Basildon Retail & Commercial Leisure Capacity Study

Volume 2

On behalf of

Basildon Council

BASILDON · BILLERICAY · WICKFORD

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Appendices

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Appendix A Core Strategy consultation responses

CORE STRATEGY – RETAIL AND TOWN CENTRE CONSULTATION RESPONSES SUMMARY

Centre	Core Strategy consultation response
Basildon	Both Wickford and Billericay are not in urgent need of renewal. It is disingenious to suggest that Billericay and Wickford high street would decline if Basildon were to be focused on. The two towns are socio-economically different and can flourish independently of Basildon. For instance, the shops in Billericay are very different to Basildon. Thus the high street does not 'compete' in the way alluded to in the Core Strategy wording, rather it complements the retail offering of Basildon.
	There are virtually no pubs and restaurants. There is no social centre in the town at night. We need fewer not more people, we need more entertainment, better services, clearer roads and more beauty.
	The so-called regeneration of the Town Centre is misguided in a vis a vis the FE College and new retail/leisure. The former because the site is restricted and will cause congestion; the latter because the case for encouraging a 'cafe culture' is out of tune with the demographics and local culture.
	InfraRed intends to ensure that the Shopping Centre maintains itself as the main retail and leisure destination in the town centre and thereby contributes to the vitality and viability of the entire town centre. InfraRed also wishes to protect the Shopping Centre from competing out of centre offers. InfraRed considers that it is important the delivery of a new cinema and related food and drink uses should be clearly related to the Eastgate Centre.
	The sequential test in the NPPF should be more explicitly stated within the core strategy. Policies should support Basildon Town Centre as the primary shopping and leisure destination in the borough.
	The plan looks as if it has been invented to reduce the likelihood of residents going to other retail centres outside the borough as a reaction to the success of Lakeside, both Westfields and Chelmsford.
Billericay	Billericay has only one supermarket in the centre and one at Queens park. Billericay Waitrose is the busiest in the country. The town has minimal parking, increasing trafic to shops would be detrimental.
	In relation to house growth there are many tell-tale signs that the town is already struggling to sustain the growth in numbers in recent years, from queueing to get petrol at the BP garage to shopping at Waitrose on a Saturday morning. It was not like this a few years ago
	The Sustainability Appraisal fails to assess and meet the NPPF in the following areas: improving quality of life in the community through jobs in the town and improving condition of travel and leisure. There are no supporting comments in the Sustainability Appraisal on high street parking, no request for increased retail space for shops restaurants, no replacement of lost open space and no mention of requirements for additional leisure facilities.
Wickford	Wickford town centre, Pitsea shopping area and Laindon shopping area are already overcrowded. The Runwell Hospital site in Wickford is large enough to accommodate a new shopping area. More houses could be built in Wickford, as they would have the high street and new shopping area.
	Wickford badly needs housing growth and town centre regeneration.
	Wickford needs regenerating throughout the town in all areas. More housing, better roads a more welcoming safer feeling town centre. If this plan can provide all this good.

Centre	Core Strategy consultation response
	Wickford is a small town with limited employment and high street facilities. These four new areas of potential development would overload existing facilities.
	There is a need for more shops in Wickford.
	Many who live in Wickford shop elsewhere due to infrastructure constrains.
	Wickford has grown enough. The HIgh Street and its shops and services cannot cope with the expanded population now.
Pitsea	No plan for development of Pitsea town centre in the local plan.
Laindon	More shops needed in Laindon.
	The Core Strategy policy for Laindon town centre places undue emphasis on retailing and makes no references to other uses, such as leisure and community facilities.
	Retail development should be abandoned in Laindon town centre and the land should be redeveloped for housing. Basildon town centre, Tesco Laindon and Lidl are all too close for retail to be a success here. Historically retail units in Laindon have not been a success. A lot of housing could be provided here.
General Observations	Recommend that the threshold for retail impact assessments of applications not in an existing centre should be lowered from the default 2,500 sq.m to 1,000 sq.m given the scale and nature of retailing within the Borough's centres. It is also not clear why the impact assessment is required for in-centre proposals.

Appendix B Town centre health checks

Appendix B: Basildon Town Centre Healthcheck

PPG indicator	Summary for Basildon town centre	
Diversity of uses	Basildon town centre is the principal shopping destination in the Borough, and can be considered to have a good diversity of retail uses, with more limited representation in respect of leisure uses. Representation from comparison goods retailers is particularly strong, and the centre also has an important civic function. A large Asda supermarket anchors the eastern end of the town centre, in the Eastgate Shopping Centre, which in itself anchors the shopping offer of the town centre. The main function of the town centre is therefore as a comparison goods shopping destination: the Eastgate Centre includes reasonable-sized branches of key fashion multiples such as H&M and Topshop, and the town centre benefits from the presence of a number of department stores (Debenhams in the Eastgate Centre, and Primark, BHS and Marks & Spencer in Town Square) which act as important anchor stores and help to drive footfall. There is concentration of clothing retailers to the western end of the town centre at the Westgate Shopping Park. The market is clearly an important contributor to the vitality and vitality of the town centre. The market is currently located in Market Square and operates four days a week, and appears to be relatively well-supported though a number of “cabins” appeared vacant during our site visit. There are a variety of goods sold including clothing, CDs and jewellery and fresh produce. The market is made up of a number of permanent structures as well as temporary stalls. The northern edge of the market is bound by formal retail units. Generally the units are small and appear to be local shops and cafes. We are aware of the Council’s proposals for the relocation of the market to a more central location within the town centre, which is considered to be potentially beneficial the wider vitality and viability of the centre. While the town is well served by retail there is a very limited leisure and evening economy. Other than the Towngate Theatre the town centre has little cultural or leisure amenities other than the Basildon Bowl and Quaser Centre. There are also very few family restaurants and pubs within the town centre. There are two main pubs - The Moon on the Square and the Beehive and The Edge Bar and Restaurant. A third pub – The Towngate Public House located within the Westgate Shopping Park has since closed down. There are a handful of restaurants, such as Nando’s in the Eastgate Centre, but most of the offer is geared towards take-aways or fast food end of the market. The relative lack of a leisure economy limits the use of the town centre to mostly day time use and is thus a drawback to increasing visitors outside of retail trading hours.	
Proportion of vacant street level property	The Experian Goad survey of Basildon town centre (March 2013) identified a total of 43 vacant units in the town centre, equivalent to 19.1% of the total offer. Our site visits to the centre in August 2015 identified that this vacancy rate has decreased, and there are currently 26 vacant units in the centre, equivalent to 11.5% of the total offer. This is slightly lower than the UK average of 12.3% and this reduction in the number of vacant units is clearly positive – although we note that in many cases, the units are being filled with lower quality/value retailers, including two discount stores. The letting of a prominent unit at the entrance to the Eastgate Centre to MetroBank is more encouraging. Similarly, the ground floor of the Eastgate Shopping Centre has seen some of its vacant units let. Out of the 13 vacant units within the Centre recorded by Experian, 7 have now been leased. New retailers trading in the centre include iCandy Cards, TReds and Mr Simms Olde Sweet Shoppe (which has relocated from smaller premises in the town centre). The area along East Walk has a fairly high proportion of vacant units compared to the rest of the town centre. Again, there is some evidence that appears to suggest an improvement in the number of shops staying vacant. Out of 13 vacant units identified by Experian Goad, five are now occupied. Nevertheless, the concentration of vacant units in this area does represent cause for concern and should be carefully monitored. The vacant units, with the exception of the now closed Towngate Public House,	

Appendix B: Basildon Town Centre Healthcheck

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	generally appear to be average to small in size. While national multiple retailers might prefer larger units, the relative age of the property stock in the town centre means it may be possible to combine two or more smaller units especially when considering the addition of small convenience good retailers into the town centre.	
Retailer representation and intentions to change representation	Basildon town centre benefits from a good level of national multiple retailer representation. Key anchor stores located throughout the centre, including Marks & Spencer and Primark at Town Square, and Debenhams in Eastgate Centre. The Asda store at the far eastern end of the Eastgate Centre is also likely to act as an anchor, being the largest foodstore in the town centre by some margin. Whilst the Eastgate Centre has a good range of mid-market, typically fashion-orientated retailers, elsewhere in the centre much of the retail offer is towards the downmarket end of the spectrum and would benefit from a broader range. New additions to the retail offer in the town are generally at the 'value' end of the market. The primary retail pitch can be considered to consist of Town Square and Eastgate Shopping Centre. Town Square is dominated by a number of national retailers constituting what could be considered a 'typical' High Street retail offering. The main anchor shops in this part of the centre are Marks and Spencer, BHS and Primark. In addition there are bank branches including Barclays and HSBC, opticians and chemists. There is however an apparent increase in the number of discount stores within the square including Poundland, Pound Party and 99p Stores. This trend does, however, mirror that seen across many town centres across the country. As with Town Square, Eastgate Shopping Centre offers a typical High Street retail mix. The shopping centre's anchor store is a large format Asda supermarket which sells a varied mix of convenience goods and a particularly extensive comparison goods range, as well as ancillary services including an opticians and photo processing. In addition, there are a number of major comparison goods retailers within the shopping centre, with a particular orientation towards mid-market fashion retailers, including Topshop, H&M and Next . The top floor of the shopping centre hosts a number of independent retailers and service providers such as hair salons but suffers from a number of vacant units and low levels of pedestrian footfall. The newest addition to the centre the Westgate Retail Park hosts a number of national retailers with an emphasis of home furnishing and household goods. These include Laura Ashely Home, Dreams Bed and Beddings, Home Bargains, Argos, Wilkinson, Thompson Travel and JD Sports. The development is, however, poorly integrated with the rest of the town centre.	
Pedestrian flows	The entire town centre benefits from a pedestrianized shopping environment. This means that pedestrian circulation is not hampered by the presence of cars. The strongest levels of pedestrian activity appear to be concentrated around Eastgate Centre Town Square and Market Square. The market and the bus station also appeared have a relatively high amount of pedestrian traffic and overall circulation of pedestrians around the town centre appears to be good. The area around St Martins Square, Southernhay and Westgate Retail Park were comparatively quieter; as noted above Westgate is poorly integrated with the rest of the town centre, and Southernhay has an above-average number of vacant units. The town centre generally benefits from a good level of pedestrian activity during the day however this is likely to change after retail trading hours.	
Accessibility	Accessibility to Basildon town centre. While navigating around the town centre is fairly easy, access to the town centre from the surrounding areas is difficult owing to the ring of busy roads around the town centre. This is particularly apparent on the approaches to the town centre from the train station, where there is little in the way of directional signposting guiding visitors to the town centre. This can be easily addressed by the Council.	

Appendix B: Basildon Town Centre Healthcheck

PPG indicator	Summary for Basildon town centre	
	Basildon's main bus station is located within the town centre in a purpose built facility which means that there is easy access to the town centre from around the borough. The bus station, whilst functional and well-used, is slightly tired and dated in appearance and would benefit from refreshing. There are also a number of public car parks available, including a surface level car park and multi-story car park both located on Great Oak Road. Basildon train station is located close to the town centre and benefits from frequent trains to London via Laindon, as well as Pitsea and Shoeburyness.	
Perception of safety/ occurrence of crime	The town centre generally appears to be safe. The fact that the entire town centre is fully pedestrianised adds to the general feeling of safety. The two main retail pitches – Town Square and the Eastgate Shopping Centre are well used and there is a high volume of pedestrian movement. Similarly the market at Market Square is also appears to attract a good volume of shoppers which adds to the feeling of security. There was no sign of litter or graffiti and the town centre was generally clean. It is important to note that the town centre has a very limited evening economy. There are only two pubs – The Moon and the Square and the Beehive and he Edge Bar and Restaurant. Most restaurants are fast food outlets. The perception of safety falls at night as pedestrian foot fall declines outside trading hours. Eastgate Shopping Centre for instance closes at 6pm. There is also very little residential use within the centre, although it is acknowledged that the Council is planning for delivery of significant numbers of new residential developments in the town centre over the course of the study period.	
State of town centre environmental quality	In general the town centre environment is considered to be of reasonably good quality. The absence of vehicular traffic is positive factor when considering the overall environmental quality of the centre i.e. there is fairly little congestion/traffic noise within the town centre. The architecture of the town centre is evidently a legacy of Basildon's New Town status. As such there is little architectural diversity as most buildings were constructed in the 1950s/60s, with the exception of the Eastgate Shopping Centre and more recent Westgate Shopping Park. However, most buildings appear to be in decent condition. Since the town centre faces inwards the backs/ service areas usually the first thing visitors to the town centre see which may diminish visitor perception of the centre. Westgate Shopping Park is the most recent addition to the town centre. Alongside some public realm improvements these new buildings have helped to diversify the town centre's character, although the Retail Park is of a fairly functional design. The large retail warehouse unit at the eastern end of the town centre, occupied by Toys R Us and Sports Direct, and the adjacent multi-storey car park, are overly imposing, somewhat unsightly and contribute little to the centre. The lack of significant green space within the town centre and sheltered areas diminish the town centre's environmental quality. Further planting and landscaping may well be beneficial.	

