Policy R13: Locations for Hotel/Visitor Accommodation
- Policy R14: Locations for Town Centre Uses
- Policy R15: Existing Local Shops
- Policy R16: Hot Food Takeaways
- Policy R17: Betting Offices

Basildon Town Centre Regeneration Strategy (September 2020)

- 2.4.5 The Basildon Town Centre Regeneration Strategy was approved by the Council's Town Centre Revival Committee at a meeting on 9 September 2020. The purpose of the document is to provide strategic guidance to landowners and investors.
- 2.4.6 The Strategy sets out the Council's aspirations for growth within the town centre according to eight Guiding Principles:
- A framework for growth
 - Expand the role of the town centre
 - Encourage high quality development and regeneration
 - Improve connectivity
 - Create new green links and spaces
 - Create welcoming new town centre arrival points
 - Establish a diverse and inclusive destination
 - Promote a sustainable approach
- 2.4.7 The Strategy identifies five 'focus areas', shown in the extract below, along with details on the strategic aspirations for each in terms of land use, massing, connectivity and public realm. Specific targets are also ascribed to different land uses. The areas are described briefly in the sections below, along with the targets relating to retail and leisure floorspaces, where relevant.

Figure 2.1 Basildon's five focus areas



Source: Basildon Town Centre Masterplan

- 2.4.8 The St Martin's Quarter & Westgate Area is in the western quarter of the town centre and considers opportunities to: expand the theatre; relocate council offices to make way for redevelopment; provide employment and residential development with consolidated carparking to allow for active uses at ground floor; community uses on the southern sites. The proposals contain a target mixed use floorspace (comprising 'leisure/culture/community' uses) of 4,200sqm in St Martin's Square.
- 2.4.9 Town Square and East Square is a central area within the town centre and considers opportunities to: provide retail focussed town centre uses, predominantly in existing buildings, with potential for residential development above most sites; mixed use community and leisure facilities; consolidated car parking on the north-east corner of the area. The proposals contain a target of 39,000 sqm of additional retail floorspace throughout the focus area and 1,928 sqm of mixed use floorspace (comprising 'leisure/culture/community' uses).
- 2.4.10 The Station Environs area explores the opportunity to emphasise the point of arrival to the town centre through Basildon train station. Surrounding buildings, mostly already existing, follow retail focused town centre uses – up to 25,400 sqm – with residential development above, and other buildings dedicated to employment, education, and a consolidated car parking building. The south west corner of the site, adjacent to the station, would be dominated by medium density residential development.
- 2.4.11 The Eastgate Area comprises the south-east corner of the town centre, and explores the opportunity for car parking and town centre (retail-focussed) buildings with residential development above, as well as some standalone residential buildings in the south-east corner of the site. Retail development is suggested to accommodate up to 25,400 sqm of floorspace.
- 2.4.12 The Great Oaks area comprises the north-east part of the town centre. The Strategy explores the opportunity to provide mostly residential developments, especially along the northern boundary of the town centre, and car parking buildings with residential development above.

New Basildon Regeneration Strategy

2.4.13 The Regeneration of Basildon Town Centre remains a priority for the Council and, following the May 2021 Local Elections, the new administration opted to review the 2020 Regeneration Strategy. This is to ensure that any new strategy meets residents' aspirations, needs and ambitions for the town centre. While it will not be a planning policy document, the Regeneration Strategy will help to ensure that the right plans and regeneration activities are brought forward. An Early Engagement Strategy was undertaken in July 2021 to ask local people what they would like to see in their town centre. 2,948 people participated in the survey. The results concluded that local people would like to create a new look and feel whilst enhancing the appearance of the town centre, with high quality developments and green spaces. It was also noted that Brooke House should remain the dominant feature within the town scape, and that all new developments are supported by the relevant infrastructure.

2.4.14 The new strategy will provide a platform to enable the town centre to grow and live up to its economic potential where people want to work, live and invest both now and in the future. It has 7 key aims:

Aim 1. Developing prosperity in the Town Centre. A successful local economy needs a successful Basildon town centre at its heart. Therefore, the Council has set an ambitious vision for the longer-term aspirations for the town centre. This includes the creation of a multi-functioning town centre and to encourage flexibility and diversity in the range of land uses. This will help to broaden the range of uses and things to do in the town centre.

Aim 2. Enhancing the Appearance of the Town Centre. This will promote higher design standards and raising the overall quality of our architectural culture.

Aim 3. A Public Space Network for a Mixed-Use Town Centre. The Council aspires to create public realm which is a visual, as well as a practical, asset for the town centre. This will look to create new, inclusive, well-signed and coherent pedestrian routes.

Aim 4. Inclusive Mixed Use Urban Living. A key focus of the Strategy is to contribute to the vision and social well-being of the town centre by promoting a mix of town-centre uses including retail, leisure, culture, community, and workspace uses, to encourage an active and vibrant town centre. There is a need to deliver place-changing development and infrastructure.

Aim 5. Urban Culture and Placemaking. The design of new spaces and buildings will take their soundings from the context enhancing the local character and heritage whilst simultaneously responding to current-day needs.

Aim 6. A Clean and Green Town Centre. A key aim of this strategy is for the town centre to be enabled to address climate change. To achieve this the identity of the town centre should be strengthened by focusing on a healthy green and pedestrian friendly street-scape, i.e. turning Basildon 'from grey to green'.

Aim 7. Social and Economic Infrastructure and Partnership Working. Town Centres are facing seismic challenges and in order to succeed they need to be resilient. To help achieve this, public sector partners need to unite and work together to provide 'fit for purpose' public sector services to support the local community.

2.5 Existing retail evidence base

2.5.1 This section presents a summary of the key findings on retail and leisure floorspace needs contained in the previous 2015 and 2017 Studies.

Basildon Retail, Commercial Leisure and Town Centres Study (2015)

- 2.5.2 Basildon Council commissioned the Basildon Retail, Commercial Leisure and Town Centres Study (2015) (the '2015 Study') to understand the retail and commercial leisure needs of the Council over the course of its local plan period to 2035, and to form part of the local plan's evidence base. The study served as an update of previous borough-wide evidence base studies such as the Basildon District Retail Capacity Study 2007 and the Leisure, Arts, Culture and Tourism Study 2010.
- 2.5.3 The 2015 Study summarised the performance of the existing retail network, using Health Check indicators that captured the vitality and viability of the network. These were summarised along lines of the town centres hierarchy, beginning with Basildon town centre as the highest-order centre in the borough, designated as a regional town centre, and then the town centres of Billericay, Laindon, Pitsea, and Wickford. The Study did not address the 39 local centres in the borough on an individual basis, but did consider the network of out-of-centre retail and leisure floorspace, and the surrounding network of regional centres in other boroughs.
- 2.5.4 Detailed retail and commercial leisure capacity figures for the borough are presented in Volume 2 of the 2015 Study (Appendices E, H). This assessment of quantitative need is summarised in the table below from the 2015 Study.

Table 2.1 2015 Study quantitative retail needs

	2016	2021	2026	2031	2035
Comparison goods					
Net (sqm)	3,540	14,592	32,660	53,669	72,162
Gross (sqm)	5,057	20,845	46,656	76,670	103,088
Convenience goods					
Net (sqm)	3,891	4,349	4,990	5,522	5,899
Gross (sqm)	5,986	6,691	7,676	8,496	9,076

Source: Table 8.1, Basildon Retail, Commercial Leisure and Town Centres Study (2015), PBA

- 2.5.5 Additionally, the 2015 Study recommended the following qualitative needs in the borough:
- Additional food store floorspace in Basildon, Billericay and Laindon town centres
 - Scope for considerable qualitative enhancement of the A3 and A4 offer in Basildon town centre, and to a lesser extent Pitsea and Wickford
 - A need for additional cinema facilities, potentially alongside A3 and A4 provision in Basildon town centre
 - A de-emphasis on the out-of-centre Festival Leisure Park, as a way of rebalancing entertainment facility floorspace elsewhere, particularly Basildon town centre.
- 2.5.6 The 2015 Study made a number of strategic recommendations, including:
- Directing the majority of new retail development towards Basildon town centre
 - Potentially allocating some comparison goods floorspace for out-of-centre bulky goods retail
 - Testing whether existing centres are able to accommodate significant residential growth in relevant part of the borough
 - Encouraging retail development and extensions that improve the quality of stock within the borough, provided they are of appropriate scale.

South Essex Retail Study (2017)

- 2.5.7 The South Essex Retail Study (the '2017 Study') was the result of a joint commission by five South Essex boroughs (Basildon, Castle Point, Rochford, Southend-on-Sea, Thurrock) to provide a common evidence base on retail and commercial leisure planning matters to 2037.

- 2.5.8 The 2017 Study undertook retail and leisure capacity assessment under two scenarios for all boroughs, baseline and housing-led, but focused on the housing-led scenario in its recommendations. It highlighted that both comparison, convenience retail, and cinema, needs are limited in the short to medium term due to the scale of permitted retail and leisure development, particularly at large-scale retail and leisure destinations such as Lakeside and Bluewater. Taking into account needs arising under impact sensitivity, capacity for both convenience and comparison net floorspace only begin to grow after 2031, reaching 153,226 sqm net and 12,342 sqm net, respectively, by 2037.
- 2.5.9 The retail capacity forecasts for Basildon under both scenarios are summarised in Tables 2.2 and 2.3.

Table 2.2 2017 Study quantitative retail needs for Basildon borough – Baseline scenario

	2021	2026	2031	2034	2037
Comparison (sqm net)	2,697	14,709	27,350	36,236	44,655
Convenience (sqm net)	766	1,808	3,158	4,068	4,759

Source: Table 7.3 & 7.4, South Essex Retail Study (2017), PBA

Table 2.3 2017 Study quantitative retail needs for Basildon borough – Housing-led scenario

	2021	2026	2031	2034	2037
Comparison (sqm net)	2,507	14,501	28,727	38,785	49,373
Convenience (sqm net)	685	1,742	3,631	4,900	6,223

Source: Table 7.5 & 7.6, South Essex Retail Study (2017), PBA

- 2.5.10 The 2017 Study also assessed leisure spending growth across the main categories of food and drink (referred to A3-5, reflecting the former Use Classes); cinemas and theatres; recreation and games of chance.

Table 2.4 2017 Study Basildon leisure expenditure growth 2016-37, by sector and scenario (£M)

Scenario	Food & drink	Cinema & theatre	Recreation	Games of chance
Baseline	£63.44	£3.82	£9.32	£14.07
Housing-led	£72.33	£4.36	£11.08	£15.94

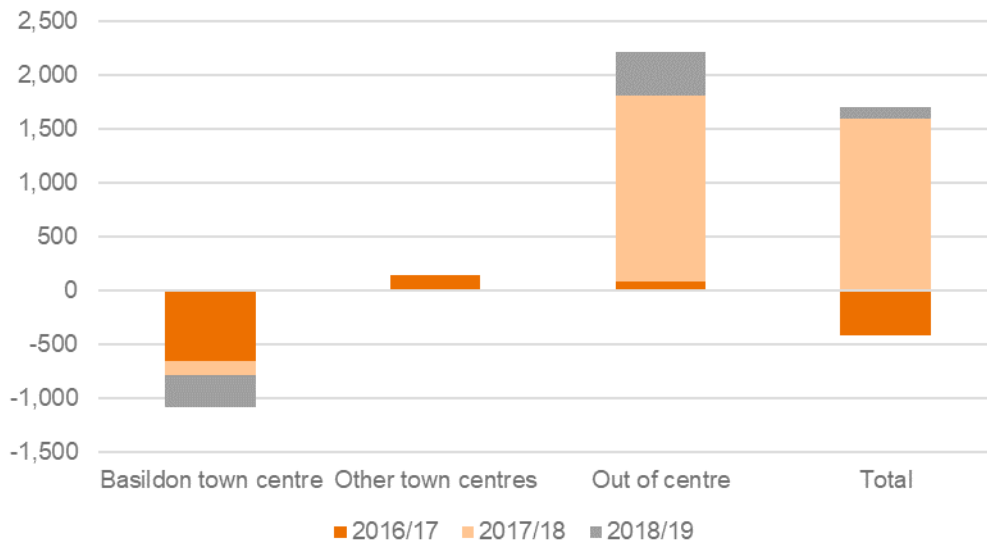
Source: Table 8.1, South Essex Retail Study (2017), PBA

- 2.5.11 The 2017 Study provided further detail in relation to cinema provision; however, because of the commitment for the redevelopment of Eastgate Shopping Centre to include a new 10 screen cinema, this did not result in any need over the period of the study to 2037.

Annual Monitoring Reports

- 2.5.12 The Council has monitored former A Class floorspace change across the borough in the last three published Annual Monitoring Reports (AMR). These show that in overall terms, there has been a modest net increase in former A Class floorspace of 1,285 sqm (gross) across the borough (2016/17 – decrease of 419 sq.m. 2017/18 – increase of 1,596 sq.m, 2018/19 – increase of 108 sq.m). However, this overall increase masks a reduction in floorspace in Basildon town centre of 1,087 sqm. Instead, growth has been focused outside the borough's town centres, with limited changes in the smaller centres.

Figure 2.2 Net floorspace change in the borough (2016/7-2018/19) (sqm gross)



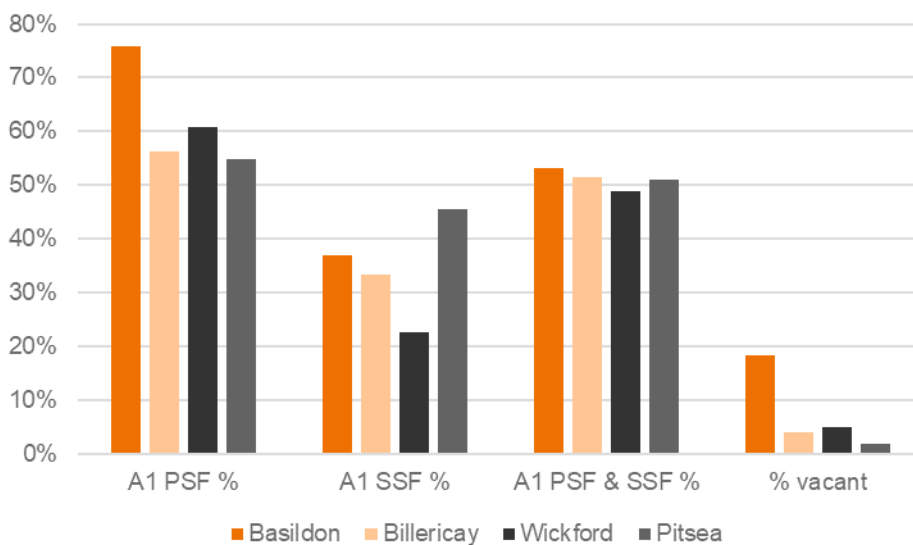
Source: AMR data

2.5.13 The 2019/20 and 2020/21 AMRs are due to be published in October 2021. The 2019/20 AMR shows a small net loss of 34 sqm of retail floorspace and the 2020/21 AMR shows a net loss of 163 sqm of retail floorspace in the borough. Again, this is not indicative of any particular trend towards or away from retail uses.

2.5.14 Only limited conclusions can be drawn from this data because it consolidates the former A Use Classes into an overall group. Therefore, it does not show whether there has been any shift away or towards retail uses over this period.

2.5.15 Additionally, while there is a baseline of frontage data provided from 2015 and summarised in the chart below in terms of how the main town centres are split into the old A and D Class uses, together with sui generis uses and vacancies, this has not been updated in subsequent years.

Figure 2.3 Town centre floorspace analysis (2015)



Source: AMR data

2.6 Changes to the planning system

Use Class Order

- 2.6.1 The Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020 introduce significant changes to the use class system set out in the Town and Country Planning (Use Classes) Order 1987 (as amended) ('the Use Classes Order').
- 2.6.2 In August 2020, a legal challenge was brought against three Government statutory instruments of which one changed the Use Classes Order markedly. However, on 17 November 2020, the Divisional Court dismissed the judicial review claim.
- 2.6.3 A summary of the changes to the main town centre uses (as defined by the NPPF) is provided in Table 2.5.

Table 2.5 Use Classes Order changes to main town centre uses

Main town centre uses		Use Class Pre-Sept 2020	Use Class Post-Sept 2020
Retail development	Shops	A1	E(a)
	Warehouse clubs	Sui Generis	Sui Generis
	Factory outlet centres	A1	E(a)
Leisure, entertainment and more intensive sport and recreation uses	Cinemas	D2(a)	Sui Generis
	Restaurants	A3	E(b)
	Drive-through restaurants	Not formally classified	
	Bars and pubs	A4	Sui Generis
	Nightclubs	Sui Generis	Sui Generis
	Casinos	Sui Generis	Sui Generis
	Health and fitness centres	D2	E(d)
	Indoor bowling centres	D2	E(d)
	Bingo halls	D2(c)	Sui Generis
Offices	Offices	B1a	E(g)
Arts, culture and tourism development	Theatres	Sui Generis	Sui Generis
	Museums	D1(e)	F1(c)
	Galleries	D1(e)	F1(c)
	Concert halls	D2(b)	Sui Generis
	Hotels	C1	C1
	Conference facilities	D2	F1(e)

- 2.6.4 The subsuming of A1, A3, D2 and B1a uses into new Use Class E has the greatest potential to impact on town centres. These changes mean that because they now form a single use class and therefore changes between them do not constitute development, planning permission will no longer be required to for a change use between existing retail, professional services, restaurants/cafes, offices (including research and development facilities and light industrial uses), clinics, health centres, creches, day nurseries, day centres, gyms, and most indoor recreation facilities unless restricted by planning conditions.
- 2.6.5 These changes mean that monitoring of town centre frontages and the use of planning conditions to control changes within Use Class E will both play an important role in monitoring and managing the impacts on town centres.

Permitted development changes

- 2.6.6 Following consultation, the Government has now confirmed further permitted development right changes which have been in part prompted by the introduction of Use Class E.

- 2.6.7 Under the previous permitted development right regime, change of use from office and retail to residential is allowed, subject to prior approval and in the case of residential up to a threshold of 150 sqm. However, the latest change mean that the right has been expanded across the whole of Class E, and as with the previous office to residential conversion permitted development right, there is no threshold attached.
- 2.6.8 The Town and Country Planning (General Permitted Development etc.) (England) (Amendment) Order 2021 introduces a new Permitted Development Right (PDR) under Class MA, which enables a Class E unit to be changed to residential uses. This has additional safeguards and conditions attached to protect existing businesses and prevent 'gaming' of the system when compared to the previous Class M Office to Residential right. The new PDR came into force on 1 August 2021, and applies to buildings which have been vacant for at least 3 continuous months immediately prior to the date of the application for prior approval. This requirement was introduced to protect existing businesses in any premises. The PDR does not apply to buildings with a cumulative floor space of more than 1,500 sq.m. Buildings above this threshold will require a planning application to change their use. In addition, the PDR only applies to buildings which were in Class E use on 1 September 2020, (or prior to 1 September 2020 any of the predecessor use classes A1, A2, A3, B1, D1(a), D1(b) or D2(e)) for a continuous period of at least 2 years prior to the date of the prior approval application.

3 Economic trends and data inputs

3.1 Published research

3.1.1 In recent years there have been numerous studies published addressing the changing market trends of town centres. We briefly summarise some of the key messages of relevant documents in this section, and in particular note the recent economic impact of COVID-19 on town centres.

Digital High Street

3.1.2 The Digital High Street 2020 Report (2015) was published on behalf of Digital High Street Advisory Board in order to promote the revitalisation of high streets in the context of growing digitisation.

3.1.3 The report made four principal recommendations, summarised as follows:

- Raising infrastructure and connectivity standards, with some specific provisions around universal fixed connectivity, access to fixed broadband speeds, high speed mobile data coverage with 4G, and public access WiFi
- Promoting Basic Digital Skills within communities, on the level of individuals, SMEs and VCSEs
- Establish a High Street Digital Lab platform for the aggregation of generally available technologies, digital applications, tools, methods and training programmes
- Adopt the High Street Digital Health Index concept to assess the competitiveness of high streets, understand the economic value creation from digital developments, and inspire positive change in local government and enterprise.

The Grimsey Review 2 (2018)

3.1.4 The former managing director of two retailers, Bill Grimsey, had produced his first Grimsey Review following the Portas Review (2011), a UK Government-commissioned, independent report into the future of UK high streets by Mary Portas. The report made a total of 31 wide-ranging recommendations, including encouraging more people to live in town centres, appointing a High Streets Minister, and freezing car parking charges for a year.

3.1.5 The Grimsey Review 2 was published in July 2018, prompted by the recent high-profile collapse of retailers and some food and drink operators. Grimsey asserted that town centres needed to reimagine their own reason for being – based on unique experiences – rather than try to compete with out-of-centre shopping destinations that are more convenient.

3.1.6 Grimsey set out 25 recommendations to tackle the problems identified under the headings 'Create a more supportive environment', 'Government and planning', and 'Smarter use of technology', with some key recommendations summarised below:

- Review and replace the current business rates system
- Creation of a digital commission to develop a 20-year strategy for local high streets
- Appointment of high-quality designers to celebrate the local identity of town centres
- Amend the planning use class system to allow for greater flexibility
- Nominal maximum charge for parking
- Improved public realm and free wi-fi.

