

# **Rochford District Retail and Leisure Needs Assessment Update**

## **Final Report**

Rochford District Council

16 June 2025

**LICHTFIELDS**

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# Contents

<b>1.0</b>	<b>Introduction</b>	<b>1</b>
	Purpose of the report	1
	Background	1
	Report structure	2
<b>2.0</b>	<b>Updated floorspace capacity assessment</b>	<b>3</b>
	Introduction	3
	National trends	3
	Study area	9
	Population projections	10
	Expenditure forecasts	10
	Changes in turnover densities	11
	Base year market shares	11
	Capacity for convenience goods retail floorspace	12
	Capacity for comparison goods floorspace	13
	Capacity for food/beverage floorspace	14
	Completions and planned commitments	15
<b>3.0</b>	<b>Commercial leisure uses</b>	<b>16</b>
	Introduction	16
	Leisure and cultural expenditure	16
	Leisure floorspace capacity	16
	Conclusions on commercial leisure uses	23
<b>4.0</b>	<b>Implications for emerging policy</b>	<b>24</b>
	Introduction	24
	Floorspace capacity projections	25
	Impact and sequential tests	27
	Town centre boundary and primary shopping areas	27

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## Glossary

### **Class A1**

Commercial units/premises previously classed as retail or shop uses in the old Use Classes Order (UCO), which are now class E(a) in the new UCO (post September 2020).

### **Class A2**

Commercial units/premises previously classed as financial or professional services, for example banks and building societies within the old UCO, which are now class E (c) in the new UCO.

### **Class A3**

Commercial units/premises previously classed as restaurants and café food outlets in the old UCO, which are now class E (b) in the new UCO.

### **Class A4**

Commercial units/premises previously classed as public houses or bars in the old UCO, which are now Sui Generis (unclassified) in the new UCO.

### **Class A5**

Commercial units previously classed fast as food or takeaway food outlets selling cooked hot food within the old UCO, which are now Sui Generis (unclassified) in the new UCO.

### **Class E**

Commercial, business and service use, including sub-categories:

a) Shop other than for the sale of hot food;

b) Food and drink which is mostly consumed on the premises;

c) financial services, professional services (other than medical services) and any other services which it is appropriate to provide in a commercial, business or service locality;

d) Indoor sport and recreation (not swimming pools, ice rinks or motorised vehicles or firearms);

e) Medical services not attached to the residence of the practitioner;

f) Non-residential creche, day centre or nursery; and

g) offices, the research and development of products or processes or any industrial process which can be carried out in any residential areas).

### **Convenience goods**

Consumer goods purchased on a regular basis such as food/groceries and cleaning materials.

**Comparison goods**

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

**Experian**

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

**Food and Beverage**

Previous uses classes A3, A4 and A5 food and drink outlets, selling food and drinks consumed away from the home or hot food takeaway food but not food and grocery items including convenience goods.

**GlobalData**

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

**Goad Plans**

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

**Gross floorspace**

Total external floorspace including exterior walls.

**Market share/Penetration rate**

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

**Multi-channel shopping**

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

**Multiplex cinema**

A cinema complex with five or more screens.

**Net (sales) floorspace**

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

**Special forms of trading**

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

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## 1.0 Introduction

### Purpose of the report

- 1.1 Lichfields was commissioned by Rochford District Council to prepare an update of the 2022 retail and leisure needs assessment. The Council's previous needs assessment was set out in the South Essex Retail Study prepared in 2017 (SERS 2017).
- 1.2 Two stages of work undertaken to provide a robust update of the SERS 2017, are as follows:
- 1 a review of the latest trends feeding into a partial update of the retail, food/beverage and leisure needs assessment; and
  - 2 a review implication arising for emerging planning policies taking account fundamental changes to the UCO and permitted development rights.
- 1.3 A parallel retail and leisure needs update was prepared for Southend-on-Sea City Council in 2022.
- 1.4 Lichfields' has been recommissioned by Rochford District Council to prepare a further update of the retail and leisure needs assessment based on the latest available population and expenditure projections.

### Background

- 1.5 Previously main town centre uses, as defined by the National Planning Policy Framework (NPPF), fell into to a range of different use classes e.g. A1 retail, A3/A4/A5 food/beverage, some D2 leisure uses and B1 offices. Evidence based studies have historically provided floorspace projections within these use class categories.
- 1.6 On 1 September 2020, the Use Classes Order (UCO) was significantly amended. In relation to main town centre uses, as defined in the NPPF Annex 2 glossary, the UCO changes provide for three new use classes:
- Class E (Commercial, business and service);
  - Class F.1 (Learning and non-residential institutions); and
  - Class F.2 (Local community).
- 1.7 The UCO changes combine: Shops (A1), financial/professional services (A2), cafés/restaurants (A3), indoor sports/fitness (D2 part), medical health facilities (D1 part), creche/nurseries and office/business uses (B1) into the new single Use Class E. The new Class E includes some uses that are not defined as 'main town centre uses" within the NPPF e.g., medical services and some light industrial uses.
- 1.8 This study update only provides floorspace projections for selected activities now within Class E, and for example it does not quantify the need for office floorspace.
- 1.9 The floorspace capacity projections in this report relate to convenience and comparison goods retail (previously A1) and restaurant/café (previously A3) use now in Class E and Sui Generis uses i.e., pubs/bar (previously A4) and takeaways (A5). Need projections within future development plans can continue to refer to separate floorspace projections for convenience and comparison goods retail and food/beverage uses (i.e. restaurants/cafés, pubs/bars and hot food takeaway).

## Report structure

- 1.10 Section 2 of this report provides an update of the retail floorspace capacity assessment based on the latest available population and expenditure projections. This section also provides a floorspace capacity assessment for food/beverage uses.
- 1.11 Section 3 updates the need assessment for commercial leisure.
- 1.12 Section 4 reviews the potential policy implications for the emerging new Local Plan arising from the updated need assessment.

## 2.0 Updated floorspace capacity assessment

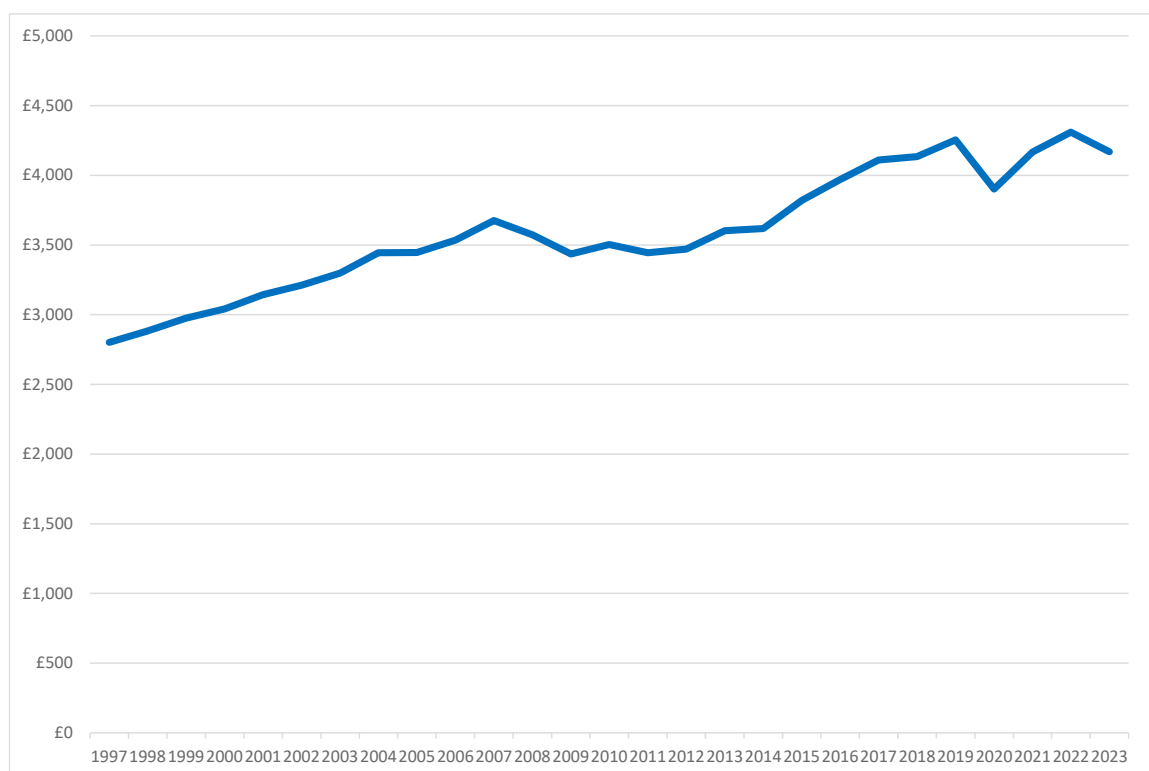
### Introduction

2.1 This section updates and rolls forward the quantitative assessment of the scope for new retail and food/beverage floorspace in Rochford District for five-year intervals during the period 2023 to 2043. The updated projections adopt Experian’s latest forecasts for population growth, average expenditure per person, special forms of trading (SFT) and sales density growth rates.

### National trends

2.2 Historic trends indicate that consumer expenditure has grown consistently in real terms, generally following a cyclical growth trend. The growth in expenditure per person on comparison retail goods between 1997 and 2023 is shown in Figure 2.1. High growth between 1997 and 2008 fuelled demand for new retail floorspace. Since the recession and credit crunch in 2009 expenditure growth has been much slower and the demand for retail floorspace has reduced, particularly comparison goods floorspace. Comparison goods expenditure per capita dropped sharply in 2020 due to the impact of Covid-19 lockdowns, but expenditure recovered to pre-Covid levels in 2022. However, expenditure per person declined in 2023 due to the on-going cost-of-living and energy crisis.

Figure 2.1 UK growth in comparison goods expenditure per head (2022 prices)



Source: Experian Retail Planner Briefing Note 22 (March 2023) – Appendix 4b.

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

- impact on the reliability of demographic and economic projections i.e., population growth and Experian expenditure forecasts including changes in consumer confidence as a result of inflation, and longer-term implications of UK trading relationships;
- short term impacts on the mix of uses and customer behaviour that distorted levels of expenditure during 2020, 2021 and 2022; and
- longer-term structural impacts that could affect the nature of town centres and the way households shop, eat/drink out and participate in leisure activities.

2.4 The key on-going uncertainties relating to the first two points are primarily the length of the cost-of-living crisis and the implications of trade tariffs and other geopolitical impacts. The longer-term structural implications are harder to predict and quantify at this stage, but recent data provides an early indication.

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

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

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

2.8 Reflecting these trends, Experian's latest forecasts (published in March 2025) suggest slower expenditure growth and home shopping/internet spending is expected to grow at a much faster rate than traditional bricks and mortar shopping.

### **Experian's latest retail expenditure forecasts**

2.9 This study adopts Experian latest expenditure information and forecasts (Retail Planning Briefing Note 22 – March 2025). The study sets out expenditure projections during five-year intervals up to 2043.

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

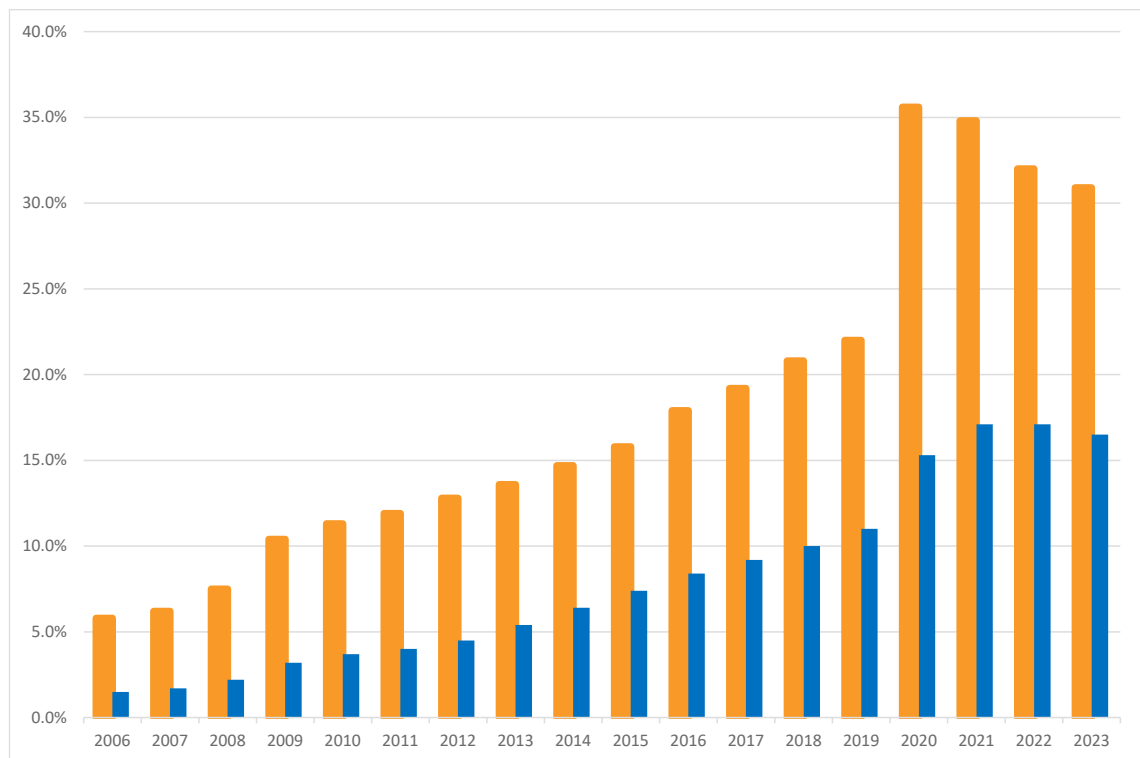
2.11 Planning based on long-term expenditure growth projections up to and beyond ten years has always had inherent uncertainties. Despite these uncertainties, development plans should assume a return to reasonable rates of growth and relative normality, although the implications of the short-term impacts should not be ignored. It is better to plan for a return to growth and then modify the strategy later if levels of growth are lower than originally predicted, rather than not planning for growth because there are significant



uncertainties. The latter approach is likely to fail to respond in time if higher levels of growth are achieved, and any growth will go elsewhere. Nevertheless, a cautious approach to expenditure growth, as now suggested by Experian, should be adopted, bearing in mind the uncertainties relating to the growth in on-line shopping.

- 2.12 For convenience goods, Experian's latest forecasts suggest a continued period of readjustment following high growth in expenditure experienced during the Covid-19 lockdowns in 2020. Convenience goods expenditure per capita is expected to continue to fall during 2025 and 2026. In the longer-term a small decline is forecast at -0.3% per annum between 2027 to 2031 and -0.2% per annum thereafter. Despite this forecast reduction in total expenditure per capita, Experian expects continued growth in non-store sales. Any need for new convenience goods retail floorspace in the District is likely to relate to population growth, high current levels of trading or qualitative areas of deficiency.
- 2.13 Comparison goods expenditure per head is predicted to fall by -1% during 2024 but will increase marginally by 1.4% during 2025 and 2026. Modest growth is expected in the longer-term (between 2.5% to 3.6% per annum), but still at a lower rate than previous historic trends (8% per annum between 1997 and 2007). Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.
- 2.14 New forms of retailing (multi-channel and home shopping) have and will continue to grow. Home/electronic shopping and home delivery has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect / click and return shopping has become more popular. Recent trends suggest continued steady growth in multi-channel activity.
- 2.15 Experian's Retail Planner Briefing Note 22 (March 2025) suggests non-store retailing's market share increased from 17.8% in 2019 to 27.7% in 2021. Non-store sales include all on-line sales and other forms of sales not generated from physical retail floorspace e.g. vending machines, party plan and deliveries. Comparison non-store sales increased from 22% to 34.8% and convenience good sales increased from 11% to 17.1% between 2019 and 2021. However, Experian indicates comparison goods non-store sales figure fell during the post Covid lockdown period in 2022 and 2023, reducing from 34.8% to 30.9%. Convenience goods non-store sales also fell to 16.5%. Nevertheless, the 2023 figures remain significantly higher than the pre-Covid market shares in 2019. The growth in non-store retail sales for comparison and convenience goods between 2006 and 2022 in the UK is shown in Figure 3.2.
- 2.16 Between 2006 and 2023 the proportion of comparison goods non-store sales increased by over 25 percentage points from 5.8% to 30.9%. The proportion of convenience goods non-store sales increased by 15 percentage points but increased by over ten times, starting from a lower 2006 base of only 1.5%. Experian data shows the sharp increase in non-store sales during the Covid lockdowns during 2020 and 2021, but a decline in 2022 and 2023.