Appendix B: Billericay Town Centre Healthcheck

PPG indicator	Summary for Billericay town centre	Traffic light score
Diversity of uses	Billericay Town centre is well served by a mix of both comparison and convenience good retailers as well as commercial leisure and other retail services. There are a relatively high number of pubs, restaurants and cafes suggesting a strong leisure component in the town centre's function and a vibrant night time economy. There is a particularly strong cluster of restaurants and take away outlets in the northern section of the town centre. There is a strong focus on comparison goods retailing, with a well-developed independent retail sector as well as national retailers such as Argos, Boots and Marks and Spencer. However, the town centre lacks large format electronics retailers. There is also a distinct lack of men's clothing and footwear outlets. Convenience goods retailing is anchored by a Waitrose Supermarket, located fairly centrally within the town centre, which is supported by an Iceland supermarket trading from the former Woolworths unit. The Waitrose is by far the largest retail outlet by net floor area and appeared to be well supported at the time of our visit to the centre. Services offered in the town centre include banking, a number of solicitors, estate agents, photo studios, picture framing services. Overall, we consider the centre to have a good diversity of uses and most day-to-day shopping needs can be met within the centre.	
Proportion of vacant street level property	The number of vacant retail outlets is far lower than the national average. At the time of our visits to the centre in August 2015, 2.2 % of the retail units were identified as vacant compared to the current UK average of 12.3%. This was down from 4.27% recorded at the time of the Experian Goad survey (March 2013). Two of the vacant units recorded in the Goad Survey and are now let out are now a grocer and a high-end jewellery shop (Colebys Jewellers) with another two units functioning as cafes. The pattern of vacant units was sporadic i.e. spread out across the town centre and there were no clusters of vacant units observed. Generally the vacant units are smaller than the average retail unit size in the town centre and are therefore likely to only appeal to independent operators. Some of the retail units while not vacant appear to have changed names and possibly, ownership. The use of these units has however remained the same. For instance, the Chimichanga Mexican Restaurant is now a Thai restaurant. While differing in cuisine, both restaurants appear to be geared to the same clientele. Similarly the Strada Restaurant was closed for renovation at the time of the visit and is scheduled to reopen as Pizza Express (in this instance, both companies are owned by the same company).	
Commercial yields / Commercial rents	Commercial retail sector in Billericay has mostly been subdued; however, some transactions have taken place which indicate that yields are improving from the 2008 level of 6.75%, with yields in the order of 7.8% and 6.6% being achieved. Mayflower House and The Walk, including 10 retail units, is currently on the market and could achieve yields in the region of 7.3%.	
Retailer representation and intentions to change representation	Billericay town centre has a good representation of national multiple retailers. The retail offer is generally mid-market with some high end retailers present. The centre's anchor store is undoubtedly the Waitrose supermarket. The store's floor area is far larger than the any of the other retail outlets. It is positive to note that there are a particularly high number of independent retailers in the town centre. This enables the town to have a considerably different retail representation to Basildon, for example. The town centre has a number of ancillary services including banks (HSBC, Lloyds TSB, Barclays, Halifax and Santander), shoe and clothing retailers (Clarks and New Look) and travel agents (Thomas Cook). In terms of restaurants and cafes offerings, Wimpy, Costa Coffee, Prezzo, Cleaver and a soon to open Pizza Express have representation within the town centre. We therefore consider the town centre to have a good range of representation from retailers,	

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PPG indicator	Summary for Billericay town centre	Traffic light score
	with a healthy mixture of national and independent retailers, and a good focus on evening economy uses. Analysis of the CoStar Focus Commercial Property Database indicates that demand for national retailer representation in Billericay is relatively limited – operators with an identified requirement include Majestic Wine, Caffe Nero, Card Factory and Magnet. However the size of the property stock in the town centre may dissuade many operators from considering the centre as a priority. However, given the overall good vitality and viability which the centre offers, coupled with a strong existing retail mix, we would expect that if a suitably-sized vacant unit was to become available, then it would attract from more 'boutique'/specialist national and independent retailers.	
Pedestrian flows	Pedestrian circulation around the town centre is generally good. Heavy car traffic during peak shopping hours and at the weekend may perhaps act as a barrier to pedestrians. Due to the linear shape of the town centre and the even distribution of retail units along its length pedestrian footfall appears to be generally good throughout.	
Accessibility	Accessibility to the town centre appears to be good. The train station with connections to London and other nearby centres (although there is no direct rail connection to Basildon) is about a 5 minute walk from the town centre. Several local and regional bus routes also pass through the town centre, including services to Chelmsford, Brentwood, Basildon and Lakeside. Parking in the town centre appears to be constrained. The main parking facility is located at the train station. The Waitrose supermarket also provides additional parking. At the time of the study both these car parks seemed well used. There are a limited number of on street parking and a third car park off the High Street on Rose Lane.	
Perception of safety/ occurrence of crime	The perception of crime within the town centre appears to be low. None of the areas within the town centre show evidence of neglect or vandalism. This further adds to the feelings of safety and security. The large number of restaurants and pubs suggests that there is still a significant night time population in the town. There are no major areas of concern in respect of this indicator.	
State of town centre environmental quality	The town centre environment quality is generally good. Architecturally, Billericay has maintained its historic character and diverse range of buildings. It is an aesthetically pleasing centre with few buildings of poor architectural merit. The town centre may benefit from an increase in vegetation e.g. trees, flower baskets etc. as there are no public spaces within the town centre. The public realm is generally kept clean and tidy. The council also may consider upgrading the town centre's paving slabs and perhaps consider traffic calming measures in order to improve the pedestrian experience and the public realm.	

Appendix B: Laindon Centre Healthcheck

PPG indicator	Summary for Laindon Centre	Traffic light score
Diversity of uses	The overall diversity of uses in the Laindon Centre is dominated by local and generally medium to downmarket quality retailers. The shopping centre is principally a mixture of comparison goods retailers and services such as a bank, a post office, a hair dresser and an undertaker. There are also two charity shops and a home goods retailer. In terms of floor space the Co-Operative supermarket appears to be the anchor store in the shopping centre, however this store is relatively small and dated. Aside from the supermarket, the only other convenience goods retailer in the centre is Greggs. There are also a number of hot food takeaways in the centre. Despite the physical challenges offered by the centre the diversity of uses is likely to meet some residents' day to day needs, but there is clear scope for improvement in this respect. Outside the centre, there is a nearby Lidl supermarket which appears well-supported by local residents.	
Proportion of vacant street level property	The proportion of vacant properties within the shopping centre is high. Out of a total of 34 retail units more than one third of the units are vacant (12 units), equivalent to about 35% of the total. This was a slight decrease from the Goad Survey carried out in March 2013 which found that 41.2% of the units were vacant (14 units). The current vacancy rate is significantly higher than the current UK average at 12.3%. Since the time of the Experian Goad survey, one of the identified vacant units has been occupied by a fast food restaurant while a second unit functions as the centre's management office.	
Retailer representation and intentions to change representation	Given the constraints and challenges faced by the shopping centre, there is an adequate level of national multiple retailers present in the context of the size of the centre. These include the Co-Operative Supermarket, Greggs Bakery, a TSB Bank, Lloyds Pharmacy and a Co-Operative Pharmacy. The centre also has a Post Office. We would expect demand for representation in the centre to be relatively limited, both from local and national retailers. However, it is considered that if the regeneration scheme goes ahead there would be an increased level of demand for representation in the centre.	
Commercial yields / Commercial rents	There is limited evidence in relation to commercial yields and rents in Laindon, in large part because the centre is in the process of coming forward for redevelopment/regeneration. For this reason, this is considered a reliable indicator for the purposes of health checking this centre	
Pedestrian flows	At the time of the visit pedestrian activity was observed to be light, with both the public areas and the shops themselves generally quiet.	
Accessibility	Accessibility to the centre on foot would benefit from improvement, particularly in terms of signposting. However, there is a pedestrian foot bridge linking the centre to the surrounding residential areas across the busy High Road. There seems to be adequate parking provided within the development. There is a large car park at the front of the development which is also used by visitors to the GP practice. There is also a second parking area located to the rear of the development. There are bus stops along Laindon Link Road and the High Road. The shopping centre is about a 15 minute walk from Laindon train station.	

Appendix B: Laindon Centre Healthcheck

PPG indicator	Summary for Laindon Centre	Traffic light score
Perception of safety/ occurrence of crime	The high number of vacant units, and the inward-looking nature of the shopping centre, makes the area feel neglected and potentially unsafe, particularly outside retail trading hours. At the same time, the large chimney structures that dominate the main pedestrian walkway obstruct the line of sight and it is recommended that any future development of the centre removes these.	
State of town centre environmental quality	The overall quality of Laindon's town centre is generally poor. The purpose-built centre now appears dated and out of step with modern shopping environments. The run-down nature of the centre and the high number of vacant shops amplify the poor environmental quality. Part of the shopping centre has also been cordoned off after part of the centre was demolished to make way for redevelopment. The cordoned off site was formerly occupied by an office block. The design of the centre also contributes to the poor quality of the environment. The shops along the main pedestrian promenade are inward-facing. As such there are few signs on the outside to indicate shopping activity. However, the presence of the GP practice right next to the development may help to attract footfall to the shopping centre. Following the architecture of the late 60s, the development is entirely made up of concrete. There is little texture variation or soft landscaping to break up the linear monotony of the architecture. There is little in the way of green planting, or public realm. The quality of the paving is poor, and the shop fronts are in need of updating. In addition, the average shop sizes are small and appear to be ill-suited to modern retail requirements. For instance the shop windows are fairly small and are low. The units also appear to have fairly low ceilings which make them appear dark and uninviting. It is considered that tackling the poor environmental quality of the centre will in turn promote improvements against the other health check indicators discussed here.	

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Appendix B: Pitsea Town Centre Healthcheck

PPG indicator	Summary for Pitsea Town Centre	Traffic light score
Diversity of uses	Pitsea is a small town centre on the eastern edge of the Basildon urban area. The town centre is split into three distinct areas, clustered around the intersection of the B1464 and A132 South Mayne. There is a 'traditional' town centre, with a parade of retail units, a small retail park with a Lidl supermarket, and, south of the A132, a standalone Tesco Extra supermarket. It is apparent that the offer of the town centre is geared towards convenience goods uses. The 'traditional' town centre is currently in the middle of a regeneration scheme, which is delivering a new market square, a relocated Aldi supermarket and a Morrisons supermarket. This development further reinforces the town's role as a convenience goods destination. Pitsea Market trades 3 days a week and is an important component in the town centre's retail offer. The Market now trades in the newly-created Market Square. The comparison goods offer of the centre is limited, but is sufficient so as to enable some day-to-day needs to be met. There is a distinct lack of clothing and footwear and electronics retailers within the town centre. The Tesco supermarket does incorporates a number of non-food related goods and services including a sizeable clothing department as well as a chemist, photo printing service and the sale of some electronic items. The leisure options in the town centre are restricted to a handful of cafes and take away restaurants. There are no family restaurants or commercial leisure facilities such as cinemas. The town centre also offers a variety of services including banks, a barber shop, hairdressers, and betting shops. There are a large number of take-away/fast food restaurants in the centre, which limits the diversity of uses while also brining the overall feel of the centre somewhat downmarket.	
Proportion of vacant street level property	Due to the regeneration work taking place a few of the retail units have been knocked down to make way for the new Aldi Supermarket. At the time of the town centre survey (August 2015), the proportion of vacant property stood at 6.06%. This is far lower than the current UK average of 12.3%. Three of the vacant units (as identified by Experian Goad) were closed due to the ongoing redevelopment scheme. In addition, the historic Railway Building which functioned as the Town Centre's pub had since been demolished to make way for the new Market Square. These units have therefore not been counted towards the overall quantum of vacant retail units in the town centre. We do not consider the vacancy level to represent significant cause for concern.	
Retailer representation and intentions to change representation	For a town centre of its size, Pitsea appears to have a relatively good representation of national multiple retailers. The convenience good offer is dominated by a large Tesco supermarket, Lidl and Aldi with Morrisons set to join. Other national operators include Lloyds Bank and Barclays Bank. The food offer is represented by Domino's Pizza, Pizza Hut, Greggs, McDonalds and KFC — confirming the emphasis of the offer in this respect is firmly on fast food. There are a limited number of independent retailers in the town centre. These include small, specialist foodstores such as the Afro-Caribbean convenience store, corner shops, a butcher, off licences, a jeweller and take away food establishments. The overall representation in the centre is clearly geared towards convenience and services operators, and comparison goods representation in the centre is for the most part limited.	
Commercial yields / Commercial rents	Analysis of recent deals on EGi indicates that the Broadway, High Road, Northlands Pavement and The Parade are the main focus of commercial investment activity. Rents achieved in the last two years, all for premises of less than 60 sqm, range between £210 to £250 per sqm. The largest unit of 130 sqm gross, although achieving a lower rent (£154/sqm), has been let for a longer lease of 15 years as opposed to the standard 10 year	

Appendix B: Pitsea Town Centre Healthcheck

PPG indicator	Summary for Pitsea Town Centre	Traffic light score
	leases.	
Pedestrian flows	Pedestrian flows in the town centre are generally hampered by the fragmented layout of the town centre. This makes navigation difficult and confusing for town centre users. While the new Market Square goes a long way in improving the town's character and legibility the design of the retail park and the Tesco Extra prioritise cars over pedestrians which perhaps discourages pedestrian flows between the different parts of the town centre. From our observations on the day of the survey, the area with the highest amount of footfall appeared to be around Market Square, suggesting that the recent investment in the centre appears to have been beneficial.	
Accessibility	The town centre is easily accessible from the local road network as well as the nearby A13. Pitsea railway station is also relatively close to the town centre however the route connecting the two is unattractive and requires the user to use a series of pedestrian underpasses. The train station connects Pitsea to Basildon, and beyond to London. The town centre is also well served by the local and regional bus network, including frequent intra-urban services which link the centre with Laindon via Basildon town centre. There appears to be an adequate amount of parking within the town centre. Both the retail park and the Tesco Extra appear to have extensive parking facilities. The new Aldi/ Morrisons development also includes the development of additional parking facilities.	
Perception of safety/ occurrence of crime	The layout of the town centre does not lend itself to a feeling of safety. In some instances pedestrians are also forced to use unattractive and isolated underpasses so as to cross the A13 highway which could further add to the perception of crime and insecurity. The evening economy in the town centre seems to be limited to the takeaway restaurants. This means that pedestrian footfall in the evening falls considerably thereby contributing to the perception of crime and insecurity in the evening.	
State of town centre environmental quality	The ongoing regeneration work clearly represents a significant investment in Pitsea town centre and can be expected to, upon completion, significantly enhance its environmental quality. The new Market Square gives the Pitsea Market an attractive and prominent location in the heart of the town centre and provides a clear focal point. However, there is a need for the visual appearance of the remainder of the town centre to be similarly upgraded in order for the overall vitality and viability of the town centre to benefit. While there appears to be some architectural diversity in the town centre the overall appearance lacks coherence this is further magnified by its disjointed layout. Furthermore, the large Tesco Extra and the retail park dominate the town centre's landscape. In general, the town centre appeared to be clean however many of the buildings are in need of refurbishment. Upgrading of pavements and other public realm works could also establish a sense of visual coherence within the town centre. The relatively high number of cars travelling through the town centre contributes to both the air and noise pollution.	