Review of High Street Footfall (June 2020)

- 3.1.7 The Review of High Street Footfall (the 'Review') was prepared for the High Streets Task Force. The report examined research provided by Springboard, based on footfall data from 154 locations in England, and looked at the immediate impact of COVID-19 and the prospects for high street recovery, using mobile phone location and other data in four case-study locations (Manchester, Ashford, Cleethorpes and Windsor).
- 3.1.8 The Review draws conclusions on the implications of the general trend of falling footfall in town centres for the traditional planning classification of towns (i.e. hierarchies). It concludes many authorities – over a quarter of those studied – are setting overly-optimistic retail aspirations that reflect a centre's 'status', but do not align practically with land uses sustained by a lower, but more realistic level of footfall.
- 3.1.9 The Review found that even prior to the COVID-19 lockdowns, footfall was falling, with all the major trading periods apart from Black Friday seeing less footfall than the year previously. Bigger cities are those that have suffered the most from falling footfall, with district and neighbourhood centres experiencing a fall to lesser extent, but perhaps predicating a 'rediscovery' of smaller local centres that serve specific catchments with essential retail.
- 3.1.10 The impact of lockdowns has been profound and has accelerated many of the trends already affecting high streets, however multifunctional towns and holiday towns have fared slightly better than comparison towns and speciality towns. This drew on an analysis of the four case study locations which were deemed to each represent a different category of town. The Review concluded that Windsor, a speciality town, and Cleethorpes, a holiday town, are recovering the fastest, while Ashford, a multifunctional town, and Manchester, a comparison city, are recovering the slowest. However, the Review reminds us of the ongoing challenges of the lockdowns, and concludes that the continued impact will be determined by future government policy and advice decisions, and people's own evolving perceptions of the risk of visiting town centres.

Grimsey Review COVID-19 Supplement Report: Build Back Better (June 2020)

- 3.1.11 Build Back Better is a supplement to the second Grimsey Review (2018) that confronts the impacts of COVID-19 lockdowns on high streets and town centres, and offers recommendations for the recovery of these in the era following COVID-19. The 27 far-reaching recommendations fall under the sub-headings of: Transferring power to communities; Leadership; Taxation; Post-retail planning; Property; Planning; and Transport. Some key recommendations are summarised as follows:
- Devolve power and responsibility for decision making around the future of high streets to communities and local government, using participatory planning, particularly with young people, and programmes to promote ownership and investment
 - De-regulate the use class system to allow local authorities to foster changes in town centres that will attract new residents, workers, and visitors to them
 - Re-visit the Digital High Street 2020 report and ensure its recommendations, particularly the need to eliminate the current gap in digital skills, are met
 - Establish rewards or tax breaks that support locally grown produce
 - Establish a special commission for re-skilling retail workers made redundant from retail and hospitality positions
 - Enact dramatic design changes within town centres to pedestrianise streets, de-emphasise travel by car, and create more public open space
 - Replace business tax with a straightforward 2% sales tax in order to level the playing field between online and offline retailers.

3.2 Market and economic trends

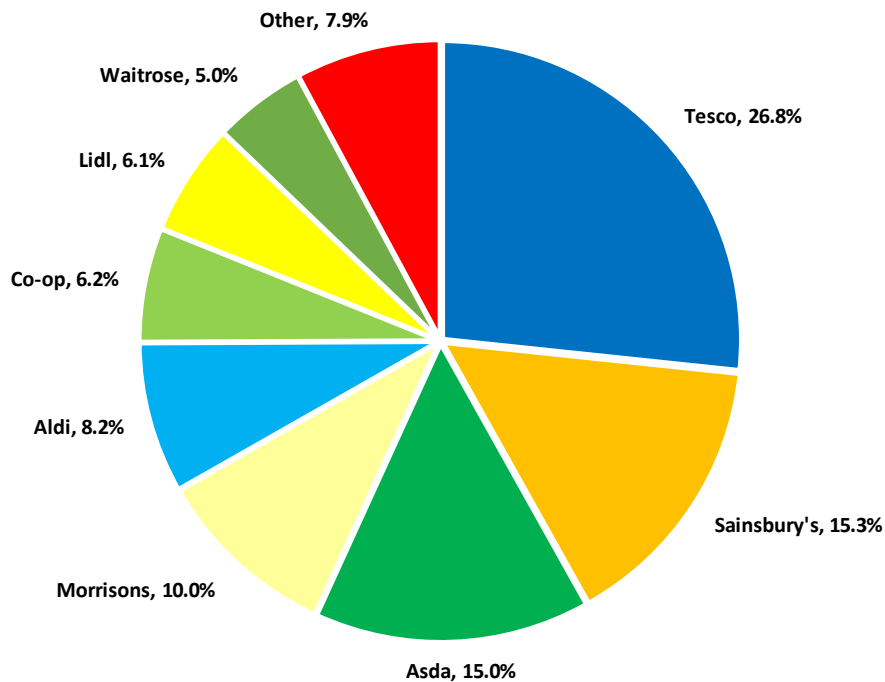
- 3.2.1 Market economic trends since the global financial crisis of 2009 have been the result of a significant restructuring of the retail and commercial leisure market. This period has been characterised by growth in online sales and the out-of-centre warehousing and logistics operations associated with this, and the decline of retail floorspace in high streets and town centres, which continue to be blighted by ever growing levels of store closures and rates of vacancies.
- 3.2.2 Retail sales overall have generally grown in this period, however as recently as 2019, this growth has been sluggish, growing by only three per cent in 2019, the lowest growth in retail sales since 2014. Overall sales have been subject to a faster growing proportion of retail transactions via Special Forms of Trading (SFT), especially online sales, at the expense of bricks and mortar retail.
- 3.2.3 More recent market trends in the retail sector have been dominated by the repercussions of the response to COVID-19. These were put in starkest relief in early April when retail sales dropped by double digits as non-essential retail units were required to closed at the beginning of the first national lockdown. Initial peaks (or troughs) that occurred as a result of the initial shock of the first lockdown softened as lockdown restrictions began to ease in most parts of the UK from June, which has seen the economy return to growth.
- 3.2.4 Blows to spending in both convenience and comparison sectors in this period have been cushioned by growth in online sales, which peaked at 33.4% of total spending in May (compared to 19.7% in August 2019).² This has been especially vital for comparison goods as the option to shop locally for essential convenience goods has remained feasible for most, and continues while large parts of the workforce continue to work from home.
- 3.2.5 The response to COVID-19 is ongoing and data is yet to be released for the period since partial lockdowns in parts of the UK from June, and another national lockdown from November, has introduced further uncertainty. The general consensus is that trends for the sector in train since the global financial crisis are being exacerbated by the pandemic. There will be an ongoing recovery but it is yet to be seen if this recovery will prove to be even handed across the sector, or if there is a permanent mark made on particular trends.

Convenience retail sector

- 3.2.6 The convenience retail sector, traditionally dominated by the Big Four grocery retailers (Asda, Morrisons, Tesco and Sainsbury's), have come under increasing pressure since the global financial crisis of 2009. This pressure has been principally in the form of expanding competition from the higher (Waitrose/M&S) and lower ends of this market, particularly the value/discount retailers (Lidl/Aldi). The rebalancing towards the lower end of the market has seen a decline in expenditure in recent years, exacerbated by low inflation.
- 3.2.7 Figure 3.1 shows the UK grocery market share, illustrating that while the 'Big Four' operators still account for two-thirds of the convenience retail market share, their dominance is being challenged by Aldi and Lidl in particular.

² Local Data Company; GB Retail and Leisure Market Analysis H1; November 2020

Figure 3.1 UK Grocery Market Share



Source: KANTAR (22 March 2020)

- 3.2.8 Within this sector there has been a move by the big convenience operators towards providing smaller format stores in town centres and district/neighbourhood shopping parades, catering towards more frequent 'top up' shopping, as the trend of bigger weekly shopping in out-of-town centres has declined. Both Sainsbury's and Tesco now have more convenience stores than large supermarkets and superstores and, along with Morrisons, these operators have withdrawn proposals from town centre redevelopment projects, and for new superstore developments, in recent years.
- 3.2.9 Big convenience operators are also adapting their stores to gain new advantages. Store formats at new Aldi and Lidl food stores are now providing more floorspace than previously, and the introduction of new facilities such as in-store bakeries. Aldi and Lidl have moved to diversify their offers to include more premium products, thereby appealing to new categories of customer. In contrast, the larger supermarkets are also incorporating concessions into their portfolio of their superstores. For example, Sainsbury's takeover of Argos in 2016 has now resulted in the introduction of Argos concessions into many of its larger stores.
- 3.2.10 At the onset of the first COVID-19 lockdown, food spending increased even as eating out reduced, on the back of bulk buying and a downturn in consumer confidence that shifted the balance from comparison goods to essentials. While convenience stores selling essentials were allowed to continue trading throughout this period, the volumes of sales were certainly aided by the ability of big convenience operators, and the likes of Ocado, to respond to the upswing in demand for online sales and delivery.
- 3.2.11 Over the coming months, it is expected that convenience spending will continue to perform relatively well as eating out remains subdued and significant numbers of households continue to work from home. Experian has upgraded its short-term outlook for convenience goods to reflect the boost to spending on food during lockdown and through lesser restrictions; however, these are expected to unwind over the medium/longer term, returning per head growth back down to 0.1% per annum.

Comparison retail sector

- 3.2.12 The comparison retail sector in the UK has been subject to modest growth in recent years, with a steadily increasing proportion of sales given to online retailing of comparison goods every year. Trading in-store has remained the dominant form of selling in each retail sector, except the non-store sector, which by definition, consist of online-only sellers.
- 3.2.13 Comparison retail units have become a smaller percentage of retail units every year since 2013, making up only 58.6% of all stores in shopping centres July 2019. The fate for comparison goods operators has been subject to a number of high-profile closures and restructurings of large comparison retail operators, for example: Toys R Us, Maplin, Dixons Carphone Warehouse, Beales, and Laura Ashley. The circumstances impacting each of the retailers are specific to each of them, however, the decline of companies, or their need to restructure, have generally been predicated by the themes of: loss of relevance, particularly of specialty retailers, and/or over-expansion in stores prior to the rise of online sales.
- 3.2.14 Department stores – particularly Debenhams, BHS, and House of Fraser – have been particularly hard hit, where, in response, there has been a shift in focus away from comparison goods retailers and towards leisure, food and beverage and experiences and events spaces. From 2013-19, department stores have seen a 23% decline in units within shopping centres, which is a higher rate of decline than on high streets.³ After 242 years, Debenhams ceased trading in May 2021. The closure of its stores, in particular, created a significant amount of vacant space on high streets and shopping centres. While many of these units around the UK still remain vacant, some of the premises have already been – or will be – repurposed for a wide range of uses, including go-kart tracks, health centres and student accommodation.
- 3.2.15 COVID-19 saw the prospects for comparison goods weakened as a result of greatly reduced consumer confidence, as a result of growing unemployment, and low wage growth. During the initial national lockdown, comparison goods trading saw a sharp decline in the face of rising expenditure on essentials. Online sales allowed some trading to continue as non-essential stores shut and, following easing of lockdown in most of the UK in June, there was further recovery still. In the midst of a second national lockdown in November, many comparison good stores have once again closed. The sector has been characterised by volatility, and that continues to be the outlook while the threat of further lockdowns exist, and any trading that does occur in-store is limited by social distancing and capacity limits.

Commercial leisure

- 3.2.16 Spending on commercial leisure is a strong indicator of the economic prospects. In order to spend on leisure, consumers have to be confident and their personal financial circumstances have to offer them disposable income for non-essential activities⁴. There has been significant growth in consumer spending on leisure, compared with spending overall, in the years since the global financial crisis. As noted above, the rise of leisure units has been at the expense of comparison retail units, and this trend is generally expected to accelerate in the future.
- 3.2.17 Table 3.1 shows average weekly household spending on leisure over the last 10 years. The average weekly household spend has increased across all the sub-categories, except for gambling. There has been a significant growth in spending on sports admission subscriptions and leisure class fees, largely led by a doubling of spending on subscriptions, which in turn reflects the growth in the discount gym market. There has also been a large increase (45.9%) in spending on restaurant and café meals since the start of the global financial crisis.

³ Local Data Company; A More Social Experience – Quantifying Trends in UK Shopping Centres; 2019

⁴ Deloitte; Passion for Leisure A view of the UK leisure consumer; 2016

Table 3.1 Average weekly household spending data 2009-2019

Spending category	2009 (£)	2014 (£)	2019 (£)	Percentage change
Cinema, theatre and museums etc.	2.30	2.80	3.40	47.8
Admissions to clubs, dances, disco and bingo	0.50	0.50	0.90	80.0
Restaurant and café meals	13.30	16.60	19.40	45.9
Takeaway meals and other snack food	8.00	8.80	11.00	37.5
Gambling payments	4.10	2.90	2.60	-36.6
Sports admission, subscriptions, leisure class fees and equipment hire	5.00	6.90	7.50	50.0

Source: ONS, Family Workbook Spending, March 2020

3.2.18 The nature of activities in the leisure sector have made it particularly vulnerable during lockdown. The impact of COVID-19 meant many leisure activities shut down, and only began to re-open, under limited circumstances in June, only to be shut down again in November. Following lockdown, there was some short-term relief in cafés/restaurants/pubs as a result of the Government's Eat out to Help Out scheme, in which it spent £500m on subsidies for meals throughout August. The effects of this on the sector as a whole have been marginal, however, and Experian expects the commercial leisure sector to contract more than any other kind of consumer spending in 2020 (-53.8% in spending on leisure per head compared to the year previous)⁵.

Commercial retail rents

3.2.19 Commercial retail rents have been falling across the UK to varying extents since the global financial crisis. The decline in retail rents has, however, been universal, even in typically robust settings like central London, which used to enjoy growth in the double digits, now with reductions of just over 5% in the year 2018-2019. Retail rents in Wales, by contrast, fell by nearly 13%.⁶

3.2.20 Another formerly robust part of the market, prime rents, fared especially badly in 2018-2019, in which prime retail rents for new deals fell by an average of 7% across the UK. This is the largest reduction in a single year since the global financial crisis which saw rents fall by 11% in the UK.

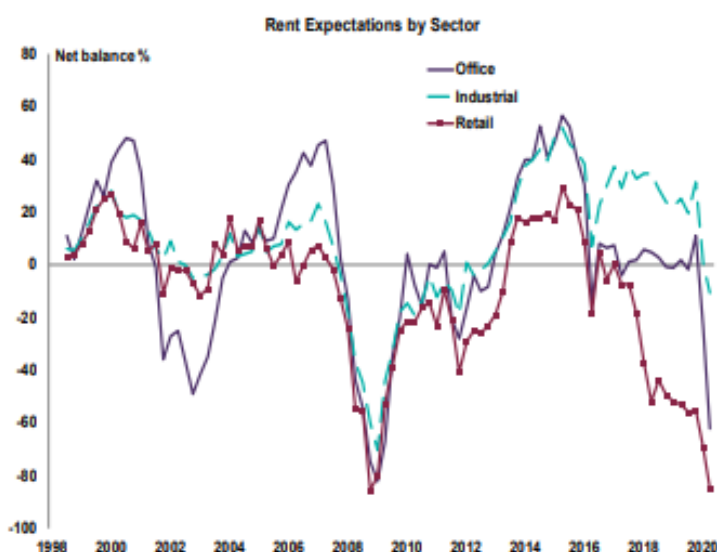
3.2.21 In the wake of COVID-19 lockdowns, it is unsurprising that the outlook for 2020 and beyond is poor. Following a UK Commercial Property Market Survey undertaken in Q2, 2020, RICS reported secondary retail rents are expected to fall by -14% while prime retail rents are seen posting declines of around -10% due to the pandemic.⁷ The same survey showed the expectation that retail is expected to perform poorly in comparison to office and industrial across every indicator, including rent expectations, in 2020, as shown in Figure 3.2 below.

⁵ Experian; Retail Planner Briefing Note 17; October 2020

⁶ Colliers Midsummer Retail Report 2019

⁷ RICS Q2 2020: UK Commercial Property Market Survey

Figure 3.2: Rent expectations by sector, 1998-2020



Source: RICS, Q2 2020 UK Commercial Property Market Survey

Store closures

3.2.22 There has been a trend in increasing net store closures that has been ongoing in the UK since 2013 and increasing in subsequent years. The net change in UK units in this period is shown in Table 3.2 below. Most recently, in 2019, it shows a net reduction of 9,169 retail units.

Table 3.2 Net change in UK retail units by year 2012-2019

Year	Store openings	Store closures	Net change
2012	43,392	47,678	-4,286
2013	49,496	47,456	2,040
2014	47,514	47,624	-110
2015	47,042	47,830	-788
2016	45,986	47,636	-1,650
2017	45,274	50,767	-5,493
2018	43,278	50,828	-7,550
2019	44,883	54,052	-9,169
2012-2019	366,865	393,871	-27,006

Source: Local Data Company, GB Retail and Leisure Market Analysis Full Year 2019

3.2.23 In just the first half of 2020 there was a net loss of 7,834 units, higher than for any full year between 2014 and 2018, demonstrating the severe impact the pandemic has already had on the sector. Comparison goods retail fared particularly poorly, with a net loss of 4,975 occupied units. Closures increased by 21% in the first half of 2020 when compared to the same period in 2019, with 31,139 shops closing permanently. Conversely, due to COVID-19 there has also been an increase in independent openings in essential categories such as grocers, and other non-essential services (particularly fast-food takeaways) that were able to stay open and take advantage of the increased demand during lockdown.⁸

Vacancy rates

3.2.24 Following a store closure, prolonged vacancy rates signal the inability of a shopping centre or high street to attract new tenants. On the back of increasing numbers of closures, and

⁸ Local Data Company; GB Retail and Leisure Market Analysis H1; November 2020

declining rents in response, vacancy rates have been growing in the UK since the beginning of 2019, after a few years of relative stability between 2015-2018.

- 3.2.25 We note that vacancy rates are varied according to location. The increase in vacancy rates has been felt across all retail location types – town centres, retail parks and shopping centres – however, the vacancy rate in retail parks (8.1 per cent) is lower than the high street and shopping centres (12.1 per cent and 14.4 per cent, respectively). This suggests tenants have greater confidence in retail parks generally.
- 3.2.26 COVID-19 has exacerbated the trend of rising vacancy rates in 2019 as low levels of confidence deepen. According to figures from Experian, the UK vacancy rate in July 2020 rose to 15% up from 14.2% in 2019, and well above the previous high in 2012 (14.4%). Basildon has not been insulated from these trends. The Cushman & Wakefield Basildon Town Centre Market Report (August 2021) commissioned by the Council, provides greater coverage of rising vacancy rates in a Basildon context.

Potential economic scenarios

- 3.2.27 The impacts of COVID-19 and Brexit feature in short, medium, and long-term economic scenarios as the key areas of uncertainty. The Hatch Regeneris 'Future Economic Opportunities and Challenges Study' (published May 2019) sets out two main future economic challenges which could impact Basildon, these being Brexit and increasing automation in logistics and manufacturing. In the Experian Retail Planner 18, the outlook across all scenarios point to recovery and growth but the pace of recovery will dictate the extent of scarring effects on the economy.
- 3.2.28 The short-term outlook will continue to be affected by successive regional and national lockdowns; low consumer confidence; growing unemployment (mitigated to an extent by the government furlough scheme); restrictions on most forms of social consumption and travel; a drop in demand for UK exports; and supply-side issues caused by closed UK manufacturers. Gradual reopening of parts of the economy has been the cause of some recent economic growth, but the prospects over the next few months will be dependent on the resurgence of positive COVID-19 cases, successive restrictions, the fate of the furlough scheme and other government support, and the confidence of consumers.
- 3.2.29 Experian assume that Government interventions in the interim will be sufficient to stop widespread job loss and insolvencies, in which case, the scarring would be regarded as mild. There are however risks to this, notably: a double dip recession that lasts through the winter; a disorderly transition to a no-deal Brexit; and the terms of any new UK-EU relationship and what that entails for recovery.
- 3.2.30 The long-term (central) scenario is less wedded to the impact of COVID-19 as recovery takes hold, although in an altered trajectory due to the inevitable scarring effects. The final terms of any UK-EU agreement add an additional layer of uncertainty and overall UK trade and foreign policy matters, including visa rules, agreeing new trade deals around the world, and whether or not the UK begins to seek a closer alignment with, or drifts further away from EU rules in future years. The long-term scenario will be driven by supply side factors such as the size of the population and the labour force, structural unemployment and productivity. The outlook is largely unaltered from the Experian Retail Planner 17, the assumption being that there are minimal long-term impacts on the economy's growth potential in the long-term central scenario.
- 3.2.31 Experian also offers up alternative scenarios in the long-term: an optimistic scenario, and two pessimistic scenarios based on (1) longer lasting pandemic impacts and a (2) disorderly no-deal Brexit transition. The optimistic scenario is based upon a highly effective vaccine coming into wide use and consumer and investor confidence bouncing back strongly as a result, spurring a swift recovery. The first pessimistic scenario would result from ongoing social distancing causing a subdued recovery, or voluntary social distancing even after restrictions have been lifted, out of cautiousness. The second pessimistic scenario would result from the same longer lasting pandemic backdrop as the previous scenario but layers on the additional shock of a disorderly no-deal Brexit, further undermining business and consumer confidence.

3.3 Basildon town centre trends

3.3.1 As part of the evidence base for the Regeneration Strategy, Cushman and Wakefield have carried out a property market review of the town centre (November 2019, therefore pre-dating the pandemic)⁹. The review considered the town centre's residential and commercial markets. While some of the finding on the property market have been superseded by events such as the pandemic and the changes to the Use Class Order, we highlight below a number of points which we consider remain relevant:

- The town centre has not been a growing office market for the past decade but vacancy rates of office stock have reduced, largely as a consequence of office to residential conversions which became permitted development in 2013.
- PROMIS data indicates that online retail spending in the area is slightly higher than the national average, denting the ability of the physical space within the town centre being able to capture spending.
- Retail occupier take up was 43% down in 2019 compared to the previous year and within the town centre itself only six transactions were recorded in the first half of 2019.
- The town centre is noted by PROMIS to be subject to 'an above average level of competition from out of town retail parks'. Cushman and Wakefield conclude that 'there is a lack of desire from high-quality tenants to move to the area, which when combined with an excess of available floorspace, creates an environment which is not conducive to the creation of a vibrant town centre which is able to attract more desirable tenants; effectively forming a self-fulfilling cycle that the town centre is struggling to break from'.

3.3.2 The Cushman & Wakefield Basildon Town Centre Market Report (August 2021) highlights some more recent trends, these being: the downturn in the vitality of Basildon town centre; a high vacancy rate of approximately 17%; the loss of key anchor stores including Debenhams, Marks & Spencer and Toys R Us; the likely loss of Next and H&M; the increase in planning applications for residential development within the town centre; the lack of leisure facilities within the town centre; the acceleration of online shopping during the pandemic; thriving local businesses during the pandemic; the struggling food & beverage sector; and the subdued office market in Basildon.