Figure 2.2 Non-store sales as a percentage of total sales in the UK



Source: Experian Retail Planner Briefing Note 21 (February 2024) – Appendix 3

- 2.17 This data suggests the proportion of retail sales spent on-line will continue to grow, which will have an impact on traditional bricks and mortar retailing. Conversely the introduction of return fees for on-line shopping and increased minimum spend thresholds for free deliveries may benefit traditional retailing.
- 2.18 Reflecting these trends, Experian's latest projections recommend relatively modest levels of growth in on-line shopping when compared with previous trends. It is too early to plan for a significant shift towards on-line shopping, over and above the levels of growth already predicted by Experian, but a higher shift to on-line shopping is possible. These longer-term forecasts should be monitored and kept under review.
- 2.19 The floorspace capacity assessment in this study makes an allowance for future growth in e-tailing based on Experian's latest projections. Given the likelihood that multi-channel expenditure will continue to grow at a faster pace than other consumer expenditure, the need assessment adopts relatively cautious growth projections for expenditure and an allowance is made for operators to increase their turnover/sales density, due to growth in home shopping and click and collect.

### Demand for town centre floorspace

- 2.20 Lower expenditure growth and deflationary pressures (i.e., price cutting) in the non-food sector had an impact on the high street in the past 20 years. Because of these trends, the UK average shop vacancy rate (based on Goad Plan data) increased from around 10% in 2005 to about 14% in 2012. Vacancy rates gradually improved to 11.8% in 2018 but has increased to 14.7% in 2024. There was a sharp increase in shop vacancies in many town centres due to the impacts of Covid-19 and the growth in on-line shopping.

- 2.21 Property owners, landlords and fund managers have come under increasing pressure with struggling occupiers seeking to renegotiate terms through company voluntary arrangement (CVA) i.e., an insolvency process designed to let a firm with debt problems reach an agreement with creditors to help pay off part or all debts. Retailers have been continuing to 'right size' their portfolios, with many operators announcing store closures. These trends have impacted on rental income and the capital value of retail/leisure property assets. These trends have been exacerbated by the cost-of-living crisis and are expected to continue at least in the short-term.
- 2.22 Whilst the CVA process has created difficulties for landlords in terms of rent negotiations, at the same time newly freed-up space has provided new opportunities. Vacated premises have been reconfigured and reused for non-retail uses i.e. food/beverage and leisure uses e.g. trampolines, escape rooms, climbing and indoor golf.

### Food store operators

- 2.23 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. Retailers have also changed their trading formats to include smaller store formats capable of being accommodated within town and local centres (such as the Tesco Express/ Metro, Sainsbury's Local, Little Waitrose and Marks & Spencer's Simply Food formats).
- 2.24 Across the UK the number of Tesco Express, Sainsbury's Local and Little Waitrose stores has increased significantly during the last decade. The number of Tesco Express stores increased by 35%, from 1,427 stores in 2012 to 1,920 stores in 2020 (source: Mintel). During the same period Sainsbury's Local stores increased by 83% and the number of Little Waitrose stores doubled. The number of Asda Express and Morrisons Daily stores has also increased. This trend is less evident in Rochford with Tesco Express and Sainsbury's Local stores in Rayleigh.
- 2.25 Several proposed larger food superstores have not been implemented across the country. There has been a move away from larger superstores to smaller formats, reflecting changes in some customers' shopping habits i.e. more frequent but smaller food and grocery shopping trips rather than bulk food shopping. This trend may have increased with more homeworking during the pandemic lockdowns, which may not move back to pre-Covid levels in the future.
- 2.26 The expansion of European discount food operators Aldi and Lidl has been rapid during the last decade. These operators are now competing more directly for market share with other main food store operators. This trend is evident in Southend but not in Rochford District. Home Bargains and B&M have also expanded rapidly in recent years and are represented in the District.
- 2.27 The number of small independent food and grocery shops in town centres declined over many years, as the number of large food stores increased. In the last decade this trend slowed and has to some extent reversed with some customers preferring to visit specialist shops e.g. butchers, bakers and greengrocers.

### Comparison retailers

- 2.28 Comparison retailers responded to difficult market conditions before the Covid-19 pandemic. The bulky goods warehouse sector (i.e. DIY, furniture, floor coverings and electrical goods) had already rationalised, including mergers and failures, and scaled down store sizes. Other traditional high street retailers previously sought large out-of-centre

stores, for example Next, TK Maxx and M&S. Matalan also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon and Sports Direct had expanded out-of-centre. These trends have slowed significantly, and in some cases reversed, and are unlikely to re-emerge for the foreseeable future.

- 2.29 The demand for premises from the bulky goods sector, i.e. furniture, carpets, electrical and DIY, has been particularly weak in recent years. The difficulties recently experienced by Homebase is an example of this trend. This trend has led to longer-term voids on some retail warehouse parks and proposals to reposition the offer within these units by extending the range of goods sold to non-bulky comparison goods. This downward trend in bulky goods stores has also led to the relocation of retailers to out-of-centre locations, creating more vacant units in town centres. The discount sector has occupied many units on retail parks e.g. Home Bargains, Poundland and B&M Bargains.
- 2.30 Within centres, many high street multiple comparison retailers have changed their format. For over two decades, high street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation into the larger regional and sub-regional centres. Many multiple retailers now require representation in fewer locations to service catchment areas. This trend is evident in most centres in South Essex, where the focus of comparison goods national multiples is in Chelmsford, Lakeside and Southend. In general, operator demand for space has decreased significantly during the last five years and, of those national multiples looking for space, many prefer to locate in these larger sub-regional and regional centres. Rayleigh and Rochford are at a lower level in the shopping hierarchy, where multiple operator demand will continue to be limited in the future. Polarisation of investment in the larger centres is likely to continue, with many retailers reducing their overall number of outlets.
- 2.31 The continuation of these trends will influence future operator space requirements in the District with smaller vacant units and lower tier centres continuing to be less attractive for new multiple occupiers, and retailers increasingly looking to locate into larger units in larger centres. However, smaller vacant units could still be attractive to independent traders and non-retail services looking to serve local catchment areas.

### **Non-retail services**

- 2.32 Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. The non-retail service uses include the following Class E and Sui Generis uses:
- hairdressers, dry cleaners, travel agents, some sandwich shops (those not categorised as hot food takeaways), funeral parlours and post offices;
  - banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies;
  - restaurants, cafés and hot food takeaways; and
  - pubs/bars.
- 2.33 The number of bank/building society outlets has decreased significantly during the last two decades, with banks looking to reduce costs and the increase in on-line banking. Nationally, the proportion of town centre units occupied by banks/building societies was 4.6% of all units in 2005. This proportion had reduced to 2.8% in 2017 and was only 1.8% in 2024. Many smaller town centres now have no remaining banks or building societies. However, banking hubs have emerged in some centres, which enable major banks to maintain a high

street presence whilst reducing costs, with different banks sharing the same unit and operating on different days. Continued rationalisation of bank and financial services could lead to an increase in town centre vacancies.

- 2.34 The growth of money lending/pay day loan shops, betting shops and hot food takeaways has raised concerns amongst many local planning authorities and has resulted in a change to permitted development rights (PDR) to control the growth of these uses in town centres.
- 2.35 Changes to the GPDO has had an impact on some town centres but the more recent changes to the Use Classes Order (UCO) and permitted development rights (PDR) are likely to lead to more significant changes in the future. These measures allow for much greater flexibility for changes of use from retail to non-retail uses. To date, these measures have not significantly changed the composition of most town centres, which may have been suppressed by the Covid pandemic. The impact of these changes will need to be carefully monitored by undertaking regular centre land uses surveys. The cost-of-living crisis may increase demand for change from retail to other uses.
- 2.36 Food/beverage, leisure and entertainment are fast moving and creative sectors, with a steady flow of new concepts emerging. Within these sectors there has been a significant increase in the number of national multiple chains which have sought to increase their geographical coverage, but primarily in larger centres.
- 2.37 The hospitality sector has experienced difficulties resulting in closures, which suggests operators may have over-stretched. Demand continued to increase for coffee shops, such as Starbucks, Costa Coffee and Café Nero. National branded pub/restaurant chains invested heavily and not exclusively in larger centres. Themed restaurants also expanded rapidly but have experienced difficulties more recently. This hospitality sector in town centres was the most adversely affected by the Covid-19 crisis. The overprovision of family-friendly restaurant chains, amongst other increases in vacant space across the UK, has led to an increase in premises available for temporary uses or pop-up uses and new formats including temporary restaurants, bars, shops and galleries.
- 2.38 Some landlords have opted for flexible leases, with changing attitudes towards short-term spaces. New independent brands have benefitted despite the lack of brand recognition. E-commerce brands have also sought physical presence, as an essential part of their marketing strategy and an effective way to engage with existing and new customers off-line. Brands have opened pop-up outlets in different locations to test and learn before committing to permanent stores. This trend may further increase as spending at traditional retailers, pubs and restaurants falls during the cost-of-living crisis, but this is not currently particularly evident in Rochford.

## Study area

- 2.39 As in the SERS 2017, the quantitative capacity analysis is based on the defined study area zones that cover the South Essex sub-region. The study area is sub-divided into 23 residential zones as shown in Appendix 1. The zones are based on postcode areas rather than wards boundaries, and therefore the areas do not precisely relate to administrative areas. Of these 23 residential areas, zones 7 to 10 broadly cover the Rochford authority area. A small part of Zone 3 extends into Rochford District, but this area is predominantly rural in nature with limited population. Part of zone 10 extends into the Southend-on-Sea authority area, as a result the combined population of zones 7 to 10 is slightly higher than the Rochford District's population.

## Population projections

- 2.40 Experian's latest population figures for 2023 and projections have been adopted as a *low* growth scenario, as shown in Table 1A (Appendix 1). These projections are consistent with ONS 2018 based projections.
- 2.41 The *high* population growth scenario adopts Lichfields' Standard Method population projections for Zones 7 to 10, which is the population that would be expected to result were housing needs to be met, as calculated using the new standard method in national planning policy. As the new Standard Method figure for Rochford is above the Adjusted High scenario, the model accommodates all the population as per the Adjusted High. No additional population is assumed; and any further housing growth is assumed to induce additional household formation, implying reduced average household size, increased vacancy and/or improved affordability.
- 2.42 The low growth scenario (Table 1A – Appendix 1) suggests population within the Rochford zones (7 to 10) is projected to increase by 10.4% between 2023 to 2043, increasing from 102,782 in 2023 to 113,468 in 2043. The high growth scenario in Table 1B suggests population within the Rochford zones will increase by 20.7%, reaching 124,115 in 2043.

## Expenditure forecasts

- 2.43 All monetary values expressed in this update report are at 2023 prices, consistent with Experian's latest expenditure information. The SERS 2017 adopted a 2015 price base and therefore the figures are not directly comparable.
- 2.44 Experian's latest local expenditure figures for the study area in 2023 have been obtained. Experian's short term EBS growth forecast rates during 2024, 2025 and 2026 reflect recent economic circumstances, including the cost-of-living crisis. The forecast changes during this three-year period are as follows:
- convenience goods: -3.2%;
  - comparison goods: +0.4%;
  - leisure: -1.3%.
- 2.45 Experian's medium and long-term growth average forecasts have been adopted, as follows:
- convenience goods: -0.3% per annum growth between 2027 and 2031 and -0.2% per annum after 2031;
  - comparison goods: +2.5% per annum growth between 2027 to 2031 and +2.6% per annum after 2031; and
  - leisure: +0.6% per annum growth between 2027 to 2031 and +0.7% per annum after 2031.
- 2.46 Experian's pre-Covid medium and long-term projections (Retail Planner Briefing Note 22 – March 2025) suggest a gradual decline in convenience goods expenditure per capita (-0.2% to -0.3% per annum) but growth for comparison goods expenditure (+2.5% to 2.6% per annum) and leisure expenditure (+0.6% to +0.7% per annum). These growth figures relate to real growth and exclude inflation. The current high levels of inflation should not affect Experian's long-term expenditure projections that are over and above inflation.
- 2.47 Experian's latest adjusted deductions for SFT (i.e., home and online shopping through non-retail businesses) in 2023 were:
- 5.0% of convenience goods expenditure; and

- 23.1% of comparison goods expenditure.

- 2.48 Experian's projections suggest that these SFT percentages will increase to 6.4% and 26.9% in 2033 respectively. The long-term Experian projections suggest an increase to 7.3% and 29.3% in 2040 respectively.
- 2.49 Table 1 in Appendix 2 sets out the updated forecasts for spending per head on convenience goods within each zone in the study area up to 2043, excluding SFT. Average convenience goods expenditure is projected to reduce due to a higher proportional increase in SFT. Forecasts for comparison goods spending per capita are in Table 1 in Appendix 3. Food and beverage expenditure forecasts are shown in Table 1 in Appendix 4.
- 2.50 Allowing for the low population growth scenario, total convenience goods spending within the Rochford zones (7 to 10) is forecast to increase by +0.3% from £292.77 million in 2023 to £293.64 million in 2043, calculated from Table 2A (Appendix 2). The high population growth scenario is an increase of 9.7% (£321.24 million by 2043).
- 2.51 The low growth scenario suggests comparison goods spending is forecast to increase by +56.8% from £343.87 million to £539.18 million, calculated from Table 2A in Appendix 3. The high population growth scenario shows an increase of +71.6% (£590.02 million by 2043).
- 2.52 The low growth scenario suggests food/beverage spending is forecast to increase by +22% from £194.11 million to £236.78 million, calculated from Table 2A in Appendix 4. The high population growth scenario shows an increase of +33.5% (£259.18 million by 2043).

## Changes in turnover densities

- 2.53 Experian's Retail Planner Briefing Note 22 – March 2025 indicates comparison goods retail sales floorspace is expected to increase its average sales density by only +1.9% during 2024 to 2026, representing a slow recovery from the cost-of-living crisis, but higher growth is envisaged thereafter in the medium and long-term (+2.3% per annum beyond 2026). These recommended increases have been adopted and will absorb much of the future expenditure growth. These growth rates are consistent with the expected increase in on-line/home shopping through retail businesses i.e., the total sales of retail businesses will increase at a much higher rate than the amount of physical sales floorspace they provide.
- 2.54 For convenience goods retail, Experian indicates a decrease of -2.4% during 2024 to 2025. No growth is envisaged in the medium term (2026 to 2031) and a small gradual decline (-0.1% per annum) is predicted in sales densities thereafter.
- 2.55 Experian's Retail Planner Briefing Note 22 – Leisure, March 2025 provides projections for food/beverage use sales densities. Experian indicates a decrease of -2.3% during 2024 to 2025. Limited growth (+0.1% per annum) is envisaged in the medium and long-term (2026 to 2040).

## Base year market shares

- 2.56 Shopping expenditure patterns in the 2022 base year adopt market shares within each study area zones taken from the SERS 2017. These market shares or penetration rates were calculated from the results of a household shopper survey in July 2016. These market shares should have remained broadly constant between 2016 and 2022, because there have been no significant changes in retail provision since 2016, although SFT expenditure deducted has increased based on Experian's latest data. The market shares exclude SFT and the higher growth in home shopping has been accounted for.

## Capacity for convenience goods retail floorspace

- 2.57 Available convenience goods expenditure attracted to Rochford District is projected from the 2023 base year forward to 2028, 2033, 2038 and 2043. Total convenience goods expenditure attracted to Rochford District in 2023 is £143.18 million as shown in Table 10A in Appendix 2. The benchmark expected turnover of the main food stores in the District is £79.65 million as shown in Table 9 in Appendix 2. This is not necessarily the actual turnover of each store but is the expected turnover based on the size of store and the company average sales density. The benchmark turnover excludes small convenience shops. If the large stores listed in Table 9 achieved their benchmark turnover (£79.65 million), then this implies large store's market share of total available convenience goods expenditure (£143.18 million) would be around 56%, which is within the low end of the range one would expect, but this reflects the flow of expenditure to large food stores in Southend-on-Sea and local role of centres in the District. These figures suggest convenience good sales floorspace is trading healthily, but there is no evidence of significant under or over-trading in 2023.
- 2.58 The low growth scenario results are summarised in Table 10A in Appendix 2 and the high growth scenario are shown in Table 10B. Convenience goods expenditure available to facilities within the Rochford District is expected to increase from about £143.18 million in 2023 to £142.58 million in 2043 (low growth). This increase is due to population growth, which offsets the slight reduction in average expenditure per person (excluding SFT).
- 2.59 Tables 10A and 10B in Appendix 2 subtract the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for future new development. Based on the low growth scenario, there is a projected convenience goods expenditure deficit up to 2038 due to increases in sales densities. Longer term growth suggests a small surplus of +£1.25 million in 2043. Based on the high growth scenario, there is a projected convenience goods expenditure surplus of +£4.2 million in 2033. Longer term growth suggests a surplus of +£8.25 million in 2038, increasing to +£12.62 million by 2043.
- 2.60 The surplus expenditure projections, excluding SFT, are converted into potential new floorspace estimates in Tables 11A and 11B in Appendix 2, based on an average sales density of £12,845 per sq.m net in 2023, which is the average for the eight main food store operators. This average turnover density is projected to decrease in line with Experian's recommended sales density projections. The low and high growth scenario results are summarised in Table 2.1.