Appendix B: Wickford Town Centre Healthcheck

PPG indicator	Summary for Wickford Town Centre	Traffic light score
Diversity of uses	Wickford Town Centre has a reasonable diversity of uses; the retail offer is mostly geared to the provision of comparison goods. The railway line bisects the town centre into two halves. Both halves are anchored by fairly large supermarkets — Aldi to the north and the Co-Operative to the south. The southern portion of the town centre appeared to have a better mix and quality of retail than the northern portion. The town centre also contains two small shopping centres – The Willows and the Ladygate Centre with The Ladygate also incorporating the Co-Operative supermarket. There is a well-established market in the town centre, which has relocated to the High Street from Market Road. The town's leisure economy is limited to a handful of restaurants. Dining options appear to be dominated by take away eateries, a pub and cafes.	
Proportion of vacant street level property	At the time of the study, 5% of the retail units were vacant. This is an improvement on the vacancy rate of 8% identified in the most recent Experian Goad centre survey, which was carried out in March 2013. The number of vacant units has fallen from 12 to 8. The new tenants in the town centre include a hair salon, a branch of Subway Restaurants, Paddy Power betting shop and a shop selling art materials. One retailer, Samuel George Jewellers, moved from a location south of London Road to a more prominent position on High Street. The proportion of vacant units is therefore considerably lower than the UK average of 12.3%, which is a positive reflection on the vitality and viability of the town centre. There appears to be some clustering of vacant units especially towards the northern part of the town centre around the Broadway. In the southern part of the town, the pattern of vacant units is less pronounced. In general the vacant units are generally smaller than average. Some of them appear to be badly sited i.e. they do not front the main shopping streets, and might therefore not benefit from high levels of pedestrian footfall.	
Commercial yields / Commercial rents	As with the other smaller centres, commercial data on retail premises is limited. However, based on properties currently on the market, there is some evidence on the performance of the town. New build retail floorspace at the Capricorn Centre is currently being marketed at £65 per sqm, achieving yields of 7.6%. At the more centrally located Riverside Place, further new floorspace is being marketed at £174 per sqm and for sale on the basis of 8.4% yield.	
Retailer representation and intentions to change representation	There is a fairly good national multiple retailer representation within the town centre. The two largest retailers in terms of net sales floorspace are the Aldi and Co-Operative supermarkets. These two outlets make up the bulk of the town's convenience goods offer. In addition there is an Iceland supermarket and a 99p Stores (which sells a mixture of convenience and comparison products). The number of national clothing and footwear retailers in the town centre is relatively low. They are currently represented byNew Look, Peacocks, Superdrug and Dorothy Perkins. Other national retailers offer ancillary services such as banking. Barclays, Halifax, Natwest, Nationwide Building Society and Lloyds TSB all have branches in the centre. We would expect demand for representation to principally be from local/independent retailers, although demand from national retailers may arise for the more modern retail floorspace, e.g. in The Willows.	

Appendix B: Wickford Town Centre Healthcheck

PPG indicator	Summary for Wickford Town Centre	Traffic light score
Pedestrian flows	The town centre is generally linear in shape making pedestrian flows and navigation relatively straightforward. However, the presence of the railway viaduct does present a navigation challenge for town centre visitors. The area around the Aldi supermarket also feels somewhat isolated and is dominated by heavy traffic. Pedestrian footfall was fairly high around The Willows and Ladygate shopping centres. However, the northern portion of the town centre (with the exception of Aldi) had very little footfall.	
Accessibility	Accessibility to the town centre is fairly easy. The train station is located close to the town centre (though navigation from the station to the centre could be improved) and there are also a number of bus routes in operation along the High Street and The Broadway which connect Wickford to Basildon and Southend. The two main supermarkets also have large car parks though they seemed to be fairly full at the time of our visit. Addition parking is available in a large car park behind Iceland Supermarket and outside the Wickford train station. This perhaps suggests that car parking might be a problem within the town centre during peak shopping hours.	
Perception of safety/ occurrence of crime	Perception of crime and safety within the town centre is low to moderate. The railway viaduct is particularly unattractive and could potentially attract criminal activity. As there is a very limited evening economy in Wickford, we would expect the town centre to be fairly quiet at night especially in the northern portion of the town centre.	
State of town centre environmental quality	The town centre environment is generally of poor quality although we note that Basildon Council is currently undertaking a programme of public realm improvement works in the town centre. Most notably, a small number of market stalls are being constructed on the High Street in addition to other public realm improvements including a refurbished leisure centre, a new toilet block and a revamped market. The town centre might also benefit from the introduction of more greenery/planting, given that it lacks significant amounts of public open space. The southern portion of the town centre is more architecturally cohesive than the northern portion. There are few historic buildings within the town centre. However, most shopfronts are dominated by large signage. Improvements to the shopfronts to make them more appropriate in size may aesthetically improve the town centre experience. Of the two shopping centres, The Willows offers the most attractive quality. Though the centre is small, it was developed more recently than the Ladygate Centre - the design is generally of high quality. The Ladygate Centre is however of poor architectural quality and is in need of refurbishment.	

BASILDON DISTRICT LOCAL PLAN

ADOPTED 25 MARCH 1998

IMPORTANT ADDENDUM

On 20th September 2007, the Secretary of State issued a Direction to Basildon District Council which set out the policies of the Adopted Local Plan that could be saved beyond 27th September 2007. These are set out in the Basildon District Local Plan Saved Policies - September 2007 document.

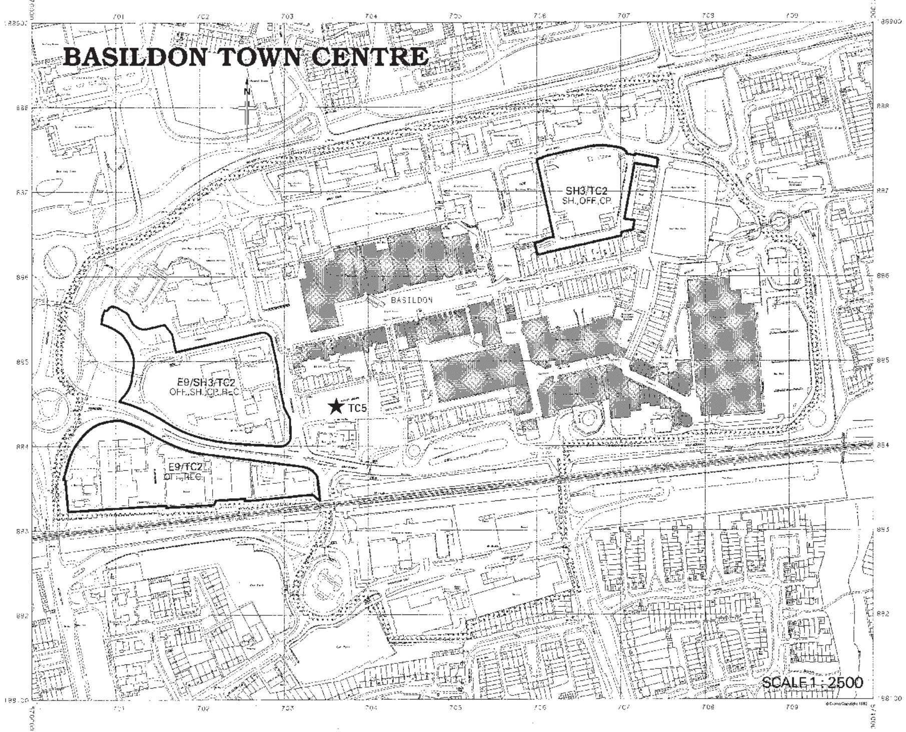
Care should be taken when using the Proposals Maps, as some policies and their corresponding land allocations or designations may no longer apply.

If in doubt, please contact the Council's Forward Plans Team by Tel. 01268 204748 or E-mail df@basildon.gov.uk.

TOWN CENTRE INSET MAPS

Scale 1:2,500

Planning Services
Basildon District Council
Basildon Centre
St. Martin's Square
Basildon
Essex SS14 1DL



KEY TO THE TOWN CENTRE INSET MAPS

- TOWN CENTRE BOUNDARY — Policies - E9, SH1, TC1 & TC5
- PROPOSED BILLERICAY CONSERVATION AREA BOUNDARY — Policies - BE8, BE9 & BE10
- TC5 SH. — SITE IDENTIFIED FOR DEVELOPMENT FOR USES APPROPRIATE TO A TOWN CENTRE — Policies - E9, SH1, SH3, TC2, TC3 & TC4
- SHOP UNITS WITHIN THE PRIME SHOPPING FRONTAGE — Policy - SH4
- ★ MARKETS — Policy - TC5
- EXISTING OPEN SPACE — Policy - R1

SH. SHOPPING
OFF. OFFICES
REC. RECREATION
CP. CAR PARKING

Cartography and Printing by Cook, Hammond and Kell Group.

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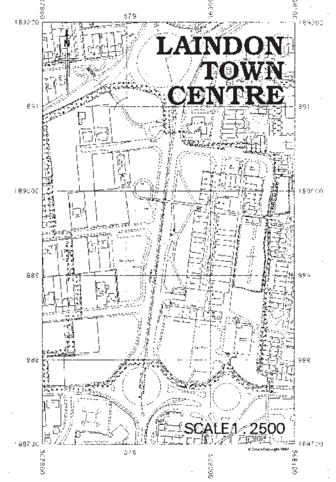


Appendix B: Town centre benchmarking

1. This appendix, using scored rankings, benchmarks the larger town centres within Basildon Borough against those performing a similar role within the East of England, as well as showing the relative positions of the main centres located outwith the Borough that exert influence on shopping patterns.

2. The VENUESCORE is provided by Javelin Group and is calculated for each centre using a scoring system that takes account of the presence of multiple retailers, anchor stores and fashion operators which is then weighted to reflect the relevant centre's overall impact on shopping patterns:

   'The score attached to each operator is weighted to reflect their overall impact on shopping patterns. For example, anchor stores such as John Lewis, Marks & Spencer and Selfridges receive a higher score than other unit stores. The resulting aggregate score for each venue is called is VENUESCORE.'

3. Operators are differentiated into different classes: at the top of the hierarchy sit Premier Department Stores (e.g. Harrods, Selfridges in London), down to the bottom tier of Other Multiple Retailers (e.g. 99p Stores, Carphone Warehouse and Clarks). The classifications include both comparison and convenience retailers.

4. In terms of geographical areas that comprise the definitions, it is important to note that the centres identified below do not include the retail park offer which is scored as a separate venue. However, it should be borne in mind that the geographical area used for the town or city centre is unlikely to coincide with the adopted primary shopping areas or equivalent destination. This is constant across all the centres and as such, as a comparison tool, it is still considered useful.

5. The tables below set out the VENUESCORE ranking for the main centres within Basildon Borough in relation to centres of a similar ranking within the East of England region. It should be noted that Laindon is too small to be ranked by VENUESCORE.

Town/location	Role	Rank	Venuescore	Market classification	Fashion position classification	Age position classification
Luton	Regional	79	208	Middle	Fashion Moderate	Mid
Southend On Sea	Regional	88	202	Middle	Fashion Moderate	Mid
Basildon	Regional	**94**	**191**	**Lower Middle**	**Fashion Moderate**	**Mid**
Bedford	Regional	105	186	Middle	Fashion Moderate	Mid
King's Lynn	Regional	121	173	Middle	Updated Classic	Mid

Town/location	Role	Rank	Venuescore	Market classification	Fashion position classification	Age position classification
Stansted Airport	Major District	549	54	Upper Middle	Progressive	Old
Saffron Walden	Major District	578	52	Upper Middle	Traditional	Old

Appendix B: Town centre benchmarking

Town/location	Role	Rank	Venuescore	Market classification	Fashion position classification	Age position classification
Billericay	**Major District**	**601**	**50**	**Middle**	**Updated Classic**	**Old**
Oaks/Princes Gate/Queensgate Retail Parks, Harlow	Retail Park	601	50	Middle	Updated Classic	Old
Diss	District	616	49	Middle	Traditional	Old

Town/location	Role	Rank	Venuescore	Market classification	Fashion position classification	Age position classification
Tollgate Retail Park, Colchester	Retail Park	966	32	Middle	Traditional	Old
Luton Airport	District	966	32	Upper Middle	Updated Classic	Old
Pitsea	**District**	**989**	**31**	**Lower**	**Fashion Moderate**	**Old**
Bretton, Peterborough	District	989	31	Middle	Traditional	Old
Canvey Island	District	1021	30	Lower	Updated Classic	Mid

Town/location	Role	Rank	Venuescore	Market classification	Fashion position classification	Age position classification
North Quay Retail Park, Lowestoft	Retail Park	898	34	Middle	Traditional	Old
St Ives	District	935	33	Middle	Traditional	Old
Wickford	**District**	**935**	**33**	**Lower Middle**	**Traditional**	**Mid**
Pipps Hill Retail Park, Basildon	Retail Park	966	32	Middle	n/a	Old
Tollgate Retail Park, Colchester	Retail Park	966	32	Middle	Traditional	Old

Appendix B: Town centre benchmarking

6. The table shows the VENUESCORE ranking of centres that exert influence over the study area and Basildon Borough specifically.