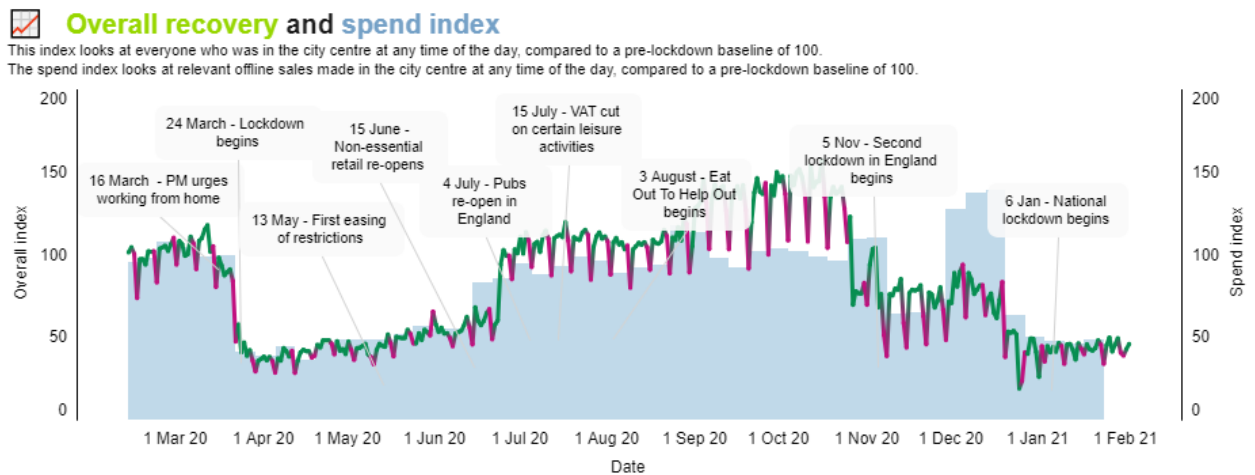
Trends during COVID-19

3.3.3 Centre for Cities provides data on high streets recovery in the context of COVID-19 lockdowns over time on a local authority basis¹⁰. Figure 3.3 shows numbers of people Basildon town centre between March 2020 and February 2021, compared with the pre-lockdown baseline (set at 100), set against key milestones in the pandemic's timeline.

⁹ Basildon Town Centre Masterplan Evidence Base Report: Property Market Review (November 2019)

¹⁰ <https://www.centreforcities.org/data/high-streets-recovery-tracker/>

Figure 3.3 Centre for Cities High Street Recovery Tracker, Basildon, March 2020-February 2021



Source: Centre for Cities High Street Recovery Tracker, accessed 10/3/2021

3.3.4 The data shows a significant reduction in footfall in Basildon in the months of the first national lockdown, and a return to approximately normal levels between July and September 2020, with an increase on normal levels through October prior to the second lockdown starting 5 November 2020. Levels reverted, at the start of the national lockdown on January 6, to levels similar in the first national lockdown.

3.3.5 The same Centre of Cities resource also provides data on numbers of people coming to Basildon over this period in terms of origin (where they have come from), numbers of workers, weekend and night-time data. Some key observations are summarised below:

- A greater proportion of people in Basildon town centre appear to be coming from outside the city, at the expense of city suburbs and the city centre, since the pandemic began
- The number of workers in Basildon did not return to pre-pandemic levels following the first national lockdown, despite a modest uplift in the summer. Numbers appear to be even lower in the early 2021 national lockdown, than in the first (April-June 2020)
- The data shows the weekend and night-time economy, specifically, in Basildon returned to pre-pandemic levels in the summer following first national lockdown, and in some instances exceeded pre-pandemic levels, before falling again.

3.3.6 The recent committee report¹¹ on the redevelopment of the Eastgate Centre reinforced this view, stating that:

‘There is a high vacancy rate of retail units within Basildon Town Centre, not helped by the current national pandemic and reduced footfall. Within the existing application site more than 50% of the units are vacant. Those existing retailers include Wetherspoons Public House (Moon on The Square), Lloyds Bank, Mallards Jewellers and Pawnbrokers, Specsavers, Greggs Bakers, Robins Pie & Mash shop, Lifestyle Mobility, St. Lukes Hospice, Cashmart, Adecco and Ladbrokes. Whilst some may be lost or relocate elsewhere in the town centre, some retailers have expressed an interest to the applicant in renewing leases in the new development. There will be a reduction in the amount of retail and commercial floor space in the new development.’

11

<http://www.basildonmeetings.info/documents/s118240/Enc.%20-%20for%20Planning%20Application%202000955FULL%20-%20Update.pdf>

3.4 Updates to data inputs

3.4.1 In this section we provide an overview of changes to key data inputs which inform the capacity update presented in Section 4. The following data inputs have been reviewed as part of our assessment:

- Population forecasts
- Per capita expenditure data
- Special forms of trading (such as online shopping)
- Sales density growth for existing retailers (also known as efficiency gain)
- Commitments to new retail floorspace
- Convenience trading performance assessment.

Population forecasts

- 3.4.2 This report updates both sets of quantitative capacity forecasts for both retail and leisure needs contained in the 2017 Study.
- 3.4.3 The baseline scenario in this report adopts the latest population forecasts produced by Experian in 2019. The 2017 Study adopted Experian's 2016 population forecasts. The housing-led scenario adopts the local population projections contained in the Strategic Housing Market Assessment (SHMA) (May 2016) and subsequent addendum (May 2017) prepared by Turley. Table 3.1 compares forecast population growth used in the baseline and housing-led scenario's in the 2017 Study and this update. Table 3.1 shows that while the latest Experian population figures are closer to the SHMA, the SHMA still produces the greatest level of population growth.

Table 3.3 Basildon population growth 2018-2037

	Baseline	Housing-led
2017 Study	20,893	30,358
2021 Update	26,558	As above

3.4.4 We note that since the SHMA was undertaken, the Government introduced the standard method for calculating housing need. This is something that the Council have considered as part of the draft Local Plan and note that it is broadly in alignment with the level of housing growth set out in the SHMA. For the purpose of this update, and noting the PPG's requirement that such evidence base should be carried out in a proportionate manner, because the two sets of figures are broadly similar, we have however continued to work with the SHMA data which has been provided to us on a zonal basis rather than simply at the local authority level.

Expenditure growth

- 3.4.5 While the 2017 Study adopted a base year of 2016, the base year for this update has been adjusted to 2018 to take account of the latest per capita expenditure data provided by Experian.
- 3.4.6 The total comparison and convenience expenditure growth expected to come forward over the current study period is summarised for both scenarios in Table 3.2. This includes a deduction (adjusted for sales in stores) made for special forms of trading (SFT) which is derived from the October 2020 Experian Retail Planner Briefing Note 18 (ERPBN). Across the study period, the housing-led scenario has an additional £37.77m of comparison and £8.80m convenience expenditure growth over the baseline scenario.

Table 3.4 Basildon comparison and convenience expenditure growth 2018-2037 (exc. SFT) (£M)

	Baseline	Housing-led
Comparison	£516.70	£554.47
Convenience	£63.35	£72.15

- 3.4.7 In the comparison sector, the proportion of SFT is forecast to continue steadily increase from 22.4% in 2018 to 37.8% in 2037. Comparison SFT forecasts have been revised upwards significantly since the 2017 Study was completed.
- 3.4.8 In the convenience sector, the proportion of SFT is also forecast to continue steadily increase from 12.8% in 2018 to 24.1% in 2037. Convenience SFT forecasts have been revised upwards significantly since the 2017 Study was completed.
- 3.4.9 In common with the 2017 Study, there will be far greater growth in comparison spending in both scenarios due to the fact that convenience expenditure growth is forecast by Experian to be negative in the short term (-4.8% in 2021) and very low annual average growth is forecast for the long term (0.3% from 2028-2040). Whereas in the comparison sector, Experian forecast a short term annual average growth rate of 2.9% (2021) and a long-term growth rate of 2.1% (2028-2040).

Commitments to new retail floorspace

- 3.4.10 This capacity update is based on a on a household survey undertaken by NEMS Market Research in July 2016 as part of the 2017 Study. To provide an accurate indication of the surplus expenditure available to support additional retail floorspace it is necessary to deduct the turnover of commitments from the total available expenditure. Commitments include retail developments which have been granted planning permission but not trading at the time the survey was undertaken.
- 3.4.11 The 2017 Study did not identify any comparison or convenience commitments in Basildon. This capacity update makes an allowance for one major retail commitment which provides a mix of convenience and comparison floorspace. The Council granted planning permission in 2019 for the redevelopment of the Gilbarco site which lies immediately adjacent to Pipp's Hill Retail Park including a new food store and four flexible A1/A3 units (LPA ref. 19/00948/FULL). The estimated convenience turnover is £13.89m and comparison turnover is £10.26m (Table E, Appendix B).

4 Retail and leisure capacity forecasts

4.1 Introduction

- 4.1.1 This section presents the retail and leisure capacity updates for Basildon District detailed in Appendix B, which sets out all the information referred to below, together with full details of relevant data sources. An overview of the method is set out in Appendix C.
- 4.1.2 Capacity forecasts should, in line with the PPG, be subject to regular review throughout the plan period to ensure an up-to-date evidence base which is based on accurate economic and market trends. We advise that longer-term quantitative forecasts set out in this assessment (post-2026) should be treated as indicative.

4.2 Retail goods need

- 4.2.1 The table below sets out comparison needs over the plan period. There is limited variance between the two scenarios with quantitative needs only emerging after five years (by 2026) and overall need of c. 30,000 sqm net by the end of the plan period.

Table 4.1 Cumulative comparison goods need summary (sqm net)

	2021	2026	2031	2034
Baseline	-7,692	9,090	22,154	30,388
Housing-led	-7,910	7,737	21,851	31,208

- 4.2.2 In convenience terms, again, the levels of emerging need are similar across both scenarios, with no short-term need but in the order of 4,700-800sqm emerging over the plan period.

Table 4.2 Cumulative convenience goods need summary (sqm net)

	2021	2026	2031	2034
Baseline	76	2,078	3,712	4,683
Housing-led	-177	1,522	3,544	4,864

4.3 Leisure spending growth

- 4.3.1 The table below summarises spending growth over the plan period within Basildon across the main leisure sectors. This highlights the short-term impact of the pandemic on leisure spending, with a large decline in all sectors between 2018 and 2021; however, in overall terms, the long-term change remains broadly in keeping with the findings of the 2017 Study.

Table 4.3 Leisure expenditure growth by sector (£M)

Baseline scenario	2018	2021	2026	2031	2034	2018-34
Food & drink	£255.84	£200.87	£269.36	£297.74	£312.17	£56.33
Cinema & theatre	£12.70	£9.88	£13.25	£14.65	£15.35	£2.65
Recreation	£27.45	£21.35	£28.63	£31.64	£33.17	£5.72
Games of chance	£52.91	£41.18	£55.22	£61.05	£64.01	£11.10
Housing-led scenario		2021	2026	2031	2034	2018-34
Food & drink	£253.63	£206.70	£277.01	£308.99	£327.08	£73.45
Cinema & theatre	£13.21	£10.20	£13.57	£15.17	£16.04	£2.82
Recreation	£28.35	£22.12	£29.42	£32.89	£34.77	£6.42
Games of chance	£54.46	£42.06	£55.93	£62.52	£66.10	£11.64

- 4.3.2 The redevelopment of the Eastgate Centre is now underway; this will absorb much of forecast spending growth in the cinema sector.
- 4.3.3 We note that due to the COVID-19 lockdown restrictions, some typically in-person leisure activities, such as yoga / exercise classes, and some live events, have been adapted to an online format. It may be the case that, due to the efficiencies of this format for instructors and/or participants, this may continue to an extent, and could impact on future leisure expenditure figures.

4.4 Comparison against the 2017 Study

- 4.4.1 The table below summarises, for both the scenarios, the updated findings against the previous evidence base.

Table 4.4 Summary of 2017 Study and 2021 Update retail needs (sqm net)

		2021	2026	2031	2034
Comparison					
Baseline	2017 Study	2,697	14,709	27,350	36,236
	2021 Update	-7,692	9,090	22,154	30,388
Housing-led	2017 Study	2,507	14,501	28,727	38,785
	2021 Update	-7,910	7,737	21,851	31,208
Convenience					
Baseline	2017 Study	766	1,808	3,158	4,068
	2021 Update	76	2,078	3,712	4,683
Housing-led	2017 Study	685	1,742	3,631	4,900
	2021 Update	-177	1,522	3,544	4,864

- 4.4.2 This represents a reduction in comparison need from the 2017 Study which, in the period to 2034, indicated between 36,200 sqm and 38,800 sqm. This is unsurprising given the impact the pandemic has had on physical comparison retail spending; this is exemplified by the current forecasts only indicating positive need after 2026 once the short-term impacts on spending patterns have played out.
- 4.4.3 For convenience need, unlike comparison goods needs, the updated forecasts indicate slightly higher need than the 2017 Study. For both scenarios, this reflects the slightly increased levels of per capita spending; this has been bolstered by the pandemic where convenience retailers have benefited from increased levels of spending on food. The baseline scenario is now more closely aligned to the housing-led scenario; this reflects that while the population forecasts which underpin the housing-led scenario are the same as those underpinning the 2017 Study, the baseline scenario which is linked to the latest ONS data, indicates higher levels of growth.

5 How should retail and leisure needs be met?

5.1 Introduction

- 5.1.1 This section considers how retail and leisure needs should be met in several ways. Firstly, we revisit the analysis undertaken in the 2015 Study on planned strategic housing growth.
- 5.1.2 Secondly, taking the findings in the previous section as our starting point, we then consider what the regeneration strategy for Basildon town centre means in qualitative terms. We do not revisit the qualitative findings set out in the 2015 Study in relation to the other centre in the borough as that is outside the scope of this addendum.
- 5.1.3 Finally, we look at the overall distribution of floorspace, as identified in the preceding section, across the borough.

5.2 Strategic housing growth

- 5.2.1 The publication Local Plan includes a number of key strategic housing sites. Reflecting the progress made in developing the plan, these sites represent significant refinement of the 29 strategic sites considered in the 2015 Study.
- 5.2.2 We use the same approach here to consider how the identified retail growth could be apportioned across the main areas of growth as that used in the 2015 Study. Therefore, as previously, the estimates of need are not in addition to the global figures identified in the preceding section.
- 5.2.3 The updated assessment is based on the following inputs:
- Average household size based on ONS average UK household size (2019)
 - Average per capita expenditure estimates for comparison and convenience goods are derived from Experian Retail Planner MMG3 for the Zones 1-4 of the study area
 - Expenditure forecasting based on ERPBN have been applied to project forward available expenditure to 2034
 - An allowance for SFT, derived from ERPBN, has been made and deducted at source
 - Sales densities, held constant at 2021, as set out Appendix B are applied to provide potential net floorspace figures
 - It is assumed strategic sites will be completed by the end of the plan period and no account is taken of phasing
- 5.2.4 The principles set out in Section 7.3 of the 2015 Study in terms of the role and function any large housing sites remain i.e. that they should be sustainable and that any new provision should be focused on meeting a proportion of day-to-day needs of local residents rather than being an 'attractor'.
- 5.2.5 Table 5.1 below summarises need generated in the strategic sites (comprising allocations of 650 units or more), with their draft policies also noted. As with all the capacity figures identified, because these extend over the life of the whole plan, caution should be applied to long-term forecasts. Basildon Town Centre is essentially a strategic site and should be thought of in the same way, having its own specific quantum of retail needs for convenience and comparison retail.

Table 5.1 Retail capacity generated by strategic housing sites

	Units	Population	Convenience goods (£m)	Net sales (sqm)	Comparison goods (£m)	Net sales (sqm)
H5: Gardiners Lane	747	1,770	£4,066	339	£6,719	1,120
H7: Land at London Road, Vange	650	1,541	£3,538	295	£5,846	974
H11: East Basildon	650	1,541	£3,538	295	£5,846	974
Bowers Gifford and North Benfleet NA	1,350	3,200	£7,348	612	£12,142	2,024
H12: Land South of Wickford	1,112	2,635	£6,053	504	£10,001	1,667
H17: SW Billericay	1,700	4,029	£9,254	771	£15,290	2,548

5.2.6 There is currently a degree of uncertainty around the final housing number for Basildon Town Centre, but a balance will need to be struck between employment, housing and infrastructure provision. Considering each of the strategic sites in turn:

- H5 Gardiners Lane: the 2015 Study did not review this strategic site. It is located at the northern edge of the Basildon urban area, in land that has traditionally been in employment use. While the scale of residential use is relatively modest in overall terms, there is potential that any small-scale town centre uses within this site could more sustainably cater to the needs of some working population. As such, town centre uses of up to 400 sqm net may be appropriate in this location, subject to impact and sequential testing.
- H7 Land at London Road, Vange: growth in this location was not something that the 2015 Study considered. The site is located on the edge of the Basildon built up area, adjacent to the A13 and near to designated centre at Pitsea. Any potential allocations here should be considered carefully because of the proximity to the A13 which could allow them to take on an out-of-centre function.
- H11 East Basildon: again, growth here was not considered in the 2015 Study. The site is located closest to Pitsea town centre and as such does not suggest there is an immediate need for any retail provision beyond the potential for some small-scale Class E uses for placemaking purposes.
- Bowers Gifford and North Benfleet: we recommended planning for a local centre as part of the strategy for the area. We previously suggested that this should be capped at 1,000 sqm net with an upper limit of 300 sqm on any single unit. In the context of the above analysis which identifies scope for c. 600 sqm convenience floorspace, we remain of that view.
- H12 Land south of Wickford: the 2015 Study looked at the prospect of 870 homes in this broad location and concluded that in order to make sure that any provision did not function as an out-of-centre destination on the A127 and compete with Wickford town centre, this should not exceed 400 sqm and should be focused on convenience and service uses. The submitted plan now includes c. 300 more homes; however, the concerns we articulated in terms of balancing impact on Wickford town centre remain valid and we do not recommend any increase above the 400 sqm net in the absence of full impact and sequential assessment.
- H17 SW Billericay: we previously concluded that there might be scope to 'introducing retail provision of a limited scale [not in excess of 500 sqm net] as part of small local centre or parade ... primarily comprising convenience or service uses' but that this should

be subject to sequential assessment. We do not consider that the somewhat greater scale of homes (now 1,700, compared to the 1,270 tested previously) means that this approach should change.

5.3 Regeneration objectives

- 5.3.1 In relation to Basildon town centre the 2015 Study found that in qualitative terms:
- There was a need for the quality of the retail offer to be improved in order to fulfil its role at the top of the town centre hierarchy and better compete with Lakeside
 - This may involve the refurbishment and/or amalgamation of units, as well as the modernisation and improvement of the secondary areas
 - Enhancement of the convenience offer in the town centre to provide competition and choice to the existing Asda store and drive footfall elsewhere in town centre.
- 5.3.2 Since the previous study was undertaken, the Council have undertaken significant work to develop a vision for Basildon town centre. As set out in Section 2, this includes substantial additional residential development. According to the draft Basildon Town Centre Urban Capacity Study (September 2021), there is capacity for 4,200 houses within Basildon Town Centre. A balance will need to be struck between employment, housing and infrastructure provision. It also includes significant remodelling of the existing town centre which could support in the order of nearly 100,000 sqm (gross) retail floorspace, focused on the Town Square and East Square, Station Environs and Eastgate.
- 5.3.3 The scale of growth identified in Section 4 is much lower than this capacity-based number set out in the Regeneration Strategy. This does not necessarily mean that it is not appropriate; it is possible that given the scale of the ambition set out, it will continue to be delivered beyond the plan period. Furthermore, it is likely that within this 100,000 sqm, some will be replacing existing floorspace.
- 5.3.4 We considered recent delivery of former Class A1-5 uses in the town centre (and in the borough more widely) in Section 2. This showed that there had been a reduction in overall terms over a three-year period. While this represents only a short time period, it is notable that actual delivery has fallen short of forecasts. The positive signals to investors provided by the comprehensive strategy for the future of town centre and the Council's commitment through measures such as acquisition of the Eastgate Centre may mean that this short-term trend is reversed; but we suggest caution is applied when considering overall quantum of floorspace.
- 5.3.5 In circumstances where the NPPF's impact and sequential tests can represent relatively surmountable thresholds for out-of-centre applications, and where the introduction of Class E means that there is a risk that large-scale main town centre uses could come forward without requiring planning permission, we advocate caution in quantitative allocations. Instead, we suggest that as set out in much of the Regeneration Strategy, the approach to Basildon town centre should be one of physical consolidation.
- 5.3.6 As noted at Para 2.4.5 – 2.4.12, the Council's 2020 Regeneration Strategy has 8 guiding principles for the regeneration of Basildon Town Centre, which are organised around the themes of improving the look and feel of the town centre; inclusivity; sustainability; improving connectivity and movement; public realm improvements; delivering high quality and well-designed development and encouraging a greater range of land uses. Although the Council is looking to introduce a new Regeneration Strategy (para 2.4.13), it is clear that there is a vision and the political aspiration to improve the town centre.
- 5.3.7 However, in acknowledging the structural changes affecting the retail and leisure sectors, the Cushman & Wakefield Market Report (2021) has noted the additional problem of rents per sq ft now falling for retail space, with the number of vacant units also increasing and likely to remain high in the short term (at least) in Basildon Town Centre. The South Essex Retail Study (2017) noted a relative lack of leisure facilities in the town centre, and stated that there

is considerable scope to improve the food and drink offer in Basildon. This still remains the case.

- 5.3.8 The closure of many businesses which were deemed to be 'non-essential' as part of the Government's policy response to COVID-19 has, importantly, served to normalise internet shopping for many people. In a society increasingly used to the convenience of e-commerce, physical shopping will need to offer a superior experience in order to compete. If retail will be driven in part by its surroundings and by town centres offering a greater mixture of uses, people will shop in a location because it is an enjoyable space to be in. With construction underway of the cinema development at East Square, which will also offer 6 units for restaurant uses, this is a welcome first step towards addressing the leisure offer and developing the 'experience' element which many town centres are likely to find they will need to encourage people to visit going forwards.