Table 2.1 Convenience goods floorspace capacity (sq.m gross) – (cumulative)

<b>Low growth</b>	<b>2028</b>	<b>2033</b>	<b>2038</b>	<b>2043</b>
Rochford	-210	-152	-34	128
Rayleigh	-70	-61	-36	-1
Hockley	-4	-2	0	2
Great Wakering	-3	-2	0	3
Hullbridge	-1	-1	0	1
Other Rochford district	-3	-1	2	8
<b>Low growth total</b>	<b>-291</b>	<b>-219</b>	<b>-68</b>	<b>141</b>
<b>High growth</b>	<b>2028</b>	<b>2033</b>	<b>2038</b>	<b>2043</b>
Rochford	83	382	734	1,118
Rayleigh	-4	58	138	227
Hockley	3	9	17	25



Great Wakering	2	6	11	16
Hullbridge	1	4	7	10
Other Rochford district	2	10	17	26
<b>High growth total</b>	<b>87</b>	<b>468</b>	<b>925</b>	<b>1,422</b>

Source: Tables 11A and 11B, Appendix 2

- 2.61 There are floorspaces deficit up to 2038 for the low growth scenario because growth in population is offset by the reduction in average expenditure per person (excluding SFT). The low growth surplus expenditure up to 2043 indicates that there is capacity for additional convenience goods floorspace in the District of only 99 sq.m net (141 sq.m gross) as shown in Table 11A in Appendix 2. The high growth projections suggest there is capacity for 996 sq.m net (1,422 sq.m gross) by 2043, as shown in Table 11B in Appendix 2. These scenarios all assume a constant market share; however, the Council may wish to take a strategic approach to increase market share and 'claw back' a degree of leakage out of the District.
- 2.62 In terms of accommodating these floorspace projections, small convenience goods stores (below the Sunday trading limited - 280 sq.m net) would require stores of up to 400 sq.m gross. Discount food stores such as Lidl and Aldi would require at least 1,800 sq.m gross and large food superstores are generally over 3,500 sq.m gross.
- ### Capacity for comparison goods floorspace
- 2.63 Available comparison goods expenditure attracted to Rochford District is projected from the 2023 base year forward to 2028, 2033, 2038 and 2043. The low growth scenario results are summarised in Table 9A in Appendix 3 and the high growth scenario are shown in Table 9B. Comparison goods expenditure available to facilities within the Rochford District is expected to increase from about £172.79 million in 2023 to £266.74 million in 2043 (low growth).
- 2.64 Tables 9A and 9B in Appendix 3 subtract the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for future new development. Based on the low growth scenario, there is a projected comparison goods expenditure deficit up to 2033, due to increases in sales densities. Longer term growth suggests a surplus of +£1.03 million in 2038, increasing to +£7.55 million in 2043. Based on the high growth scenario, there is a small projected comparison goods expenditure surplus of +£5.17 million in 2033. Longer term growth suggests a surplus of +£11.36 million in 2038, increasing to +£22.77 million by 2043.
- 2.65 The surplus expenditure projections are converted into potential new floorspace estimates in Tables 10A and 10B in Appendix 3, based on an average sales density of £7,000 per sq.m net in 2023. This average turnover density is projected to increase in line with Experian's recommended growth rates. The low and high growth scenario results are summarised in Table 2.2.

Table 2.2 Comparison goods floorspace capacity (sq.m gross) – (cumulative)

Low growth	2028	2033	2038	2043
Rochford	-90	-25	55	230
Rayleigh	-409	-186	45	649
Hockley	-16	2	19	55
Great Wakering	-3	0	4	12

Other Rochford district	-15	9	34	82
<b>Low growth total</b>	<b>-533</b>	<b>-200</b>	<b>157</b>	<b>1,028</b>
<b>High growth</b>	<b>2028</b>	<b>2033</b>	<b>2038</b>	<b>2043</b>
Rochford	7	151	303	544
Rayleigh	-7	553	1,130	2,089
Hockley	26	80	133	207
Great Wakering	5	14	23	35
Other Rochford district	27	85	142	223
<b>High growth total</b>	<b>58</b>	<b>883</b>	<b>1,731</b>	<b>3,098</b>

Source: Tables 10A and 10B, Appendix 3

- 2.66 The low growth surplus expenditure up to 2043 indicates that there is capacity for additional comparison goods floorspace in the District of 718 sq.m net (1,028 sq.m gross) as shown in Table 10A in Appendix 3. The high growth projections suggest there is capacity for 2,169 sq.m net (3,098 sq.m gross) by 2043, as shown in Table 10B in Appendix 3. As with the convenience capacity assessment, the Council may also wish to proactively address existing leakage out of the District by devising a strategy and planning for an increase in market share.

## Capacity for food/beverage floorspace

- 2.67 Available food/beverage expenditure attracted to Rochford District is projected from the 2023 base year forward to 2028, 2033, 2038 and 2043. The low growth scenario results are summarised in Table 9A in Appendix 4 and the high growth scenario are shown in Table 9B. Food/beverage expenditure available to facilities within the Rochford District is expected to increase from about £184.62 million in 2023 to £224.09 million in 2043 (low growth).
- 2.68 Based on the low growth scenario, there is a projected food/beverage expenditure surplus of £4.73 million in 2028, which will increase to £14.56 million in 2033. Longer term growth suggests a surplus of +£25.24 million in 2038, increasing to £36.68 million in 2043.
- 2.69 Based on the high growth scenario, there is a small projected comparison goods expenditure surplus of +£9.14 million in 2028, increasing to +£22.98 million in 2033. Longer term growth suggests a surplus of +£37.93 million in 2038, increasing to +£53.71 million by 2043.
- 2.70 The surplus expenditure projections are converted into potential new floorspace estimates in Tables 10A and 10B in Appendix 4, based on an average sales density of £6,000 per sq.m gross in 2023. The low and high growth scenario results are summarised in Table 2.3.

Table 2.3 Food/beverage floorspace capacity (sq.m gross) – (cumulative)

<b>Low growth</b>	<b>2028</b>	<b>2033</b>	<b>2038</b>	<b>2043</b>
Rochford	136	408	710	1,040
Rayleigh	372	1,159	1,991	2,863
Hockley	157	479	820	1,177
Great Wakering	12	38	65	93
Hullbridge	53	162	286	422
Other Rochford district	57	169	293	427
<b>Low growth total</b>	<b>789</b>	<b>2,415</b>	<b>4,165</b>	<b>6,022</b>
<b>High growth</b>	<b>2028</b>	<b>2033</b>	<b>2038</b>	<b>2043</b>

Rochford	274	667	1,085	1,522
Rayleigh	702	1,790	2,954	4,173
Hockley	311	771	1,265	1,783
Great Wakering	105	260	426	599
Hullbridge	22	57	94	133
Other Rochford district	109	267	434	608
<b>High growth total</b>	<b>1,523</b>	<b>3,812</b>	<b>6,258</b>	<b>8,819</b>

Source: Tables 10A and 10B, Appendix 4

- 2.71 The low growth surplus expenditure up to 2043 indicates that there is capacity for additional food/beverage floorspace in the District of 6,022 sq.m gross as shown in Table 10A in Appendix 4. The high growth projections suggest there is capacity for 8,819 sq.m gross by 2043, as shown in Table 10B in Appendix 4.

## Completions and planned commitments

- 2.72 The main development completions since 2023 and the uncompleted proposed commitments in Rochford (as of April 2025) are as follows:

### Completions since 2023

- 19/00608/FUL - 18 Aviation Way, Rochford (490 sq.m food/beverage);
- 17/00904/FUL - Next at Unit 7A Airport Retail Park – increased mezzanine floor (73 sq.m retail).

### Planned commitments

- 20/00452/FUL - Land Rear of 98-128 High Street, Rayleigh (151 sq.m retail);
- 20/00940/OUT - Wolsey Park Phase 2, Rayleigh (500 sq.m retail/food/beverage);
- 23/00248/REM - Cherry Orchard Brickworks, Rochford (900 sq.m retail/food/beverage/commercial);
- 18/01125/FUL - 68 - 72 West Street, Rochford (117 sq.m retail/food/beverage);
- 20/00190/FUL - View Gardens, Chelmsford Road, Rawreth – extension to retail sales (158 sq.m retail)
- 23/00856/FUL - land at Hambro Parade, Rayleigh (65 sq.m retail)

- 2.73 These mixed-use developments could provide new retail and food/beverage floorspace of up to 2,500 sq.m gross. The precise mix of uses is not clear at this stage.

- 2.74 If implemented new retail and food/beverage floorspace within these mixed-use developments should be subtracted from the floorspace capacity projection shown in Tables 2.1, 2.2 and 2.3.

## 3.0 Commercial leisure uses

### Introduction

- 3.1 This section updates the needs assessment for commercial leisure use including, cinema/multiplex, tenpin bowling, bingo, nightclubs and private health/fitness clubs. Main town centre uses, as defined within the NPPF glossary, exclude less intensive sports and recreation uses such as swimming pools, sports halls and sports pitches, and therefore the need for these uses has not been assessed in this update. A separate South Essex Indoor Built Facilities Strategy and Action Plan was prepared, including Southend-on-Sea and Rochford District, which provides a more detailed assessment of the future need for indoor sports facilities.

### Leisure and cultural expenditure

- 3.2 Experian local expenditure data for the Southend-on-Sea and Rochford zones (Zones 7 to 13) indicate the resident population generated £61.18 million in 2023 (an average of £233 person) on selected cultural, recreational and sporting services, broken down as follows:

• cinema admissions	£3.09 million;
• live entertainment i.e., theatre/concerts/shows	£12.29 million;
• museums, theme parks, houses and gardens	£5.80 million;
• admissions to clubs, dances, discos, bingo	£7.58 million;
• other miscellaneous entertainment	£4.00 million;
• subscriptions for leisure activities	£7.86 million; and
• leisure class fees	£20.56 million.

- 3.3 Not all leisure spend from residents in these zones will be spent in Southend or Rochford. Based on the market shares for retail and food/beverage derived from the household survey results, it is reasonable to assume Rochford could attract 30% of leisure expenditure generated by Zones 7 to 13. Southend-on-Sea should attract 70% of leisure expenditure.

- 3.4 On this basis, leisure facilities in Rochford District attracted £18.35 million in 2023.

### Leisure floorspace capacity

- 3.5 Experian's expenditure projections suggest leisure expenditure per person should increase in real terms by 3.1% between 2023 to 2033, or by 10.6% between 2023 to 2043.

- 3.6 With Experian's population growth (the low growth scenario), expenditure on these leisure/cultural activities in Rochford District should increase from £18.35 million to £19.88 million by 2033; £21.03 million by 2038 and then to £22.26 million by 2043, an additional £1.53 million by 2033; £2.68 million by 2038 or £3.91 million by 2043.

- 3.7 Adopting Standard Method population growth (the high growth scenario), expenditure on these leisure/cultural activities in Rochford District should increase from £18.35 million to £20.2 million by 2033; £21.67 million by 2038 and then to £22.99 million by 2043, an additional £1.95 million by 2033; £3.32 million by 2038 or £4.74 million by 2043.

- 3.8 On the basis that Rochford District will attract 30% of leisure expenditure growth generated in Zones 7 to 13, Rochford's leisure capacity floorspace projection is shown in Table 3.1.

3.9 This additional expenditure could support about 1,072 sq.m to 1,328 sq.m of new commercial leisure/cultural floorspace by 2038, based on an average of £2,500 per sq.m.

Table 3.1 Commercial leisure/cultural floorspace capacity (sq.m) - cumulative

	Low growth scenario	High growth scenario
By 2033	612	780
By 2038	1,072	1,328
By 2043	1,564	1,896

Source: Experian expenditure projections and Lichfields’ estimates.

3.10 This analysis provides a broad brush global floorspace capacity analysis. A more detailed sector by sector assessment is set out in the remainder of this section.

### Cinemas

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

3.12 The number of trips during the Covid-19 crisis reduced significantly. The latest 2024 figures indicate 126.5 million cinema trips were made in the UK (about 1.8 trips per person), still 28% below pre-Covid levels (176 million). The cinema assessment for Rochford District assumes trip levels comparable with the latest UK average i.e. 1.8 trips per person per annum.

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

3.14 The Odeon, Victoria Circus in Southend-on-Sea is the only full-time cinema in the Southend-on-Sea and Rochford local authority areas. It has 8 screens and 1,627 seats. A new 11-screen (1,370 seats) cinema was previously proposed as part of the Seaway development in Southend-on-Sea but this development remains unimplemented and recent local reported has suggested that this project may have stalled. There is also a large Cineworld at Festival Leisure Park in Basildon with 12 screens and 2,835 seats and a 10 screen, 1,035 seat Vue Cinema in Basildon Town Centre, which attracts customers from both Southend-on-Sea and Rochford.

3.15 The population within the Southend-on-Sea and Rochford zones (Zones 7 to 13) in 2023 (261,930 people) would generate 471,500 cinema trips per annum, based on the national average visitation rate (1.8 trips per annum). Based on the low growth scenario, population is projected to increase to 287,609 in 2043, which should generate 517,700 cinema trips.

The high growth scenario population is projected to increase to 298,256 in 2043, which should generate 536,900 cinema trips.

3.16 Experian’s local expenditure data indicates these zones generate £3.09 million on cinema trips. This expenditure estimate is broadly consistent with the 471,500 cinema trip estimate by on the lower post Covid visitation rate (1.8 trips per annum) i.e. an average of just over £6.55 per person each trip.

3.17 Adopting the national average population per cinema screen (38,000 trips per screen), implies the low growth projection of 681,000 trips in 2043 generates demand for about 13.6 cinema screens, as shown in Table 3.2. The high growth scenario generates demand for about 14.1 screens, as shown in Table 3.3. Within Southend, the existing Odeon provides 8 screens.

Table 3.2 Projected cinema screen/seat potential in Southend-on-Sea and Rochford – low growth scenario

<b>Low growth scenario</b>	<b>2028</b>	<b>2033</b>	<b>2038</b>	<b>2043</b>
Population	269,011	275,235	281,262	287,609
Cinema trips	484,200	495,400	506,300	517,700
Cinema trips per screen	38,000	38,000	38,000	38,000
Cinema trips per seats	220	220	220	220
Cinema screen potential	12.7	13.0	13.3	13.6
Cinema seat potential	2,201	2,252	2,301	2,353
Existing/proposed screens	19.0	19.0	19.0	19.0
Existing/proposed seats	2,997	2,997	2,997	2,997
<b>Surplus screen capacity</b>	<b>4.7</b>	<b>5</b>	<b>5.3</b>	<b>5.6</b>
<b>Surplus seat capacity</b>	<b>574</b>	<b>625</b>	<b>674</b>	<b>726</b>

3.18 In terms of seats, the national average (220 trips per seat) suggests 517,700 trips could support 2,353 seats, compared with the existing provision of 1,627 seats. The high growth trip projection (536,900 trips) could support 2,440 seats.