Town/location	Role	Rank	Venuescore	Market classification	Fashion position classification	Age position classification
Lakeside Shopping Centre	Major Regional	52	243	Middle	Fashion Forward	Mid
Chelmsford	Regional	69	217	Middle	Fashion Moderate	Mid
Southend On Sea	Regional	88	202	Middle	Fashion Moderate	Mid
Basildon	**Regional**	**94**	**191**	**Lower Middle**	**Fashion Moderate**	**Mid**
Brentwood	Sub-Regional	221	115	Middle	Traditional	Old
Billericay	**Major District**	**601**	**50**	**Middle**	**Updated Classic**	**Old**
Pitsea	**District**	**989**	**31**	**Lower**	**Fashion Moderate**	**Old**
Wickford	**District**	**935**	**33**	**Lower Middle**	**Traditional**	**Mid**

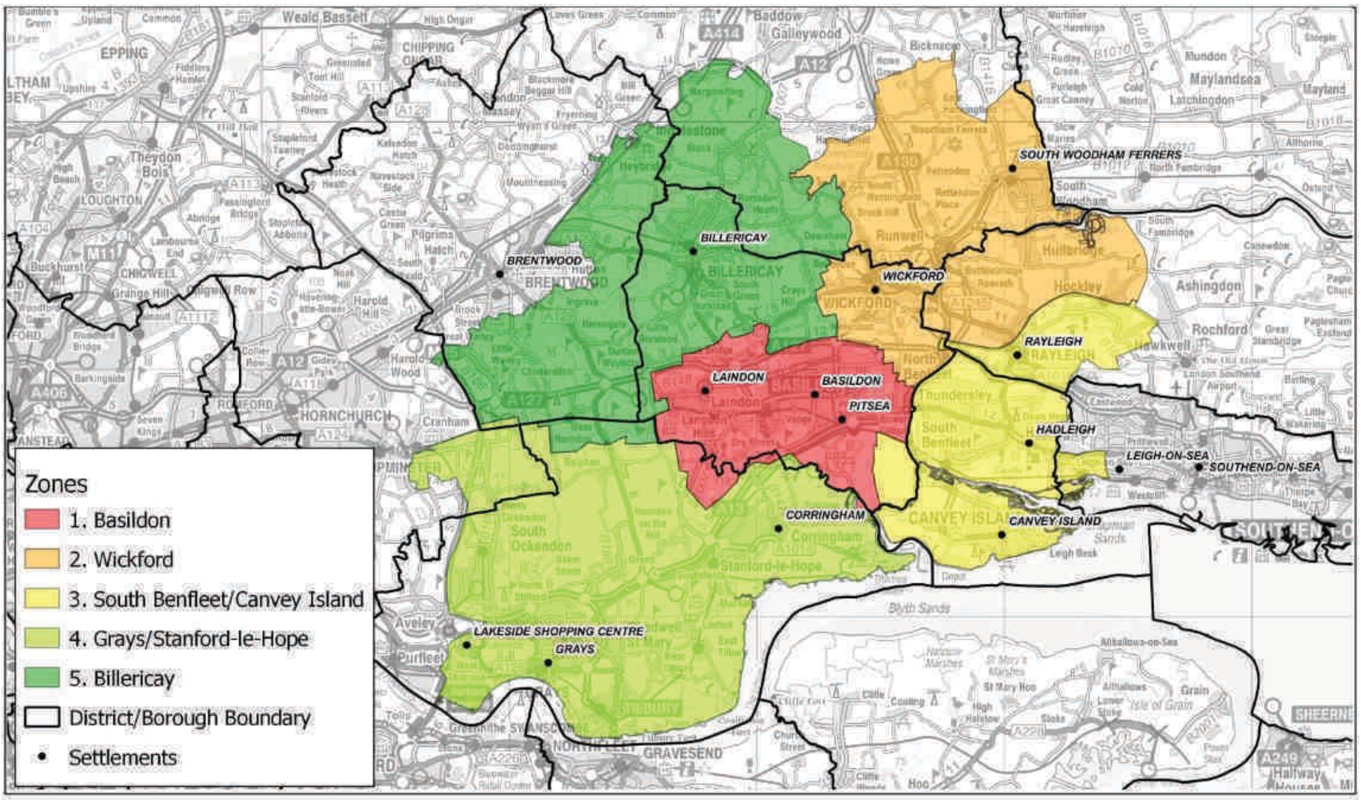
Appendix C Local centres schedule

Appendix C: Local centres in Basildon Borough

Settlement Area	Name of Local Centre	
Basildon	• Presidents Court, Hoover Drive, Laindon • The Triangle, High Road, Langdon Hills • Great Berry, Nightingales • Station Approach, Laindon Station • Kathleen Ferrier Court, Kathleen Ferrier Crescent, Laindon • Ballards Walk, Lee Chapel South • Kibcaps, The Knares, Lee Chapel South • Clay Hill Road, Kingswood • Cherrydown West • Swanmead, Church Road, Vange • Osier Drive, Steepleview • Bull Parade, Clay Hill Road, Vange • Riverview Centre, Vange • Southview Park, Marsh View Court, Vange • Chalvedon Court, Chalvedon, Pitsea • Whitmore Way/Church Road, Fryerns • Whitmore Way/Battleswick, Fryerns • Felmores End, Felmores • Rectory Road, Pitsea • Paycocke Road • Somercotes, Laindon • Parkinsons Corner, Laindon • Stacey's Corner, Timberlog Lane • Local Shopping Parade, Beechwood Village	
Billericay	• Pantiles, Queens Park • Perry Street, Queens Park • Bush Hall Parade, Stock Road • Bridge Parade, Gooseberry Green • Morris Avenue, Sunnymede • Meadow Rise • Western Road • Grange Road, South Green • Radford Way, adjacent to Billericay Station	
Wickford	• Alderney Gardens, Runwell • Apple Tree Way • Southend Road, Hill Avenue • Shotgate • Nevendon Road • Silva Island Way	

Source: Local Centres Review (2015 update)

Appendix D Study area



pba peterbrett

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Basildon Council
BASILDON BILLERICAY WICKFORD

Basildon Retail Capacity Study

Survey Zones

Date	03/07/2014
Scale	1:200,000
Drawn By	CM
Checked By	AB

Appendix E Quantitative retail capacity tables

Table CM1 —
Population projections

	2014	2015	2016	2021	2026	2031	2035	Change, 2014-35
Zone 1	110,723	111,397	112,107	115,852	119,519	123,025	125,854	15,131
Zone 2	80,079	80,524	80,994	83,506	86,057	88,475	90,370	10,291
Zone 3	126,296	126,809	127,350	130,500	134,054	137,520	140,178	13,882
Zone 4	153,759	155,299	156,914	165,208	173,176	180,624	186,671	32,912
Zone 5	59,789	60,167	60,583	62,821	65,040	67,185	68,889	9,100
Total	**530,646**	**534,196**	**537,948**	**557,887**	**577,846**	**596,829**	**611,962**	**81,316**

Notes
Source: Experian MMG3 (2014), for base year and population projections.
Population forecasts 2014-33 are based on Office of National Statistics Sub-National Population Projections.
Population forecast for 2035 projected forward based on ONS SNPP rates.

Table CM2 —
Per capita expenditure on comparison goods

	2014	2015	2016	2021	2026	2031	2035
	£	£	£	£	£	£	£
Zone 1	2,782	2,929	3,023	3,501	4,090	4,788	5,431
Zone 2	3,487	3,671	3,789	4,388	5,127	6,001	6,807
Zone 3	3,423	3,605	3,720	4,308	5,033	5,892	6,683
Zone 4	2,960	3,117	3,217	3,725	4,352	5,095	5,779
Zone 5	4,133	4,352	4,491	5,201	6,077	7,113	8,068

Notes
The following expenditure growth rates are applied (source: Experian Retail Planner Briefing Note 13, November 2015, Figures 1a and b):

2013-14	5.50%	
2014-15	5.30%	
2015-16	3.20%	
2016-17	2.90%	
2017-22	3.00%	(per annum)
2022-35	3.20%	(per annum)

Source: Experian MMG for 2013 base data
All monetary values are held constant at 2013 prices.

Table CM3 —

Total comparison goods expenditure

a. Total expenditure (Table CM1 x Table CM2)

	2014	2016	2021	2026	2031	2035
	£m	£m	£m	£m	£m	£m
Zone 1	308.02	338.91	405.62	488.89	589.06	683.53
Zone 2	279.21	306.88	366.44	441.19	530.96	615.15
Zone 3	432.34	473.74	562.23	674.75	810.26	936.83
Zone 4	455.13	504.74	615.46	753.72	920.23	1,078.74
Zone 5	247.10	272.08	326.75	395.23	477.91	555.83
Total	**1,721.79**	**1,896.35**	**2,276.50**	**2,753.78**	**3,328.42**	**3,870.07**

b. Spending on Special Forms of Trading, e.g. internet shopping

	2014	2016	2021	2026	2031	2035
SFT rate	11.20%	12.40%	15.00%	15.00%	14.60%	14.30%
	£m	£m	£m	£m	£m	£m
Zone 1	34.50	42.02	60.84	73.33	86.00	97.74
Zone 2	31.27	38.05	54.97	66.18	77.52	87.97
Zone 3	48.42	58.74	84.33	101.21	118.30	133.97
Zone 4	50.97	62.59	92.32	113.06	134.35	154.26
Zone 5	27.67	33.74	49.01	59.29	69.77	79.48
Total	**192.84**	**235.15**	**341.48**	**413.07**	**485.95**	**553.42**

c. Residual comparison goods expenditure (Table a less Table b)

	2014	2016	2021	2026	2031	2035
	£m	£m	£m	£m	£m	£m
Zone 1	273.52	296.88	344.78	415.55	503.06	585.78
Zone 2	247.94	268.83	311.47	375.01	453.44	527.19
Zone 3	383.92	415.00	477.90	573.54	691.97	802.86
Zone 4	404.15	442.15	523.14	640.66	785.88	924.48
Zone 5	219.42	238.35	277.74	335.95	408.13	476.35
Total	**1,528.95**	**1,661.21**	**1,935.03**	**2,340.71**	**2,842.47**	**3,316.65**

Notes
Source: Table CM1, Table CM2

Special forms of trading ('SFT') discount source: Experian Retail Planner Briefing Note 13, November 2015, Appendix 3 ('adjusted' percentage figures to take into account store-picked goods)

The main component of SFT is online shopping.

All monetary values are held constant at 2013 prices.

Table CM4 —
Comparison goods market shares, 2014

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %
Zone 1					
Basildon town centre					
Basildon town centre	46.23%	19.81%	17.54%	6.40%	16.08%
Asda, Eastgate Centre	5.46%	0.31%	0.37%	0.15%	0.09%
Sub-total, Basildon town centre	**51.69%**	**20.12%**	**17.91%**	**6.55%**	**16.17%**
Pitsea					
Pitsea town centre	2.04%	0.58%	0.45%	0.25%	0.32%
Tesco Extra, Pitsea	3.18%	0.59%	2.42%	0.68%	1.09%
Pitsea Retail Park, Pitsea	0.53%	0.17%	0.17%	0.00%	0.57%
Sub-total, Pitsea	**5.76%**	**1.34%**	**3.03%**	**0.93%**	**1.98%**
Laindon					
Laindon	0.70%	0.26%	0.02%	0.03%	0.10%
Tesco, Laindon Hills	0.20%	0.00%	0.05%	0.09%	0.03%
Sub-total, Laindon	**0.90%**	**0.26%**	**0.07%**	**0.13%**	**0.13%**
Mayflower Retail Park, Basildon					
Mayflower Retail Park	1.40%	9.82%	3.92%	0.57%	5.91%
Homebase, Mayflower Retail Park	0.95%	1.48%	0.08%	0.08%	0.71%
Tesco Extra, Mayflower Retail Park	1.89%	1.61%	0.16%	0.25%	1.36%
Sub-total, Mayflower Retail Park	**4.23%**	**12.91%**	**4.15%**	**0.90%**	**7.98%**
Pipps Hill Retail Park, Basildon					
Pipps Hill Retail Park	9.83%	10.16%	3.40%	1.73%	11.60%
B&Q, Pipps Hill Retail Park	3.00%	1.45%	0.41%	0.50%	2.79%
Asda, Pipps Hill Retail Park	1.82%	0.55%	0.13%	0.00%	1.45%
Sub-total, Pipps Hill Retail Park	**14.65%**	**12.16%**	**3.94%**	**2.23%**	**15.83%**
Other locations, zone 1	3.73%	0.56%	0.23%	0.59%	0.76%
Sub-total, zone 1	**80.96%**	**47.34%**	**29.33%**	**11.34%**	**42.86%**
Zone 2					
Wickford town centre	0.51%	10.18%	0.08%	0.00%	0.14%
South Woodham Ferrers (including Asda)	0.00%	0.71%	0.01%	0.04%	0.00%
Other locations, zone 2	0.00%	0.36%	0.38%	0.09%	0.00%
Sub-total, zone 2	**0.51%**	**11.25%**	**0.46%**	**0.13%**	**0.14%**
Zone 3					
Rayleigh / Rayleigh Weir	0.48%	5.43%	12.61%	0.35%	0.29%
Canvey Island	0.09%	0.00%	4.99%	0.03%	0.00%
Hadleigh	0.00%	0.04%	2.35%	0.00%	0.00%
Other locations, zone 3	0.20%	0.08%	1.73%	0.06%	0.27%
Sub-total, zone 3	**0.77%**	**5.55%**	**21.68%**	**0.44%**	**0.57%**
Zone 4					
Lakeside					
Lakeside Shopping Centre	5.80%	11.46%	11.63%	27.71%	8.26%
Lakeside Retail Parks	7.42%	8.40%	8.18%	44.66%	10.35%
Tesco Extra, Lakeside	0.28%	0.09%	0.00%	1.38%	0.09%
Sub-total, Lakeside	**13.50%**	**19.95%**	**19.81%**	**73.75%**	**18.71%**
Tilbury	0.00%	0.07%	0.00%	4.14%	0.00%
Grays	0.04%	0.12%	0.15%	3.26%	0.03%
Chafford Hundred	0.01%	0.49%	1.69%	0.41%	1.87%
Other locations, zone 4	0.00%	0.01%	0.22%	1.91%	0.12%
Sub-total, zone 4	**13.55%**	**20.62%**	**21.87%**	**83.47%**	**20.73%**
Zone 5					
Billericay	0.22%	0.32%	0.00%	0.05%	11.18%
Hutton	0.00%	0.00%	0.00%	0.00%	0.03%
Sub-total, zone 5	**0.22%**	**0.32%**	**0.00%**	**0.05%**	**11.21%**
Total, study area	**96.01%**	**85.09%**	**73.35%**	**95.43%**	**75.50%**
Destinations outside study area					
Southend-on-Sea (all centres/stores incl Leigh-on-Sea)	0.82%	4.51%	20.25%	0.53%	0.22%
Chelmsford (city centre, retail parks, foodstores)	0.45%	5.89%	0.92%	0.18%	11.14%
Brentwood (town centre, foodstores)	0.09%	0.28%	0.02%	0.05%	4.02%
London (West End, Stratford City, Ilford, Romford, Upminster)	1.55%	2.55%	2.12%	2.66%	3.63%
Other locations outside study area	1.08%	1.68%	3.34%	1.15%	5.48%
Total, outside study area	**3.99%**	**14.91%**	**26.65%**	**4.57%**	**24.50%**
Overall total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Notes
Source: NEMS Market Research Household Survey, July 2014