5.4 Distribution of floorspace

- 5.4.1 The 2015 Study set out that most of the additional retail floorspace should be directed towards Basildon town centre. Given the pressure faced by the town centre in recent years and the supportive environment for investment created by the work the Council has undertaken in developing both a policy framework and bringing sites forward, the case for this focusing of growth is even stronger.
- 5.4.2 We have also considered whether any strategic sites warrant any specific town centre provision. In some cases, where links to existing centres are limited, we have provided advice on small-scale allocations to meet local day-to-day needs; however, the overriding principle for these allocations are that they should be indicative and subject to further testing to ensure that they do not significantly adverse impact on the performance of existing town centres.

6 Recommendations

6.1 Policy recommendations

- 6.1.1 The town centre hierarchy which is set out in draft Local Plan Policy R1, places Basildon at the top of the borough as a regional town centre, supported by the town centres of Billericay, Laindon, Pitsea and Wickford, together with a network of 39 local centres. This follows the recommendations made in the 2015 Study; nothing we have identified in this addendum suggests that this approach should be changed.
- 6.1.2 While the need recommendations of the 2015 Study were superseded by the 2017 Study, the 2015 Study included the recommendation to introduce a local impact threshold of 500 sqm for retail development outside town centres and 200 sqm outside local centres, applied based on the nearest centre to the application site. We do not propose any change to this recommendation as part of this study.
- 6.1.3 Since the 2015 Study was undertaken, the NPPF has been updated and the emphasis on allocating shopping frontages has reduced. The NPPF was most recently updated in July 2021, however, no major changes were made to national policy on town centres and retail. In practical terms, the recent changes to the Use Class Order means that retail uses now form part of the broad spectrum of uses which make up Class E. Because a change of use within Class E does not constitute development, while it is possible to designate primary and secondary frontages, in reality it remains challenging to set a meaningful policy.
- 6.1.4 The need to allocate primary shopping areas as the focus for retail uses within any town centre continues to be a requirement of the NPPF. Noting the ethos behind the introduction of Class E, the Council will need to ensure that they are equipped to both allocate and monitor the primary shopping areas. To address the unintended consequences of the changes to the Use Class Order, imposing conditions where justified and necessary to preserve the retail function of those areas. In circumstances where a condition is in place, having regard to the overall purpose of the changes to the Use Class Order set out by the Government's Explanatory Memorandum, the policy include clear criteria under which shifts away from retail use will be judged acceptable.
- 6.1.5 Detailed revisions to current draft policy wording is contained at Appendix E.

6.2 Monitoring

- 6.2.1 The new Use Class E, while intended by the Government to bolster the health of town centres by allowing greater flexibility in the face of changing market pressures and habits, will mean that there is significantly greater scope for change without recourse to the planning regime. At present, the Council monitors change in the old A1-5 Use Classes, as noted in Section 2, this does not capture change between these uses. In effect, Class E will have the same effect.
- 6.2.2 We therefore recommend that within the main town centres, the Council should monitor the following to understand whether policy objectives for individual town centres are being met:
- Planning permissions for Class E including noting where any restrictions to sub-classes such as retail or office have been applied
 - For retail-specific floorspace approved under Class E – by type, amount (sqm gross and net), location and retailer
 - Completions of Class E floorspace – by type (e.g. retail, office, food and drink), amount, location and occupier
 - Mix of uses, including vacancies. This should provide a greater breakdown of uses than just the Use Class Order and should include categories such as convenience retail, comparison retail, service retail, restaurants etc.

- Health checks in line with the PPG indicators
 - Loss of Class E premises to residential uses under Permitted Development Rights
- 6.2.3 The first three items should be conducted on a rolling basis, with the final two being undertaken ideally annually.
- 6.2.4 There are several issues that may influence the scope for new floorspace, as follows:
- a. Major retail developments in competing centres;
 - b. The re-occupation of vacant retail floorspace;
 - c. The suitability and availability of land to accommodate new development;
 - d. Long term expenditure projections;
 - e. The effect of internet shopping on the demand for retail property;
 - f. The level of operator demand for floorspace in the District;
 - g. The likelihood of change in market share in the District; and
 - h. The potential impact new development may have on existing centres.
- 6.2.5 In relation to Basildon Town Centre, the vacancy rate is above its natural level. Many of the town centre's older units are small and are unlikely to meet the floorspace requirements of national chain operators. The Council may consider consolidation of the town centre, by re-developing or re-purposing long-standing vacant units, which would create a greater mix of uses in the town centre and reduce the vacancy rate. The smaller, older units in the town centre should be the focus for independent retail operators or other main town centre uses.

Appendix A Planning policies

Basildon District Local Plan Saved Policies (2007)

Policy BAS SH1

New retail development will be concentrated within the urban areas of Basildon, Billericay and Wickford, and within those areas in the town centres as defined on the Proposals Maps. In assessing proposed retail developments, the Council will apply a sequential test:-

- i. firstly, consideration should be given to potential sites within the existing five town centres;
- ii. secondly, if it is demonstrated that all potential town centre sites have been thoroughly assessed but do not prove suitable for that development, potential edge of town centre sites should be considered;
- iii. only after it has been demonstrated that there are no suitable town centre and edge of town centre sites, out of town sites within the urban areas will be considered, subject to the following criteria:-
 - a. That the cumulative effect of this and other recently completed or approved out of town retailing developments will not affect the vitality and viability of the existing town centres;
 - b. The location should be accessible by a choice of means of transport including public transport, cyclists and pedestrians, not just by car. Where appropriate the Council will seek from the developer improvements to public transport accessibility;
 - c. It should not give rise to problems of access, road safety and traffic congestion;
 - d. It should not harm the visual character of the area or cause unreasonable loss of amenity to adjoining land uses;
 - e. It should not materially prejudice the provision of other land uses, particularly the supply of land for industrial, housing and community uses, including open space;
 - f. Adequate controls should be installed to limit the emission of noise, pollutants, discharge and smells which could be associated with the proposed use; and
 - g. The criteria set out in Policy BAS SH10(v) and other policies applicable in this plan.

Large out of centre developments should preferably be combined with existing out of centre developments. Large retail developments should include recycling facilities.

NPPF 2018 review comment: Generally Compliant - less weight can be given to this policy

Policy BAS SH3

Within the town centres, the following are identified as opportunity sites for retail development including class A2 and A3 uses subject to policies BAS SH4 and BAS SH5:-

- i. Car Park Two, Great Oaks, Basildon, subject to the provision of replacement car parking;
- ii. Fodderwick, Basildon;
- iii. Station Avenue, Wickford; and
- iv. Rear of Tudor Mansions, Pitsea.

Elsewhere within the town centres, as identified on the Proposals Map, proposals for the redevelopment of other sites and buildings for retail use will be treated on their merits and with regard to the appropriate policies in the plan.

NPPF 2018 review comment: Generally Compliant - less weight can be given to this policy

Policy BAS SH4

Changes of Use from Use Class A1 (shops) to Use Class A2 (Financial and Professional Services) or Class A3 (Food and Drink) at ground floor level within the Primary Shopping Frontages will be allowed provided that material harm to the retail function of the Primary Shopping Frontage or the vitality and viability of the town centre as a whole does not result. In assessing whether harm would result the Council will have regard to the following factors:-

- i. the generation of visitors;
- ii. pedestrian flows;
- iii. the retail appearance and character of the frontage;
- iv. whether a clear predominance of shops would remain in the Primary Shopping Frontage concerned; and
- v. if necessary, the cumulative impact of a proposed Change of Use, with other proposed or permitted changes of use, will be taken into account.

Changes of Use to Class A3 uses must avoid creating a significant detrimental impact upon adjacent occupiers by reason of noise, fumes and smell.

A condition may be imposed requiring a window display, in order to prevent a dead frontage.

For the purposes of this policy, the Primary Shopping Frontages are defined as follows, and shown on the Town Centre Inset Maps:-

Basildon - The Eastgate Centre; South Gunnells; Town Square north and south sides;
Billericay - 50 to 96 High Street (even numbers) and 53 to 127 High Street (odd numbers); and
Wickford - High Street; the Ladygate Centre and the Willowdale Centre.

NPPF 2018 review comment: Generally Compliant - less weight can be given to this policy

Policy BAS SH5

In the town centres but outside of the Primary Shopping Frontages changes of use at ground floor level from Class A1 (Shops) to Class A2 (Financial and Professional Services) and Class A3 (Food and Drink) plus other appropriate uses, will be allowed provided that:-

- i. the proposed use provides a service to visiting members of the public and contributes to the overall character, variety and activity of the town centre; and
- ii. the proposed use would not be significantly detrimental to the amenities of adjacent occupiers by reason of noise, smell and fumes.

A condition may be imposed requiring a window display in order to avoid a dead frontage.

NPPF 2018 review comment: Generally Compliant - less weight can be given to this policy

Policy BAS SH6

Planning permission for the change of use, or partial change of use of an existing building used for Class B1, B2 or B8 to a retail use or for a retail use ancillary to the main use of the premises, will be allowed subject to the following criteria:-

- i. the proposed use does not cause material harm to the vitality and viability of any town centre;
- ii. there is not a significant net loss of employment; and
- iii. customer car parking provision is provided separate from existing car parking.

Where a large scale retail use results from the change of use, then planning applications will be considered also with regard to policies BAS SH1 and SH2(vi) of this plan.

NPPF 2018 review comment: Compliant – weight can be given to this policy

Policy BAS SH7

Within the built up area, planning permission will normally be granted for new local shopping centres, expansion to existing local shopping centres and individual shops providing there is no serious loss of residential amenity. Planning permission will only be given subject to the proposal satisfactorily fulfilling the criteria set out in Policy BAS SH10(vii).

NPPF 2018 review comment: Compliant – weight can be given to this policy

Policy BAS SH8

Non-Class A1 (Shops) uses will be permitted in local shopping centres, as defined on the Proposals Map and in Appendix Two, subject to the following criteria:-

- i. The new use would not materially detract from the ability of the local shopping centre to meet the everyday needs of local residents; and
- ii. Class A3 (food and drink) uses will not be permitted if they would materially harm the amenities of nearby residents.

NPPF 2018 review comment: Compliant – weight can be given to this policy

Policy BAS SH9

If planning permission is required for temporary uses, including the holding of car boot sales and Sunday markets, this will be granted subject to the following criteria being satisfied:-

- i. the surrounding roads should be adequate to accommodate the increase in vehicle traffic generated, having regard to the physical and environmental capacity of the roads and their function in the county road hierarchy;
- ii. the proposal should not conflict with the policies safeguarding the status and role of the Green Belt or any site of acknowledged wildlife importance;
- iii. the proposal should not detrimentally affect the visual and residential amenities of nearby residential areas;
- iv. the proposal or use of the site should not involve the erection of any permanent buildings; and
- v. the site should not be permanently laid out for such a use.

NPPF 2018 review comment: Generally Compliant - less weight can be given to this policy

Basildon Borough Local Plan 2014 -2034 (Revised Publication version)

Policy R1 Retail and Commercial Leisure Strategy

1. The Council will seek to deliver up to 2,500m² net additional comparison goods floorspace and up to 700m² net additional convenience good floorspace by 2021. A further 21,600m² and 4,200m² net floorspace respectively will be delivered by the end of the plan period, subject to periodic monitoring and review of economic and market trends.
2. In addition to new retail provision, the Council will seek to deliver up to 1,900m² gross additional food and drink (A3, A4 and A5) floorspace by 2021, and a further 7,400m² gross floorspace by the end of the plan period, subject to periodic monitoring and review of economic and market trends.
3. To ensure the long-term vitality and viability of the Borough's centres, the Council will apply a "town centre-first" approach to proposals for retail, leisure and other main town centre uses in accordance with the established hierarchy of centres as follows:
 - Regional Town Centre: Basildon
 - Town Centre: Billericay, Laindon, Pitsea and Wickford
 - Local Centre: 39 Local Centres as defined in Appendix 4
4. The regeneration of Basildon, Laindon, Wickford and Pitsea Town Centres in accordance with policies R2 to R5 will be a key priority, while enhancements to the vitality of Billericay Town Centre will be sought in accordance with policy R6. Proposals that focus new development for retail, leisure and other main town centre uses within these centres will be supported.
5. The Council will support proposals for the development and retention of hotel/visitor accommodation, in appropriate locations, where identified needs are not being met by existing facilities, taking into account locational requirements when applying the sequential test, the target market of hotel patron and the viability of hotel development.
6. In addition to the main town centre uses, residential development will be permitted on appropriate sites within the Borough's town centres, where they could contribute to their vitality and subject to compliance with all other relevant policies of this plan.
7. The Council will safeguard existing street markets and encourage the creation of new street markets where they support the vitality of the town centre.
8. The Council will give preference to applications for main town centre uses located in town centres, and will apply the sequential and impact tests to proposals to re-use, redevelop or intensify out of centre locations for retail, leisure and other main town centre uses.
9. Shops and other community facilities within local centres should be retained and enhanced where they remain viable and new local centres created where they are required to meet the day-to-day needs of the local community.
10. Greater emphasis will be placed on sustainable access to and from the town centres such as walking, cycling and public transport, and appropriate levels of car parking will be provided in key locations and along main movement corridors into the town centres. The Council will ensure there continues to be sufficient car parking capacity across each town centre to support the economic and future growth aspirations, without inducing unmanageable traffic flows across the highway network.

Policy R2 Basildon Town Centre Regeneration

1. Basildon Town Centre will be the primary focus for all future major retail and leisure development within the Borough, in order to reinforce its role and function as the highest-order centre in the Borough and enable it to compete with other similar sized centres in the sub-region.
2. The town centre will be regenerated with the aim of providing the majority of the additional retail floorspace required for the Borough, alongside leisure and entertainment floorspace, a new hotel, up to around 2,128 residential units, a further education college, and a mix of business, community and open space uses. These will all be delivered as guided by the most up to date Town Centre Masterplan.
3. The primary shopping area, which includes the primary and secondary frontages will be protected, as will the street market; while the redevelopment and modernisation of existing premises, particularly around the periphery of the primary shopping area, will be encouraged to support the diversification of uses and the introduction of a night-time economy.
4. Enhancements to the environmental quality of the town centre will be made through the refurbishment of the existing public realm and the creation of new squares and green spaces as part of development, which will provide greater connectivity between the surrounding residential areas and the centre.

Policy R3 Laindon Town Centre Regeneration

1. The regeneration and redevelopment of Laindon Town Centre is a key priority of the Council and will be delivered in accordance with its Masterplan.
2. The town centre will be regenerated through a mixed-use scheme providing new retail floorspace in a High Street format, including a stand-alone replacement large format foodstore, alongside at least 224 residential units, 1,681m² of offices, a replacement NHS health centre, open space, and community uses.
3. Enhancements to the environmental quality of the town centre will be made through landscaping and improvements to the public realm, highways, car parking and public transport links will provide greater access to the centre.

Policy R4 Pitsea Town Centre Regeneration

1. The regeneration of Pitsea Town Centre will ensure its vitality and viability and enable it to thrive as a 'destination' providing a diverse retail and leisure offer, alongside health and community facilities that meet the needs of the local community.
2. The primary shopping area, which includes the primary and secondary frontages will be protected, as will the street market; while the modernisation of existing premises, particularly around the periphery of the primary shopping area, will be encouraged to support the diversification of uses and the creation of a vibrant evening economy.
3. Enhancements to the environmental quality of the town centre and the creation of pedestrian friendly public realm will improve its attractiveness and encourage greater pedestrian movement through the centre.

Policy R5 Wickford Town Centre Regeneration

1. The regeneration of Wickford Town Centre will be delivered in accordance with the most up to date Masterplan or Regeneration Strategy.
2. The town centre will be regenerated with the aim of providing new retail floorspace including an additional foodstore, and 15 - 100 residential units, alongside a mix of other leisure, business, health and community uses where opportunities arise. This will increase the popularity of the town centre as a shopping and leisure destination and enable it to thrive.
3. The primary shopping area, which includes the primary and secondary frontages will be protected, as will the street market; while the modernisation of existing premises and the diversification of the retail offer will be encouraged.
4. Further enhancements to the public realm will be supported where they improve the cohesiveness of the town centre and increase its attractiveness to investors and retailers.

Policy R6 Billericay Town Centre Enhancement

1. To support the vitality and viability of Billericay Town Centre, the strong independent retailing sector and evening economy will be protected, and the provision of a local store format foodstore which enhances consumer choice will be considered favourably, alongside a mix of other leisure and community uses where opportunities arise.
2. Opportunities to enhance the public realm, including the introduction of a dedicated space for a street market and an increase in public space will be encouraged where they contribute to the vitality of the town centre and are in keeping with the town centre's historic character, whilst not impacting on amenity.
3. The overall vehicle parking stock will be efficiently and effectively managed through the implementation of appropriately designed supply, maintenance, charging and enforcement measures.
4. Works carried out to buildings and/or land within the town centre boundary which enhance the character and vibrancy of the town centre will be supported where they are in accordance with the latest Billericay Conservation Area Shop Front and Design Guide, Billericay Town Centre Conservation Area Management Plan and any other relevant policy requirements of this plan.

Policy R7 Town Centre Boundaries

1. The location and extent of the Borough's town centres are shown on the Policies Map. Land within the town centre boundaries will be retained for the ongoing provision of town centre uses appropriate to a town centre, including retailing, offices, leisure and community facilities, and residential (where it contributes to the viability and vitality of the town centre).
2. Proposals for development within the town centre boundaries will be permitted where:
 - a. The use and scale is consistent with the role and function of the town centre; and

- b. It is consistent with the Borough's spatial strategy and all other relevant policy requirements of this plan.
3. For proposals within Primary Shopping Areas, development above ground floor level will be encouraged where there will be no adverse impact on the functioning of the ground floor retail or other beneficial use, to the extent that it would make a ground floor units unviable.

Policy R8 Primary Shopping Frontages

1. Within the Primary Shopping Frontages, as defined on the Policies Map, the change of use of ground floor premises from Class A1 uses (shops) to other town centre uses will be permitted provided the proposed use will provide a service to visiting members of the public and would:
 - a. Make a positive contribution to the vitality and viability of the town centre;
 - b. Not result in the net loss of retail floorspace at a scale that would result in the proportion of A1 retail uses at ground floor level (taking account of any unimplemented planning permissions) falling below:
 - i. 75% in Basildon Town Centre; or
 - ii. 60% in Billericay, Pitsea or Wickford Town Centres.
 - c. Not fragment any part of the Primary Shopping Frontage by creating 3 or more non-A1 uses together;
 - d. Be compatible with the retail appearance and character of the frontage; and
 - e. In the case of uses that would not create an active frontage, a window display or other frontage appropriate to the centre would be provided.
2. The beneficial temporary use of vacant units will be encouraged where it would maintain or enhance the function of the town centre, having regard to both their number within the centre as a whole and the primary shopping frontage, and the length of time the unit has been vacant.

Policy R9 Secondary Shopping Frontages

1. Within the Secondary Shopping Frontages, as defined on the Policies Map, the use of ground floor premises for retail and other appropriate town centre uses will be permitted, provided the proposed use will provide a service to visiting members of the public and would:
 - a. Make a positive contribution to the vitality and viability of the centre;
 - b. Not result in the net loss of retail floorspace at a scale that would result in the proportion of A1 retail uses at ground floor level (taking account of other unimplemented planning permissions) falling below 30% which is justified as necessary to support the continued retail function of that frontage zone;
 - c. Be compatible with the retail appearance and character of the frontage; and
 - d. In the case of uses that would not create an active frontage, a window display or other frontage appropriate to the centre would be provided.
2. The Council will give consideration to the provision of community facilities within secondary frontages, where it can be demonstrated that these will provide a service to visiting members of the public and would support the vitality and viability of the town centre.

Policy R10 Local Centres

1. Within local centres, as defined on the Policies Map and listed in Appendix 4, the Council will only permit changes of use at ground floor level from an existing Class A1 retail use where:
 - a. Class A1 (retail) will continue to be the predominant use within the local centre boundary taking into account unimplemented planning permissions for changes of use;
 - b. The shop unit has been proactively and appropriately marketed for a minimum of one calendar year and it has been demonstrated that there is no realistic prospect of the unit being used for A1 retail purposes in the foreseeable future;
 - c. The proposal meets the needs of residents within the local neighbourhood;
 - d. Other essential shops which meet the day to day needs of the community are within 400 metres walking distance from the centre of the local centre;
 - e. The proposal will not have an adverse effect on the vitality and viability of the centre as a whole and/or on the individual shop unit; and
 - f. A shop front is retained or provided.
2. Residential, business or community uses of the upper floors of units within local centres will be encouraged where there will be no adverse impact on the functioning of the ground floor retail or other appropriate use and where adequate parking and servicing arrangements can be put in place.
3. The Council will support the establishment of a new local centre where the following criteria are satisfied:

- a. The need for a local centre is identified in the relevant strategic housing allocation policy in this Local Plan;
- b. The new centre will not have an adverse effect on the vitality and viability of an existing centre;
- c. A minimum of 3 units are provided; and d. At least 50% of the total number of units are for retail (Class A1) use.

Policy R11 Out of Centre Retail Areas

1. There are six out of centre shopping areas in the Borough, as identified on the Policies Map. These are:
 - a. Pipp's Hill Retail Park, Basildon
 - b. Mayflower Retail Park, Basildon
 - c. Cricketers Way Retail Park, Basildon
 - d. Vange Retail Park, Basildon
 - e. Hazelmere, Pitsea
 - f. Mandeville Way, Laindon
2. The Council will only support further development, including the expansion and intensification of the shopping area in these locations, where sequential and impact assessments have indicated that it is appropriate to do so.

Policy R12 Festival Leisure Park and Surroundings

The Council will only support the expansion or intensification of facilities at Festival Leisure Park and its surroundings, as identified on the Policies Map, if the sequential and impact assessments have robustly justified that it is appropriate to do so.