Table 3.3 Projected cinema screen/seat potential in Southend-on-Sea and Rochford – high growth scenario

<b>High growth scenario</b>	<b>2028</b>	<b>2033</b>	<b>2038</b>	<b>2043</b>
Population	272,110	280,964	289,533	298,256
Cinema trips	489,800	505,700	521,200	536,900
Cinema trips per screen	38,000	38,000	38,000	38,000
Cinema trips per seats	220	220	220	220
Cinema screen potential	12.9	13.3	13.7	14.1
Cinema seat potential	2,226	2,299	2,369	2,440
Existing/proposed screens	19.0	19.0	19.0	19.0
Existing/proposed seats	2,997	2,997	2,997	2,997
<b>Surplus screen capacity</b>	<b>4.9</b>	<b>5.3</b>	<b>5.7</b>	<b>6.1</b>
<b>Surplus seat capacity</b>	<b>599</b>	<b>672</b>	<b>742</b>	<b>813</b>

3.19 These projections deduct existing cinema provision (8 screens – 1,627 seats). The projections suggest there will be some demand for additional cinema screens or seats in the Southend-on-Sea and Rochford local authority areas. However, this demand is not projected to be sufficient to support an 11-screen (1,370 seats) cinema as was previously proposed as part of the Seaway development for the foreseeable future, particularly given the scale of the recent 10 screen (1,035 seat) Vue Cinema in Basildon Town Centre

### Theatres, nightclubs, live music and other cultural activities

- 3.20 The Theatre Trust estimates there are over 1,100 active theatres in the UK, which is on average around one venue per 62,000 people. Experian expenditure data suggests £3.5 billion was spent by UK residents on live entertainment (i.e. theatres, concerts and shows) in 2023, which is about £52 per person. Total live entertainment expenditure was around £3.2 million per theatre venue in the UK in 2023, based on the theatre Trusts estimate (1,100 venues).
- 3.21 Experian's local expenditure data indicates the Southend-on-Sea and Rochford zones (Zones 7 to 13) generates £12.29 million on live theatre, concerts and shows. Assuming the national average expenditure per venue (£3.2 million) these figures suggest there is capacity for three or four venues in the Southend-on-Sea and Rochford local authority areas. This implied demand is consistent with existing provision of theatres, including Palace Theatre and Cliffs Pavilion in Westcliff-on-Sea and Clifftown Theatre in Southend-on-Sea, as well as the range of productions at the Mill Arts and Events Centre in Rayleigh. Rochford District Council also recently committed funds to undertake essential repairs and reopen The Freight House in Rochford on an interim basis whilst a strategy for the long-term future of the 300-person multi-use events space is explored.
- 3.22 Population and leisure expenditure growth in the Southend-on-Sea and Rochford zones (Zones 7 to 13) is projected to increase by between 21.3% and 26% between 2023 and 2043, based on the low and high growth scenarios. Expenditure on live theatre, concerts and shows could increase by £2.6 million to £3.2 million between 2023 to 2043, which could support one new venue.
- 3.23 The nightclub/live music sector (not including music halls) has struggled in recent years. IBISWorld (providers of global industry research) suggests these venues have lost their competitive advantage over pubs or bars, with lower prices and a more relaxed atmosphere. Approximately one-quarter of nightclubs have closed in the past decade as operators have struggled to respond to new challenges from regulation, licensing, planning, business rates and policing.
- 3.24 The Pink Toothbrush in Rayleigh is the main nightclub in the District. Southend-on-Sea also has a good provision of nightclubs, reflecting its role as a major tourist destination. Access to existing facilities in Southend and national trends suggest there may be limited potential for further nightclub/live music facilities in Rochford District.
- 3.25 Experian's local expenditure data indicates the Southend-on-Sea and Rochford zones (Zones 7 to 13) generates £5.8 million on museums, theme parks, houses and gardens. Population growth and expenditure growth could increase this expenditure to £7.04 million to £7.31 million. This £1.24 million to £1.51 million increase in expenditure could support modest additional facilities in Southend-on-Sea and Rochford District.
- 3.26 There may be potential quantitative capacity for additional cultural facilities in Rochford District. The development strategy needs to be flexible to respond to emerging opportunities for attractive new facilities of this kind.

### Health and fitness clubs

- 3.27 The NPPF glossary indicates that some more intensive sport and recreational uses are included as main town centre uses. Indoor sports halls, swimming pools, pitches and courts are not considered to be intensive sport and recreational uses and are not main town centre uses. This section only assesses commercial health and fitness gyms and does not include sports halls.

- 3.28 The 2019 State of the UK Fitness Industry Report revealed that the UK health and fitness industry was continuing to grow pre-Covid. In 2019 there were more than 10.4 million fitness members in the UK and the industry was worth £5.1 billion, with a participation rate of 15.6%. The number of members dropped to 9.9 million in 2022, with a participation rate of 14.6% compared with 15.6% in 2019. The number of gym clubs dropped by 176 between 2019 to 2022. However, the latest 2024 UK Fitness Industry Report suggests a post-Covid recovery. The number of gym members was 10.7 million in 2024, a participation rate of 15.9% and the market value was £5.9 billion, which exceeds all pre-Covid levels.
- 3.29 The Sport England/Active Places data indicates that there are 811 registered health and fitness facilities in the East Region, with 52,879 fitness stations, an average of 65 fitness station per facility. This provision equates to 8.1 fitness station per 1,000 people across the region.
- 3.30 There are 33 facilities in the Southend-on-Sea and Rochford local authority areas, with 2,355 fitness stations, as shown in Table 3.4. There are 12 facilities in Rochford District with 703 fitness stations. There are 21 facilities in Southend-on-Sea with 1,652 fitness stations.

Table 3.4 Health and Fitness Clubs (Sport England/Active Places Data, 2025)

Name/location	Location	Type	No. Fitness Stations
JD Gym	Rochford	Registered Membership	250
Elite Fitness	Hockley	Registered Membership	75
Elite Fitness Gym	Rochford	Registered Membership	70
Hockley Gym	Hockley	Registered Membership	60
Stack House Gym	Rayleigh	Registered Membership	50
Athenaeum Club	Southend-on-Sea	Registered Membership	44
Rayleigh Leisure Centre	Rayleigh	Pay and Play	42
Leeman Fitness	Rayleigh	Registered Membership	40
Clements Hall Leisure Centre	Hockley	Pay and Play	20
King Edmund School	Rochford	Sports Club/Com. Assoc.	20
Fitzwimarc School	Rayleigh	Private Use	18
Westcliff RFC	Southend-on-Sea	Private Use	14
<b>Rochford District sub-total</b>			<b>703</b>
Welcome Gym	Southend-on-Sea	Registered Membership	250
Pure Gym, Fossetts Park	Southend-on-Sea	Registered Membership	220
The Gym Group	Southend-on-Sea	Registered Membership	220
Anytime Fitness	Southend-on-Sea	Registered Membership	200
Trugym (Thorpe Bay)	Southend-on-Sea	Registered Membership	180
Southend Leisure & Tennis Centre	Southend-on-Sea	Pay and Play	150
David Lloyd Club	Southend-on-Sea	Registered Membership	77
SAS Gym	Southend-on-Sea	Registered Membership	60
SPT Fitness	Southend-on-Sea	Registered Membership	50
Thorpe Hall School,	Southend-on-Sea	Private Use	40
Shoeburyness Leisure Centre,	Southend-on-Sea	Pay and Play	30
Westcliff High School for Boys	Westcliff-on-Sea	Sports Club/Com. Assoc.	28
Southend High School for Boys	Westcliff-on-Sea	Private Use	22
Chase Sports & Fitness Centre,	Westcliff-on-Sea	Pay and Play	21
Leigh Fitness Centre,	Leigh-on-Sea	Pay and Play	21
Belfairs Academy	Leigh-on-Sea	Private Use	17
Southend High School for Girls	Southend-on-Sea	Private Use	16
Cecil Jones Academy	Southend-on-Sea	Private Use	15
Westcliff High School for Girls	Westcliff-on-Sea	Private Use	15
St Bernards High School,	Westcliff-on-Sea	Private Use	13



St Christopher's School Academy	Leigh-on-Sea	Private Use	7
<b>Southend-on-Sea sub-total</b>			<b>1,652</b>
<b>Grand Total</b>			<b>2,355</b>

Source: Sport England Active Places

- 3.31 The 2023 base year population in the Southend-on-Sea and Rochford zones (Zones 7 to 13) is 261,930 people. This population indicates the Southend-on-Sea and Rochford zones have 9.0 fitness stations per 1,000 people (2,355 registered stations in total). This existing provision is higher than the East Region average of 8.1 fitness stations per 1,000 people, suggesting higher participation rates and/or a relative over-supply of fitness stations.
- 3.32 The higher provision in in the Southend-on-Sea and Rochford zones may be due to the demographic profile and higher participation rates. However, if the area's provision remains at 9.1 stations per 1,000 people, then the demand for fitness stations could increase from 2,355 to 2,559 stations by 2038, and then to 2,617 stations by 2043, based on the low growth scenario. The +204 station increase by 2038 could support about medium sized facilities, which would increase to +262 stations by 2043, about 4 medium sized facilities.
- 3.33 The high growth scenario suggests an additional +278 stations by 2038 about 4 or 5 medium sized facilities, increasing to +359 by 2045 (about 6 medium sized facilities).
- 3.34 These projections suggest there is potential to increase the number of health and fitness facilities by 4 to 6 by 2043. There could be demand for 1 to 2 facilities in Rochford District and 3 to 4 facilities in Southend-on-Sea.

### Tenpin bowling and other indoor leisure innovations

- 3.35 Across the country freed-up retail space in town centres has provided new opportunities for leisure uses. Vacated premises have been reconfigured and reused for trampolines, climbing and indoor golf etc. The innovations are likely to continue, and a flexible approach is required to respond to arising opportunities.
- 3.36 There are two tenpin bowling facilities in the Southend-on-Sea and Rochford local authority areas, i.e. Kingpins Bowl Southend (10 lanes) and CJ's Bowling in Hockley (12 lanes). The Kursaal Bowling on the Southend seafront closed in 2019.
- 3.37 The base year population in the Southend-on-Sea and Rochford zones (Zones 7 to 13) is 261,930 people in 2023. This base year catchment area population can theoretically support about 22 tenpin bowling lanes, based on one lane per 12,000 people (national average). However, the Kingpins Bowl in Southend serves tourist visitors as well as residents.
- 3.38 Population growth within the study area between 2023 and 2043 would increase the theoretical capacity to 24 lanes based on the low growth scenario or 25 lanes based on the high growth scenario.
- 3.39 A new 20 lane Hollywood Bowl was proposed within the Seaway development in Southend-on-Sea. This new facility, if implemented, would be sufficient to meet future demand in the Southend and Rochford authority areas.
- 3.40 Indoor trampoline centres are a recent leisure activity in the UK. In America outdoor trampoline centres were popular in the late 1950s and 1960s. This format first seen in America has been adopted and modernised and is now becoming a popular indoor leisure activity for a variety of age groups in the UK. The UK's first indoor trampoline centre was opened by Bounce in 2014.

- 3.41 Trampoline and soft play centres offer a new, recreational experience for both children and adults. They typically have over 100 interconnected trampolines on site, consisting of differing courts including a Main Arena, Dodgeball Court, Kids Court, Slam Dunk Area, Foam Pit, Airbag Jump, Touch Walls, Gladiator Pits and Tumble Tracks, as well as an arcade and party rooms.
- 3.42 Base Jump Trampoline Park in Rayleigh is the only major trampoline facility in the Southend-on-Sea and Rochford zones. The Seaway development in Southend was expected to include a Jump Inc Urban Playground (2,388 sq.m). This sector is still relatively new and there may be potential for continued growth. The strategy for Rochford should be flexible to respond to any emerging demand for trampoline centres.
- 3.43 The number of escape rooms in the UK grew rapidly in the last 4 years before the Covid pandemic, increasing from about 600 at the end of 2016 to over 1,500 by 2019. The market is fragmented and is still relatively new. There are three escape room facilities in Southend i.e. Room Escape, Escape and Escape Live. It is not clear whether this sector is approaching saturation point, therefore a flexible strategy is required.

### **Bingo, games of chance and gambling**

- 3.44 Gala (now Buzz Bingo) and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose-built units. Bingo clubs have become increasingly sophisticated and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. However, the significant increase in on-line gambling has, and will continue to affect this sector.
- 3.45 The Gambling Commission indicates the number of bingo premises fell by over 15% between 2014 to 2020, due in part to the increase in on-line bingo. The Gambling Commission latest figures indicates the UK currently has:
- 582 bingo halls;
  - 175 casinos;
  - 1,405 adult gaming centres;
  - 191 family entertainment centres; and
  - 6,661 betting shops.
- 3.46 This equates to approximately one bingo facility per 93,000 adults, one casino per 310,000 adults and one family entertainment centre per 280,000 adults.
- 3.47 The 2023 base year population in the Southend-on-Sea and Rochford zones (261,930 people) is theoretically sufficient to support at least two bingo facilities, based on the national average. Mecca Bingo in Southend is the only major facility in the Southend-on-Sea and Rochford zones. Southend also has the Grosvenor Casino. Until recently, Southend had three casinos, but facilities have closed at the Kursaal and Palace Hotel.
- 3.48 There is theoretical scope for an additional bingo facility in the Southend-on-Sea and Rochford area, although the national decline in the number of bingo premises and increase in on-line gambling suggest there may limited operator demand to open new facilities of this kind.

## Conclusions on commercial leisure uses

- 3.49 The leisure, entertainment and cultural sectors are fragmented and innovative. In addition to the main leisure and entertainment uses outlined above, there are a larger number of other activities that could be promoted e.g., museum, gallery/exhibition space, tourist attractions and new emerging leisure activities such as escape rooms and virtual golf centres. Given the fragmented nature of these sectors, it is difficult to precisely quantify the potential demand for these uses over the next 10-15 years. However, it is important that new emerging sectors can be accommodated.
- 3.50 Leisure expenditure growth up to 2043 could support new leisure floorspace of between 1,564 sq.m to 1,896 sq.m in Rochford District. This floorspace capacity could, for example, include:
- a small theatre;
  - a museum/gallery; and
  - 1 or 2 medium sized health and fitness facilities;
  - a bingo club.
- 3.51 The development strategy for these uses should be flexible to respond to emerging opportunities for new leisure, entertainment and cultural related facilities, including the repurposing of existing assets across the District's centres.

## 4.0 Implications for emerging policy

### Introduction

- 4.1 The National Planning Policy Framework (NPPF) indicates development plans should allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure and other main town centre uses over this period should not be compromised by limited site availability. The emerging new Local Plan should seek to accommodate retail, food/beverage and commercial leisure floorspace projections at least up to 2038.
- 4.2 The latest NPPF (December 2024) indicates planning policies should (para. 90):
- define a network and hierarchy of town centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;
  - define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;
  - retain and enhance existing markets and, where appropriate, re-introduce or create new ones;
  - allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;
  - where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and
  - recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.
- 4.3 In relation to town centres, the latest NPPF does not change the overall aims of policy, although there are some important modifications. These changes are logical points of clarification that address areas of debate that have arisen in recent years.
- 4.4 The rapid changes that are affecting the retail sector and town centres, are acknowledged and reflected in the NPPF. It recognises that diversification is key to the long-term vitality and viability of town centres, to respond to ‘rapid changes in the retail and leisure industries’. Accordingly, planning policies should clarify ‘the range of uses permitted in such locations, as part of a positive strategy for the future of each centre’.
- 4.5 The importance of a mix of retail and other town centre activity has increased in recent years and town centres increasingly need to compete with on-line shopping. Town centres need a better mix of uses that extend activity throughout the daytime and into the evenings.
- 4.6 The updated projections confirm there is a need for town centres to maintain their primary retail function, whilst increasing their diversity with a range of complementary uses. The appropriate balance between retail and other town centre activity has been debated in

recent years, as town centres increasingly need to compete with on-line shopping. Online shopping has grown faster than previously expected due to shifts in customer behaviour accelerated by the Covid-19 crisis. The need for a better mix of uses within town centre will become increasingly important. A broader mix of uses should extend activity throughout the daytime and into the evenings.

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

## Floorspace capacity projections

- 4.9 Tables 4.1 and 4.2 summarise the low growth floorspace projections (cumulative) for convenience and comparison goods retail and food/beverage by broad location up to 2038 and 2043. The division of floorspace is based on the existing market shares and expenditure patterns; however, the precise distribution of the capacity for new development may ultimately reflect the Council's chosen spatial strategy for the distribution of population growth and the location of any specific housing allocations. The high growth projections are shown in Table 4.3 and 4.4.

Table 4.1 Summary of retail and food/beverage floorspace projections from 2023 to 2038 (sq.m gross) – low growth

	Convenience	Comparison	Food/beverage	Total
Rochford	-34	55	710	731
Rayleigh	-36	45	1,991	2,000
Hockley	0	19	820	839
Great Wakering	0	4	65	69
Hullbridge	0	0	286	286
Other Rochford District	2	34	293	329
<b>Total</b>	<b>-68</b>	<b>157</b>	<b>4,165</b>	<b>4,254</b>

Table 4.2 Summary of retail and food/beverage floorspace projections from 2023 to 2043 (sq.m gross) – low growth

	Convenience	Comparison	Food/beverage	Total
Rochford	128	230	1,040	1,398
Rayleigh	-1	649	2,863	3,511
Hockley	2	55	1,177	1,234
Great Wakering	3	12	93	108
Hullbridge	1	0	422	423
Other Rochford District	8	82	427	517
<b>Total</b>	<b>141</b>	<b>1,028</b>	<b>6,022</b>	<b>7,191</b>

- 4.10 It is widely accepted that long-term projections have inherent uncertainties. In response to these uncertainties, the NPPF indicates that local planning authorities are no longer required to allocate sites to meet the need for town centre uses over the full plan period.