Table CM5 —
Comparison goods spending patterns, 2014

	Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Total £m
Total available comparison goods expenditure	*273.52*	*247.94*	*383.92*	*404.15*	*219.42*	*1,528.95*
Zone 1						
Basildon town centre						
Basildon town centre	126.46	49.12	67.33	25.87	35.29	304.06
Asda, Eastgate Centre	14.93	0.77	1.43	0.62	0.19	17.94
Sub-total, Basildon town centre	**141.39**	**49.89**	**68.75**	**26.49**	**35.48**	**322.00**
Pitsea						
Pitsea town centre	5.59	1.43	1.73	1.01	0.70	10.46
Tesco Extra, Pitsea	8.71	1.46	9.27	2.76	2.39	24.60
Pitsea Retail Park, Pitsea	1.45	0.42	0.64	0.00	1.26	3.77
Sub-total, Pitsea	**15.75**	**3.31**	**11.64**	**3.78**	**4.34**	**38.83**
Laindon						
Laindon	1.91	0.64	0.09	0.14	0.23	3.01
Tesco, Laindon Hills	0.54	0.00	0.19	0.37	0.06	1.17
Sub-total, Laindon	**2.46**	**0.64**	**0.28**	**0.51**	**0.29**	**4.18**
Mayflower Retail Park, Basildon						
Mayflower Retail Park	3.82	24.35	15.05	2.29	12.98	58.48
Homebase, Mayflower Retail Park	2.59	3.68	0.29	0.33	1.56	8.45
Tesco Extra, Mayflower Retail Park	5.16	3.99	0.61	1.00	2.98	13.73
Sub-total, Mayflower Retail Park	**11.57**	**32.01**	**15.95**	**3.62**	**17.51**	**80.66**
Pipps Hill Retail Park, Basildon						
Pipps Hill Retail Park	26.87	25.18	13.06	7.00	25.45	97.57
B&Q, Pipps Hill Retail Park	8.22	3.60	1.56	2.03	6.12	21.52
Asda, Pipps Hill Retail Park	4.97	1.35	0.51	0.00	3.18	10.01
Sub-total, Pipps Hill Retail Park	**40.06**	**30.14**	**15.13**	**9.03**	**34.74**	**129.10**
Other locations, zone 1	10.21	1.39	0.87	2.40	1.67	16.53
Sub-total, zone 1	**221.44**	**117.38**	**112.62**	**45.82**	**94.03**	**591.29**
Zone 2						
Wickford town centre	1.39	25.25	0.30	0.00	0.31	27.25
South Woodham Ferrers (including Asda)	0.00	1.75	0.02	0.16	0.00	1.93
Other locations, zone 2	0.00	0.90	1.45	0.37	0.00	2.72
Sub-total, zone 2	**1.39**	**27.89**	**1.77**	**0.53**	**0.31**	**31.90**
Zone 3						
Rayleigh / Rayleigh Weir	1.31	13.46	48.42	1.42	0.65	65.25
Canvey Island	0.24	0.00	19.17	0.14	0.00	19.55
Hadleigh	0.00	0.10	9.03	0.00	0.00	9.13
Other locations, zone 3	0.55	0.20	6.62	0.23	0.60	8.20
Sub-total, zone 3	**2.10**	**13.75**	**83.25**	**1.79**	**1.24**	**102.14**
Zone 4						
Lakeside						
Lakeside Shopping Centre	15.87	28.41	44.65	111.97	18.12	219.03
Lakeside Retail Parks	20.30	20.83	31.39	180.51	22.72	275.75
Tesco Extra, Lakeside	0.76	0.21	0.00	5.56	0.21	6.74
Sub-total, Lakeside	**36.93**	**49.46**	**76.04**	**298.05**	**41.05**	**501.52**
Tilbury	0.00	0.16	0.00	16.71	0.00	16.87
Grays	0.10	0.29	0.56	13.19	0.07	14.22
Chafford Hundred	0.03	1.21	6.50	1.67	4.11	13.52
Other locations, zone 4	0.00	0.02	0.86	7.72	0.26	8.86
Sub-total, zone 4	**37.06**	**51.13**	**83.96**	**337.35**	**45.49**	**554.99**
Zone 5						
Billericay	0.61	0.80	0.00	0.20	24.52	26.13
Hutton	0.00	0.00	0.00	0.00	0.07	0.07
Sub-total, zone 5	**0.61**	**0.80**	**0.00**	**0.20**	**24.59**	**26.20**
Total, study area	**262.60**	**210.96**	**281.60**	**385.69**	**165.67**	**1306.52**
Destinations outside study area						
Southend-on-Sea (all centres/stores incl Leigh-on-Sea)	2.25	11.18	77.75	2.13	0.49	93.80
Chelmsford (city centre, retail parks, foodstores)	1.24	14.61	3.53	0.71	24.45	44.54
Brentwood (town centre, foodstores)	0.25	0.70	0.07	0.21	8.82	10.06
London (West End, Stratford City, Ilford, Romford, Upminste	4.23	6.32	8.14	10.76	7.97	37.41
Other locations outside study area	2.95	4.16	12.83	4.66	12.02	36.63
Total, outside study area	**10.92**	**36.98**	**102.32**	**18.47**	**53.75**	**222.44**
Overall total	**273.52**	**247.94**	**383.92**	**404.15**	**219.42**	**1528.95**

Notes
Source: Table CM3, Table CM4
All monetary values held constant at 2013 prices.

Table CM6 —

Comparison goods floorspace requirements to 2035

Basline requirement

		2014	2016	2021	2026	2031	2035
Total population and expenditure							
A	Total population (persons)	530,646	537,948	557,887	577,846	596,829	611,962
B	Total comparison goods expenditure (£m)	1,528.95	1,661.21	1,935.03	2,340.71	2,842.47	3,316.65
Retained expenditure							
C	Retained comparison goods expenditure in Basildon Borough (%)	42%	42%	42%	42%	42%	42%
D	Retained comparison goods expenditure in Basildon Borough (£m)	644.74	700.51	815.98	987.05	1198.64	1398.59
E	Comparison goods expenditure leakage (£m)	884.21	960.69	1,119.05	1,353.66	1,643.84	1,918.06
Inflow							
F	Inflow (%)	0%	0%	0%	0%	0%	0%
G	Inflow (£m)	0.00	0.00	0.00	0.00	0.00	0.00
Total turnover							
H	Baseline comparison goods turnover of stores (£m)	644.74	644.74	644.74	644.74	644.74	644.74
Initial surplus							
I	Growth in retained comparison goods expenditure (£m)	0.00	55.77	171.24	342.31	553.90	753.85
Claims on expenditure							
J	Sales efficiency growth in existing retailers (£m)	0.00	19.49	70.82	126.12	185.70	236.66
K	Comparison goods commitments (£m)	0.00	18.05	19.44	20.94	22.56	23.95
L	Total claims on capacity	0.00	37.53	90.26	147.07	208.26	260.61
Expenditure summary							
M	Initial surplus of comparison goods expenditure (£m)	0.00	55.77	171.24	342.31	553.90	753.85
N	Total claims on capacity (£m)	0.00	37.53	90.26	147.07	208.26	260.61
O	Residual comparison goods expenditure (£m)	0.00	18.23	80.97	195.24	345.63	493.25
Conversion to floorspace need							
P	Assumed turnover per sq.m (£ per sq.m)	5,000	5,151	5,549	5,978	6,440	6,835
Q	**Comparison goods floorspace need (sq.m net)**	**0**	**3,540**	**14,592**	**32,660**	**53,669**	**72,162**
R	Comparison goods floorspace need (sq.m gross)	0	5,057	20,845	46,656	76,670	103,088

Notes
Total comparison goods expenditure retained by stores in Basildon Borough (zone 1 overall total, zone 2 total for Wickford, zone 5 overall total)
No inflow is applied.
Sales efficiency growth of 1.5% per annum applied.
Turnover per sq.m at 2014 PBA estimate. Turnover per sq.m increased to 2034 in line with sales effiency growth rate.
Total requirement shown is cumulative.
Gross: net ratio of 70% applied.
All monetary values held constant at 2013 prices.

Commitments (Row K)	*Base**	2016	2021	2026	2031	2035
Morrisons, Pitsea (comparison goods floorspace) - net sales 1,012 sq.m	*9.34*	9.63	10.37	11.17	12.03	12.77
Block C, Pitsea (assumes all comparison goods floorspace) - net sales 1,635 sq.m	*8.18*	8.42	9.07	9.77	10.53	11.18
Total	*17.52*	18.05	19.44	20.94	22.56	23.95

*Base turnover is turnover at 2014, in 2013 prices. We assume commitments will commence trading from 2016.

Table CV1 —
Population projections

	2014	2015	2016	2021	2026	2031	2035	Change, 2014-35
Zone 1	110,723	111,397	112,107	115,852	119,519	123,025	125,854	15,131
Zone 2	80,079	80,524	80,994	83,506	86,057	88,475	90,370	10,291
Zone 3	126,296	126,809	127,350	130,500	134,054	137,520	140,178	13,882
Zone 4	153,759	155,299	156,914	165,208	173,176	180,624	186,671	32,912
Zone 5	59,789	60,167	60,583	62,821	65,040	67,185	68,889	9,100
Total	**530,646**	**534,196**	**537,948**	**557,887**	**577,846**	**596,829**	**611,962**	**81,316**

Notes
Source: Experian MMG3 (2014), for base year and population projections.
Population forecasts 2014-33 are based on Office of National Statistics Sub-National Population Projections.
Population forecast for 2035 projected forward based on ONS SNPP rates.

Table CV2 —
Per capita expenditure on convenience goods

	2014	2015	2016	2021	2026	2031	2035
Zone 1	1,873	1,870	1,872	1,885	1,894	1,904	1,911
Zone 2	2,147	2,143	2,145	2,160	2,171	2,182	2,191
Zone 3	2,127	2,122	2,124	2,139	2,150	2,161	2,170
Zone 4	1,896	1,893	1,894	1,908	1,917	1,927	1,935
Zone 5	2,369	2,364	2,367	2,383	2,395	2,407	2,417

Notes
The following expenditure growth rates are applied (source: Experian Retail Planner Briefing Note 13, November 2015, Figures 1a and b):

2013-14	-1.80%	
2014-15	-0.20%	
2015-16	0.10%	
2016-17	0.30%	
2017-22	0.10%	(per annum)
2022-35	0.10%	(per annum)

Source: Experian MMG for 2013 base data
All monetary values are held constant at 2013 prices.

Table CV3 —
Total convenience goods expenditure

a. Total expenditure (Table CM1 x Table CM2)

	2014	2016	2021	2026	2031	2035
	£m	£m	£m	£m	£m	£m
Zone 1	207.43	209.81	218.34	226.38	234.19	240.53
Zone 2	171.96	173.75	180.39	186.84	193.05	197.97
Zone 3	268.58	270.55	279.19	288.23	297.17	304.12
Zone 4	291.57	297.26	315.17	332.02	348.04	361.13
Zone 5	141.64	143.37	149.71	155.78	161.72	166.49
Total	**1,081.18**	**1,094.75**	**1,142.81**	**1,189.25**	**1,234.16**	**1,270.25**

b. Spending on Special Forms of Trading, e.g. internet shopping

	2014	2016	2021	2026	2031	2035
SFT rate	2.50%	3.00%	4.40%	5.10%	5.80%	6.40%
	£m	£m	£m	£m	£m	
Zone 1	5.19	6.29	9.61	11.55	13.58	15.39
Zone 2	4.30	5.21	7.94	9.53	11.20	12.67
Zone 3	6.71	8.12	12.28	14.70	17.24	19.46
Zone 4	7.29	8.92	13.87	16.93	20.19	23.11
Zone 5	3.54	4.30	6.59	7.94	9.38	10.66
Total	**27.03**	**32.84**	**50.28**	**60.65**	**71.58**	**81.30**

c. Residual comparison goods expenditure (Table a less Table b)

	2014	2016	2021	2026	2031	2035
	£m	£m	£m	£m	£m	£m
Zone 1	202.24	203.52	208.73	214.83	220.60	225.14
Zone 2	167.66	168.54	172.46	177.31	181.85	185.30
Zone 3	261.87	262.44	266.91	273.53	279.93	284.66
Zone 4	284.29	288.34	301.30	315.09	327.85	338.02
Zone 5	138.10	139.07	143.13	147.83	152.34	155.83
Total	**1,054.15**	**1,061.90**	**1,092.52**	**1,128.60**	**1,162.58**	**1,188.95**

Notes
Source: Table CV1, Table CV2

Special forms of trading ('SFT') discount source: Experian Retail Planner Briefing Note 13, November 2015, Appendix 3 ('adjusted' percentage figures to take into account store-picked goods)

The main component of SFT is online shopping.

All monetary values are held constant at 2013 prices.