Policy R13 Locations for Hotel/Visitor Accommodation

1. The provision of a full-service hotel with conference and function space will be permitted on land adjacent to Basildon Golf Course, as defined on the Policies Map, where the following criteria have been met:
 - a. The proposal satisfies the sequential test and impact assessment for main town centres uses;
 - b. The proposal is ancillary to Basildon Golf Course;
 - c. The hotel will provide around 100 bedrooms;
 - d. Where an ancillary facility such as a function suite is proposed as part of the hotel development, the proposal must demonstrate the need for such a facility and that it is economically viable;
 - e. The design, scale, massing and layout of the proposal is sympathetic to the character of the surrounding area and should be no taller than four storeys; and
 - f. All other relevant policies in this plan have been complied with, in particular, those policies in chapter 16 of this plan.
2. The Council will support other new or redeveloped leisure and/ or operational uses on the remaining part of land adjacent to Basildon Golf Course where such uses are appropriate in terms of nature, scale and location subject to compliance with all other relevant policies of this plan.
3. The Council will support additional hotel provision in the Borough's town centre locations, as well as in the A127 Enterprise Corridor alongside, and in support of, business development.

Policy R14 Locations for Town Centre Uses

1. The Council will seek to ensure that retail uses (A1 use class) are predominantly located within its designated town centres. Development and uses must be appropriate to the scale, character and function of the town centre, be in keeping with its role and function within the Borough's hierarchy of centres, and not harm the vitality and viability of the centre as a whole.
2. A sequential test will be applied to planning applications for main town centre uses that are not in an existing centre, or where the proposal is not in accordance with the Local Plan. Town centre uses should be located in town centres and then in edge of centre locations and only if suitable sites are not available will out of centre sites be considered.
3. In terms of proposals outside town centres, preference will be given to accessible sites that are well connected to the town centre.
4. For out of centre proposals, preference will be given to those that are located within the existing out of centre shopping areas or Festival Leisure Park.

5. The Council will require an Impact Assessment for applications for retail, leisure and office development outside of town centres where:
- The development is equal to or more than the threshold, as set out below for the nearest centre; or
 - Where the threshold has already been breached within the last year by more than one planning application.

Nearest Centre	Threshold
Regional Town Centre	500m ²
Town Centre	500m ²
Local Centre	200m ²

6. The Impact Assessments should include an assessment of:
- The impact of the proposal on existing, committed and planned public and private investment in the regional, town and local centres in the catchment area of the proposed development;
 - Individual and cumulative impact of the proposal on the vitality and viability of the Borough's centres taking into consideration:
 - Its impact on linked trip spending between different town centre uses or businesses;
 - Its impact on local consumer choice;
 - The potential for relocation of businesses currently trading in town centres to locations out of centre;
 - The extent to which the market profile of the development proposed will compete with existing facilities in town centres; and
 - The impact through trade diversion on the role and function of a town centre up to five years from the time the application is made.

Policy R15 Existing Local Shops

Development proposing the change of use or loss of any premises or land currently or last used as a local shop (A1 use class) outside of the defined town centre or local centre boundaries will be permitted subject to compliance with policy HC11 and all other relevant policy requirements of this plan.

Policy R16 Hot Food Takeaways

- Applications for new hot food takeaways falling within the A5 use class will be supported, subject to compliance with all other relevant policies of this plan, where the following thresholds are not exceeded:
 - Within town centres, no more than 10% of shop units should comprise hot food takeaways;
 - Within local centres comprising 6 or less shop units, no more than 50% of the shop units should comprise hot food takeaways;
 - Within local centres comprising 7 to 14 shop units, no more than 30% of the shop units should comprise hot food takeaways; and
 - Within local centres comprising 15 or more units, no more than 20% of the shop units should comprise hot food takeaways.
- New hot food takeaway shops will only be permitted when they fall outside 400 metres of the boundary of new and existing schools, colleges, and youth centres. Exceptions will apply to retail, town and local centre locations within this 400 metre buffer zone, subject to compliance with all other relevant policies of this plan.
- Outside designated centres, and in areas where the residential character of an area predominates, no more than two A5 units should be located adjacent to each other.
- This policy will also apply to applications to relax or vary conditions to allow hot food takeaway facilities in conjunction with existing restaurants, cafés and other hospitality uses.

Policy R17 Betting offices

In addition to the principles set out in the Council's *Gambling Licensing Policy Statement*, proposals for new betting offices will not be permitted if they fall within 400m of any existing permitted betting office.

Appendix B Updated capacity tables

Table A: Experian population

	Zone 1	Zone 2	Zone 3	Zone 4	Zones 5-16	Zones 17-23	Total
2018	40,944	74,365	29,297	25,553	497,266	1,747,576	2,415,001
2019	41,313	75,154	29,555	25,701	501,151	1,766,417	2,439,291
2020	41,710	75,933	29,818	25,876	505,132	1,784,688	2,463,157
2021	42,096	76,686	30,116	26,015	509,146	1,802,520	2,486,579
2022	42,478	77,428	30,378	26,182	513,038	1,819,748	2,509,252
2023	42,825	78,145	30,665	26,366	516,823	1,836,238	2,531,062
2024	43,187	78,839	30,908	26,541	520,573	1,852,312	2,552,360
2025	43,523	79,532	31,159	26,703	524,254	1,867,957	2,573,128
2026	43,815	80,202	31,403	26,856	527,929	1,883,158	2,593,363
2027	44,124	80,877	31,659	27,011	531,480	1,897,965	2,613,116
2028	44,443	81,494	31,894	27,167	534,945	1,912,752	2,632,695
2029	44,771	82,108	32,119	27,308	538,434	1,927,108	2,651,848
2030	45,073	82,715	32,368	27,462	541,848	1,941,330	2,670,796
2031	45,345	83,335	32,619	27,623	545,164	1,955,090	2,689,176
2032	45,664	83,955	32,828	27,793	548,437	1,968,612	2,707,289
2033	45,964	84,603	33,053	27,931	551,601	1,982,113	2,725,265
2034	46,267	85,239	33,261	28,079	554,801	1,995,411	2,743,058
Growth 2018-34	5,323	10,874	3,964	2,526	57,535	247,835	328,057

Table B: SHMA population

	Zone 1	Zone 2	Zone 3	Zone 4	Zones 5-16	Zones 17-23	Total
2018	40,163	72,859	28,800	33,361	512,275	1,747,576	2,435,034
2019	40,397	73,285	28,968	33,556	515,845	1,766,417	2,458,469
2020	40,617	73,683	29,126	33,738	520,007	1,784,688	2,481,859
2021	40,964	74,313	29,375	34,027	525,656	1,802,520	2,506,855
2022	41,116	74,588	29,483	34,153	529,029	1,819,748	2,528,117
2023	41,277	74,881	29,599	34,287	533,034	1,836,238	2,549,316
2024	41,548	75,373	29,794	34,512	536,636	1,852,312	2,570,175
2025	41,893	75,998	30,041	34,798	539,255	1,867,957	2,589,942
2026	42,326	76,783	30,351	35,158	541,925	1,883,158	2,609,701
2027	42,821	77,681	30,706	35,569	547,681	1,897,965	2,632,423
2028	43,096	78,180	30,903	35,797	551,000	1,912,752	2,651,729
2029	43,581	79,060	31,251	36,200	555,445	1,927,108	2,672,644
2030	44,006	79,831	31,556	36,553	561,996	1,941,330	2,695,271
2031	44,361	80,476	31,811	36,848	566,756	1,955,090	2,715,342
2032	44,737	81,157	32,080	37,160	571,330	1,968,612	2,735,076
2033	45,184	81,969	32,401	37,532	576,385	1,982,113	2,755,584
2034	45,659	82,831	32,742	37,927	582,107	1,995,411	2,776,677
Growth 2018-34	5,497	9,972	3,942	4,566	69,832	247,835	341,643

Table 1A: Comparison expenditure

Per capita comparison expenditure

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	Zone 19	Zone 20	Zone 21	Zone 22	Zone 23
2018	£3,109	£3,467	£4,084	£4,140	£4,231	£4,096	£3,677	£4,130	£3,568	£3,502	£3,676	£4,520	£4,688	£3,618	£3,737	£3,537	£4,041	£3,534	£4,057	£4,039	£4,438	£3,168	£4,002
Exc. SFT	£2,413	£2,690	£3,169	£3,213	£3,283	£3,178	£2,853	£3,205	£2,769	£2,718	£2,853	£3,508	£3,638	£2,808	£2,900	£2,745	£3,136	£2,742	£3,148	£3,134	£3,444	£2,458	£3,106
2021	£3,103	£3,405	£4,011	£4,066	£4,155	£4,023	£3,611	£4,056	£3,504	£3,439	£3,610	£4,439	£4,604	£3,553	£3,670	£3,474	£3,969	£3,471	£3,984	£3,967	£4,359	£3,111	£3,930
2026	£3,633	£4,051	£4,772	£4,837	£4,944	£4,786	£4,296	£4,826	£4,169	£4,092	£4,295	£5,281	£5,478	£4,227	£4,366	£4,133	£4,722	£4,129	£4,740	£4,719	£5,185	£3,702	£4,676
2031	£4,187	£4,669	£5,500	£5,575	£5,698	£5,516	£4,952	£5,562	£4,805	£4,716	£4,950	£6,087	£6,313	£4,872	£5,032	£4,763	£5,442	£4,759	£5,463	£5,439	£5,976	£4,266	£5,389
2034	£4,562	£5,087	£5,992	£6,074	£6,208	£6,010	£5,395	£6,060	£5,235	£5,138	£5,394	£6,632	£6,878	£5,308	£5,483	£5,190	£5,929	£5,185	£5,953	£5,926	£6,512	£4,648	£5,872

Total comparison expenditure (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	Zone 19	Zone 20	Zone 21	Zone 22	Zone 23	Total
2018	£127.29	£257.82	£119.65	£105.79	£118.88	£228.03	£157.45	£127.14	£246.42	£151.32	£173.60	£148.31	£133.61	£94.72	£75.44	£257.18	£172.57	£148.73	£210.66	£580.43	£680.98	£2,605.31	£1,966.29	£8,888
2021	£130.64	£261.12	£120.79	£105.78	£119.09	£227.02	£157.45	£126.86	£249.62	£154.59	£175.94	£149.05	£133.74	£95.27	£75.49	£257.94	£172.97	£149.27	£209.99	£581.16	£685.16	£2,657.60	£1,986.29	£8,983
2026	£159.16	£324.89	£149.85	£129.91	£145.52	£276.43	£193.16	£155.04	£310.18	£195.06	£218.82	£183.72	£164.34	£117.18	£92.52	£317.90	£212.65	£183.45	£256.32	£711.86	£846.51	£3,325.62	£2,464.71	£11,135
2031	£189.85	£389.08	£179.40	£154.00	£172.00	£325.72	£229.52	£183.10	£370.84	£235.64	£261.74	£218.14	£195.66	£139.82	£109.49	£377.92	£252.21	£217.51	£302.89	£841.12	£1,010.41	£3,999.13	£2,945.18	£13,300
2034	£211.05	£433.60	£199.31	£170.56	£190.36	£359.28	£254.51	£201.78	£412.32	£263.56	£290.71	£240.93	£216.46	£155.34	£121.29	£419.03	£278.79	£241.24	£334.71	£928.77	£1,122.53	£4,457.91	£3,273.35	£14,777

Table 2A: Convenience expenditure

Per capita convenience expenditure

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	Zone 19	Zone 20	Zone 21	Zone 22	Zone 23
2018	£2,195	£2,249	£2,312	£2,284	£2,319	£2,363	£2,216	£2,280	£2,187	£2,121	£2,216	£2,431	£2,451	£2,198	£2,254	£2,213	£2,365	£2,183	£2,383	£2,289	£2,439	£2,084	£2,276
Exc. SFT	£2,195	£2,249	£2,312	£2,284	£2,319	£2,363	£2,216	£2,280	£2,187	£2,121	£2,216	£2,431	£2,451	£2,198	£2,254	£2,213	£2,365	£2,183	£2,383	£2,289	£2,439	£2,084	£2,276
2021	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
2026	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
2031	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
2034	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0

Total convenience expenditure (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	Zone 19	Zone 20	Zone 21	Zone 22	Zone 23	Total
2018	£91.20	£169.51	£68.88	£78.83	£106.48	£126.09	£69.16	£61.35	£42.54	£21.95	£142.61	£177.71	£111.77	£157.43	£103.96	£107.65	£105.21	£95.78	£127.56	£341.44	£392.30	£1,837.36	£1,180.69	£5,717
2021	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0
2026	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0
2031	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0
2034	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0

Notes

Prices 2018

Per capita expenditure by zone derived from Experian 2019 (MMG)

Growth rates and SFT deductions derived from Experian Retail Planner Briefing Note 17 (2020).

Total expenditure product of per capita expenditure and Table 1A

Table 3A: Comparison turnover 2018

Local authority	Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zones 5-16	Zones 17-23	Total
Basildon	Basildon town centre	£74.30	£121.63	£41.99	£31.85	£154.85	£54.62	£479.25
	Billericay town centre	£0.00	£4.11	£0.07	£18.21	£0.51	£12.92	£35.82
	Laindon town centre	£0.45	£11.27	£0.73	£0.24	£0.71	£2.30	£15.69
	Pitsea town centre	£6.00	£1.52	£0.17	£0.01	£2.79	£0.75	£11.24
	Wickford town centre	£0.54	£0.34	£27.25	£0.30	£0.36	£26.33	£55.11
	Basildon out-of-centre	£22.72	£58.43	£20.38	£25.15	£53.42	£55.70	£235.80
	Other Basildon destinations	£0.00	£0.00	£0.11	£0.00	£0.00	£0.00	£0.11
Basildon total		£104.01	£197.29	£90.70	£75.76	£212.64	£152.63	£833.03
Castle Point total		£0.74	£1.42	£0.00	£0.00	£46.05	£0.00	£48.21
Rochford total		£1.53	£0.86	£1.70	£0.64	£225.58	£22.84	£253.15
Southend	Southend-on-Sea town centre	£1.17	£2.12	£0.24	£0.00	£519.40	£8.08	£531.01
	Westcliff-on-Sea	£0.00	£0.00	£0.00	£0.00	£15.31	£0.32	£15.63
	Leigh-on-Sea	£0.54	£2.10	£0.46	£0.00	£38.73	£0.00	£41.84
	Shoeburyness	£0.00	£0.00	£0.00	£0.00	£9.09	£0.00	£9.09
	Southend-on-Sea out-of-centre	£0.05	£2.60	£0.03	£0.00	£193.32	£31.91	£227.91
	Westcliff-on-Sea out-of-centre	£0.00	£0.00	£0.00	£0.00	£0.33	£0.00	£0.33
	Other Southend-on-Sea destinations	£0.00	£0.00	£0.00	£0.00	£6.38	£0.60	£6.97
Southend total		£1.77	£6.82	£0.73	£0.00	£782.55	£40.90	£832.78
Thurrock	Grays town centre	£0.00	£0.00	£0.00	£0.00	£0.73	£0.00	£0.73
	Lakeside shopping centre	£7.80	£22.16	£10.17	£8.20	£209.75	£686.37	£944.47
	Lakeside retail parks	£7.06	£16.18	£5.76	£3.46	£209.00	£596.39	£837.85
	South Ockenden	£0.00	£0.00	£0.00	£0.00	£4.61	£0.00	£4.61
	Stanford-le-Hope local centre	£0.00	£0.36	£0.20	£0.00	£10.64	£0.16	£11.36
	Tilbury local centre	£0.00	£0.00	£0.00	£0.00	£7.32	£0.00	£7.32
	Thurrock out-of-centre	£0.00	£0.00	£0.00	£0.00	£7.08	£2.08	£9.17
	Thurrock neighbourhood parades	£0.00	£0.28	£0.19	£0.00	£16.02	£0.00	£16.49
	Other Thurrock destinations	£0.00	£0.00	£0.00	£0.00	£2.61	£0.00	£2.61
Thurrock total		£14.86	£38.99	£16.31	£11.67	£467.78	£1,285.00	£1,834.60
Other study area zones total		£2.35	£6.70	£6.63	£13.12	£103.66	£4,019.05	£4,151.51
Outside study area		£2.03	£5.74	£3.59	£4.60	£73.86	£844.54	£934.36
Total		£127.29	£257.82	£119.65	£105.79	£1,912.11	£6,364.98	£8,887.64

Notes

Product of Tables C & 1A

Table 4A: Convenience turnover 2018

Local authority	Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zones 5-16	Zones 17-23	Total
Basildon	Basildon town centre	£18.68	£18.25	£3.59	£2.77	£3.93	£24.19	£71.42
	Billericay town centre	£0.20	£2.31	£0.78	£18.92	£0.58	£24.96	£47.74
	Laindon town centre	£0.00	£4.24	£0.00	£0.00	£0.00	£0.13	£4.37
	Pitsea town centre	£17.29	£11.17	£2.07	£0.84	£11.44	£0.97	£43.78
	Wickford town centre	£0.40	£0.00	£8.96	£0.35	£0.00	£10.31	£20.02
	Basildon local centres	£1.19	£1.82	£3.21	£6.71	£0.00	£5.79	£18.72
	Basildon out-of-centre stores	£46.46	£116.28	£31.25	£22.00	£26.74	£53.50	£296.23
	Other Basildon destinations	£0.00	£0.00	£0.08	£0.05	£0.07	£0.00	£0.20
Basildon total		£84.22	£154.07	£49.93	£51.64	£42.76	£119.85	£502.47
Castle Point total		£3.35	£4.64	£0.00	£0.51	£193.70	£1.71	£203.91
Rochford total		£0.00	£1.18	£0.81	£0.00	£159.59	£7.24	£168.82
Southend total		£0.00	£0.67	£1.03	£0.39	£390.26	£58.71	£451.05
Thurrock total		£0.33	£1.60	£0.58	£0.86	£186.77	£280.41	£470.55
Other study area zones total		£1.97	£3.86	£14.88	£4.92	£55.89	£3,092.20	£3,173.71
Outside study area	Outside study area	£0.00	£1.23	£0.51	£0.05	£93.75	£291.79	£387.32
Total		£89.87	£167.25	£67.73	£58.36	£1,122.71	£3,851.91	£5,357.84

Table 5A: Retail summary

	Comparison		Convenience		Total
	£M	%	£M	%	£M
Turnover derived from Basildon zones	£467.76	56%	£339.86	68%	£807.62
Turnover derived from elsewhere in study area	£365.27	44%	£162.61	32%	£527.88
Leakage from Basildon zones	£142.80	23%	£43.36	11%	£186.16
Comparison expenditure					
	2018	2021	2026	2031	2034
A Total expenditure (£M)	£610.56	£618.33	£763.81	£912.32	£1,014.53
B Market share of study area (%)	77%	77%	77%	77%	77%
C Retained expenditure (£M)	£467.76	£473.71	£585.17	£698.94	£777.24
D Inflow expenditure (£M)	£365.27	£369.13	£457.68	£546.69	£607.36
E Total available expenditure (£M)	£833.03	£842.84	£1,042.85	£1,245.63	£1,384.61
Claims on expenditure					
F Turnover of existing floorspace (£M)	£833.03	£881.42	£968.40	£1,063.96	£1,125.76
G Turnover of commitments (£M)		£10.26	£11.05	£11.90	£12.45
Quantitative need					
H Expenditure capacity (£M)	£0.00	-£48.83	£63.40	£169.77	£246.40
I Assumed sales density (£ per sqm net)	£6,000	£6,349	£6,975	£7,663	£8,108
J Net quantitative need (sqm)	-	7,692	9,090	22,154	30,388
K Gross quantitative need (sqm)	-	10,989	12,986	31,649	43,411
Convenience expenditure					
	2018	2021	2026	2031	2034
A Total expenditure (£M)	£383.22	£394.32	£412.56	£427.41	£436.48
B Market share of study area (%)	89%	89%	89%	89%	89%
C Retained expenditure (£M)	£339.86	£349.71	£365.89	£379.05	£387.10
D Inflow expenditure (£M)	£162.61	£167.57	£175.41	£181.85	£185.46
E Total available expenditure (£M)	£502.47	£517.28	£541.30	£560.90	£572.56
Claims on expenditure					
F Turnover of existing floorspace (£M)	£502.47	£502.47	£502.47	£502.47	£502.47
G Turnover of commitments (£M)		£13.89	£13.89	£13.89	£13.89
Quantitative need					
H Expenditure capacity (£M)	£0.00	£0.92	£24.94	£44.54	£56.20
I Assumed sales density (£ per sqm net)	£12,000	£12,000	£12,000	£12,000	£12,000
J Net quantitative need (sqm)		76	2,078	3,712	4,683
K Gross quantitative need (sqm)		109	2,969	5,303	6,690