The need for new town centre uses should still be accommodated over a minimum ten-year period, which reflects the complexities in bringing forward town centre development sites.

Table 4.3 Summary of retail and food/beverage floorspace projections from 2023 to 2038 (sq.m gross) – high growth

	Convenience	Comparison	Food/beverage	Total
Rochford	734	303	1,085	2,122
Rayleigh	138	1,130	2,954	4,222
Hockley	17	133	1,265	1,415
Great Wakering	11	23	426	460
Hullbridge	7	0	94	101
Other Rochford District	17	142	434	593
<b>Total</b>	<b>925</b>	<b>1,731</b>	<b>6,258</b>	<b>8,914</b>

Table 4.4 Summary of retail and food/beverage floorspace projections from 2023 to 2043 (sq.m gross) – high growth

	Convenience	Comparison	Food/beverage	Total
Rochford	1,118	544	1,522	3,184
Rayleigh	227	2,089	4,173	6,489
Hockley	25	207	1,783	2,015
Great Wakering	16	35	599	650
Hullbridge	10	0	133	143
Other Rochford District	26	223	608	857
<b>Total</b>	<b>1,422</b>	<b>3,098</b>	<b>8,819</b>	<b>13,339</b>

- 4.11 The global high and low growth retail/food/beverage capacity at 2038 ranges from 4,254 sq.m gross to 8,914 sq.m gross, which will increase to 7,191 sq.m gross to 13,339 sq.m gross in 2043. Recognising the high degree of uncertainty in relation to very long-term projections, it would be prudent to seek to accommodate the high growth projection up to 2038, i.e. 8,914 sq.m gross, which is slightly higher than the low growth projection up to 2043. The level of population growth will need to be monitored.
- 4.12 In addition to retail and food/beverage floorspace, leisure expenditure growth could support about 1,072 sq.m gross to 1,328 sq.m gross of new commercial leisure/cultural floorspace by 2038, increasing to 1,564 sq.m gross to 1,896 sq.m gross by 2043.
- 4.13 The completions since 2023 and planned commitments listed at paragraph 2.72 could provide over 2,500 sq.m gross of retail and food/beverage floorspace, which would reduce the high growth projection up to 2038, from 8,914 sq.m gross to about 6,500 sq.m gross.
- 4.14 The existing stock of premises may help to accommodate some of the projected growth, particularly in the short-term. The floorspace capacity analysis in this report assumes that existing retail and food/beverage floorspace can, on average, increase its turnover to sales floorspace densities, particularly if retail businesses can maintain recent growth in on-line sales through stores. In addition to the growth in sales densities, vacant floorspace may help to accommodate some of the residual future growth. However, previous studies have shown low shop vacancy rates within Rochford District's town centres. The scope to accommodate growth within vacant units may be limited.
- 4.15 The projections suggest there is no pressing need to bring forward major new allocations for retail and food/beverage development before 2033. The short-term projections to 2028 suggest there is likely to be limited demand to reoccupy vacant retail floorspace. However, the need to retain retail floorspace in the longer term (up to 2038 and 2043) needs to be considered. In the longer-term development opportunities will need to be identified to

accommodate residual capacity for retail, food/beverage and leisure uses within town centres.

- 4.16 Some new retail, food/beverage and leisure floorspace may be required to support the day-to-day needs of any strategic housing allocations. These facilities should be commensurate with the number of new dwellings proposed and the scale of development must have an acceptable impact on town centres. These strategic housing allocations could meet much of the residual floorspace capacity, over and above the reoccupation of vacant floorspace as outlined above or small-scale windfall developments within town centres.
- 4.17 Despite the recent changes to the UCO, the new Local Plan can still refer to separate retail floorspace projections, which do not need to be merged with other uses in Class E, such as office and leisure uses. Historically, development plans have included separate floorspace projections for comparison and convenience goods retail although they both fell within Class A1, along with other non-retail services. Under the old system, there were permitted development rights for all food and beverage uses to change to Class A1. In a similar way, retail and restaurant/café uses now fall into one new Class E, whilst pubs/bars and takeaways are Sui Generis with no permitted changes.
- 4.18 The Council can still impose conditions on new development that restrict changes within the new Class E, in the same way comparison, convenience goods retail floorspace and the sale of specific types of goods have been controlled via conditions for many years. The floorspace projections in this study and retail impact assessments should help to determine when these types of conditions are necessary and appropriate.

## Impact and sequential tests

- 4.19 The NPPF (paragraph 94) states that local planning authorities, when assessing applications for retail and leisure development outside of town centres, which are not in accordance with an up to-date Local Plan, should require an impact assessment if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500 sq.m). Impact assessments should consider:
- the impact of the proposal on existing, committed and planned public and private investment in centres in the catchment area of the proposal; and
  - the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider retail catchment (as applicable to the scale and nature of the scheme).
- 4.20 The NPPF (paragraph 91) indicates local planning authorities should apply a sequential test for main town centre uses outside of designated centres. The impact test should only apply to retail and leisure development outside of centres.
- 4.21 The NPPF minimum threshold of 2,500 sq.m gross may be inappropriate for Rochford District. This scale of development would still represent a significant proportion of the overall retail and food/beverage projections for the authority area, particularly in the short to medium term up to 2033. A lower impact threshold of 400 sq.m gross, consistent with the Sunday trading threshold, could be considered.

## Town centre boundary and primary shopping areas

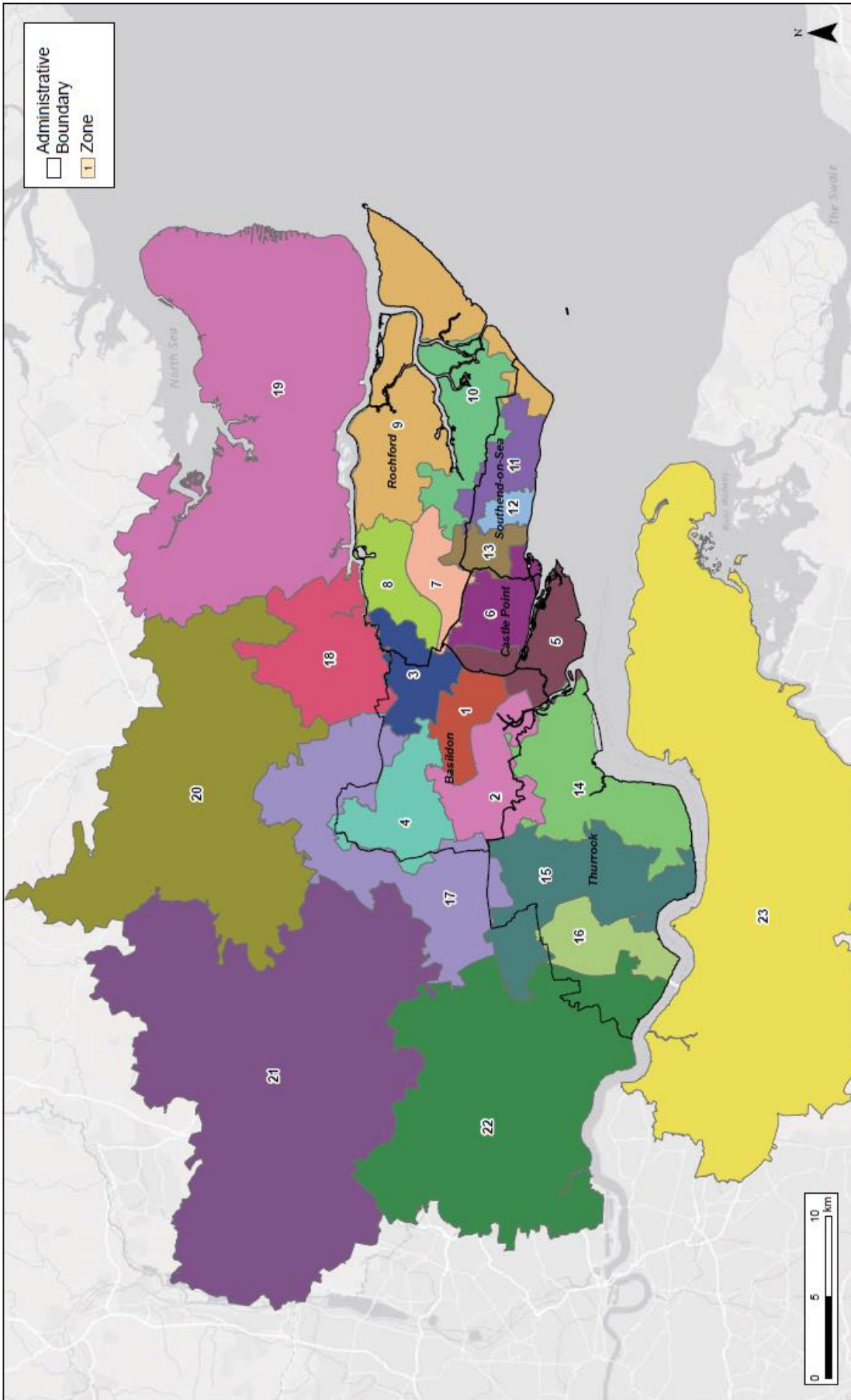
- 4.22 The new Local Plan should continue to define town centre boundaries on the proposals map to assist the application of the sequential test. Current and future market trends, the relatively low retail floorspace short term capacity projections, changes to the NPPF and the

UCO, indicate a more flexible approach to shop frontage policies and the mix of uses within centre should be considered.

- 4.23 A balanced approach that recognises the need to maintain and enhance Rochford's retail position, as well as the early evening and night-time economy. There is still a need to protect retail uses previously categorised as Class A1 uses within town centres. However, changes to the Use Classes Order (UCO) and Permitted Development Rights (PDR) will restrict the future policy approach.
- 4.24 Considering current and likely future market trends, the updated (lower) retail floorspace capacity projections, and changes to the UCO and PDR described earlier, restrictive policies may be unsound and unimplementable for existing premises. The UCO/PDR changes prevent a more restrictive approach. However, the introduction of Article 4 directions can be considered e.g. to remove permitted changes of use from Class E to residential (Class MA). However, Article 4 directions cannot prevent movement within the same use class i.e., new Class E.
- 4.25 In some circumstances the introduction of restrictive shop frontage policies or Article 4 directions could be inappropriate e.g. in areas with a high level of vacancies and where an increase in vacant units could harm the vitality and viability of the centre. Demand from retail occupiers has reduced and the updated retail floorspace projections are much lower than previous projections, particularly comparison goods retail. The continuation of the previous policy approaches could be undermined and hampered by the UCO/PDR changes.
- 4.26 Non-Class E uses including pubs, bars, hot food takeaways and other Sui Generis uses can be assessed against criteria-based policies e.g. relating to breaks in active frontages, amenity issues (noise/smells), impact on the nature and character of the retail frontages. Betting shops and hot food takeaways are Sui Generis uses that can still be controlled by policy, and this not affected by changes to the Use Classes Order or Permitted Development Rights Other non-Class E uses at ground floor level can be controlled within the designated frontages.
- 4.27 Notwithstanding the reduced controls, the mix of uses within Use Class E can still be controlled via planning conditions or legal agreements, where planning permission is required i.e., where there is a change of use requiring planning permission, redevelopment or new development is proposed, in the same way planning conditions/legal agreements were previously used to control movement usually permitted within the former Class A uses. This approach could be used to control the mix of ground floor uses on development site allocations. Planning policy could seek to control the mix of uses within Class E for new development where planning conditions can be introduced restricting movement within the use class.
- 4.28 The new Local Plan could retain primary and secondary shopping frontages within the town centres to manage the mix of uses and protect the vitality and viability of the centre. Within primary shopping frontages the retail offer could be maintained and uses within Class E could be retained whilst maintaining an active frontage. Within secondary frontages, a wider range of main town centre uses including Class E, Sui Generis and Class F could be protected.



## **Appendix 1 Study area and population**



**Table 1A - Study area population projections (low growth)**

Zone	2023	2028	2033	2038	2043
1	42,163	43,170	44,099	45,091	46,138
2	77,522	79,450	81,157	83,120	85,318
3	29,176	29,661	30,179	30,712	31,244
4	33,047	33,482	33,855	34,109	34,379
5	58,850	59,689	60,416	61,218	62,243
6	39,600	40,061	40,590	41,125	41,737
7	30,163	30,939	31,648	32,255	32,835
8	25,904	26,714	27,409	28,007	28,609
9	25,553	26,242	26,867	27,537	28,299
10	21,162	21,818	22,426	23,054	23,725
11	74,348	76,441	78,251	80,092	82,039
12	42,315	43,430	44,450	45,543	46,750
13	42,485	43,427	44,184	44,774	45,352
14	48,378	49,913	51,174	52,265	53,207
15	73,070	75,689	77,773	79,473	81,321
16	46,376	48,544	50,300	52,046	53,884
17	28,852	29,029	29,228	29,492	29,770
18	28,335	29,121	29,740	30,280	30,841
19	55,530	57,169	58,691	60,097	61,564
20	147,409	151,804	155,653	159,081	162,665
21	156,356	158,159	160,067	162,060	164,446
22	863,195	877,845	892,751	909,270	926,873
23	511,568	523,917	534,356	544,463	555,450
<b>Total</b>	<b>2,501,357</b>	<b>2,555,714</b>	<b>2,605,264</b>	<b>2,655,164</b>	<b>2,708,689</b>

Source: Experian population projections (March 2025)

**Table 1B - Study area population projections (high growth)**

Zone	2023	2028	2033	2038	2043
1	42,163	43,170	44,099	45,091	46,138
2	77,522	79,450	81,157	83,120	85,318
3	29,176	29,661	30,179	30,712	31,244
4	33,047	33,482	33,855	34,109	34,379
5	58,850	59,689	60,416	61,218	62,243
6	39,600	40,061	40,590	41,125	41,737
7	30,163	31,933	33,478	34,959	36,424
8	25,904	27,424	28,751	30,023	31,281
9	25,553	27,052	28,362	29,616	30,857
10	21,162	22,404	23,488	24,527	25,554
11	74,348	76,441	78,251	80,092	82,039
12	42,315	43,430	44,450	45,543	46,750
13	42,485	43,427	44,184	44,774	45,352
14	48,378	49,913	51,174	52,265	53,207
15	73,070	75,689	77,773	79,473	81,321
16	46,376	48,544	50,300	52,046	53,884
17	28,852	29,029	29,228	29,492	29,770
18	28,335	29,121	29,740	30,280	30,841
19	55,530	57,169	58,691	60,097	61,564
20	147,409	151,804	155,653	159,081	162,665
21	156,356	158,159	160,067	162,060	164,446
22	863,195	877,845	892,751	909,270	926,873
23	511,568	523,917	534,356	544,463	555,450
<b>Total</b>	<b>2,501,357</b>	<b>2,558,813</b>	<b>2,610,993</b>	<b>2,663,435</b>	<b>2,719,336</b>

Source: *Experian population projections (March 2025)*  
*Standard Method population projections for Zones 7 to 10 (Rochford).*

## **Appendix 2 Convenience goods capacity**



**Table 1 - Convenience goods expenditure per person per annum (£)**

Zone	2023	2028	2033	2038	2043
1	2,553	2,439	2,390	2,351	2,320
2	2,604	2,487	2,437	2,397	2,366
3	2,793	2,669	2,615	2,572	2,538
4	3,039	2,903	2,845	2,798	2,761
5	2,733	2,611	2,558	2,516	2,483
6	2,922	2,792	2,735	2,691	2,655
7	2,908	2,778	2,722	2,678	2,643
8	2,898	2,769	2,713	2,668	2,633
9	2,765	2,642	2,588	2,546	2,512
10	2,803	2,678	2,624	2,581	2,547
11	2,683	2,564	2,512	2,471	2,438
12	2,601	2,485	2,435	2,395	2,364
13	2,836	2,709	2,654	2,611	2,577
14	2,561	2,446	2,397	2,358	2,327
15	2,476	2,366	2,318	2,280	2,250
16	2,446	2,336	2,289	2,252	2,222
17	3,159	3,018	2,957	2,909	2,871
18	2,912	2,782	2,725	2,681	2,646
19	2,937	2,806	2,749	2,705	2,669
20	2,866	2,738	2,682	2,639	2,604
21	2,956	2,824	2,767	2,722	2,686
22	2,226	2,126	2,083	2,049	2,022
23	2,649	2,531	2,480	2,439	2,407