Table CV4 —

Convenience goods market shares, 2014

Zone 1					
Basildon					
Sainsbury's Superstore, Cricketers Retail Park, Cricketers Way, East Mayne, Basildon, SS13 1SA	11.35%	12.00%	0.56%	1.15%	6.53%
Asda, Pipps Hill Retail Park, Miles Grey Road, Basildon, SS14 3AF	12.13%	3.52%	1.14%	1.25%	14.15%
Asda, Eastgate Shopping Centre, Basildon, SS14 1AE	17.10%	2.51%	0.68%	2.17%	2.79%
Tesco Extra, Mayflower Retail Park, Gardiners Link, Basildon, SS14 3HZ	3.33%	13.00%	0.11%	0.27%	10.91%
Other stores, Basildon	10.42%	0.87%	0.89%	0.43%	2.62%
Sub-total, Basildon	**54.33%**	**31.90%**	**3.37%**	**5.27%**	**37.00%**
Pitsea					
Tesco Extra, Station Lane, Pitsea, Basildon, SS13 3JU	16.97%	1.55%	4.43%	3.08%	0.15%
Aldi, Rectory Park Drive, Pitsea, SS13 3DU	7.70%	0.27%	2.09%	0.95%	0.00%
Lidl, Old Market Retail Park, High Road, Pitsea, SS13 3AB	0.98%	1.15%	1.10%	0.18%	0.18%
Other stores, Pitsea	4.37%	0.04%	1.54%	0.07%	0.00%
Sub-total, Pitsea	**30.02%**	**3.01%**	**9.16%**	**4.28%**	**0.34%**
Laindon					
Tesco Superstore, Mandeville Way, Laindon, Basildon, SS15 6TJ	6.06%	1.53%	0.42%	1.49%	4.23%
Lidl, Manor Road, Laindon, Basildon, SS15 6PA	2.83%	0.19%	0.00%	0.00%	1.90%
Co-op, Laindon Centre, Basildon, SS15 5TQ	0.52%	0.00%	0.00%	0.00%	0.07%
Other stores, Laindon	0.51%	0.00%	0.00%	0.00%	0.23%
Sub-total, Laindon	**9.92%**	**1.71%**	**0.42%**	**1.49%**	**6.43%**
Sub-total, zone 1	**94.28%**	**36.63%**	**12.95%**	**11.03%**	**43.76%**
Zone 2					
Wickford					
Aldi, The Broadway, Wickford, SS11 7AJ	0.00%	19.82%	0.00%	0.00%	2.88%
Co-op, High Street, Wickford, SS12 9AT	0.00%	5.68%	0.00%	0.04%	0.15%
Iceland, High Street, Wickford, SS12 9AZ	0.19%	3.05%	0.00%	0.00%	0.00%
Marks & Spencer Simply Food, Cranfield BP PFS, Cranfield Park Road, Wickford, SS12 9FG	0.00%	0.28%	0.00%	0.00%	0.00%
Tesco Express, Silva Island Way, Wickford, SS12 9NR	0.00%	1.72%	0.00%	0.00%	0.11%
Tesco Express, Southend Road, Wickford, SS11 8EE	0.10%	1.51%	0.00%	0.00%	0.00%
Other stores, Wickford	0.27%	4.25%	0.61%	0.00%	0.20%
Sub-total, Wickford	**0.57%**	**36.31%**	**0.61%**	**0.04%**	**3.34%**
Asda, Rawreth Lane, Rayleigh, SS6 9RN	0.00%	5.09%	2.16%	0.00%	0.45%
South Woodham Ferrers (all stores)	0.15%	7.53%	0.28%	0.19%	0.33%
Other stores, zone 2	0.00%	1.21%	0.28%	0.00%	0.00%
Sub-total, zone 2	**0.72%**	**50.14%**	**3.34%**	**0.23%**	**4.12%**
Zone 3					
Rayleigh / Rayleigh Weir					
Sainsbury's Superstore, Stadium Way, Benfleet, Rayleigh Weir, SS7 3UB	0.47%	3.66%	13.21%	0.20%	0.00%
Other stores, Rayleigh	0.87%	0.92%	9.01%	0.65%	0.07%
Sub-total, Rayleigh	**1.34%**	**4.58%**	**22.22%**	**0.85%**	**0.07%**
Canvey Island					
Morrisons, Northwick Road, Canvey Island, SS8 0PT	1.37%	0.68%	16.53%	0.00%	0.00%
Other stores, Canvey Island	0.26%	0.00%	10.10%	0.00%	0.00%
Sub-total, Canvey Island	**1.62%**	**0.68%**	**26.63%**	**0.00%**	**0.00%**
Hadleigh					
Morrisons, London Road, Hadleigh, SS7 2RB	0.06%	0.31%	9.79%	0.00%	0.00%
Other stores, Hadleigh	0.00%	0.05%	4.24%	0.00%	0.48%
Sub-total, Hadleigh	**0.06%**	**0.36%**	**14.03%**	**0.00%**	**0.48%**
Benfleet / South Benfleet (all stores)	0.00%	0.03%	3.72%	0.00%	0.00%
Other stores, zone 3	0.00%	0.27%	1.05%	0.00%	0.24%
Sub-total, zone 3	**3.02%**	**5.92%**	**67.67%**	**0.85%**	**0.78%**
Zone 4					
Tilbury					
Asda, Thurrock Park Way, Tilbury, RM18 7HJ	0.00%	1.79%	0.00%	26.23%	0.00%
Other stores, Tilbury	0.00%	0.53%	0.30%	2.46%	0.00%
Sub-total, Tilbury	**0.00%**	**2.32%**	**0.30%**	**28.69%**	**0.00%**
Grays (incl Lakeside)					
Morrisons, London Road, Grays, RM17 5XZ	0.00%	0.00%	0.00%	11.10%	0.00%
Tesco Extra, Cygnet View, Lakeside, Grays, RM20 1TX	0.59%	0.00%	0.00%	11.19%	0.00%
Aldi, London Road, Grays, RM17 5YB	0.00%	0.00%	0.14%	5.01%	0.00%
Other stores, Grays / Lakeside	0.41%	0.14%	0.00%	3.48%	0.36%
Sub-total, Grays / Lakeside	**1.00%**	**0.14%**	**0.14%**	**30.79%**	**0.36%**
Corringham					
Morrisons, St John's Way, Corringham, SS17 7NA	0.00%	0.53%	0.00%	5.69%	0.00%
Other stores, Corringham	0.00%	0.00%	0.00%	3.22%	0.00%
Sub-total, Corringham	**0.00%**	**0.53%**	**0.00%**	**8.91%**	**0.00%**
Chafford Hundred					
Sainsbury's Superstore, Howard Road, Chafford Hundred, RM16 6YJ	0.00%	0.37%	0.11%	5.42%	0.00%
Other stores, Chafford Hundred	0.00%	0.00%	0.00%	1.80%	0.84%
Sub-total, Chafford Hundred	**0.00%**	**0.37%**	**0.11%**	**7.23%**	**0.84%**
Other stores, zone 4	0.26%	0.07%	0.61%	5.51%	0.00%
Sub-total, zone 4	**1.26%**	**3.44%**	**1.16%**	**81.13%**	**1.20%**
Zone 5					
Billericay					
Waitrose, High Street, Billericay, CM12 9BY	0.25%	0.12%	0.29%	0.26%	24.78%
Co-op, Queen's Park, Billericay, CM12 0UA	0.00%	0.00%	0.00%	0.00%	6.44%
Other stores, Billericay	0.11%	0.18%	0.00%	0.91%	8.23%
Sub-total, Billericay	**0.36%**	**0.30%**	**0.29%**	**1.17%**	**39.44%**
Other stores, zone 5	0.00%	0.00%	0.00%	1.94%	0.30%
Sub-total, zone 5	**0.36%**	**0.30%**	**0.29%**	**3.11%**	**39.74%**
Total, study area	**99.63%**	**96.43%**	**85.41%**	**96.35%**	**89.61%**
Destinations outside study area					
Brentwood (all stores)	0.00%	0.25%	1.42%	0.00%	5.51%
Southend-on-Sea (all stores)	0.00%	2.58%	7.86%	0.00%	0.30%
Leigh-on-Sea (all stores)	0.25%	0.21%	4.82%	0.18%	0.00%
Other locations	0.13%	0.53%	0.49%	3.47%	4.59%
Total, outside study area	**0.37%**	**3.57%**	**14.59%**	**3.65%**	**10.39%**
Overall total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Notes
Source: NEMS Market Research Household Survey, July 2014

Table CV5 —

Convenience goods spending patterns, 2014

	Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Total £m
Total available convenience goods expenditure	202.24	167.66	261.87	284.29	138.10	
Zone 1						
Basildon						
Sainsbury's Superstore, Cricketers Retail Park, Cricketers Way, East Mayne, Basildon, SS13 1SA	22.95	20.13	1.46	3.27	9.02	56.83
Asda, Pipps Hill Retail Park, Miles Grey Road, Basildon, SS14 3AF	24.53	5.90	2.98	3.54	19.54	56.49
Asda, Eastgate Shopping Centre, Basildon, SS14 1AE	34.59	4.20	1.78	6.17	3.85	50.59
Tesco Extra, Mayflower Retail Park, Gardiners Link, Basildon, SS14 3HZ	6.74	21.80	0.28	0.76	15.06	44.65
Other stores, Basildon	21.07	1.46	2.32	1.24	3.62	29.71
Sub-total, Basildon	**109.88**	**53.49**	**8.83**	**14.98**	**51.10**	**238.27**
Pitsea						
Tesco Extra, Station Lane, Pitsea, Basildon, SS13 3JU	34.33	2.60	11.60	8.75	0.21	57.48
Aldi, Rectory Park Drive, Pitsea, SS13 3DU	15.58	0.45	5.48	2.70	0.00	24.21
Lidl, Old Market Retail Park, High Road, Pitsea, SS13 3AB	1.98	1.93	2.88	0.50	0.26	7.56
Other stores, Pitsea	8.83	0.07	4.04	0.20	0.00	13.14
Sub-total, Pitsea	**60.72**	**5.05**	**23.99**	**12.16**	**0.46**	**102.39**
Laindon						
Tesco Superstore, Mandeville Way, Laindon, Basildon, SS15 6TJ	12.26	2.56	1.10	4.22	5.84	25.99
Lidl, Manor Road, Laindon, Basildon, SS15 6PA	5.73	0.31	0.00	0.00	2.62	8.66
Co-op, Laindon Centre, Basildon, SS15 5TQ	1.05	0.00	0.00	0.00	0.10	1.16
Other stores, Laindon	1.03	0.00	0.00	0.00	0.31	1.34
Sub-total, Laindon	**20.07**	**2.87**	**1.10**	**4.22**	**8.88**	37.14
Sub-total, zone 1	**190.67**	**61.41**	**33.92**	**31.36**	**60.43**	**377.80**
Zone 2						
Wickford						
Aldi, The Broadway, Wickford, SS11 7AJ	0.00	33.23	0.00	0.00	3.98	37.21
Co-op, High Street, Wickford, SS12 9AT	0.00	9.52	0.00	0.12	0.21	9.85
Iceland, High Street, Wickford, SS12 9AZ	0.39	5.11	0.00	0.00	0.00	5.51
Marks & Spencer Simply Food, Cranfield BP PFS, Cranfield Park Road, Wickford, SS12 9FG	0.00	0.48	0.00	0.00	0.00	0.48
Tesco Express, Silva Island Way, Wickford, SS12 9NR	0.00	2.88	0.00	0.00	0.15	3.03
Tesco Express, Southend Road, Wickford, SS11 8EE	0.21	2.53	0.00	0.00	0.00	2.73
Other stores, Wickford	0.55	7.12	1.59	0.00	0.28	9.54
Sub-total, Wickford	**1.15**	**60.88**	**1.59**	**0.12**	**4.61**	**68.35**
Asda, Rawreth Lane, Rayleigh, SS6 9RN	0.00	8.54	5.67	0.00	0.63	14.83
South Woodham Ferrers (all stores)	0.30	12.62	0.73	0.53	0.45	14.64
Other stores, zone 2	0.00	2.03	0.74	0.00	0.00	2.77
Sub-total, zone 2	**1.45**	**84.07**	**8.73**	**0.65**	**5.69**	**100.59**
Zone 3						
Rayleigh / Rayleigh Weir						
Sainsbury's Superstore, Stadium Way, Benfleet, Rayleigh Weir, SS7 3UB	0.95	6.14	34.60	0.56	0.00	42.26
Other stores, Rayleigh	1.75	1.54	23.59	1.86	0.09	28.83
Sub-total, Rayleigh	**2.70**	**7.68**	**58.20**	**2.42**	**0.09**	**71.09**
Canvey Island						
Morrisons, Northwick Road, Canvey Island, SS8 0PT	2.77	1.14	43.29	0.00	0.00	47.19
Other stores, Canvey Island	0.52	0.00	26.45	0.00	0.00	26.96
Sub-total, Canvey Island	**3.29**	**1.14**	**69.74**	**0.00**	**0.00**	**74.16**
Hadleigh						
Morrisons, London Road, Hadleigh, SS7 2RB	0.11	0.52	25.65	0.00	0.00	26.27
Other stores, Hadleigh	0.00	0.08	11.11	0.00	0.66	11.85
Sub-total, Hadleigh	**0.11**	**0.60**	**36.75**	**0.00**	**0.66**	**38.12**
Benfleet / South Benfleet (all stores)	0.00	0.06	9.75	0.00	0.00	9.81
Other stores, zone 3	0.00	0.46	2.76	0.00	0.33	3.54
Sub-total, zone 3	**6.10**	**9.93**	**177.20**	**2.42**	**1.08**	**196.72**
Zone 4						
Tilbury						
Asda, Thurrock Park Way, Tilbury, RM18 7HJ	0.00	3.00	0.00	74.57	0.00	77.56
Other stores, Tilbury	0.00	0.90	0.79	7.00	0.00	8.69
Sub-total, Tilbury	**0.00**	**3.89**	**0.79**	**81.57**	**0.00**	**86.25**
Grays (incl Lakeside)						
Morrisons, London Road, Grays, RM17 5XZ	0.00	0.00	0.00	31.57	0.00	31.57
Tesco Extra, Cygnet View, Lakeside, Grays, RM20 1TX	1.20	0.00	0.00	31.82	0.00	33.02
Aldi, London Road, Grays, RM17 5YB	0.00	0.00	0.36	14.25	0.00	14.61
Other stores, Grays / Lakeside	0.83	0.24	0.00	9.89	0.50	11.45
Sub-total, Grays / Lakeside	**2.03**	**0.24**	**0.36**	**87.52**	**0.50**	**90.65**
Corringham						
Morrisons, St John's Way, Corringham, SS17 7NA	0.00	0.89	0.00	16.19	0.00	17.08
Other stores, Corringham	0.00	0.00	0.00	9.15	0.00	9.15
Sub-total, Corringham	**0.00**	**0.89**	**0.00**	**25.33**	**0.00**	**26.23**
Chafford Hundred						
Sainsbury's Superstore, Howard Road, Chafford Hundred, RM16 6YJ	0.00	0.62	0.30	15.42	0.00	16.34
Other stores, Chafford Hundred	0.00	0.00	0.00	5.13	1.16	6.28
Sub-total, Chafford Hundred	**0.00**	**0.62**	**0.30**	**20.55**	**1.16**	**22.62**
Other stores, zone 4	0.52	0.12	1.59	15.67	0.00	17.90
Sub-total, zone 4	**2.54**	**5.77**	**3.04**	**230.64**	**1.65**	**243.64**
Zone 5						
Billericay						
Waitrose, High Street, Billericay, CM12 9BY	0.51	0.21	0.77	0.75	34.22	36.45
Co-op, Queen's Park, Billericay, CM12 0UA	0.00	0.00	0.00	0.00	8.89	8.89
Other stores, Billericay	0.21	0.30	0.00	2.58	11.36	14.46
Sub-total, Billericay	**0.72**	**0.51**	**0.77**	**3.33**	**54.47**	59.79
Other stores, zone 5	0.00	0.00	0.00	5.50	0.42	5.92
Sub-total, zone 5	**0.72**	**0.51**	**0.77**	**8.83**	**54.88**	**65.71**
Total, study area	**201.49**	**161.68**	**223.66**	**273.90**	**123.74**	**984.47**
Destinations outside study area						
Brentwood (all stores)	0.00	0.41	3.72	0.00	7.60	11.74
Southend-on-Sea (all stores)	0.00	4.33	20.59	0.00	0.42	25.33
Leigh-on-Sea (all stores)	0.50	0.35	12.62	0.51	0.00	13.97
Other locations	0.26	0.89	1.29	9.88	6.34	18.65
Total, outside study area	**0.76**	**5.98**	**38.21**	**10.38**	**14.35**	**69.68**
Overall total	**202.24**	**167.66**	**261.87**	**284.29**	**138.10**	**1054.15**

Notes
Source: Table CV3, Table CV4.
All monetary values held constant at 2013 prices.