Table 1B: Comparison expenditure

Per capita comparison expenditure																								
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	Zone 19	Zone 20	Zone 21	Zone 22	Zone 23	
2018	£3,109	£3,467	£4,084	£4,140	£4,231	£4,096	£3,677	£4,130	£3,568	£3,502	£3,676	£4,520	£4,688	£3,618	£3,737	£3,537	£4,041	£3,534	£4,057	£4,039	£4,438	£3,168	£4,002	
Exc. SFT	£2,413	£2,690	£3,169	£3,213	£3,283	£3,178	£2,853	£3,205	£2,769	£2,718	£2,853	£3,508	£3,638	£2,808	£2,900	£2,745	£3,136	£2,742	£3,148	£3,134	£3,444	£2,458	£3,106	
2021	£3,103	£3,405	£4,011	£4,066	£4,155	£4,023	£3,611	£4,056	£3,504	£3,439	£3,610	£4,439	£4,604	£3,553	£3,670	£3,474	£3,969	£3,471	£3,984	£3,967	£4,359	£3,111	£3,930	
2026	£3,633	£4,051	£4,772	£4,837	£4,944	£4,786	£4,296	£4,826	£4,169	£4,092	£4,295	£5,281	£5,478	£4,227	£4,366	£4,133	£4,722	£4,129	£4,740	£4,719	£5,185	£3,702	£4,676	
2031	£4,187	£4,669	£5,500	£5,575	£5,698	£5,516	£4,952	£5,562	£4,805	£4,716	£4,950	£6,087	£6,313	£4,872	£5,032	£4,763	£5,442	£4,759	£5,463	£5,439	£5,976	£4,266	£5,389	
2034	£4,562	£5,087	£5,992	£6,074	£6,208	£6,010	£5,395	£6,060	£5,235	£5,138	£5,394	£6,632	£6,878	£5,308	£5,483	£5,190	£5,929	£5,185	£5,953	£5,926	£6,512	£4,648	£5,872	
Total comparison expenditure (£M)																								
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	Zone 19	Zone 20	Zone 21	Zone 22	Zone 23	Total
2018	£124.87	£252.60	£117.62	£138.11	£193.29	£217.46	£111.47	£107.95	£67.42	£35.20	£221.54	£309.42	£200.20	£244.01	£162.29	£162.01	£110.50	£98.60	£208.32	£575.33	£685.39	£2,611.46	£1,940.21	£8,895
2021	£127.13	£253.04	£117.82	£138.35	£190.91	£214.78	£112.35	£108.80	£67.95	£35.47	£224.56	£313.65	£202.94	£247.41	£164.56	£164.27	£110.88	£98.82	£207.96	£576.93	£692.85	£2,677.66	£1,959.98	£9,009
2026	£153.75	£311.04	£144.83	£170.07	£228.38	£256.93	£134.96	£130.70	£81.63	£42.62	£278.71	£389.28	£251.87	£307.47	£204.51	£204.15	£136.74	£121.19	£254.34	£708.44	£863.65	£3,395.76	£2,434.31	£11,205
2031	£185.73	£375.73	£174.95	£205.43	£269.51	£303.21	£161.19	£156.09	£97.49	£50.90	£334.14	£466.70	£301.96	£379.14	£252.17	£251.73	£162.88	£143.61	£301.19	£840.52	£1,039.79	£4,136.05	£2,915.50	£13,506
2034	£208.28	£421.35	£196.19	£230.38	£297.23	£334.40	£179.33	£173.66	£108.46	£56.62	£372.80	£520.70	£336.90	£430.36	£286.24	£285.74	£180.49	£159.30	£332.95	£931.53	£1,162.12	£4,673.02	£3,252.67	£15,131

Table 2B: Convenience expenditure

Per capita convenience expenditure																								
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	Zone 19	Zone 20	Zone 21	Zone 22	Zone 23	
2018	£2,195	£2,249	£2,312	£2,284	£2,319	£2,363	£2,216	£2,280	£2,187	£2,121	£2,216	£2,431	£2,451	£2,198	£2,254	£2,213	£2,365	£2,183	£2,383	£2,289	£2,439	£2,084	£2,276	
Exc. SFT	£1,914	£1,961	£2,016	£1,992	£2,022	£2,061	£1,932	£1,988	£1,907	£1,850	£1,932	£2,120	£2,137	£1,917	£1,965	£1,930	£2,062	£1,904	£2,078	£1,996	£2,127	£1,817	£1,985	
2021	£2,197	£2,251	£2,314	£2,286	£2,321	£2,365	£2,218	£2,282	£2,189	£2,123	£2,218	£2,434	£2,454	£2,200	£2,256	£2,215	£2,367	£2,185	£2,385	£2,291	£2,442	£2,086	£2,278	
2026	£2,206	£2,260	£2,324	£2,296	£2,331	£2,375	£2,227	£2,292	£2,198	£2,132	£2,227	£2,443	£2,463	£2,209	£2,265	£2,224	£2,377	£2,194	£2,395	£2,301	£2,451	£2,095	£2,287	
2031	£2,202	£2,260	£2,324	£2,296	£2,331	£2,375	£2,227	£2,292	£2,198	£2,132	£2,227	£2,443	£2,463	£2,209	£2,265	£2,224	£2,377	£2,194	£2,395	£2,301	£2,451	£2,095	£2,287	
2034	£2,206	£2,260	£2,324	£2,296	£2,331	£2,375	£2,227	£2,292	£2,198	£2,132	£2,227	£2,443	£2,463	£2,209	£2,265	£2,224	£2,377	£2,194	£2,395	£2,301	£2,451	£2,095	£2,287	
Total convenience expenditure (£M)																								
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	Zone 19	Zone 20	Zone 21	Zone 22	Zone 23	Total
2018	£88.16	£163.86	£66.59	£76.20	£105.94	£125.45	£67.18	£59.59	£41.32	£21.32	£133.55	£166.42	£104.67	£148.24	£97.89	£101.36	£64.67	£60.90	£122.36	£326.05	£376.67	£1,717.89	£1,103.43	£5,340
2021	£90.01	£167.31	£67.99	£77.80	£106.65	£126.29	£69.01	£61.22	£42.45	£21.90	£137.98	£171.94	£108.14	£153.20	£101.17	£104.76	£66.14	£62.22	£124.51	£333.26	£388.11	£1,795.38	£1,136.15	£5,514
2026	£93.37	£173.56	£70.53	£80.71	£107.67	£127.50	£69.97	£62.06	£43.04	£22.20	£144.52	£180.09	£113.27	£160.68	£106.10	£109.87	£68.84	£64.39	£128.50	£345.35	£408.28	£1,921.49	£1,190.86	£5,793
2031	£97.67	£181.90	£73.92	£84.59	£110.25	£130.55	£72.50	£64.31	£44.60	£23.01	£150.33	£187.34	£117.83	£171.91	£113.52	£117.55	£71.15	£66.21	£132.04	£355.51	£426.49	£2,030.64	£1,237.49	£6,061
2034	£100.73	£187.23	£76.08	£87.06	£111.59	£132.15	£74.03	£65.67	£45.54	£23.49	£153.94	£191.83	£120.65	£179.09	£118.26	£122.46	£72.36	£67.40	£133.96	£361.62	£437.48	£2,105.70	£1,267.13	£6,235

Notes

Prices 2018

Per capita expenditure by zone derived from Experian 2019 (MMG)

Growth rates and SFT deductions derived from Experian Retail Planner Briefing Note 18 (2020).

Total expenditure product of per capita expenditure and Table 1B

Table 3B: Comparison turnover 2018

Local authority	Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zones 5-16	Zones 17-23	Total
Basildon	Basildon town centre	£72.88	£119.17	£41.28	£41.58	£153.27	£42.30	£470.49
	Billericay town centre	£0.00	£4.02	£0.06	£23.77	£0.44	£8.56	£36.86
	Laindon town centre	£0.44	£11.04	£0.72	£0.31	£0.45	£1.86	£14.81
	Pitsea town centre	£5.89	£1.49	£0.17	£0.02	£2.50	£0.49	£10.55
	Wickford town centre	£0.53	£0.33	£26.79	£0.39	£0.44	£17.90	£46.38
	Basildon out-of-centre	£22.29	£57.25	£20.03	£32.84	£49.53	£41.59	£223.53
	Other Basildon destinations	£0.00	£0.00	£0.11	£0.00	£0.00	£0.00	£0.11
Basildon total		£102.03	£193.30	£89.16	£98.91	£206.62	£112.71	£802.72
Castle Point total		£0.72	£1.39	£0.00	£0.00	£60.72	£0.00	£62.83
Rochford total		£1.50	£0.84	£1.67	£0.84	£171.57	£20.99	£197.41
Southend	Southend-on-Sea town centre	£1.15	£2.07	£0.24	£0.00	£526.95	£6.25	£536.66
	Westcliff-on-Sea	£0.00	£0.00	£0.00	£0.00	£26.95	£0.21	£27.16
	Leigh-on-Sea	£0.53	£2.06	£0.46	£0.00	£49.98	£0.00	£53.03
	Shoeburyness	£0.00	£0.00	£0.00	£0.00	£8.70	£0.00	£8.70
	Southend-on-Sea out-of-centre	£0.05	£2.55	£0.03	£0.00	£159.59	£30.93	£193.15
	Westcliff-on-Sea out-of-centre	£0.00	£0.00	£0.00	£0.00	£0.47	£0.00	£0.47
	Other Southend-on-Sea destinations	£0.00	£0.00	£0.00	£0.00	£6.82	£0.60	£7.42
Southend total		£1.74	£6.68	£0.72	£0.00	£779.45	£37.99	£826.59
Thurrock	Grays town centre	£0.00	£0.00	£0.00	£0.00	£1.11	£0.00	£1.11
	Lakeside shopping centre	£7.65	£21.71	£10.00	£10.71	£268.95	£680.80	£999.83
	Lakeside retail parks	£6.92	£15.86	£5.66	£4.52	£287.90	£589.24	£910.09
	South Ockenden	£0.00	£0.00	£0.00	£0.00	£9.43	£0.00	£9.43
	Stanford-le-Hope local centre	£0.00	£0.35	£0.19	£0.00	£6.85	£0.10	£7.49
	Tilbury local centre	£0.00	£0.00	£0.00	£0.00	£6.58	£0.00	£6.58
	Thurrock out-of-centre	£0.00	£0.00	£0.00	£0.00	£8.11	£2.09	£10.20
	Thurrock neighbourhood parades	£0.00	£0.27	£0.18	£0.00	£11.58	£0.00	£12.04
	Other Thurrock destinations	£0.00	£0.00	£0.00	£0.00	£3.88	£0.00	£3.88
Thurrock total		£14.58	£38.20	£16.03	£15.23	£604.38	£1,272.22	£1,960.64
Other study area zones total		£2.30	£6.57	£6.51	£17.13	£139.04	£3,948.80	£4,120.36
Outside study area		£1.99	£5.63	£3.53	£6.00	£70.46	£837.08	£924.70
Total		£124.87	£252.60	£117.62	£138.11	£2,032.25	£6,229.80	£8,895.25

Notes

Product of Tables C & 1B

Table 4B: Convenience turnover 2016

Local authority	Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zones 5-16	Zones 17-23	Total
Basildon	Basildon town centre	£18.32	£17.89	£3.53	£3.62	£3.03	£22.65	£69.04
	Billericay town centre	£0.19	£2.26	£0.77	£24.69	£0.46	£17.15	£45.53
	Laindon town centre	£0.00	£4.15	£0.00	£0.00	£0.00	£0.08	£4.23
	Pitsea town centre	£16.96	£10.94	£2.03	£1.10	£9.39	£0.79	£41.21
	Wickford town centre	£0.39	£0.00	£8.81	£0.46	£0.00	£6.82	£16.48
	Basildon local centres	£1.17	£1.79	£3.15	£8.76	£0.00	£4.07	£18.93
	Basildon out-of-centre stores	£45.57	£113.93	£30.72	£28.72	£26.58	£40.49	£286.01
	Other Basildon destinations	£0.00	£0.00	£0.07	£0.06	£0.06	£0.00	£0.20
Basildon total		£82.61	£150.95	£49.09	£67.42	£39.52	£92.05	£481.64
Castle Point total		£3.29	£4.55	£0.00	£0.66	£217.12	£1.11	£226.72
Rochford total		£0.00	£1.16	£0.80	£0.00	£95.54	£7.16	£104.66
Southend total		£0.00	£0.65	£1.01	£0.51	£406.98	£58.61	£467.76
Thurrock total		£0.33	£1.57	£0.57	£1.12	£262.52	£279.73	£545.83
Other study area zones total		£1.93	£3.78	£14.63	£6.43	£73.06	£3,043.10	£3,142.92
Outside study area	Outside study area	£0.00	£1.20	£0.50	£0.06	£78.21	£290.22	£370.19
Total		£88.16	£163.86	£66.59	£76.20	£1,172.93	£3,771.98	£5,339.71

Table 5B: Retail summary

	Comparison		Convenience		Total
	£M	%	£M	%	£M
Turnover derived from Basildon zones	£483.39	60%	£350.07	73%	£833.45
Turnover derived from elsewhere in study area	£319.33	40%	£131.57	27%	£450.90
Leakage from Basildon zones	£149.81	24%	£44.73	11%	£194.55
Comparison expenditure					
	2018	2021	2026	2031	2034
A Total expenditure (£M)	£633.20	£636.34	£779.69	£941.84	£1,056.21
B Market share of study area (%)	76%	76%	76%	76%	76%
C Retained expenditure (£M)	£483.39	£485.78	£595.22	£719.00	£806.31
D Inflow expenditure (£M)	£319.33	£323.61	£402.95	£485.60	£543.99
E Total available expenditure (£M)	£802.72	£809.39	£998.17	£1,204.60	£1,350.30
Claims on expenditure					
F Turnover of existing floorspace (£M)	£802.72	£849.35	£933.16	£1,025.25	£1,084.80
G Turnover of commitments (£M)		£10.26	£11.05	£11.90	£12.45
Quantitative need					
H Expenditure capacity (£M)	£0.00	-£50.21	£53.96	£167.45	£253.05
I Assumed sales density (£ per sqm net)	£6,000	£6,349	£6,975	£7,663	£8,108
J Net quantitative need (sqm)	-	7,910	7,737	21,851	31,208
K Gross quantitative need (sqm)	-	11,300	11,052	31,215	44,583
Convenience expenditure					
	2018	2021	2026	2031	2034
A Total expenditure (£M)	£394.80	£403.10	£418.16	£438.08	£451.10
B Market share of study area (%)	89%	89%	89%	89%	89%
C Retained expenditure (£M)	£350.07	£357.42	£370.78	£388.44	£399.99
D Inflow expenditure (£M)	£131.57	£135.98	£143.01	£149.62	£153.91
E Total available expenditure (£M)	£481.64	£493.40	£513.79	£538.06	£553.90
Claims on expenditure					
F Turnover of existing floorspace (£M)	£481.64	£481.64	£481.64	£481.64	£481.64
G Turnover of commitments (£M)		£13.89	£13.89	£13.89	£13.89
Quantitative need					
H Expenditure capacity (£M)	£0.00	-£2.13	£18.26	£42.53	£58.37
I Assumed sales density (£ per sqm net)	£12,000	£12,000	£12,000	£12,000	£12,000
J Net quantitative need (sqm)	-	177	1,522	3,544	4,864
K Gross quantitative need (sqm)	-	253	2,174	5,063	6,949

Table L1A: Leisure expenditure per capita

Restaurants, cafes																								
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	Zone 19	Zone 20	Zone 21	Zone 22	Zone 23	
2018	£1,055	£1,221	£1,429	£1,419	£1,462	£1,466	£1,276	£1,466	£1,269	£1,241	£1,263	£1,638	£1,648	£1,244	£1,320	£1,281	£1,482	£1,342	£1,396	£1,482	£1,617	£1,156	£1,314	
2021	£799	£924	£1,082	£1,074	£1,107	£1,110	£966	£1,110	£961	£940	£956	£1,240	£1,248	£942	£999	£970	£1,122	£1,016	£1,057	£1,122	£1,224	£875	£995	
2026	£1,028	£1,190	£1,392	£1,383	£1,425	£1,429	£1,243	£1,429	£1,237	£1,209	£1,231	£1,596	£1,606	£1,212	£1,286	£1,248	£1,444	£1,308	£1,360	£1,444	£1,576	£1,126	£1,280	
2031	£1,096	£1,269	£1,485	£1,475	£1,519	£1,524	£1,326	£1,524	£1,319	£1,290	£1,313	£1,702	£1,713	£1,293	£1,372	£1,331	£1,540	£1,395	£1,451	£1,540	£1,681	£1,201	£1,366	
2034	£1,126	£1,304	£1,526	£1,515	£1,561	£1,565	£1,362	£1,565	£1,355	£1,325	£1,348	£1,749	£1,759	£1,328	£1,409	£1,368	£1,582	£1,433	£1,490	£1,582	£1,726	£1,234	£1,403	
Pubs / bars / nightclubs / music venues																								
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	Zone 19	Zone 20	Zone 21	Zone 22	Zone 23	
2015	£188	£204	£260	£288	£235	£259	£270	£266	£225	£279	£221	£220	£262	£229	£206	£232	£308	£278	£261	£264	£279	£215	£267	
2018	£222	£261	£317	£323	£327	£327	£276	£333	£276	£265	£272	£220	£354	£357	£274	£292	£283	£326	£304	£306	£324	£353	£236	£295
2021	£168	£198	£240	£245	£248	£248	£209	£252	£209	£201	£206	£268	£270	£207	£221	£214	£247	£230	£232	£245	£267	£179	£223	
2026	£216	£254	£309	£315	£319	£319	£269	£324	£269	£324	£265	£345	£348	£267	£285	£276	£318	£296	£298	£316	£344	£230	£287	
2031	£231	£271	£329	£336	£340	£340	£287	£346	£287	£275	£283	£368	£371	£285	£303	£294	£339	£316	£318	£337	£367	£245	£307	
2034	£237	£279	£338	£345	£349	£349	£295	£356	£295	£283	£290	£378	£381	£293	£312	£302	£348	£325	£327	£346	£377	£252	£315	
Cinemas and theatres																								
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	Zone 19	Zone 20	Zone 21	Zone 22	Zone 23	
2018	£59	£72	£89	£91	£98	£90	£76	£95	£75	£79	£74	£106	£109	£79	£82	£72	£92	£73	£96	£100	£113	£59	£78	
2021	£45	£55	£67	£69	£74	£68	£58	£72	£57	£60	£56	£80	£83	£60	£62	£55	£70	£55	£73	£76	£86	£45	£59	
2026	£57	£70	£87	£89	£95	£88	£74	£93	£73	£77	£72	£103	£106	£77	£80	£70	£90	£71	£94	£97	£110	£57	£76	
2031	£61	£75	£92	£95	£102	£94	£79	£99	£78	£82	£77	£110	£113	£82	£85	£75	£96	£76	£100	£104	£117	£61	£81	
2034	£63	£77	£95	£97	£105	£96	£81	£101	£80	£84	£79	£113	£116	£84	£88	£77	£98	£78	£102	£107	£121	£63	£83	
Games of chance																								
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	Zone 19	Zone 20	Zone 21	Zone 22	Zone 23	
2018	£324.0	£306.0	£306.0	£310.0	£291.0	£318.0	£325.0	£299.0	£272.0	£252.0	£321.0	£282.0	£270.0	£299.0	£298.0	£267.0	£307.0	£228.0	£289.0	£270.0	£272.0	£188.0	£222.0	
2021	£245.3	£231.7	£231.7	£234.7	£220.3	£240.8	£246.1	£226.4	£205.9	£190.8	£243.0	£213.5	£204.4	£226.4	£225.6	£202.1	£232.4	£172.6	£218.8	£204.4	£205.9	£142.3	£168.1	
2026	£315.7	£298.2	£298.2	£302.1	£283.6	£309.9	£316.7	£291.4	£265.1	£245.6	£312.8	£274.8	£263.1	£291.4	£290.4	£260.2	£299.2	£222.2	£281.6	£263.1	£265.1	£183.2	£216.3	
2031	£336.7	£318.0	£318.0	£322.2	£302.4	£330.5	£337.8	£310.8	£282.7	£261.9	£333.6	£293.1	£280.6	£310.8	£309.7	£277.5	£319.1	£237.0	£300.4	£280.6	£282.7	£195.4	£230.7	
2034	£345.9	£326.7	£326.7	£331.0	£310.7	£339.5	£347.0	£319.2	£290.4	£269.0	£342.7	£301.1	£288.3	£319.2	£318.1	£285.1	£327.8	£243.4	£308.5	£288.3	£290.4	£200.7	£237.0	
Recreational and sporting services																								
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	Zone 19	Zone 20	Zone 21	Zone 22	Zone 23	
2018	£116.0	£153.0	£205.0	£208.0	£222.0	£215.0	£162.0	£226.0	£191.0	£174.0	£159.0	£282.0	£298.0	£170.0	£175.0	£172.0	£218.0	£179.0	£201.0	£226.0	£269.0	£214.0	£263.0	
2021	£87.8	£115.8	£155.2	£157.5	£168.1	£162.8	£122.7	£171.1	£144.6	£131.7	£120.4	£213.5	£225.6	£128.7	£132.5	£130.2	£165.0	£135.5	£152.2	£171.1	£203.7	£162.0	£199.1	
2026	£113.0	£149.1	£199.8	£202.7	£216.3	£209.5	£157.9	£220.2	£186.1	£169.6	£154.9	£274.8	£290.4	£165.7	£170.5	£167.6	£212.4	£174.4	£195.9	£220.2	£262.1	£208.5	£256.3	
2031	£120.6	£159.0	£213.1	£216.2	£230.7	£223.5	£168.4	£234.9	£198.5	£180.8	£165.2	£293.1	£309.7	£176.7	£181.9	£178.8	£226.6	£186.0	£208.9	£234.9	£279.6	£222.4	£273.3	
2034	£123.8	£163.3	£218.9	£222.1	£237.0	£229.5	£173.0	£241.3	£203.9	£185.8	£169.8	£301.1	£318.1	£181.5	£186.8	£183.6	£232.7	£191.1	£214.6	£241.3	£287.2	£228.5	£280.8	

Notes

Prices 2018

Per capita expenditure by zone derived from Experian 2018 (MMG)

Restaurants & café = MMG3 Restaurant and café meals

Pubs/bars/nightclubs/music venues = MMG3 Alcoholic drinks (away from home) + Admissions to clubs, dances, discos, bingo

Cinemas & theatres = MMG3 Cinemas + Live entertainment (theatre, concerts, shows)

Games of chance = MMG3 Games of chance

Recreational and sporting services = MMG3 Recreational and sporting services + Subscriptions for leisure activities and other subscriptions