Sources:

*Experian Local Expenditure 2023 (2023 prices)*

*Experian growth rates from Retail Planner Briefing Note 22 - Figure 1a*

*Excludes Special Forms of Trading - Experian adjusted SFT Retail Planner Briefing Note 22 - Figure 5*

**Table 2A - Total convenience goods expenditure (£m) - low growth**

Zone	2023	2028	2033	2038	2043
1	107.65	105.30	105.39	106.00	107.04
2	201.83	197.63	197.79	199.27	201.84
3	81.50	79.16	78.91	78.99	79.30
4	100.43	97.21	96.31	95.45	94.94
5	160.81	155.83	154.53	154.03	154.55
6	115.72	111.84	111.02	110.65	110.82
7	87.72	85.96	86.15	86.37	86.77
8	75.07	73.96	74.35	74.73	75.34
9	70.65	69.32	69.54	70.11	71.10
10	59.32	58.44	58.85	59.51	60.44
11	199.50	195.97	196.55	197.89	200.03
12	110.07	107.93	108.23	109.08	110.50
13	120.47	117.65	117.27	116.90	116.85
14	123.87	122.10	122.65	123.23	123.80
15	180.92	179.05	180.25	181.18	182.96
16	113.41	113.42	115.14	117.20	119.74
17	91.15	87.62	86.44	85.79	85.46
18	82.50	81.01	81.05	81.18	81.60
19	163.11	160.44	161.37	162.54	164.32
20	422.40	415.60	417.50	419.74	423.55
21	462.23	446.71	442.94	441.14	441.75
22	1921.20	1866.68	1859.92	1863.44	1874.53
23	1355.11	1325.94	1324.96	1328.00	1336.98
<b>Total</b>	<b>6,406.66</b>	<b>6,254.78</b>	<b>6,247.10</b>	<b>6,262.43</b>	<b>6,304.21</b>

Source: Tables 1A, Appendix 1 and Table 1, Appendix 2



**Table 2B - Total convenience goods expenditure (£m) - high growth**

Zone	2023	2028	2033	2038	2043
1	107.65	105.30	105.39	106.00	107.04
2	201.83	197.63	197.79	199.27	201.84
3	81.50	79.16	78.91	78.99	79.30
4	100.43	97.21	96.31	95.45	94.94
5	160.81	155.83	154.53	154.03	154.55
6	115.72	111.84	111.02	110.65	110.82
7	87.72	88.72	91.13	93.61	96.25
8	75.07	75.93	77.99	80.11	82.37
9	70.65	71.46	73.40	75.40	77.53
10	59.32	60.00	61.63	63.31	65.10
11	199.50	195.97	196.55	197.89	200.03
12	110.07	107.93	108.23	109.08	110.50
13	120.47	117.65	117.27	116.90	116.85
14	123.87	122.10	122.65	123.23	123.80
15	180.92	179.05	180.25	181.18	182.96
16	113.41	113.42	115.14	117.20	119.74
17	91.15	87.62	86.44	85.79	85.46
18	82.50	81.01	81.05	81.18	81.60
19	163.11	160.44	161.37	162.54	164.32
20	422.40	415.60	417.50	419.74	423.55
21	462.23	446.71	442.94	441.14	441.75
22	1921.20	1866.68	1859.92	1863.44	1874.53
23	1355.11	1325.94	1324.96	1328.00	1336.98
<b>Total</b>	<b>6,406.66</b>	<b>6,263.21</b>	<b>6,262.37</b>	<b>6,284.15</b>	<b>6,331.81</b>

Source: Tables 1B, Appendix 1 and Table 1, Appendix 2

**Table 3 - Base year convenience goods market shares (%)**

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23
<b>Southend-on-Sea</b>																								
Southend town centre		0.00	0.00	0.23	0.00	0.00	0.51	0.98	0.98	2.57	6.95	23.49	18.52	7.56	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.11	0.00
Southend out-of-centre		0.00	0.40	1.29	0.66	1.76	6.57	25.53	11.73	42.12	53.49	33.89	44.17	44.42	0.83	0.73	0.00	0.65	0.00	0.22	0.00	0.07	0.25	0.00
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.00	0.47	2.02	0.00	0.00	1.94	11.76	0.91	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Eastwood town centre		0.00	0.00	0.00	0.00	0.91	1.30	1.66	0.84	5.24	0.55	5.18	7.24	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Leigh-on-Sea		0.00	0.00	0.00	0.11	7.03	0.00	0.11	0.40	0.06	0.37	2.53	20.22	0.00	0.15	1.16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Thorpe Bay town centre		0.00	0.00	0.00	0.00	0.00	0.36	0.00	0.07	0.00	2.46	6.05	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.63	0.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other Southend		0.00	0.00	0.00	0.00	0.00	0.29	0.17	0.94	0.00	1.04	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Southend total</b>		<b>0.00</b>	<b>0.40</b>	<b>1.52</b>	<b>0.66</b>	<b>1.87</b>	<b>15.02</b>	<b>28.93</b>	<b>16.67</b>	<b>46.94</b>	<b>65.74</b>	<b>66.37</b>	<b>88.38</b>	<b>80.46</b>	<b>0.94</b>	<b>0.88</b>	<b>1.16</b>	<b>0.65</b>	<b>0.00</b>	<b>0.22</b>	<b>0.00</b>	<b>0.07</b>	<b>3.36</b>	<b>0.00</b>
<b>Rochford</b>																								
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.24	0.00	10.50	7.99	0.00	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Rayleigh town centre		0.00	0.00	0.11	0.00	0.20	0.95	15.57	7.12	0.00	1.07	0.00	0.00	0.73	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.41	0.00
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.98	1.38	0.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.56	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.86	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Hullbridge		0.00	0.00	0.00	0.00	0.00	1.06	0.00	0.00	0.00	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Rochford out-of-centre		0.00	0.71	1.08	0.00	2.76	4.45	30.28	46.74	13.52	14.68	0.26	0.94	0.71	0.00	0.00	0.00	0.00	0.29	0.00	0.00	0.00	0.00	0.00
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.25	0.00	0.63	0.00	0.63	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Rochford total</b>		<b>0.00</b>	<b>0.71</b>	<b>1.19</b>	<b>0.00</b>	<b>2.96</b>	<b>5.40</b>	<b>47.07</b>	<b>56.55</b>	<b>26.02</b>	<b>26.93</b>	<b>0.26</b>	<b>1.18</b>	<b>1.44</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.29</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.41</b>	<b>0.00</b>
Other destinations		100.00	98.89	97.29	99.34	95.17	79.58	24.00	26.78	27.04	7.33	33.37	10.44	18.10	99.06	99.12	98.84	99.35	99.71	99.78	100.00	99.93	96.23	100.00
<b>TOTAL</b>		<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>

Source: South Essex Retail Study Volume 2, Appendix C, Table D.

**Table 4 - Base year convenience goods shopping patterns (£M)**

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
<b>Expenditure 2022</b>		107.65	201.83	81.50	100.43	160.81	115.72	87.72	75.07	70.65	59.32	199.50	110.07	120.47	123.87	180.92	113.41	91.15	82.50	163.11	422.40	462.23	1921.20	1355.11	6406.66
<b>Southend-on-Sea</b>																									
Southend town centre		0.00	0.00	0.19	0.00	0.00	0.59	0.86	0.74	1.82	4.12	46.86	20.38	9.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	59.75	0.00	144.42
Southend out-of-centre		0.00	0.81	1.05	0.66	2.83	7.60	22.39	8.81	29.76	31.73	67.61	48.62	53.51	1.03	1.32	0.00	0.59	0.00	0.36	0.00	0.32	4.80	0.00	283.81
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.41	1.52	0.00	0.00	3.87	12.94	1.10	0.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	19.98
Eastwood town centre		0.00	0.00	0.00	0.00	0.00	1.05	1.14	1.25	0.59	3.11	1.10	5.70	8.72	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	22.66
Leigh-on-Sea		0.00	0.00	0.00	0.00	0.18	8.13	0.00	0.08	0.28	0.04	0.74	2.78	24.36	0.00	0.27	1.32	0.00	0.00	0.00	0.00	0.00	0.00	0.00	38.18
Thorpe Bay town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.32	0.00	0.05	0.00	4.91	6.66	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.06
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.25	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.36
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.25	0.13	0.66	0.00	2.07	0.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.20
<b>Southend total</b>		<b>0.00</b>	<b>0.81</b>	<b>1.24</b>	<b>0.66</b>	<b>3.01</b>	<b>17.38</b>	<b>25.38</b>	<b>12.51</b>	<b>33.16</b>	<b>39.00</b>	<b>132.41</b>	<b>97.28</b>	<b>96.93</b>	<b>1.16</b>	<b>1.59</b>	<b>1.32</b>	<b>0.59</b>	<b>0.00</b>	<b>0.36</b>	<b>0.00</b>	<b>0.32</b>	<b>64.55</b>	<b>0.00</b>	<b>529.67</b>
<b>Rochford</b>																									
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.21	0.00	7.42	4.74	0.00	0.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.51
Rayleigh town centre		0.00	0.00	0.09	0.00	0.32	1.10	13.66	5.34	0.00	0.63	0.00	0.00	0.88	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.88	0.00	29.90
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.86	1.04	0.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.99
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.52	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.52
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.31	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.31
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.80	0.00	0.00	0.00	0.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.92
Rochford out-of-centre		0.00	1.43	0.88	0.00	4.44	5.15	26.56	35.09	9.55	8.71	0.52	1.03	0.86	0.00	0.00	0.00	0.00	0.24	0.00	0.00	0.00	0.00	0.00	94.46
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.19	0.00	0.37	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.56
<b>Rochford total</b>		<b>0.00</b>	<b>1.43</b>	<b>0.97</b>	<b>0.00</b>	<b>4.76</b>	<b>6.25</b>	<b>41.29</b>	<b>42.45</b>	<b>18.38</b>	<b>15.98</b>	<b>0.52</b>	<b>1.30</b>	<b>1.73</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.24</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>7.88</b>	<b>0.00</b>	<b>143.18</b>
Other destinations		107.65	199.59	79.29	99.77	153.05	92.09	21.05	20.10	19.10	4.35	66.57	11.49	21.80	122.71	179.33	112.10	90.56	82.26	162.75	422.40	461.90	1848.77	1355.11	5733.81
<b>TOTAL</b>		<b>107.65</b>	<b>201.83</b>	<b>81.50</b>	<b>100.43</b>	<b>160.81</b>	<b>115.72</b>	<b>87.72</b>	<b>75.07</b>	<b>70.65</b>	<b>59.32</b>	<b>199.50</b>	<b>110.07</b>	<b>120.47</b>	<b>123.87</b>	<b>180.92</b>	<b>113.41</b>	<b>91.15</b>	<b>82.50</b>	<b>163.11</b>	<b>422.40</b>	<b>462.23</b>	<b>1921.20</b>	<b>1355.11</b>	<b>6406.66</b>

Source: Tables 2A and 3.

**Table 5A - Future 2028 convenience goods shopping patterns (£M) - low growth**

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
<b>Expenditure 2028</b>		105.30	197.63	79.16	97.21	155.83	111.84	85.96	73.96	69.32	58.44	195.97	107.93	117.65	122.10	179.05	113.42	87.62	81.01	160.44	415.60	446.71	1866.68	1325.94	6254.78
<b>Southend-on-Sea</b>																									
Southend town centre		0.00	0.00	0.18	0.00	0.00	0.57	0.84	0.72	1.78	4.06	46.03	19.99	8.89	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	58.05	0.00	141.13
Southend out-of-centre		0.00	0.79	1.02	0.64	2.74	7.35	21.95	8.68	29.20	31.26	66.41	47.67	52.26	1.01	1.31	0.00	0.57	0.00	0.35	0.00	0.31	4.67	0.00	278.19
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.40	1.49	0.00	0.00	3.80	12.69	1.07	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	19.60
Eastwood town centre		0.00	0.00	0.00	0.00	1.02	1.12	1.23	0.58	3.06	1.08	5.59	8.52	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	22.19
Leigh-on-Sea		0.00	0.00	0.00	0.00	0.17	7.86	0.00	0.08	0.28	0.04	0.73	2.73	23.79	0.00	0.27	1.32	0.00	0.00	0.00	0.00	0.00	0.00	0.00	37.26
Thorpe Bay town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.31	0.00	0.05	0.00	4.82	6.53	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.84
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.15	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.26
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.25	0.13	0.65	0.00	2.04	0.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.14
<b>Southend total</b>		<b>0.00</b>	<b>0.79</b>	<b>1.20</b>	<b>0.64</b>	<b>2.91</b>	<b>16.80</b>	<b>24.87</b>	<b>12.33</b>	<b>32.54</b>	<b>38.42</b>	<b>130.07</b>	<b>95.39</b>	<b>94.66</b>	<b>1.15</b>	<b>1.58</b>	<b>1.32</b>	<b>0.57</b>	<b>0.00</b>	<b>0.35</b>	<b>0.00</b>	<b>0.31</b>	<b>62.72</b>	<b>0.00</b>	<b>518.61</b>
<b>Rochford</b>																									
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.21	0.00	7.28	4.67	0.00	0.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.29
Rayleigh town centre		0.00	0.00	0.09	0.00	0.31	1.06	13.38	5.27	0.00	0.63	0.00	0.00	0.86	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.65	0.00	29.25
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.84	1.02	0.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.96
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.50	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.50
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.29	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.29
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.78	0.00	0.00	0.00	0.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.90
Rochford out-of-centre		0.00	1.40	0.85	0.00	4.30	4.98	26.03	34.57	9.37	8.58	0.51	1.01	0.84	0.00	0.00	0.00	0.00	0.23	0.00	0.00	0.00	0.00	0.00	92.68
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.18	0.00	0.37	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.55
<b>Rochford total</b>		<b>0.00</b>	<b>1.40</b>	<b>0.94</b>	<b>0.00</b>	<b>4.61</b>	<b>6.04</b>	<b>40.46</b>	<b>41.83</b>	<b>18.04</b>	<b>15.74</b>	<b>0.51</b>	<b>1.27</b>	<b>1.69</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.23</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>7.65</b>	<b>0.00</b>	<b>140.43</b>
Other destinations		105.30	195.44	77.01	96.57	148.30	89.00	20.63	19.81	18.74	4.28	65.40	11.27	21.29	120.96	177.47	112.11	87.05	80.77	160.08	415.60	446.39	1796.31	1325.94	5595.74
<b>TOTAL</b>		<b>105.30</b>	<b>197.63</b>	<b>79.16</b>	<b>97.21</b>	<b>155.83</b>	<b>111.84</b>	<b>85.96</b>	<b>73.96</b>	<b>69.32</b>	<b>58.44</b>	<b>195.97</b>	<b>107.93</b>	<b>117.65</b>	<b>122.10</b>	<b>179.05</b>	<b>113.42</b>	<b>87.62</b>	<b>81.01</b>	<b>160.44</b>	<b>415.60</b>	<b>446.71</b>	<b>1866.68</b>	<b>1325.94</b>	<b>6254.78</b>

Source: Tables 2A and 3.