Table CV6 —

Foodstore trading assessment

	Survey-derived turnover from SA	Net floorspace	Convenience floorspace(2)	Net convenience floorspace	Average sales density	Benchmark turnover	Under / over-trading
	£m	sq.m	%	sq.m	£ / sq.m net	£m	£m
Basildon							
Sainsbury's Superstore, Cricketers Retail Park, Cricketers Way, East Mayne, Basildon, SS13 1SA	56.83	5,462	69.8%	3,812	14,237	54.28	2.55
Asda, Pipps Hill Retail Park, Miles Grey Road, Basildon, SS14 3AF	56.49	4,290	65.0%	2,789	13,407	37.39	19.10
Asda, Eastgate Shopping Centre, Basildon, SS14 1AE	50.59	6,828	55.0%	3,755	13,407	50.35	0.24
Tesco Extra, Mayflower Retail Park, Gardiners Link, Basildon, SS14 3HZ	44.65	4,488	80.0%	3,590	11,967	42.97	1.68
Pitsea							
Tesco Extra, Station Lane, Pitsea, Basildon, SS13 3JU	57.48	9,411	60.0%	5,647	11,967	67.57	-10.09
Aldi, Rectory Park Drive, Pitsea, SS13 3DU	24.21	1,000	90.0%	900	11,636	10.47	13.74
Lidl, Old Market Retail Park, High Road, Pitsea, SS13 3AB	7.56	846	90.0%	761	7,000	5.33	2.23
Laindon							
Tesco Superstore, Mandeville Way, Laindon, Basildon, SS15 6TJ	25.99	2,275	85.0%	1,934	11,967	23.14	2.85
Lidl, Manor Road, Laindon, Basildon, SS15 6PA	8.66	910	90.0%	819	7,000	5.73	2.93
Co-op, Laindon Centre, Basildon, SS15 5TQ	1.16	652	95.0%	619	4,858	3.01	-1.85
Sub-total, Basildon urban area	**333.61**					**300.24**	**33.37**
Wickford							
Aldi, The Broadway, Wickford, SS11 7AJ	37.21	650	90.0%	585	11,636	6.81	30.40
Co-op, High Street, Wickford, SS12 9AT	9.85	1,970	90.0%	1,773	4,858	8.61	1.23
Iceland, High Street, Wickford, SS12 9AZ	5.51	373	90.0%	336	7,682	2.58	2.93
Sub-total, Wickford	**52.57**					**18.00**	**34.57**
Billericay							
Waitrose, High Street, Billericay, CM12 9BY	36.45	2,225	90.0%	2,003	12,269	24.57	11.88
Co-op, Queen's Park, Billericay, CM12 0UA	8.89	1,143	85.0%	972	4,858	4.72	4.17
Sub-total, Billericay	**45.34**					**29.29**	**16.05**
Total for Borough							**83.99**

Notes
Foodstores listed are 'main' food shopping destinations with a meaningful market share, as listed in Table CV4 and Table CV!
Foodstores with a net sales area over 500 sq.m are listed
The proportion of convenience floorspace is informed by company average food / non-food splits in Verdict's 2010 UK Grocery Retailers document, updated by PBA through sit visits where appropriate.
Average sales densities are goods based sales densities derived from Verdict's UK Grocery Retailers Repor
A positive figure indicates that the store is overtrading compared to company averages

All monetary values held constant at 2013 prices

Table CV7 —

Convenience goods floorspace requirements to 2034

Basline requirement

		2014	2016	2021	2026	2031	2035
Total population and expenditure							
A	Total population (persons)	530,646	537,948	557,887	577,846	596,829	611,962
B	Total convenience goods expenditure (£m)	1,054.15	1,061.90	1,092.52	1,128.60	1,162.58	1,188.95
Retained expenditure							
C	Retained convenience goods expenditure in Basildon Borough (%)	49%	49%	49%	49%	49%	49%
D	Retained convenience goods expenditure in Basildon Borough (£m)	511.86	515.63	530.50	548.01	564.51	577.32
E	Convenience goods expenditure leakage (£m)	542.29	546.28	562.03	580.59	598.07	611.63
Inflow							
F	Inflow (%)	0%	0%	0%	0%	0%	0%
G	Inflow (£m)	0.00	0.00	0.00	0.00	0.00	0.00
Total turnover							
H	Baseline convenience goods turnover of stores (£m)	511.86	511.86	511.86	511.86	511.86	511.86
Initial surplus							
I	Growth in retained convenience goods expenditure (£m)	0.00	3.76	18.63	36.15	52.65	65.46
Claims on expenditure							
J	Sales efficiency growth in existing retailers (£m)	0.00	0.00	7.72	15.56	23.52	29.98
K	Convenience goods commitments (£m)	0.00	39.12	39.71	40.31	40.91	41.41
L	Total claims on capacity	0.00	39.12	47.43	55.87	64.44	71.39
Expenditure summary							
M	Initial surplus of convenience goods expenditure (£m)	0.00	3.76	18.63	36.15	52.65	65.46
N	Total claims on capacity (£m)	0.00	39.12	47.43	55.87	64.44	71.39
O	Foodstore trading performance allowance (£m)	83.99	83.99	83.99	83.99	83.99	83.99
P	Residual convenience goods expenditure (£m)	83.99	48.63	55.19	64.27	72.20	78.06
Conversion to floorspace need							
Q	Assumed turnover per sq.m (£ per sq.m)	12,500	12,500	12,689	12,880	13,074	13,232
R	**Convenience goods floorspace need (sq.m net)**	**6,719**	**3,891**	**4,349**	**4,990**	**5,522**	**5,899**
S	Convenience goods floorspace need (sq.m gross)	10,337	5,986	6,691	7,676	8,496	9,076

Notes
Total convenience goods expenditure retained by stores in Basildon Borough (zone 1 overall total, zone 2 total for Wickford, zone 5 overall total)
No inflow is applied.
Sales efficiency growth of 0.3% per annum applied, 2016 onwards
Turnover per sq.m at 2014 PBA estimate. Turnover per sq.m increased to 2031 in line with sales effiency growth rate.
Total requirement shown is cumulative.
Gross: net ratio of 65% applied.
All monetary values held constant at 2013 prices.

Commitments (Row K)	*Base**	2016	2021	2026	2031	2035
Morrisons, Pitsea (convenience goods floorspace) - net sales 1,012 sq.m	*39.00*	39.12	39.71	40.31	40.91	41.41

Turnover source: D2 Planning Limited Retail Statement, Appendix 1
*Base turnover is turnover at 2014, in 2013 prices. We assume commitments will commence trading from 2016.

Appendix F Quantitative retail need method

Appendix: Quantitative Need Methodology

Summary of methodology

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

The technical inputs into each stage of the methodology which we have used for the purposes of this study are presented overleaf.

Step 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.
Step 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.
Step 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.
Step 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**)
Step 5	Allow for any 'inflow' of expenditure from beyond the study area, if appropriate.
Step 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)
Step 7	Project the spending forecasts forward to the forecast years.
Step 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)
Step 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.
Step 10	Assess alternative policy scenarios, and / or the sensitivity testing of key assumptions.

Appendix G Technical inputs

Appendix: Technical inputs into capacity forecasts

<table>
<tr><th>Data</th><th>Source</th><th>How we have used the data</th></tr>
<tr><td>Base Population</td><td>Experian</td><td>Experian’s MMG3 software provides 2013-based population forecasts at postcode sector level. The postcode sector populations are grouped together to form the study zones used for the purpose of our analysis.</td></tr>
<tr><td>Population Projections</td><td>Basildon Council / Experian</td><td>Experian’s MMG software provides annual population projections over the period to 2035. These have been verified by the Council.</td></tr>
<tr><td>Base Per Capita Expenditure</td><td>Experian</td><td>Experian’s MMG software provides per capita annual expenditure in each zone of the study area on convenience (food), comparison (non-food) and commercial leisure.</td></tr>
<tr><td>Retail and leisure expenditure growth forecasts</td><td>Experian</td><td>We have adopted expenditure growth rates from Experian Retail Planner Briefing Note 13 (Figures 1a and 1b), as follows:
<table>
<tr><th></th><th>Comparison goods</th><th>Convenience goods</th><th>Commercial leisure</th></tr>
<tr><td>2013-14</td><td>5.5%</td><td>-1.8%</td><td>1.4%</td></tr>
<tr><td>2014-15</td><td>5.3%</td><td>-0.2%</td><td>2.7%</td></tr>
<tr><td>2015-16</td><td>3.2%</td><td>0.1%</td><td>1.6%</td></tr>
<tr><td>2016-17*</td><td>2.9%</td><td>0.3%</td><td>1.6%</td></tr>
<tr><td>2017-22</td><td>3.0%</td><td>0.1%</td><td>1.3%</td></tr>
<tr><td>2022+*</td><td>3.2%</td><td>0.1%</td><td>1.4%</td></tr>
</table>
*per annum growth rates</td></tr>
<tr><td>Base Year Special Forms of Trading (SFT)</td><td>Experian / Household survey</td><td>Special Forms of Trading refers to the amount of money <u>not</u> spent in bricks and mortar retail floorspace (includes internet, temporary markets etc...). Experian’s Retail Planner Briefing Note 13 (Appendix 3 Figure 5) advises the following SFT discounts at the base year of the study:

Comparison goods (2014): 11.2%
Convenience goods (2014): 2.5%

For the purposes of our assessment we used the ‘adjusted’ figure presented by Experian, which makes allowance for store-picked online shopping transactions.</td></tr>
<tr><td>Growth in SFT</td><td>Experian</td><td>Experian’s Retail Planner Briefing Note 13 (Appendix 3) advises the following SFT discounts at the study forecast years:
<table>
<tr><th></th><th>Comparison goods</th><th>Convenience goods</th></tr>
<tr><td>2016</td><td>12.4%</td><td>3.0%</td></tr>
<tr><td>2021</td><td>15.0%</td><td>4.4%</td></tr>
<tr><td>2026</td><td>15.0%</td><td>5.1%</td></tr>
<tr><td>2031</td><td>14.6%</td><td>5.8%</td></tr>
<tr><td>2035</td><td>14.3%</td><td>6.4%</td></tr>
</table>
For the purposes of our assessment we used the ‘adjusted’ figure presented by Experian, which makes allowance for store-picked online shopping transactions.</td></tr>
<tr><td>Retailer productivity changes</td><td>Experian/PBBI</td><td>Experian’s forecast of retailer productivity changes outstrips the per capita expenditure growth figures highlighted above. We have therefore assumed the following productivity changes for the purposes of our quantitative analysis:

Comparison goods: 1.5% per annum, 2014-35
Convenience goods: 0% per annum, 2014-16; 0.3% per annum, 2016-35.</td></tr>
</table>

Appendix H Commercial leisure capacity tables

Table L1 —

Population projections

	2014	2015	2016	2021	2026	2031	2035	Change, 2014-35
Zone 1	110,723	111,397	112,107	115,852	119,519	123,025	125,854	15,131
Zone 2	80,079	80,524	80,994	83,506	86,057	88,475	90,370	10,291
Zone 3	126,296	126,809	127,350	130,500	134,054	137,520	140,178	13,882
Zone 4	153,759	155,299	156,914	165,208	173,176	180,624	186,671	32,912
Zone 5	59,789	60,167	60,583	62,821	65,040	67,185	68,889	9,100
Total	**530,646**	**534,196**	**537,948**	**557,887**	**577,846**	**596,829**	**611,962**	**81,316**

Notes
Source: Experian MMG3 (2014), for base year and population projections.
Population forecasts 2014-31 are based on Office of National Statistics Sub-National Population Projections.
Population forecast for 2035 projected forward based on ONS SNPP rates.

Table LC2 —

Per capita expenditure on leisure services

	2014	2015	2016	2021	2026	2031	2035
	£	£	£	£	£	£	£
Accommodation services							
Zone 1	97	99	101	108	116	124	131
Zone 2	156	160	163	174	186	200	211
Zone 3	147	151	154	164	176	189	199
Zone 4	119	123	125	133	143	153	162
Zone 5	183	188	191	204	219	234	248
Cultural services							
Zone 1	255	262	266	285	305	327	346
Zone 2	321	329	334	358	383	411	434
Zone 3	320	329	334	358	383	411	434
Zone 4	275	282	287	307	328	352	372
Zone 5	381	392	398	426	456	489	517
Games of chance							
Zone 1	167	172	175	187	200	215	227
Zone 2	190	195	198	212	227	244	258
Zone 3	197	202	206	220	236	252	267
Zone 4	179	184	187	200	214	229	242
Zone 5	192	197	200	214	229	246	260
Hairdressing salons & personal grooming							
Zone 1	67	69	70	75	80	86	91
Zone 2	110	113	115	123	132	141	149
Zone 3	112	115	117	125	134	143	152
Zone 4	80	82	84	89	96	103	108
Zone 5	136	140	142	152	163	175	185
Recreational & sporting goods							
Zone 1	66	68	69	74	79	85	89
Zone 2	114	117	119	128	137	146	155
Zone 3	109	112	114	122	131	140	148
Zone 4	84	86	87	93	100	107	113
Zone 5	136	140	142	152	163	175	185
Restaurants & cafes							
Zone 1	884	908	922	987	1057	1133	1198
Zone 2	1244	1278	1298	1389	1487	1594	1685
Zone 3	1201	1233	1253	1340	1436	1539	1627
Zone 4	982	1009	1025	1097	1174	1259	1331
Zone 5	1446	1485	1508	1614	1728	1853	1959

Notes
Source: Experian MMG for 2013 base data

The following expenditure growth rates are applied (source: Experian Retail Planner Briefing Note 13, November 2015, Figures 1a and b):

2013-14	1.40%	
2014-15	2.70%	
2015-16	1.60%	
2016-17	1.60%	
2017-22	1.30%	per annum
2022-35	1.40%	per annum

All monetary values are held constant at 2013 prices.