Table L2A: Basildon leisure turnover (£M) summary 2018

Local authority	Destination	Basildon				Other South	Zones outside	Total
		Zone 1	Zone 2	Zone 3	Zone 4	Essex zones	South Essex	
Food and drink uses								
Basildon	Basildon town centre	£34.40	£35.68	£20.34	£3.09	£40.86	£7.86	£142.24
	Billericay town centre	£1.34	£13.82	£6.89	£54.87	£4.19	£33.60	£114.71
	Laindon town centre	£0.00	£0.74	£0.00	£0.00	£0.63	£0.00	£1.37
	Other Basildon destinations	£1.05	£1.20	£0.40	£1.51	£0.00	£1.69	£5.84
	Pitsea town centre	£1.45	£0.24	£0.40	£0.00	£0.00	£0.00	£2.10
Basildon total		£38.24	£51.67	£28.03	£59.47	£45.69	£43.15	£266.26
Other destinations in South Essex	Castle Point	£1.27	£1.30	£0.00	£0.00	£53.88	£0.00	£56.45
	Rochford	£0.34	£1.11	£3.34	£0.00	£184.88	£1.20	£190.86
	Southend-on-sea town centre	£1.98	£2.20	£2.34	£0.00	£209.69	£1.74	£217.96
	Other destinations in Southend	£1.26	£1.51	£20.00	£1.57	£129.45	£16.94	£170.73
	Grays main centre	£1.34	£0.00	£0.00	£0.00	£20.04	£0.00	£21.38
	Lakeside main centre	£1.87	£0.31	£1.89	£0.99	£67.92	£40.81	£113.79
	Other destinations in Thurrock	£0.00	£0.00	£0.00	£0.00	£41.36	£0.00	£41.36
Other destinations in South Essex total		£8.06	£6.44	£27.58	£2.55	£707.22	£60.69	£812.53
Destinations outside South Essex		£5.99	£11.29	£12.19	£4.33	£73.99	£779.33	£887.13
Total		£52.29	£69.40	£67.80	£66.35	£826.90	£883.17	£1,965.91
Cinemas and theatres								
Basildon	Basildon town centre	£0.14	£0.23	£0.87	£0.00	£1.38	£0.23	£2.85
	Billericay town centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
	Laindon town centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
	Other Basildon destinations	£1.90	£4.40	£1.38	£2.19	£10.08	£6.47	£26.43
	Pitsea town centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Basildon total		£2.05	£4.64	£2.25	£2.19	£11.46	£6.70	£29.29
Other destinations in South Essex	Castle Point	£0.20	£0.11	£0.00	£0.00	£3.36	£0.39	£4.05
	Rochford	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
	Southend-on-sea town centre	£0.00	£0.00	£0.02	£0.00	£2.00	£1.28	£3.31
	Other destinations in Southend	£0.02	£0.11	£0.02	£0.00	£16.18	£0.24	£16.57
	Grays main centre	£0.00	£0.00	£0.00	£0.00	£0.06	£0.00	£0.06
	Lakeside main centre	£0.05	£0.27	£0.08	£0.02	£5.09	£15.52	£21.03
	Other destinations in Thurrock	£0.00	£0.00	£0.00	£0.00	£0.02	£0.00	£0.02
Other destinations in South Essex total		£0.27	£0.49	£0.12	£0.02	£26.71	£17.43	£45.04
Destinations outside South Essex		£0.10	£0.23	£0.23	£0.12	£3.41	£106.41	£110.49
Total		£2.42	£5.35	£2.61	£2.33	£41.58	£130.54	£184.82
Health and fitness								
Basildon	Basildon town centre	£1.14	£3.93	£1.59	£1.16	£2.50	£1.28	£11.60
	Billericay town centre	£0.00	£0.50	£0.00	£1.11	£0.00	£1.75	£3.36
	Laindon town centre	£0.00	£0.22	£0.00	£0.00	£0.00	£0.00	£0.22
	Other Basildon destinations	£0.00	£1.04	£0.00	£0.13	£0.00	£0.00	£1.16
	Pitsea town centre	£0.52	£0.00	£0.00	£0.00	£0.00	£0.00	£0.52
Basildon total		£1.66	£5.69	£1.59	£2.39	£2.50	£3.03	£16.87
Other destinations in South Essex	Castle Point	£0.25	£0.00	£0.00	£0.00	£6.61	£0.00	£6.86
	Rochford	£0.00	£0.00	£0.00	£0.04	£12.69	£0.00	£12.74
	Southend-on-sea town centre	£0.42	£0.00	£0.08	£0.00	£9.41	£0.00	£9.90
	Other destinations in Southend	£0.05	£0.00	£1.10	£0.10	£5.20	£1.61	£8.05
	Grays main centre	£0.00	£0.00	£0.00	£0.00	£2.11	£0.00	£2.11
	Lakeside main centre	£0.00	£0.00	£0.00	£0.00	£1.68	£0.00	£1.68
	Other destinations in Thurrock	£0.00	£0.00	£0.00	£0.00	£4.71	£11.36	£16.07
Other destinations in South Essex total		£0.71	£0.00	£1.18	£0.14	£42.39	£12.97	£57.40
Destinations outside South Essex		£0.00	£0.00	£0.23	£0.13	£4.39	£187.12	£191.86
Total		£2.37	£5.69	£3.00	£2.66	£49.28	£203.12	£266.13
Family entertainment								
Basildon	Basildon town centre	£2.01	£4.16	£1.60	£2.02	£12.72	£8.48	£30.98
	Billericay town centre	£0.00	£0.00	£0.00	£0.04	£0.00	£0.49	£0.52
	Laindon town centre	£0.00	£0.05	£0.00	£0.00	£0.00	£0.00	£0.05
	Other Basildon destinations	£0.00	£0.87	£0.00	£0.14	£0.02	£0.49	£1.52
	Pitsea town centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Basildon total		£2.01	£5.08	£1.60	£2.20	£12.74	£9.45	£33.08
Other destinations in South Essex	Castle Point	£0.00	£0.00	£0.00	£0.00	£0.45	£0.00	£0.45
	Rochford	£0.00	£0.00	£0.00	£0.00	£6.34	£0.00	£6.34
	Southend-on-sea town centre	£0.12	£0.20	£1.23	£0.18	£22.99	£5.76	£30.47
	Other destinations in Southend	£0.00	£0.00	£0.04	£0.00	£1.05	£0.51	£1.60
	Grays main centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
	Lakeside main centre	£0.00	£0.00	£0.00	£0.00	£0.21	£0.00	£0.21
	Other destinations in Thurrock	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Other destinations in South Essex total		£0.12	£0.20	£1.28	£0.18	£31.03	£6.26	£39.07
Destinations outside South Essex		£0.24	£0.41	£0.13	£0.28	£5.51	£187.41	£193.99
Total		£2.37	£5.69	£3.00	£2.66	£49.28	£203.12	£266.13

Local authority	Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zones 5-16	Zones 17-23	Total
Recreation								
Basildon	Basildon town centre	£3.16	£8.08	£3.19	£3.18	£15.22	£9.76	£42.58
	Billericay town centre	£0.00	£0.50	£0.00	£1.15	£0.00	£2.24	£3.88
	Laindon town centre	£0.00	£0.28	£0.00	£0.00	£0.00	£0.00	£0.28
	Other Basildon destinations	£0.00	£1.91	£0.00	£0.26	£0.02	£0.49	£2.68
	Pitsea town centre	£0.52	£0.00	£0.00	£0.00	£0.00	£0.00	£0.52
Basildon total		£3.68	£10.77	£3.19	£4.59	£15.24	£12.48	£49.94
Other destinations in South Essex	Castle Point	£0.25	£0.00	£0.00	£0.00	£7.06	£0.00	£7.31
	Rochford	£0.00	£0.00	£0.00	£0.04	£19.03	£0.00	£19.07
	Southend-on-sea town centre	£0.54	£0.20	£1.31	£0.18	£32.39	£5.76	£40.37
	Other destinations in Southend	£0.05	£0.00	£1.15	£0.10	£6.25	£2.12	£9.65
	Grays main centre	£0.00	£0.00	£0.00	£0.00	£2.11	£0.00	£2.11
	Lakeside main centre	£0.00	£0.00	£0.00	£0.00	£1.88	£0.00	£1.88
	Other destinations in Thurrock	£0.00	£0.00	£0.00	£0.00	£4.71	£11.36	£16.07
Other destinations in South Essex total		£0.83	£0.20	£2.46	£0.32	£73.42	£19.24	£96.46
Destinations outside South Essex		£0.24	£0.41	£0.36	£0.40	£9.90	£374.52	£385.85
Total		£4.75	£11.38	£6.01	£5.31	£98.56	£406.24	£532.26
Games of chance								
Basildon	Basildon town centre	£3.66	£10.66	£1.67	£0.00	£5.73	£5.72	£27.45
	Billericay town centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
	Laindon town centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
	Other Basildon destinations	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
	Pitsea town centre	£0.94	£0.00	£0.00	£0.00	£0.00	£0.00	£0.94
Basildon total		£4.60	£10.66	£1.67	£0.00	£5.73	£5.72	£28.39
Other destinations in South Essex	Castle Point	£0.47	£0.00	£0.00	£0.00	£11.24	£0.00	£11.71
	Rochford	£0.00	£0.00	£0.00	£0.00	£4.79	£0.00	£4.79
	Southend-on-sea town centre	£6.45	£12.09	£3.34	£7.92	£97.09	£38.87	£165.75
	Other destinations in Southend	£1.75	£0.00	£3.95	£0.00	£13.42	£3.45	£22.58
	Grays main centre	£0.00	£0.00	£0.00	£0.00	£1.04	£0.00	£1.04
	Lakeside main centre	£0.00	£0.00	£0.00	£0.00	£1.29	£0.00	£1.29
	Other destinations in Thurrock	£0.00	£0.00	£0.00	£0.00	£0.18	£0.00	£0.18
Other destinations in South Essex total		£8.67	£12.09	£7.29	£7.92	£129.06	£42.32	£207.35
Destinations outside South Essex		£0.00	£0.00	£0.00	£0.00	£9.26	£333.89	£343.16
Total		£13.26	£22.75	£8.96	£7.92	£144.05	£381.94	£578.89
Summary								
Basildon	Basildon town centre	£44.52	£62.73	£29.26	£9.45	£78.41	£33.33	£257.71
	Billericay town centre	£1.34	£14.82	£6.89	£57.16	£4.19	£38.07	£122.48
	Laindon town centre	£0.00	£1.29	£0.00	£0.00	£0.63	£0.00	£1.92
	Other Basildon destinations	£2.95	£9.42	£1.78	£4.22	£10.12	£9.14	£37.64
	Pitsea town centre	£3.42	£0.24	£0.40	£0.00	£0.00	£0.00	£4.07
Basildon total		£52.24	£88.51	£38.33	£70.84	£93.36	£80.54	£423.81
Other destinations in South Essex	Castle Point	£2.43	£1.41	£0.00	£0.00	£82.59	£0.39	£86.82
	Rochford	£0.34	£1.11	£3.34	£0.08	£227.73	£1.20	£233.80
	Southend-on-sea town centre	£9.51	£14.69	£8.32	£8.29	£373.56	£53.40	£467.77
	Other destinations in Southend	£3.12	£1.62	£26.27	£1.76	£171.54	£24.87	£229.19
	Grays main centre	£1.34	£0.00	£0.00	£0.00	£25.36	£0.00	£26.70
	Lakeside main centre	£1.92	£0.58	£1.97	£1.00	£78.06	£56.34	£139.87
	Other destinations in Thurrock	£0.00	£0.00	£0.00	£0.00	£50.97	£22.73	£73.70
Other destinations in South Essex total		£18.66	£19.41	£39.90	£11.14	£1,009.82	£158.91	£1,257.85
Destinations outside South Essex		£6.57	£12.35	£13.14	£5.26	£106.47	£1,968.68	£2,112.47
Total		£77.47	£120.27	£91.38	£87.23	£1,209.65	£2,208.14	£3,794.13

Table L3A: Leisure expenditure (£M)

Restaurants, cafes

	Zone 1	Zone 2	Zone 3	Zone 4	Zones 5-16	Zones 17-23	Total
2018	£43.20	£49.99	£58.51	£58.10	£679	£401	£1,289
2021	£33.62	£70.89	£32.58	£27.95	£524	£1,755	£2,445
2026	£45.04	£95.43	£43.73	£37.14	£699	£2,359	£3,279
2031	£49.72	£105.75	£48.44	£40.74	£770	£2,610	£3,625
2034	£52.11	£111.11	£50.74	£42.54	£805	£2,736	£3,797

Pubs / bars / nightclubs / music venues

	Zone 1	Zone 2	Zone 3	Zone 4	Zones 5-16	Zones 17-23	Total
2018	£9.09	£19.41	£9.29	£8.25	£148	£482	£677
2021	£7.08	£15.15	£7.23	£6.36	£115	£376	£527
2026	£9.48	£20.40	£9.70	£8.45	£153	£506	£707
2031	£10.46	£22.61	£10.75	£9.27	£169	£559	£781
2034	£10.97	£23.75	£11.26	£9.68	£176	£586	£818

Cinemas and theatres

	Zone 1	Zone 2	Zone 3	Zone 4	Zones 5-16	Zones 17-23	Total
2018	£2.42	£5.35	£2.61	£2.33	£42	£131	£185
2021	£1.88	£4.18	£2.03	£1.79	£32	£102	£144
2026	£2.52	£5.63	£2.72	£2.38	£43	£137	£193
2031	£2.78	£6.24	£3.02	£2.61	£47	£151	£213
2034	£2.91	£6.55	£3.16	£2.73	£49	£158	£223

Games of chance

	Zone 1	Zone 2	Zone 3	Zone 4	Zones 5-16	Zones 17-23	Total
2018	£13.27	£22.76	£8.96	£7.92	£144	£382	£579
2021	£10.33	£17.77	£6.98	£6.11	£112	£298	£451
2026	£13.83	£23.91	£9.36	£8.11	£149	£400	£604
2031	£15.27	£26.50	£10.37	£8.90	£164	£443	£668
2034	£16.00	£27.85	£10.87	£9.29	£171	£464	£699

Recreational and sporting services

	Zone 1	Zone 2	Zone 3	Zone 4	Zones 5-16	Zones 17-23	Total
2018	£4.75	£11.38	£6.01	£5.32	£99	£406	£532
2021	£3.70	£8.88	£4.67	£4.10	£76	£317	£415
2026	£4.95	£11.96	£6.27	£5.44	£102	£426	£557
2031	£5.47	£13.25	£6.95	£5.97	£112	£472	£616
2034	£5.73	£13.92	£7.28	£6.24	£117	£495	£645

Notes

Product of Table A and Table L1A

Table L1B: Leisure expenditure per capita

Restaurants, cafes																								
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	Zone 19	Zone 20	Zone 21	Zone 22	Zone 23	
2018	£1,055	£1,221	£1,429	£1,419	£1,462	£1,466	£1,276	£1,466	£1,269	£1,241	£1,263	£1,638	£1,648	£1,244	£1,320	£1,281	£1,482	£1,342	£1,396	£1,482	£1,617	£1,156	£1,314	
2021	£799	£924	£1,082	£1,074	£1,107	£1,110	£966	£1,110	£961	£940	£956	£1,240	£1,248	£942	£999	£970	£1,122	£1,016	£1,057	£1,122	£1,224	£875	£995	
2026	£1,028	£1,190	£1,392	£1,383	£1,425	£1,429	£1,243	£1,429	£1,237	£1,209	£1,231	£1,596	£1,606	£1,212	£1,286	£1,248	£1,444	£1,308	£1,360	£1,444	£1,576	£1,126	£1,280	
2031	£1,096	£1,269	£1,485	£1,475	£1,519	£1,524	£1,326	£1,524	£1,319	£1,290	£1,313	£1,702	£1,713	£1,293	£1,372	£1,331	£1,540	£1,395	£1,451	£1,540	£1,681	£1,201	£1,366	
2034	£1,126	£1,304	£1,526	£1,515	£1,561	£1,565	£1,362	£1,565	£1,355	£1,325	£1,348	£1,749	£1,759	£1,328	£1,409	£1,368	£1,582	£1,433	£1,490	£1,582	£1,726	£1,234	£1,403	
Pubs / bars / nightclubs / music venues																								
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	Zone 19	Zone 20	Zone 21	Zone 22	Zone 23	
2015	£188	£204	£260	£288	£235	£259	£270	£266	£225	£279	£221	£220	£262	£229	£206	£232	£308	£278	£261	£264	£279	£215	£267	
2018	£222	£261	£317	£323	£327	£327	£276	£333	£276	£265	£272	£220	£354	£357	£274	£292	£283	£326	£304	£306	£324	£353	£236	£295
2021	£168	£198	£240	£245	£248	£248	£209	£252	£209	£201	£206	£268	£270	£207	£221	£214	£247	£230	£232	£245	£267	£179	£223	
2026	£216	£254	£309	£315	£319	£319	£269	£324	£269	£258	£265	£345	£348	£267	£285	£276	£318	£296	£298	£316	£344	£230	£287	
2031	£231	£271	£329	£336	£340	£340	£287	£346	£287	£275	£283	£368	£371	£285	£303	£294	£339	£316	£318	£337	£367	£245	£307	
2034	£237	£279	£338	£345	£349	£349	£295	£356	£295	£283	£290	£378	£381	£293	£312	£302	£348	£325	£327	£346	£377	£252	£315	
Cinemas and theatres																								
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	Zone 19	Zone 20	Zone 21	Zone 22	Zone 23	
2018	£59	£72	£89	£91	£98	£90	£76	£95	£75	£79	£74	£106	£109	£79	£82	£72	£92	£73	£96	£100	£113	£59	£78	
2021	£45	£55	£67	£69	£74	£68	£58	£72	£57	£60	£56	£80	£83	£60	£62	£55	£70	£55	£73	£76	£86	£45	£59	
2026	£57	£70	£87	£89	£95	£88	£74	£93	£73	£77	£72	£103	£106	£77	£80	£70	£90	£71	£94	£97	£110	£57	£76	
2031	£61	£75	£92	£95	£102	£94	£79	£99	£78	£82	£77	£110	£113	£82	£85	£75	£96	£76	£100	£104	£117	£61	£81	
2034	£63	£77	£95	£97	£105	£96	£81	£101	£80	£84	£79	£113	£116	£84	£88	£77	£98	£78	£102	£107	£121	£63	£83	
Games of chance																								
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	Zone 19	Zone 20	Zone 21	Zone 22	Zone 23	
2018	£324.0	£306.0	£306.0	£310.0	£291.0	£318.0	£325.0	£299.0	£272.0	£252.0	£321.0	£282.0	£270.0	£299.0	£298.0	£267.0	£307.0	£228.0	£289.0	£270.0	£272.0	£188.0	£222.0	
2021	£245.3	£231.7	£231.7	£234.7	£220.3	£240.8	£246.1	£226.4	£205.9	£190.8	£243.0	£213.5	£204.4	£226.4	£225.6	£202.1	£232.4	£172.6	£218.8	£204.4	£205.9	£142.3	£168.1	
2026	£315.7	£298.2	£298.2	£302.1	£283.6	£309.9	£316.7	£291.4	£265.1	£245.6	£312.8	£274.8	£263.1	£291.4	£290.4	£260.2	£299.2	£222.2	£281.6	£263.1	£265.1	£183.2	£216.3	
2031	£336.7	£318.0	£318.0	£322.2	£302.4	£330.5	£337.8	£310.8	£282.7	£261.9	£333.6	£293.1	£280.6	£310.8	£309.7	£277.5	£319.1	£237.0	£300.4	£280.6	£282.7	£195.4	£230.7	
2034	£345.9	£326.7	£326.7	£331.0	£310.7	£339.5	£347.0	£319.2	£290.4	£269.0	£342.7	£301.1	£288.3	£319.2	£318.1	£285.1	£327.8	£243.4	£308.5	£288.3	£290.4	£200.7	£237.0	
Recreational and sporting services																								
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Zone 16	Zone 17	Zone 18	Zone 19	Zone 20	Zone 21	Zone 22	Zone 23	
2018	£116.0	£153.0	£205.0	£208.0	£222.0	£215.0	£162.0	£226.0	£191.0	£174.0	£159.0	£282.0	£298.0	£170.0	£175.0	£172.0	£218.0	£179.0	£201.0	£226.0	£269.0	£214.0	£263.0	
2021	£87.8	£115.8	£155.2	£157.5	£168.1	£162.8	£122.7	£171.1	£144.6	£131.7	£120.4	£213.5	£225.6	£128.7	£132.5	£130.2	£165.0	£135.5	£152.2	£171.1	£203.7	£162.0	£199.1	
2026	£113.0	£149.1	£199.8	£202.7	£216.3	£209.5	£157.9	£220.2	£186.1	£169.6	£154.9	£274.8	£290.4	£165.7	£170.5	£167.6	£212.4	£174.4	£195.9	£220.2	£262.1	£208.5	£256.3	
2031	£120.6	£159.0	£213.1	£216.2	£230.7	£223.5	£168.4	£234.9	£198.5	£180.8	£165.2	£293.1	£309.7	£176.7	£181.9	£178.8	£226.6	£186.0	£208.9	£234.9	£279.6	£222.4	£273.3	
2034	£123.8	£163.3	£218.9	£222.1	£237.0	£229.5	£173.0	£241.3	£203.9	£185.8	£169.8	£301.1	£318.1	£181.5	£186.8	£183.6	£232.7	£191.1	£214.6	£241.3	£287.2	£228.5	£280.8	

Notes

Prices 2018

Per capita expenditure by zone derived from Experian 2018 (MMG)

Restaurants & café = MMG3 Restaurant and café meals

Pubs/bars/nightclubs/music venues = MMG3 Alcoholic drinks (away from home) + Admissions to clubs, dances, discos, bingo

Cinemas & theatres = MMG3 Cinemas + Live entertainment (theatre, concerts, shows)

Games of chance = MMG3 Games of chance

Recreational and sporting services = MMG3 Recreational and sporting services + Subscriptions for leisure activities and other subscriptions