**Table 5B - Future 2028 convenience goods shopping patterns (£M) - high growth**

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total	
<b>Expenditure 2028</b>		105.30	197.63	79.16	97.21	155.83	111.84	88.72	75.93	71.46	60.00	195.97	107.93	117.65	122.10	179.05	113.42	87.62	81.01	160.44	415.60	446.71	1866.68	1325.94	6263.21	
<b>Southend-on-Sea</b>																										
Southend town centre		0.00	0.00	0.18	0.00	0.00	0.57	0.87	0.74	1.84	4.17	46.03	19.99	8.89	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	58.05	0.00	141.34	
Southend out-of-centre		0.00	0.79	1.02	0.64	2.74	7.35	22.65	8.91	30.10	32.10	66.41	47.67	52.26	1.01	1.31	0.00	0.57	0.00	0.35	0.00	0.31	4.67	0.00	280.87	
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.42	1.53	0.00	0.00	3.80	12.69	1.07	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	19.65	
Eastwood town centre		0.00	0.00	0.00	0.00	0.00	1.02	1.15	1.26	0.60	3.14	1.08	5.59	8.52	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	22.36	
Leigh-on-Sea		0.00	0.00	0.00	0.00	0.17	7.86	0.00	0.08	0.29	0.04	0.73	2.73	23.79	0.00	0.27	1.32	0.00	0.00	0.00	0.00	0.00	0.00	0.00	37.27	
Thorpe Bay town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.32	0.00	0.05	0.00	4.82	6.53	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.85	
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.15	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.26	
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.26	0.13	0.67	0.00	2.04	0.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.17	
<b>Southend total</b>		<b>0.00</b>	<b>0.79</b>	<b>1.20</b>	<b>0.64</b>	<b>2.91</b>	<b>16.80</b>	<b>25.67</b>	<b>12.66</b>	<b>33.54</b>	<b>39.45</b>	<b>130.07</b>	<b>95.39</b>	<b>94.66</b>	<b>1.15</b>	<b>1.58</b>	<b>1.32</b>	<b>0.57</b>	<b>0.00</b>	<b>0.35</b>	<b>0.00</b>	<b>0.31</b>	<b>62.72</b>	<b>0.00</b>	<b>521.78</b>	
<b>Rochford</b>																										
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.21	0.00	7.50	4.79	0.00	0.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.65	
Rayleigh town centre		0.00	0.00	0.09	0.00	0.31	1.06	13.81	5.41	0.00	0.64	0.00	0.00	0.86	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.65	0.00	29.84	
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.87	1.05	0.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.02	
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.54	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.54	
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.33	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.33	
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.80	0.00	0.00	0.00	0.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.92	
Rochford out-of-centre		0.00	1.40	0.85	0.00	4.30	4.98	26.87	35.49	9.66	8.81	0.51	1.01	0.84	0.00	0.00	0.00	0.00	0.23	0.00	0.00	0.00	0.00	0.00	94.96	
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.19	0.00	0.38	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.57	
<b>Rochford total</b>		<b>0.00</b>	<b>1.40</b>	<b>0.94</b>	<b>0.00</b>	<b>4.61</b>	<b>6.04</b>	<b>41.76</b>	<b>42.94</b>	<b>18.59</b>	<b>16.16</b>	<b>0.51</b>	<b>1.27</b>	<b>1.69</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.23</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>7.65</b>	<b>0.00</b>	<b>143.82</b>	
Other destinations		105.30	195.44	77.01	96.57	148.30	89.00	21.29	20.33	19.32	4.40	65.40	11.27	21.29	120.96	177.47	112.11	87.05	80.77	160.08	415.60	446.39	1796.31	1325.94	5597.62	
<b>TOTAL</b>		<b>105.30</b>	<b>197.63</b>	<b>79.16</b>	<b>97.21</b>	<b>155.83</b>	<b>111.84</b>	<b>88.72</b>	<b>75.93</b>	<b>71.46</b>	<b>60.00</b>	<b>195.97</b>	<b>107.93</b>	<b>117.65</b>	<b>122.10</b>	<b>179.05</b>	<b>113.42</b>	<b>87.62</b>	<b>81.01</b>	<b>160.44</b>	<b>415.60</b>	<b>446.71</b>	<b>1866.68</b>	<b>1325.94</b>	<b>6263.21</b>	

Source: Tables 2B and 3.

**Table 6A - Future 2033 convenience goods shopping patterns (£M) - low growth**

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total	
<b>Expenditure 2033</b>		105.39	197.79	78.91	96.31	154.53	111.02	86.15	74.35	69.54	58.85	196.55	108.23	117.27	122.65	180.25	115.14	86.44	81.05	161.37	417.50	442.94	1859.92	1324.96	6247.10	
<b>Southend-on-Sea</b>																										
Southend town centre		0.00	0.00	0.18	0.00	0.00	0.57	0.84	0.73	1.79	4.09	46.17	20.04	8.87	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	57.84	0.00	141.12
Southend out-of-centre		0.00	0.79	1.02	0.64	2.72	7.29	21.99	8.72	29.29	31.48	66.61	47.80	52.09	1.02	1.32	0.00	0.56	0.00	0.36	0.00	0.31	4.65	0.00	0.00	278.66
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.40	1.50	0.00	0.00	3.81	12.73	1.07	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	19.65
Eastwood town centre		0.00	0.00	0.00	0.00	0.00	1.01	1.12	1.23	0.58	3.08	1.08	5.61	8.49	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	22.21
Leigh-on-Sea		0.00	0.00	0.00	0.00	0.17	7.81	0.00	0.08	0.28	0.04	0.73	2.74	23.71	0.00	0.27	1.34	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	37.15
Thorpe Bay town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.31	0.00	0.05	0.00	4.84	6.55	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.87
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.17	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.28
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.25	0.13	0.65	0.00	2.04	0.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.15
<b>Southend total</b>		<b>0.00</b>	<b>0.79</b>	<b>1.20</b>	<b>0.64</b>	<b>2.89</b>	<b>16.68</b>	<b>24.92</b>	<b>12.39</b>	<b>32.64</b>	<b>38.69</b>	<b>130.45</b>	<b>95.65</b>	<b>94.36</b>	<b>1.15</b>	<b>1.59</b>	<b>1.34</b>	<b>0.56</b>	<b>0.00</b>	<b>0.36</b>	<b>0.00</b>	<b>0.31</b>	<b>62.49</b>	<b>0.00</b>	<b>519.09</b>	
<b>Rochford</b>																										
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.21	0.00	7.30	4.70	0.00	0.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.35
Rayleigh town centre		0.00	0.00	0.09	0.00	0.31	1.05	13.41	5.29	0.00	0.63	0.00	0.00	0.86	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.63	0.00	0.00	29.27
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.84	1.03	0.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.97
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.51	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.51
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.29	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.29
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.79	0.00	0.00	0.00	0.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.91
Rochford out-of-centre		0.00	1.40	0.85	0.00	4.27	4.94	26.09	34.75	9.40	8.64	0.51	1.02	0.83	0.00	0.00	0.00	0.00	0.24	0.00	0.00	0.00	0.00	0.00	0.00	92.94
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.19	0.00	0.37	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.56
<b>Rochford total</b>		<b>0.00</b>	<b>1.40</b>	<b>0.94</b>	<b>0.00</b>	<b>4.57</b>	<b>6.00</b>	<b>40.55</b>	<b>42.05</b>	<b>18.09</b>	<b>15.85</b>	<b>0.51</b>	<b>1.28</b>	<b>1.69</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.24</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>7.63</b>	<b>0.00</b>	<b>140.79</b>	
Other destinations		105.39	195.59	76.77	95.67	147.07	88.35	20.68	19.91	18.80	4.31	65.59	11.30	21.23	121.50	178.66	113.81	85.87	80.82	161.02	417.50	442.63	1789.80	1324.96	5587.22	
<b>TOTAL</b>		<b>105.39</b>	<b>197.79</b>	<b>78.91</b>	<b>96.31</b>	<b>154.53</b>	<b>111.02</b>	<b>86.15</b>	<b>74.35</b>	<b>69.54</b>	<b>58.85</b>	<b>196.55</b>	<b>108.23</b>	<b>117.27</b>	<b>122.65</b>	<b>180.25</b>	<b>115.14</b>	<b>86.44</b>	<b>81.05</b>	<b>161.37</b>	<b>417.50</b>	<b>442.94</b>	<b>1859.92</b>	<b>1324.96</b>	<b>6247.10</b>	

Source: Tables 2A and 3.

**Table 6B - Future 2033 convenience goods shopping patterns (£M) - high growth**

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
<b>Expenditure 2033</b>		105.39	197.79	78.91	96.31	154.53	111.02	91.13	77.99	73.40	61.63	196.55	108.23	117.27	122.65	180.25	115.14	86.44	81.05	161.37	417.50	442.94	1859.92	1324.96	6262.37
<b>Southend-on-Sea</b>																									
Southend town centre		0.00	0.00	0.18	0.00	0.00	0.57	0.89	0.76	1.89	4.28	46.17	20.04	8.87	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	57.84	0.00	141.50
Southend out-of-centre		0.00	0.79	1.02	0.64	2.72	7.29	23.27	9.15	30.92	32.97	66.61	47.80	52.09	1.02	1.32	0.00	0.56	0.00	0.36	0.00	0.31	4.65	0.00	283.48
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.43	1.58	0.00	0.00	3.81	12.73	1.07	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	19.75
Eastwood town centre		0.00	0.00	0.00	0.00	0.00	1.01	1.18	1.29	0.62	3.23	1.08	5.61	8.49	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	22.51
Leigh-on-Sea		0.00	0.00	0.00	0.00	0.17	7.81	0.00	0.09	0.29	0.04	0.73	2.74	23.71	0.00	0.27	1.34	0.00	0.00	0.00	0.00	0.00	0.00	0.00	37.18
Thorpe Bay town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.33	0.00	0.05	0.00	4.84	6.55	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.89
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.17	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.28
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.26	0.13	0.69	0.00	2.04	0.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.21
<b>Southend total</b>		<b>0.00</b>	<b>0.79</b>	<b>1.20</b>	<b>0.64</b>	<b>2.89</b>	<b>16.68</b>	<b>26.36</b>	<b>13.00</b>	<b>34.46</b>	<b>40.52</b>	<b>130.45</b>	<b>95.65</b>	<b>94.36</b>	<b>1.15</b>	<b>1.59</b>	<b>1.34</b>	<b>0.56</b>	<b>0.00</b>	<b>0.36</b>	<b>0.00</b>	<b>0.31</b>	<b>62.49</b>	<b>0.00</b>	<b>524.79</b>
<b>Rochford</b>																									
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.22	0.00	7.71	4.92	0.00	0.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.99
Rayleigh town centre		0.00	0.00	0.09	0.00	0.31	1.05	14.19	5.55	0.00	0.66	0.00	0.00	0.86	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.63	0.00	30.33
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.89	1.08	0.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.07
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.58	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.58
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.37	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.37
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.83	0.00	0.00	0.00	0.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.95
Rochford out-of-centre		0.00	1.40	0.85	0.00	4.27	4.94	27.60	36.45	9.92	9.05	0.51	1.02	0.83	0.00	0.00	0.00	0.00	0.24	0.00	0.00	0.00	0.00	0.00	97.08
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.19	0.00	0.39	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.58
<b>Rochford total</b>		<b>0.00</b>	<b>1.40</b>	<b>0.94</b>	<b>0.00</b>	<b>4.57</b>	<b>6.00</b>	<b>42.90</b>	<b>44.10</b>	<b>19.10</b>	<b>16.60</b>	<b>0.51</b>	<b>1.28</b>	<b>1.69</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.24</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>7.63</b>	<b>0.00</b>	<b>146.95</b>
Other destinations		105.39	195.59	76.77	95.67	147.07	88.35	21.87	20.89	19.85	4.52	65.59	11.30	21.23	121.50	178.66	113.81	85.87	80.82	161.02	417.50	442.63	1789.80	1324.96	5590.64
<b>TOTAL</b>		<b>105.39</b>	<b>197.79</b>	<b>78.91</b>	<b>96.31</b>	<b>154.53</b>	<b>111.02</b>	<b>91.13</b>	<b>77.99</b>	<b>73.40</b>	<b>61.63</b>	<b>196.55</b>	<b>108.23</b>	<b>117.27</b>	<b>122.65</b>	<b>180.25</b>	<b>115.14</b>	<b>86.44</b>	<b>81.05</b>	<b>161.37</b>	<b>417.50</b>	<b>442.94</b>	<b>1859.92</b>	<b>1324.96</b>	<b>6262.37</b>

Source: Tables 2B and 3.

**Table 7A - Future 2038 convenience goods shopping patterns (£M) - low growth**

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total	
<b>Expenditure 2038</b>		106.00	199.27	78.99	95.45	154.03	110.65	86.37	74.73	70.11	59.51	197.89	109.08	116.90	123.23	181.18	117.20	85.79	81.18	162.54	419.74	441.14	1863.44	1328.00	6262.43	
<b>Southend-on-Sea</b>																										
Southend town centre		0.00	0.00	0.18	0.00	0.00	0.56	0.85	0.73	1.80	4.14	46.48	20.20	8.84	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	57.95	0.00	141.74
Southend out-of-centre		0.00	0.80	1.02	0.63	2.71	7.27	22.05	8.77	29.53	31.83	67.06	48.18	51.93	1.02	1.32	0.00	0.56	0.00	0.36	0.00	0.31	4.66	0.00	0.00	280.01
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.41	1.51	0.00	0.00	3.84	12.83	1.06	0.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	19.78
Eastwood town centre		0.00	0.00	0.00	0.00	0.00	1.01	1.12	1.24	0.59	3.12	1.09	5.65	8.46	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	22.28
Leigh-on-Sea		0.00	0.00	0.00	0.00	0.17	7.78	0.00	0.08	0.28	0.04	0.73	2.76	23.64	0.00	0.27	1.36	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	37.11
Thorpe Bay town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.31	0.00	0.05	0.00	4.87	6.60	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.96
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.20	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.31
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.25	0.13	0.66	0.00	2.06	0.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.17
<b>Southend total</b>		<b>0.00</b>	<b>0.80</b>	<b>1.20</b>	<b>0.63</b>	<b>2.88</b>	<b>16.62</b>	<b>24.99</b>	<b>12.46</b>	<b>32.91</b>	<b>39.12</b>	<b>131.34</b>	<b>96.41</b>	<b>94.06</b>	<b>1.16</b>	<b>1.59</b>	<b>1.36</b>	<b>0.56</b>	<b>0.00</b>	<b>0.36</b>	<b>0.00</b>	<b>0.31</b>	<b>62.61</b>	<b>0.00</b>	<b>521.36</b>	
<b>Rochford</b>																										
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.21	0.00	7.36	4.75	0.00	0.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.47
Rayleigh town centre		0.00	0.00	0.09	0.00	0.31	1.05	13.45	5.32	0.00	0.64	0.00	0.00	0.85	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.64	0.00	0.00	29.35
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.85	1.03	0.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.98
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.52	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.52
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.30	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.30
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.79	0.00	0.00	0.00	0.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.91
Rochford out-of-centre		0.00	1.41	0.85	0.00	4.25	4.92	26.15	34.93	9.48	8.74	0.51	1.03	0.83	0.00	0.00	0.00	0.00	0.24	0.00	0.00	0.00	0.00	0.00	0.00	93.35
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.19	0.00	0.37	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.56
<b>Rochford total</b>		<b>0.00</b>	<b>1.41</b>	<b>0.94</b>	<b>0.00</b>	<b>4.56</b>	<b>5.98</b>	<b>40.65</b>	<b>42.26</b>	<b>18.24</b>	<b>16.03</b>	<b>0.51</b>	<b>1.29</b>	<b>1.68</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.24</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>7.64</b>	<b>0.00</b>	<b>141.43</b>	
Other destinations		106.00	197.05	76.85	94.82	146.59	88.06	20.73	20.01	18.96	4.36	66.04	11.39	21.16	122.07	179.59	115.84	85.24	80.94	162.18	419.74	440.83	1793.19	1328.00	5599.64	
<b>TOTAL</b>		<b>106.00</b>	<b>199.27</b>	<b>78.99</b>	<b>95.45</b>	<b>154.03</b>	<b>110.65</b>	<b>86.37</b>	<b>74.73</b>	<b>70.11</b>	<b>59.51</b>	<b>197.89</b>	<b>109.08</b>	<b>116.90</b>	<b>123.23</b>	<b>181.18</b>	<b>117.20</b>	<b>85.79</b>	<b>81.18</b>	<b>162.54</b>	<b>419.74</b>	<b>441.14</b>	<b>1863.44</b>	<b>1328.00</b>	<b>6262.43</b>	

Source: Tables 2A and 3.