Table LC3 —

Total expenditure on leisure services

	2014	2015	2016	2021	2026	2031	2035	Change, 2014-35
	£m	£m	£m	£m	£m	£m	£m	£m
Accommodation services								
Zone 1	10.73	11.08	11.33	12.53	13.84	15.27	16.52	5.79
Zone 2	12.48	12.89	13.17	14.53	16.04	17.67	19.08	6.60
Zone 3	18.60	19.18	19.57	21.45	23.60	25.95	27.96	9.37
Zone 4	18.36	19.05	19.56	22.03	24.73	27.65	30.21	11.84
Zone 5	10.94	11.30	11.56	12.83	14.23	15.75	17.08	6.14
Total	**71.11**	**73.50**	**75.19**	**83.37**	**92.43**	**102.30**	**110.85**	**39.74**
Cultural services								
Zone 1	28.28	29.22	29.87	33.03	36.49	40.27	43.55	15.27
Zone 2	25.67	26.51	27.09	29.88	32.98	36.35	39.25	13.58
Zone 3	40.46	41.72	42.57	46.67	51.34	56.46	60.84	20.38
Zone 4	42.25	43.82	44.99	50.68	56.89	63.61	69.49	27.25
Zone 5	22.79	23.56	24.10	26.74	29.65	32.83	35.58	12.79
Total	**159.45**	**164.83**	**168.62**	**187.00**	**207.35**	**229.51**	**248.72**	**89.27**
Games of chance								
Zone 1	18.54	19.16	19.59	21.66	23.93	26.40	28.55	10.01
Zone 2	15.23	15.73	16.08	17.73	19.57	21.57	23.29	8.06
Zone 3	24.88	25.66	26.18	28.70	31.57	34.72	37.41	12.53
Zone 4	27.49	28.52	29.27	32.97	37.02	41.39	45.22	17.73
Zone 5	11.46	11.84	12.12	13.44	14.90	16.50	17.89	6.43
Total	**97.60**	**100.90**	**103.23**	**114.50**	**126.99**	**140.58**	**152.37**	**54.76**
Hairdressing salons & personal grooming								
Zone 1	7.43	7.68	7.85	8.68	9.59	10.59	11.45	4.01
Zone 2	8.81	9.10	9.30	10.26	11.32	12.47	13.47	4.66
Zone 3	14.13	14.57	14.87	16.30	17.93	19.72	21.25	7.12
Zone 4	12.31	12.77	13.11	14.77	16.58	18.54	20.25	7.94
Zone 5	8.16	8.43	8.62	9.57	10.61	11.74	12.73	4.58
Total	**50.84**	**52.55**	**53.75**	**59.57**	**66.03**	**73.06**	**79.15**	**28.31**
Recreational & sporting goods								
Zone 1	7.31	7.56	7.73	8.54	9.44	10.41	11.26	3.95
Zone 2	9.15	9.45	9.66	10.65	11.75	12.95	13.99	4.84
Zone 3	13.80	14.23	14.52	15.92	17.51	19.25	20.75	6.95
Zone 4	12.84	13.32	13.67	15.40	17.29	19.33	21.12	8.28
Zone 5	8.15	8.42	8.62	9.56	10.60	11.74	12.72	4.57
Total	**51.25**	**52.97**	**54.19**	**60.07**	**66.59**	**73.69**	**79.84**	**28.59**
Restaurants & cafes								
Zone 1	97.87	101.13	103.40	114.32	126.31	139.37	150.73	52.85
Zone 2	99.62	102.88	105.13	115.97	127.99	141.06	152.32	52.70
Zone 3	151.65	156.38	159.56	174.93	192.44	211.63	228.05	76.40
Zone 4	151.04	156.67	160.83	181.16	203.37	227.39	248.44	97.40
Zone 5	86.43	89.32	91.38	101.38	112.40	124.47	134.92	48.49
Total	**586.61**	**606.38**	**620.31**	**687.76**	**762.51**	**843.91**	**914.46**	**327.85**

Notes
Source: Table LC1, Table LC2
All monetary values are held constant at 2013 prices.

Table LC4 —

Restaurants market shares, 2014

Table LC4a Unadjusted (includes 'don't know'/'don't do this activity')

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %
Within Borough					
Basildon					
Festival Leisure Park	30.05%	22.14%	4.77%	10.80%	8.31%
Town Centre	8.95%	1.10%	0.00%	0.97%	0.87%
Laindon	0.76%	0.00%	1.25%	0.57%	0.00%
Other locations	8.76%	1.63%	0.68%	2.99%	1.44%
Billericay town centre	3.44%	8.17%	0.00%	0.68%	50.86%
Wickford	2.16%	13.92%	0.31%	2.32%	0.34%
Sub-total for borough	**54.11%**	**46.96%**	**7.01%**	**18.34%**	**61.81%**
Other locations					
Lakeside	0.76%	1.01%	2.15%	21.86%	0.00%
Southend-on-Sea	2.47%	5.13%	15.66%	0.95%	0.69%
Rayleigh	0.66%	3.94%	11.77%	0.00%	0.34%
Central London / West End	4.93%	3.44%	2.02%	8.54%	3.26%
Chelmsford	1.24%	7.24%	1.89%	0.00%	5.70%
Brentwood	2.81%	1.01%	0.31%	4.12%	6.13%
Canvey Island	0.51%	0.43%	8.69%	0.00%	0.00%
Leigh-on-Sea	0.00%	0.00%	7.34%	0.68%	0.34%
Grays	0.00%	0.00%	0.00%	10.48%	0.00%
Hadleigh	0.93%	0.43%	6.78%	0.00%	0.55%
All other locations	3.69%	4.99%	6.05%	13.74%	8.08%
Sub-total for other locations	**17.99%**	**27.62%**	**62.67%**	**60.37%**	**25.09%**
(Don't do this activity)	23.89%	15.01%	17.23%	17.38%	10.51%
(Don't know / varies)	4.01%	10.41%	13.09%	3.92%	2.59%
Overall total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Table LC4b Adjusted (excludes 'don't know'/'don't do this activity')

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %
Within Borough					
Basildon					
Festival Leisure Park	41.68%	29.69%	6.84%	13.72%	9.56%
Town Centre	12.41%	1.47%	0.00%	1.23%	1.00%
Laindon	1.05%	0.00%	1.79%	0.73%	0.00%
Other locations	12.15%	2.18%	0.98%	3.80%	1.66%
Billericay town centre	4.77%	10.96%	0.00%	0.87%	58.52%
Wickford	3.00%	18.66%	0.45%	2.95%	0.40%
Sub-total for borough	**75.05%**	**62.96%**	**10.06%**	**23.30%**	**71.13%**
Other locations					
Lakeside	1.05%	1.35%	3.08%	27.78%	0.00%
Southend-on-Sea	3.42%	6.88%	22.48%	1.20%	0.79%
Rayleigh	0.91%	5.28%	16.89%	0.00%	0.40%
Central London / West End	6.84%	4.61%	2.89%	10.85%	3.75%
Chelmsford	1.72%	9.71%	2.71%	0.00%	6.56%
Brentwood	3.89%	1.35%	0.45%	5.24%	7.06%
Canvey Island	0.71%	0.58%	12.48%	0.00%	0.00%
Leigh-on-Sea	0.00%	0.00%	10.54%	0.87%	0.40%
Grays	0.00%	0.00%	0.00%	13.32%	0.00%
Hadleigh	1.30%	0.58%	9.74%	0.00%	0.63%
All other locations	5.11%	6.69%	8.69%	17.46%	9.29%
Sub-total for other locations	**24.95%**	**37.04%**	**89.94%**	**76.70%**	**28.87%**
Overall total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Notes
Source: NEMS Market Research Household Survey, July 2014

Table LC5 —

Cafes, bars & restaurants market shares, 2014

Unadjusted (includes 'don't know'/'don't do this activity')

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %
Within Borough					
Basildon					
Festival Leisure Park	9.01%	1.49%	1.84%	2.32%	1.99%
Town Centre	16.25%	1.84%	2.46%	0.66%	0.69%
Laindon	1.21%	2.00%	0.00%	0.00%	0.00%
Pitsea	2.64%	0.00%	0.00%	0.00%	0.00%
Other locations	8.95%	0.60%	0.00%	2.98%	1.44%
Billericay town centre	3.07%	4.44%	0.00%	0.53%	51.47%
Wickford	0.30%	26.47%	0.00%	0.00%	0.69%
Sub-total for borough	**41.44%**	**36.83%**	**4.30%**	**6.49%**	**56.28%**
Other locations					
Lakeside	0.30%	0.41%	1.28%	11.64%	0.00%
Southend-on-Sea	0.48%	3.26%	4.27%	0.57%	0.34%
Rayleigh	0.00%	7.17%	13.27%	0.00%	0.00%
Central London / West End	3.77%	4.54%	1.68%	6.82%	1.07%
Chelmsford	1.24%	7.74%	0.00%	0.00%	3.20%
Brentwood	3.16%	0.41%	0.00%	2.74%	6.98%
Canvey Island	0.00%	0.00%	10.31%	0.00%	0.00%
Leigh-on-Sea	0.00%	0.41%	12.92%	0.00%	0.00%
Grays	0.00%	0.00%	0.00%	9.00%	0.00%
Hadleigh	0.00%	0.43%	5.00%	0.00%	0.00%
All other locations	2.10%	5.13%	9.22%	19.93%	5.04%
Sub-total for other locations	**11.05%**	**29.52%**	**57.95%**	**50.70%**	**16.62%**
(Don't do this activity)	44.28%	29.41%	29.29%	40.35%	26.41%
(Don't know / varies)	3.23%	4.25%	8.47%	2.47%	0.69%
Overall total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Adjusted (excludes 'don't know'/'don't do this activity')

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %
Within Borough					
Basildon					
Festival Leisure Park	17.17%	2.25%	2.95%	4.05%	2.72%
Town Centre	30.96%	2.77%	3.95%	1.16%	0.95%
Laindon	2.31%	3.01%	0.00%	0.00%	0.00%
Pitsea	5.03%	0.00%	0.00%	0.00%	0.00%
Other locations	17.05%	0.90%	0.00%	5.22%	1.98%
Billericay town centre	5.85%	6.70%	0.00%	0.92%	70.61%
Wickford	0.58%	39.89%	0.00%	0.00%	0.95%
Sub-total for borough	**78.94%**	**55.51%**	**6.90%**	**11.35%**	**77.20%**
Other locations					
Lakeside	0.58%	0.62%	2.06%	20.36%	0.00%
Southend-on-Sea	0.91%	4.91%	6.87%	1.00%	0.47%
Rayleigh	0.00%	10.81%	21.33%	0.00%	0.00%
Central London / West End	7.19%	6.84%	2.69%	11.92%	1.46%
Chelmsford	2.36%	11.67%	0.00%	0.00%	4.39%
Brentwood	6.03%	0.62%	0.00%	4.78%	9.57%
Canvey Island	0.00%	0.00%	16.56%	0.00%	0.00%
Leigh-on-Sea	0.00%	0.62%	20.75%	0.00%	0.00%
Grays	0.00%	0.00%	0.00%	15.73%	0.00%
Hadleigh	0.00%	0.65%	8.04%	0.00%	0.00%
All other locations	4.00%	7.73%	14.81%	34.86%	6.91%
Sub-total for other locations	**21.06%**	**44.49%**	**93.10%**	**88.65%**	**22.80%**
Overall total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Notes
Source: NEMS Market Research Household Survey, July 2014

Table LC6 —

Summary of A3, A4 & A5 floorspace requirements

		2014	2016	2021	2026	2031	2035
Total population and expenditure							
A	Total population	530,646	537,948	557,887	577,846	596,829	611,962
B	Total study area expenditure on food & drink	586.61	620.31	687.76	762.51	843.91	914.46
Retained expenditure							
C	Retained food & drink expenditure(1)	40%	40%	40%	40%	40%	40%
D	Retained food & drink expenditure	237.49	251.13	278.44	308.70	341.66	370.22
E	Expenditure leakage	349.12	369.17	409.32	453.80	502.25	544.24
Inflow							
F	Inflow(2)	0%	0%	0%	0%	0%	0%
G	Inflow	0.00	0.00	0.00	0.00	0.00	0.00
Total turnover of food & drink facilities							
H	Total turnover	237.49	237.49	237.49	237.49	237.49	237.49
Initial surplus							
I	Growth in retained expenditure	0.00	13.64	40.95	71.21	104.17	132.73
Claims on expenditure							
J	Sales efficiency growth in existing operators(3)	0.00	0.00	4.79	9.67	14.66	14.66
K	Commitments for new floorspace	0.00	0.00	0.00	0.00	0.00	1.00
L	Total claims on capacity	0.00	0.00	4.79	9.67	14.66	15.66
Expenditure summary							
M	Initial surplus of expenditure	0.00	13.64	40.95	71.21	104.17	132.73
N	Total claims on capacity	0.00	0.00	4.79	9.67	14.66	15.66
O	Residual expenditure	0.00	13.64	36.16	61.54	89.51	117.08
Conversion to floorspace requirements							
P	Assumed turnover per sq.m(4)	6,500	6,526	6,631	6,765	6,901	7,040
Q	**Gross food & drink floorspace requirement(5)**	**0**	**2,090**	**5,453**	**9,097**	**12,971**	**16,629**

Notes
All monetary values are held constant at 2013 prices.
Sales efficiency growth rate of 0.4% per annum applied from 2016 onwards.

Table LC7 —

Cinema & theatre market shares, 2014

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5
	%	%	%	%	%
Within Borough					
Empire Cinema, Festival Leisure Park, Cranes Farm Road, Basildon	52.79%	61.70%	29.00%	23.53%	62.07%
Towngate Theatre, Basildon Centre, St Martin's Square, Basildon	1.87%	1.26%	0.63%	2.02%	0.34%
Sub-total for Borough	**54.66%**	**62.96%**	**29.63%**	**25.55%**	**62.41%**
Other locations					
Vue, Lakeside Shopping Centre, West Thurrock	0.48%	0.00%	1.12%	43.53%	1.73%
Movie Starr, Eastern Esplanade, Canvey Island	1.32%	0.43%	15.35%	0.00%	0.00%
Odeon Cinema, Broadway, London Road, Southend-on-Sea	0.00%	0.98%	7.21%	0.71%	0.34%
Southend Theatre, Cliffs Pavillion, Station Road, Southend-on-Sea	0.30%	4.43%	5.30%	1.08%	1.38%
Palace Theatre, London Road, Southend-on-Sea	0.61%	0.27%	4.54%	1.08%	0.00%
London (all destinations)	6.78%	1.42%	7.03%	4.10%	4.00%
All other destinations	0.46%	2.31%	0.31%	1.36%	5.36%
Sub-total for other locations	**9.94%**	**9.85%**	**40.86%**	**51.86%**	**12.81%**
(Don't know / varies)	1.39%	3.67%	1.68%	0.42%	2.95%
(Don't do this activity)	34.01%	23.52%	27.83%	22.18%	21.83%
Overall total	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Notes
Source: NEMS Market Research Household Survey, July 2014