Table L2B: Basildon leisure turnover (£M) summary 2018

Local authority	Destination	Basildon				Other South Essex zones	Zones outside South Essex	Total
		Zone 1	Zone 2	Zone 3	Zone 4	Zones 5-16	Zones 17-23	
Food and drink uses								
Basildon	Basildon town centre	£33.75	£34.99	£19.96	£3.03	£40.43	£7.64	£139.80
	Billericay town centre	£1.32	£13.55	£6.76	£56.33	£4.21	£31.21	£113.37
	Laindon town centre	£0.00	£0.72	£0.00	£0.00	£0.50	£0.00	£1.22
	Other Basildon destinations	£1.03	£1.17	£0.39	£1.48	£0.00	£1.66	£5.73
	Pitsea town centre	£1.42	£0.24	£0.39	£0.00	£0.00	£0.00	£2.06
Basildon total		£37.51	£50.67	£27.50	£60.85	£45.13	£40.51	£262.17
Other destinations in South Essex	Castle Point	£1.24	£1.28	£0.00	£0.00	£57.96	£0.00	£60.48
	Rochford	£0.33	£1.09	£3.28	£0.00	£165.26	£1.17	£171.13
	Southend-on-sea town centre	£1.95	£2.16	£2.30	£0.00	£210.57	£1.71	£218.68
	Other destinations in Southend	£1.24	£1.49	£19.63	£1.57	£133.34	£15.41	£172.67
	Grays main centre	£1.32	£0.00	£0.00	£0.00	£23.69	£0.00	£25.00
	Lakeside main centre	£1.83	£0.30	£1.85	£0.99	£68.20	£40.54	£113.72
	Other destinations in Thurrock	£0.00	£0.00	£0.00	£0.00	£38.01	£0.00	£38.01
Other destinations in South Essex total		£7.90	£6.31	£27.06	£2.56	£697.02	£58.84	£799.69
Destinations outside South Essex		£5.88	£11.07	£11.96	£4.36	£80.78	£765.16	£879.21
Total		£51.29	£68.05	£66.52	£67.77	£822.94	£864.50	£1,941.08
Cinemas and theatres								
Basildon	Basildon town centre	£0.14	£0.23	£0.86	£0.00	£1.79	£0.19	£3.21
	Billericay town centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
	Laindon town centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
	Other Basildon destinations	£1.87	£4.31	£1.36	£2.85	£8.52	£5.22	£24.13
	Pitsea town centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Basildon total		£2.01	£4.54	£2.22	£2.85	£10.32	£5.40	£27.34
Other destinations in South Essex	Castle Point	£0.19	£0.11	£0.00	£0.00	£4.02	£0.25	£4.58
	Rochford	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
	Southend-on-sea town centre	£0.00	£0.00	£0.02	£0.00	£2.21	£1.23	£3.46
	Other destinations in Southend	£0.02	£0.11	£0.02	£0.00	£15.73	£0.15	£16.04
	Grays main centre	£0.00	£0.00	£0.00	£0.00	£0.14	£0.00	£0.14
	Lakeside main centre	£0.05	£0.26	£0.08	£0.02	£8.41	£15.51	£24.34
	Other destinations in Thurrock	£0.00	£0.00	£0.00	£0.00	£0.04	£0.00	£0.04
Other destinations in South Essex total		£0.27	£0.48	£0.12	£0.02	£30.56	£17.15	£48.60
Destinations outside South Essex		£0.09	£0.19	£0.17	£0.08	£2.57	£32.63	£35.73
Total		£2.37	£5.21	£2.51	£2.95	£43.45	£55.18	£111.66
Health and fitness								
Basildon	Basildon town centre	£1.11	£3.81	£1.55	£1.49	£2.30	£0.92	£11.17
	Billericay town centre	£0.00	£0.49	£0.00	£1.43	£0.00	£1.17	£3.09
	Laindon town centre	£0.00	£0.22	£0.00	£0.00	£0.00	£0.00	£0.22
	Other Basildon destinations	£0.00	£1.01	£0.00	£0.16	£0.00	£0.00	£1.17
	Pitsea town centre	£0.50	£0.00	£0.00	£0.00	£0.00	£0.00	£0.50
Basildon total		£1.61	£5.52	£1.55	£3.09	£2.30	£2.09	£16.16
Other destinations in South Essex	Castle Point	£0.24	£0.00	£0.00	£0.00	£8.16	£0.00	£8.40
	Rochford	£0.00	£0.00	£0.00	£0.05	£7.78	£0.00	£7.83
	Southend-on-sea town centre	£0.40	£0.00	£0.08	£0.00	£10.88	£0.00	£11.36
	Other destinations in Southend	£0.04	£0.00	£1.07	£0.13	£7.96	£1.05	£10.25
	Grays main centre	£0.00	£0.00	£0.00	£0.00	£3.64	£0.00	£3.64
	Lakeside main centre	£0.00	£0.00	£0.00	£0.00	£2.94	£0.00	£2.94
	Other destinations in Thurrock	£0.00	£0.00	£0.00	£0.00	£4.74	£11.05	£15.79
Other destinations in South Essex total		£0.69	£0.00	£1.15	£0.18	£46.10	£12.10	£60.22
Destinations outside South Essex		£0.00	£0.00	£0.22	£0.16	£4.24	£180.73	£185.35
Total		£2.31	£5.52	£2.92	£3.43	£52.63	£194.92	£261.73
Family entertainment								
Basildon	Basildon town centre	£1.95	£4.03	£1.55	£2.61	£14.34	£6.97	£31.46
	Billericay town centre	£0.00	£0.00	£0.00	£0.05	£0.00	£0.31	£0.36
	Laindon town centre	£0.00	£0.05	£0.00	£0.00	£0.00	£0.00	£0.05
	Other Basildon destinations	£0.00	£0.84	£0.00	£0.18	£0.05	£0.31	£1.38
	Pitsea town centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Basildon total		£1.95	£4.92	£1.55	£2.84	£14.39	£7.59	£33.25
Other destinations in South Essex	Castle Point	£0.00	£0.00	£0.00	£0.00	£0.49	£0.00	£0.49
	Rochford	£0.00	£0.00	£0.00	£0.00	£4.84	£0.00	£4.84
	Southend-on-sea town centre	£0.12	£0.19	£1.20	£0.24	£24.52	£5.62	£31.88
	Other destinations in Southend	£0.00	£0.00	£0.04	£0.00	£1.15	£0.50	£1.70
	Grays main centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
	Lakeside main centre	£0.00	£0.00	£0.00	£0.00	£0.19	£0.00	£0.19
	Other destinations in Thurrock	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Other destinations in South Essex total		£0.12	£0.19	£1.24	£0.24	£31.19	£6.12	£39.09
Destinations outside South Essex		£0.24	£0.40	£0.13	£0.36	£7.05	£181.21	£189.38
Total		£2.31	£5.52	£2.92	£3.43	£52.63	£194.92	£261.73

Local authority	Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zones 5-16	Zones 17-23	Total
Recreation								
Basildon	Basildon town centre	£3.06	£7.84	£3.10	£4.11	£16.64	£7.89	£42.63
	Billericay town centre	£0.00	£0.49	£0.00	£1.48	£0.00	£1.48	£3.45
	Laindon town centre	£0.00	£0.27	£0.00	£0.00	£0.00	£0.00	£0.27
	Other Basildon destinations	£0.00	£1.85	£0.00	£0.34	£0.05	£0.31	£2.55
	Pitsea town centre	£0.50	£0.00	£0.00	£0.00	£0.00	£0.00	£0.50
Basildon total		£3.57	£10.44	£3.10	£5.93	£16.69	£9.68	£49.40
Other destinations in South Essex	Castle Point	£0.24	£0.00	£0.00	£0.00	£8.65	£0.00	£8.89
	Rochford	£0.00	£0.00	£0.00	£0.05	£12.62	£0.00	£12.67
	Southend-on-sea town centre	£0.52	£0.19	£1.27	£0.24	£35.40	£5.62	£43.24
	Other destinations in Southend	£0.04	£0.00	£1.12	£0.13	£9.11	£1.55	£11.94
	Grays main centre	£0.00	£0.00	£0.00	£0.00	£3.64	£0.00	£3.64
	Lakeside main centre	£0.00	£0.00	£0.00	£0.00	£3.13	£0.00	£3.13
	Other destinations in Thurrock	£0.00	£0.00	£0.00	£0.00	£4.74	£11.05	£15.79
Other destinations in South Essex total		£0.81	£0.19	£2.39	£0.42	£77.29	£18.22	£99.31
Destinations outside South Essex		£0.24	£0.40	£0.35	£0.52	£11.29	£361.94	£374.74
Total		£4.61	£11.03	£5.84	£6.87	£105.26	£389.84	£523.45
Games of chance								
Basildon	Basildon town centre	£3.59	£10.45	£1.64	£0.00	£10.22	£3.87	£29.77
	Billericay town centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
	Laindon town centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
	Other Basildon destinations	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
	Pitsea town centre	£0.92	£0.00	£0.00	£0.00	£0.00	£0.00	£0.92
Basildon total		£4.51	£10.45	£1.64	£0.00	£10.22	£3.87	£30.69
Other destinations in South Essex	Castle Point	£0.46	£0.00	£0.00	£0.00	£14.72	£0.00	£15.17
	Rochford	£0.00	£0.00	£0.00	£0.00	£4.07	£0.00	£4.07
	Southend-on-sea town centre	£6.33	£11.85	£3.28	£10.34	£84.71	£38.25	£154.76
	Other destinations in Southend	£1.71	£0.00	£3.89	£0.00	£18.74	£2.29	£26.63
	Grays main centre	£0.00	£0.00	£0.00	£0.00	£2.67	£0.00	£2.67
	Lakeside main centre	£0.00	£0.00	£0.00	£0.00	£0.82	£0.00	£0.82
	Other destinations in Thurrock	£0.00	£0.00	£0.00	£0.00	£0.47	£0.00	£0.47
Other destinations in South Essex total		£8.50	£11.85	£7.17	£10.34	£126.19	£40.54	£204.59
Destinations outside South Essex		£0.00	£0.00	£0.00	£0.00	£14.63	£328.26	£342.89
Total		£13.01	£22.29	£8.81	£10.34	£151.04	£372.67	£578.17
Summary								
Basildon	Basildon town centre	£43.61	£61.33	£28.66	£11.25	£85.72	£27.48	£258.04
	Billericay town centre	£1.32	£14.52	£6.76	£59.29	£4.21	£34.18	£120.27
	Laindon town centre	£0.00	£1.26	£0.00	£0.00	£0.50	£0.00	£1.76
	Other Basildon destinations	£2.89	£9.19	£1.75	£5.01	£8.63	£7.49	£34.96
	Pitsea town centre	£3.35	£0.24	£0.39	£0.00	£0.00	£0.00	£3.98
Basildon total		£51.17	£86.54	£37.56	£75.55	£99.05	£69.14	£419.01
Other destinations in South Essex	Castle Point	£2.37	£1.38	£0.00	£0.00	£94.00	£0.25	£98.01
	Rochford	£0.33	£1.09	£3.28	£0.11	£194.57	£1.17	£200.55
	Southend-on-sea town centre	£9.32	£14.39	£8.15	£10.82	£368.30	£52.43	£463.39
	Other destinations in Southend	£3.06	£1.59	£25.77	£1.82	£186.02	£20.96	£239.22
	Grays main centre	£1.32	£0.00	£0.00	£0.00	£33.78	£0.00	£35.10
	Lakeside main centre	£1.88	£0.56	£1.93	£1.01	£83.68	£56.05	£145.14
	Other destinations in Thurrock	£0.00	£0.00	£0.00	£0.00	£47.99	£22.10	£70.09
Other destinations in South Essex total		£18.28	£19.02	£39.13	£13.76	£1,008.34	£152.97	£1,251.50
Destinations outside South Essex		£6.44	£12.06	£12.84	£5.48	£120.55	£1,849.93	£2,007.30
Total		£75.89	£117.62	£89.53	£94.79	£1,227.95	£2,072.03	£3,677.81

Table L3B: Leisure expenditure (£M)

Restaurants, cafes

	Zone 1	Zone 2	Zone 3	Zone 4	Zones 5-16	Zones 17-23	Total
2018	£42.37	£49.04	£57.39	£56.99	£666	£393	£1,265
2021	£32.72	£68.70	£31.78	£36.56	£557	£1,723	£2,449
2026	£43.51	£92.43	£42.76	£49.18	£746	£2,354	£3,329
2031	£48.64	£102.99	£47.64	£54.80	£830	£2,624	£3,708
2034	£51.43	£109.08	£50.46	£58.05	£877	£2,772	£3,918

Pubs / bars / nightclubs / music venues

	Zone 1	Zone 2	Zone 3	Zone 4	Zones 5-16	Zones 17-23	Total
2018	£8.92	£19.02	£9.13	£10.78	£157	£471	£676.42
2021	£6.89	£14.68	£7.05	£8.32	£122	£369	£527.92
2026	£9.16	£19.53	£9.38	£11.07	£162	£499	£710.34
2031	£10.24	£21.83	£10.48	£12.37	£181	£557	£792.19
2034	£10.82	£23.08	£11.08	£13.08	£190	£588	£836.68

Cinemas and theatres

	Zone 1	Zone 2	Zone 3	Zone 4	Zones 5-16	Zones 17-23	Total
2018	£2.37	£5.25	£2.56	£3.04	£45	£128	£186
2021	£1.83	£4.05	£1.98	£2.34	£35	£100	£145
2026	£2.43	£5.39	£2.63	£3.12	£46	£135	£195
2031	£2.72	£6.02	£2.94	£3.48	£51	£150	£217
2034	£2.88	£6.37	£3.11	£3.68	£54	£159	£229

Games of chance

	Zone 1	Zone 2	Zone 3	Zone 4	Zones 5-16	Zones 17-23	Total
2018	£13.01	£22.29	£8.81	£10.34	£151	£373	£578
2021	£10.05	£17.22	£6.81	£7.99	£117	£292	£451
2026	£13.36	£22.90	£9.05	£10.62	£156	£395	£606
2031	£14.94	£25.59	£10.12	£11.87	£174	£440	£676
2034	£15.79	£27.06	£10.70	£12.55	£183	£465	£714

Recreational and sporting services

	Zone 1	Zone 2	Zone 3	Zone 4	Zones 5-16	Zones 17-23	Total
2018	£4.61	£11.03	£5.84	£6.87	£105	£390	£523
2021	£3.60	£8.61	£4.56	£5.36	£83	£312	£417
2026	£4.78	£11.45	£6.06	£7.13	£110	£423	£562
2031	£5.35	£12.80	£6.78	£7.97	£122	£472	£627
2034	£5.65	£13.53	£7.17	£8.42	£129	£499	£663

Notes

Product of Table B and Table L1B

Appendix C Retail capacity method

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

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

Appendix D Revised policy wording

Policy R1 Retail and Commercial Leisure Strategy

1. The Council will seek to deliver up to ~~2,500~~ 9,000m² net additional comparison goods floorspace and up to ~~2,170~~ 2,170m² net additional convenience good floorspace by ~~2024~~ 2026. A further ~~21,600~~ 24,100m² and ~~4,280~~ 4,280m² net floorspace respectively will be delivered by the end of the plan period, subject to periodic monitoring and review of economic and market trends.
2. In addition to new retail provision, the Council will seek to deliver up to 1,900m² gross additional food and drink (A3, A4 and A5) floorspace by 2021, and a further 7,400m² gross floorspace by the end of the plan period, subject to periodic monitoring and review of economic and market trends.
3. To ensure the long-term vitality and viability of the Borough's centres, the Council will apply a "town centre-first" approach to proposals for retail, leisure and other main town centre uses in accordance with the established hierarchy of centres as follows:
 - Regional Town Centre: Basildon
 - Town Centre: Billericay, Laindon, Pitsea and Wickford
 - Local Centre: 39 Local Centres as defined in Appendix 4
4. The regeneration of Basildon, Laindon, Wickford and Pitsea Town Centres in accordance with policies R2 to R5 will be a key priority, while enhancements to the vitality of Billericay Town Centre will be sought in accordance with policy R6. Proposals that focus new development for retail, leisure and other main town centre uses within these centres will be supported.
5. The Council will support proposals for the development and retention of hotel/visitor accommodation, in appropriate locations, where identified needs are not being met by existing facilities, taking into account locational requirements when applying the sequential test, the target market of hotel patron and the viability of hotel development.
6. In addition to the main town centre uses, residential development will be permitted on appropriate sites within the Borough's town centres, where they could contribute to their vitality and subject to compliance with all other relevant policies of this plan.
7. The Council will safeguard existing street markets and encourage the creation of new street markets where they support the vitality of the town centre.
8. The Council will give preference to applications for main town centre uses located in town centres, and will apply the sequential and impact tests to proposals to re-use, redevelop or intensify out of centre locations for retail, leisure and other main town centre uses.
9. Shops and other community facilities within local centres should be retained and enhanced where they remain viable and new local centres created where they are required to meet the day-to-day needs of the local community.
10. Greater emphasis will be placed on sustainable access to and from the town centres such as walking, cycling and public transport, and appropriate levels of car parking will be provided in key locations and along main movement corridors into the town centres. The Council will ensure there continues to be sufficient car parking capacity across each town centre to support the economic and future growth aspirations, without inducing unmanageable traffic flows across the highway network.

Policy R2 Basildon Town Centre Regeneration

1. Basildon Town Centre will be the primary focus for all future major retail and leisure development within the Borough, in order to reinforce its role and function as the highest-order centre in the Borough and enable it to compete with other similar sized centres in the sub-region.

2. The town centre will be regenerated with the aim of providing the majority of the additional retail floorspace required for the Borough, alongside leisure and entertainment floorspace, a new hotel, up to around 2,128 residential units, a further education college, and a mix of business, community and open space uses. These will all be delivered as guided by the most up to date Town Centre Masterplan.
3. The primary shopping area, ~~which includes the primary and secondary frontages will be protected,~~ as will the street market; while the redevelopment and modernisation of existing premises, particularly around the periphery of the primary shopping area, will be encouraged to support the diversification of uses and the introduction of a night-time economy.
4. Enhancements to the environmental quality of the town centre will be made through the refurbishment of the existing public realm and the creation of new squares and green spaces as part of development, which will provide greater connectivity between the surrounding residential areas and the centre.

Policy R3 Laindon Town Centre Regeneration

[No changes recommended]

Policy R4 Pitsea Town Centre Regeneration

1. The regeneration of Pitsea Town Centre will ensure its vitality and viability and enable it to thrive as a 'destination' providing a diverse retail and leisure offer, alongside health and community facilities that meet the needs of the local community.
2. The primary shopping area, ~~which includes the primary and secondary frontages will be protected,~~ as will the street market; while the modernisation of existing premises, particularly around the periphery of the primary shopping area, will be encouraged to support the diversification of uses and the creation of a vibrant evening economy.
3. Enhancements to the environmental quality of the town centre and the creation of pedestrian friendly public realm will improve its attractiveness and encourage greater pedestrian movement through the centre.

Policy R5 Wickford Town Centre Regeneration

1. The regeneration of Wickford Town Centre will be delivered in accordance with the most up to date Masterplan or Regeneration Strategy.
2. The town centre will be regenerated with the aim of providing new retail floorspace including an additional foodstore, and 15 - 100 residential units, alongside a mix of other leisure, business, health and community uses where opportunities arise. This will increase the popularity of the town centre as a shopping and leisure destination and enable it to thrive.
3. The primary shopping area, ~~which includes the primary and secondary frontages will be protected,~~ as will the street market; while the modernisation of existing premises and the diversification of the retail offer will be encouraged.
4. Further enhancements to the public realm will be supported where they improve the cohesiveness of the town centre and increase its attractiveness to investors and retailers.

Policy R6 Billericay Town Centre Enhancement

[No changes recommended]

Policy R7 Town Centre Boundaries and Primary Shopping Areas

1. The location and extent of the Borough's town centres are shown on the Policies Map. Land within the town centre boundaries will be retained for the ongoing provision of town centre uses appropriate to a town centre, including retailing, offices, leisure and community facilities, and residential (where it contributes to the viability and vitality of the town centre).
2. Proposals for development within the town centre boundaries will be permitted where:
 - a. The use and scale is consistent with the role and function of the town centre; and
 - b. It is consistent with the Borough's spatial strategy and all other relevant policy requirements of this plan.
3. For proposals within Primary Shopping Areas, development above ground floor level will be encouraged where there will be no adverse impact on the functioning of the ground floor retail or other beneficial use, to the extent that it would make a ground floor units unviable.

Policy R8 Primary Shopping Frontages

- ~~1. Within the Primary Shopping Frontages, as defined on the Policies Map, the change of use of ground floor premises from Class A1 uses (shops) to other town centre uses will be permitted provided the proposed use will provide a service to visiting members of the public and would:~~
 - ~~a. Make a positive contribution to the vitality and viability of the town centre;~~
 - ~~b. Not result in the net loss of retail floorspace at a scale that would result in the proportion of A1 retail uses at ground floor level (taking account of any unimplemented planning permissions) falling below:~~
 - ~~i. 75% in Basildon Town Centre; or~~
 - ~~ii. 60% in Billericay, Pitsea or Wickford Town Centres.~~
 - ~~c. Not fragment any part of the Primary Shopping Frontage by creating 3 or more non-A1 uses together;~~
 - ~~d. Be compatible with the retail appearance and character of the frontage; and~~
 - ~~e. In the case of uses that would not create an active frontage, a window display or other frontage appropriate to the centre would be provided.~~
4. The beneficial temporary use of vacant units will be encouraged where it would maintain or enhance the function of the town centre, having regard to both their number within the centre as a whole and the primary shopping frontage, and the length of time the unit has been vacant.

Policy R9 Secondary Shopping Frontages

- ~~1. Within the Secondary Shopping Frontages, as defined on the Policies Map, the use of ground floor premises for retail and other appropriate town centre uses will be permitted, provided the proposed use will provide a service to visiting members of the public and would:~~
 - ~~a. Make a positive contribution to the vitality and viability of the centre;~~
 - ~~b. Not result in the net loss of retail floorspace at a scale that would result in the proportion of A1 retail uses at ground floor level (taking account of other unimplemented planning permissions) falling below 30% which is justified as necessary to support the continued retail function of that frontage zone;~~

~~c. Be compatible with the retail appearance and character of the frontage; and~~

~~d. In the case of uses that would not create an active frontage, a window display or other frontage appropriate to the centre would be provided.~~

5. Outside Primary Shopping Areas, the Council will give consideration to the provision of community facilities ~~within secondary frontages~~, where it can be demonstrated that these will provide a service to visiting members of the public and would support the vitality and viability of the town centre.