**Table 7B - Future 2038 convenience goods shopping patterns (£M) - high growth**

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
<b>Expenditure 2038</b>		106.00	199.27	78.99	95.45	154.03	110.65	93.61	80.11	75.40	63.31	197.89	109.08	116.90	123.23	181.18	117.20	85.79	81.18	162.54	419.74	441.14	1863.44	1328.00	6284.15
<b>Southend-on-Sea</b>																									
Southend town centre		0.00	0.00	0.18	0.00	0.00	0.56	0.92	0.79	1.94	4.40	46.48	20.20	8.84	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	57.95	0.00	142.26
Southend out-of-centre		0.00	0.80	1.02	0.63	2.71	7.27	23.90	9.40	31.76	33.87	67.06	48.18	51.93	1.02	1.32	0.00	0.56	0.00	0.36	0.00	0.31	4.66	0.00	286.75
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.44	1.62	0.00	0.00	3.84	12.83	1.06	0.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	19.92
Eastwood town centre		0.00	0.00	0.00	0.00	0.00	1.01	1.22	1.33	0.63	3.32	1.09	5.65	8.46	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	22.71
Leigh-on-Sea		0.00	0.00	0.00	0.00	0.17	7.78	0.00	0.09	0.30	0.04	0.73	2.76	23.64	0.00	0.27	1.36	0.00	0.00	0.00	0.00	0.00	0.00	0.00	37.14
Thorpe Bay town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.34	0.00	0.05	0.00	4.87	6.60	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.99
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.20	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.31
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.27	0.14	0.71	0.00	2.06	0.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.25
<b>Southend total</b>		<b>0.00</b>	<b>0.80</b>	<b>1.20</b>	<b>0.63</b>	<b>2.88</b>	<b>16.62</b>	<b>27.08</b>	<b>13.35</b>	<b>35.39</b>	<b>41.62</b>	<b>131.34</b>	<b>96.41</b>	<b>94.06</b>	<b>1.16</b>	<b>1.59</b>	<b>1.36</b>	<b>0.56</b>	<b>0.00</b>	<b>0.36</b>	<b>0.00</b>	<b>0.31</b>	<b>62.61</b>	<b>0.00</b>	<b>529.33</b>
<b>Rochford</b>																									
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.22	0.00	7.92	5.06	0.00	0.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	13.34
Rayleigh town centre		0.00	0.00	0.09	0.00	0.31	1.05	14.58	5.70	0.00	0.68	0.00	0.00	0.85	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.64	0.00	30.90
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.92	1.11	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.13
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.62	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.62
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.40	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.40
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.85	0.00	0.00	0.00	0.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.97
Rochford out-of-centre		0.00	1.41	0.85	0.00	4.25	4.92	28.35	37.44	10.19	9.29	0.51	1.03	0.83	0.00	0.00	0.00	0.00	0.24	0.00	0.00	0.00	0.00	0.00	99.33
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.20	0.00	0.40	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.60
<b>Rochford total</b>		<b>0.00</b>	<b>1.41</b>	<b>0.94</b>	<b>0.00</b>	<b>4.56</b>	<b>5.98</b>	<b>44.06</b>	<b>45.30</b>	<b>19.62</b>	<b>17.05</b>	<b>0.51</b>	<b>1.29</b>	<b>1.68</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.24</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>7.64</b>	<b>0.00</b>	<b>150.29</b>
Other destinations		106.00	197.05	76.85	94.82	146.59	88.06	22.47	21.45	20.39	4.64	66.04	11.39	21.16	122.07	179.59	115.84	85.24	80.94	162.18	419.74	440.83	1793.19	1328.00	5604.53
<b>TOTAL</b>		<b>106.00</b>	<b>199.27</b>	<b>78.99</b>	<b>95.45</b>	<b>154.03</b>	<b>110.65</b>	<b>93.61</b>	<b>80.11</b>	<b>75.40</b>	<b>63.31</b>	<b>197.89</b>	<b>109.08</b>	<b>116.90</b>	<b>123.23</b>	<b>181.18</b>	<b>117.20</b>	<b>85.79</b>	<b>81.18</b>	<b>162.54</b>	<b>419.74</b>	<b>441.14</b>	<b>1863.44</b>	<b>1328.00</b>	<b>6284.15</b>

Source: Tables 2B and 3.

**Table 8A - Future 2043 convenience goods shopping patterns (£M) - low growth**

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total	
<b>Expenditure 2043</b>		107.04	201.84	79.30	94.94	154.55	110.82	86.77	75.34	71.10	60.44	200.03	110.50	116.85	123.80	182.96	119.74	85.46	81.60	164.32	423.55	441.75	1874.53	1336.98	6304.21	
<b>Southend-on-Sea</b>																										
Southend town centre		0.00	0.00	0.18	0.00	0.00	0.57	0.85	0.74	1.83	4.20	46.99	20.46	8.83	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	58.30	0.00	142.95
Southend out-of-centre		0.00	0.81	1.02	0.63	2.72	7.28	22.15	8.84	29.95	32.33	67.79	48.81	51.91	1.03	1.34	0.00	0.56	0.00	0.36	0.00	0.31	4.69	0.00	0.00	282.50
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.41	1.52	0.00	0.00	3.88	12.99	1.06	0.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	20.00
Eastwood town centre		0.00	0.00	0.00	0.00	0.00	1.01	1.13	1.25	0.60	3.17	1.10	5.72	8.46	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	22.44
Leigh-on-Sea		0.00	0.00	0.00	0.00	0.17	7.79	0.00	0.08	0.28	0.04	0.74	2.80	23.63	0.00	0.27	1.39	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	37.19
Thorpe Bay town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.31	0.00	0.05	0.00	4.92	6.69	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.10
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.26	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.37
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.25	0.13	0.67	0.00	2.08	0.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.21
<b>Southend total</b>		<b>0.00</b>	<b>0.81</b>	<b>1.21</b>	<b>0.63</b>	<b>2.89</b>	<b>16.65</b>	<b>25.10</b>	<b>12.56</b>	<b>33.37</b>	<b>39.73</b>	<b>132.76</b>	<b>97.66</b>	<b>94.02</b>	<b>1.16</b>	<b>1.61</b>	<b>1.39</b>	<b>0.56</b>	<b>0.00</b>	<b>0.36</b>	<b>0.00</b>	<b>0.31</b>	<b>62.98</b>	<b>0.00</b>	<b>525.76</b>	
<b>Rochford</b>																										
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.21	0.00	7.47	4.83	0.00	0.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.65
Rayleigh town centre		0.00	0.00	0.09	0.00	0.31	1.05	13.51	5.36	0.00	0.65	0.00	0.00	0.85	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.69	0.00	29.51
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.85	1.04	0.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.99
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.55	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.55
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.32	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.32
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.00	0.80	0.00	0.00	0.00	0.00	0.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.92
Rochford out-of-centre		0.00	1.43	0.86	0.00	4.27	4.93	26.27	35.21	9.61	8.87	0.52	1.04	0.83	0.00	0.00	0.00	0.00	0.24	0.00	0.00	0.00	0.00	0.00	0.00	94.08
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.19	0.00	0.38	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.57
<b>Rochford total</b>		<b>0.00</b>	<b>1.43</b>	<b>0.94</b>	<b>0.00</b>	<b>4.57</b>	<b>5.98</b>	<b>40.84</b>	<b>42.60</b>	<b>18.50</b>	<b>16.28</b>	<b>0.52</b>	<b>1.30</b>	<b>1.68</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.24</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>7.69</b>	<b>0.00</b>	<b>142.58</b>	
Other destinations		107.04	199.60	77.15	94.31	147.09	88.19	20.82	20.18	19.23	4.43	66.75	11.54	21.15	122.63	181.35	118.35	84.91	81.36	163.96	423.55	441.44	1803.86	1336.98	5635.86	
<b>TOTAL</b>		<b>107.04</b>	<b>201.84</b>	<b>79.30</b>	<b>94.94</b>	<b>154.55</b>	<b>110.82</b>	<b>86.77</b>	<b>75.34</b>	<b>71.10</b>	<b>60.44</b>	<b>200.03</b>	<b>110.50</b>	<b>116.85</b>	<b>123.80</b>	<b>182.96</b>	<b>119.74</b>	<b>85.46</b>	<b>81.60</b>	<b>164.32</b>	<b>423.55</b>	<b>441.75</b>	<b>1874.53</b>	<b>1336.98</b>	<b>6304.21</b>	

Source: Tables 2A and 3.

**Table 8B - Future 2043 convenience goods shopping patterns (£M) - high growth**

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
<b>Expenditure 2043</b>		107.04	201.84	79.30	94.94	154.55	110.82	96.25	82.37	77.53	65.10	200.03	110.50	116.85	123.80	182.96	119.74	85.46	81.60	164.32	423.55	441.75	1874.53	1336.98	6331.81
<b>Southend-on-Sea</b>																									
Southend town centre		0.00	0.00	0.18	0.00	0.00	0.57	0.94	0.81	1.99	4.52	46.99	20.46	8.83	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	58.30	0.00	143.60
Southend out-of-centre		0.00	0.81	1.02	0.63	2.72	7.28	24.57	9.66	32.65	34.82	67.79	48.81	51.91	1.03	1.34	0.00	0.56	0.00	0.36	0.00	0.31	4.69	0.00	290.95
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.45	1.66	0.00	0.00	3.88	12.99	1.06	0.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	20.19
Eastwood town centre		0.00	0.00	0.00	0.00	0.00	1.01	1.25	1.37	0.65	3.41	1.10	5.72	8.46	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	22.97
Leigh-on-Sea		0.00	0.00	0.00	0.00	0.17	7.79	0.00	0.09	0.31	0.04	0.74	2.80	23.63	0.00	0.27	1.39	0.00	0.00	0.00	0.00	0.00	0.00	0.00	37.23
Thorpe Bay town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.35	0.00	0.05	0.00	4.92	6.69	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.14
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.26	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.37
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.28	0.14	0.73	0.00	2.08	0.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.31
<b>Southend total</b>		<b>0.00</b>	<b>0.81</b>	<b>1.21</b>	<b>0.63</b>	<b>2.89</b>	<b>16.65</b>	<b>27.85</b>	<b>13.73</b>	<b>36.39</b>	<b>42.79</b>	<b>132.76</b>	<b>97.66</b>	<b>94.02</b>	<b>1.16</b>	<b>1.61</b>	<b>1.39</b>	<b>0.56</b>	<b>0.00</b>	<b>0.36</b>	<b>0.00</b>	<b>0.31</b>	<b>62.98</b>	<b>0.00</b>	<b>535.75</b>
<b>Rochford</b>																									
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.23	0.00	8.14	5.20	0.00	0.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	13.72
Rayleigh town centre		0.00	0.00	0.09	0.00	0.31	1.05	14.99	5.86	0.00	0.70	0.00	0.00	0.85	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.69	0.00	31.54
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.94	1.14	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.19
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.67	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.67
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.44	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.44
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.87	0.00	0.00	0.00	0.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.99
Rochford out-of-centre		0.00	1.43	0.86	0.00	4.27	4.93	29.14	38.50	10.48	9.56	0.52	1.04	0.83	0.00	0.00	0.00	0.00	0.24	0.00	0.00	0.00	0.00	0.00	101.79
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.21	0.00	0.41	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.62
<b>Rochford total</b>		<b>0.00</b>	<b>1.43</b>	<b>0.94</b>	<b>0.00</b>	<b>4.57</b>	<b>5.98</b>	<b>45.31</b>	<b>46.58</b>	<b>20.17</b>	<b>17.53</b>	<b>0.52</b>	<b>1.30</b>	<b>1.68</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.24</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>7.69</b>	<b>0.00</b>	<b>153.95</b>
Other destinations		107.04	199.60	77.15	94.31	147.09	88.19	23.10	22.06	20.96	4.77	66.75	11.54	21.15	122.63	181.35	118.35	84.91	81.36	163.96	423.55	441.44	1803.86	1336.98	5642.10
<b>TOTAL</b>		<b>107.04</b>	<b>201.84</b>	<b>79.30</b>	<b>94.94</b>	<b>154.55</b>	<b>110.82</b>	<b>96.25</b>	<b>82.37</b>	<b>77.53</b>	<b>65.10</b>	<b>200.03</b>	<b>110.50</b>	<b>116.85</b>	<b>123.80</b>	<b>182.96</b>	<b>119.74</b>	<b>85.46</b>	<b>81.60</b>	<b>164.32</b>	<b>423.55</b>	<b>441.75</b>	<b>1874.53</b>	<b>1336.98</b>	<b>6331.81</b>

Source: Tables 2B and 3.

**Table 9 - Convenience goods floorspace in Rochford District (2023 prices)**

Store	Sales floorspace (sq.m net)	Convenience goods floorspace (%)	Convenience goods floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Co-op, Spa Road, Hockley	486	95%	461	£12,059	£5.56
Co-op, Ferry Road, Hockley	193	95%	183	£12,059	£2.21
Co-op, Ferry Road, Hockley	270	95%	257	£12,059	£3.10
Co-op, Main Road, Hockley	159	95%	151	£12,059	£1.82
Co-op, Main Road, Hockley	31	95%	30	£12,059	£0.36
Tesco Express, London Road, Rayleigh	191	95%	181	£16,226	£2.94
Sainsburys Local, Eastwood Road, Rayleigh	360	95%	342	£13,869	£4.74
M&S Simply Food (BP), London Road, Rayleigh	84	95%	79	£10,934	£0.87
M&S Foodhall, Eastwood Road, Rayleigh	2,282	95%	2,168	£10,934	£23.70
Iceland, High Street, Rayleigh	437	95%	415	£7,180	£2.98
Asda, Rawreth Lane, Rayleigh	2,195	90%	1,976	£11,105	£21.94
Co-op, Golden Cross Parade, Rochford	256	95%	243	£12,059	£2.94
Sainsburys Local, West Street, Rochford	199	95%	189	£13,869	£2.62
Co-op, High Street, Great Wakering, Southend-on-Sea	137	95%	130	£12,059	£1.57
Home Bargains, Rochford Road, Southend-on-Sea	643	30%	193	£6,731	£1.30
B&M Bargains, Southend-on-Sea	946	30%	284	£3,546	£1.01
<b>TOTAL</b>	<b>8,868</b>		<b>7,282</b>		<b>£79.65</b>

Source: ORC Storepoint 2025 and Global Data 2024

**Table 10A - Summary of convenience goods expenditure 2022 to 2040 (£M) - low growth**

	2023	2028	2033	2038	2043
<b>Available expenditure</b>					
Rochford town centre	12.51	12.29	12.35	12.47	12.65
Rayleigh town centre	29.90	29.25	29.27	29.35	29.51
Hockley town centre	1.99	1.96	1.97	1.98	1.99
Ashingdon	1.52	1.50	1.51	1.52	1.55
Great Wakering	1.31	1.29	1.29	1.30	1.32
Hullbridge	0.92	0.90	0.91	0.91	0.92
Rochford out-of-centre	94.46	92.68	92.94	93.35	94.08
Other Rochford District	0.56	0.55	0.56	0.56	0.57
<b>Total</b>	<b>143.18</b>	<b>140.43</b>	<b>140.79</b>	<b>141.43</b>	<b>142.58</b>
<b>Turnover of existing facilities</b>					
Rochford town centre	12.51	12.50	12.47	12.41	12.35
Rayleigh town centre	29.90	29.87	29.81	29.67	29.52
Hockley town centre	1.99	1.99	1.99	1.98	1.97
Ashingdon	1.52	1.52	1.51	1.51	1.50
Great Wakering	1.31	1.31	1.31	1.30	1.30
Hullbridge	0.92	0.92	0.91	0.91	0.90
Rochford out-of-centre	94.46	94.36	94.18	93.71	93.24
Other Rochford District	0.56	0.56	0.56	0.56	0.55
<b>Total</b>	<b>143.18</b>	<b>143.04</b>	<b>142.75</b>	<b>142.04</b>	<b>141.33</b>
<b>Surplus/deficit expenditure £M</b>					
Rochford town centre	0.00	-0.21	-0.12	0.05	0.30
Rayleigh town centre	0.00	-0.63	-0.55	-0.32	-0.01
Hockley town centre	0.00	-0.03	-0.02	0.00	0.02
Ashingdon	0.00	-0.02	-0.01	0.02	0.05
Great Wakering	0.00	-0.02	-0.02	0.00	0.03
Hullbridge	0.00	-0.01	-0.01	0.00	0.02
Rochford out-of-centre	0.00	-1.68	-1.24	-0.36	0.84
Other Rochford District	0.00	-0.01	0.00	0.00	0.01
<b>Total</b>	<b>0.00</b>	<b>-2.61</b>	<b>-1.96</b>	<b>-0.60</b>	<b>1.25</b>

Source: Tables 4 to 8A and Experian sales density growth rates from Retail Planner Briefing Note 22 - Figure 4a

**Table 10B - Summary of convenience goods expenditure 2022 to 2040 (£M) - high growth**

	2023	2028	2033	2038	2043
<b>Available expenditure</b>					
Rochford town centre	12.51	12.65	12.99	13.34	13.72
Rayleigh town centre	29.90	29.84	30.33	30.90	31.54
Hockley town centre	1.99	2.02	2.07	2.13	2.19
Ashingdon	1.52	1.54	1.58	1.62	1.67
Great Wakering	1.31	1.33	1.37	1.40	1.44
Hullbridge	0.92	0.92	0.95	0.97	0.99
Rochford out-of-centre	94.46	94.96	97.08	99.33	101.79
Other Rochford District	0.56	0.57	0.58	0.60	0.62
<b>Total</b>	<b>143.18</b>	<b>143.82</b>	<b>146.95</b>	<b>150.29</b>	<b>153.95</b>
<b>Turnover of existing facilities</b>					
Rochford town centre	12.51	12.50	12.47	12.41	12.35
Rayleigh town centre	29.90	29.87	29.81	29.67	29.52
Hockley town centre	1.99	1.99	1.99	1.98	1.97
Ashingdon	1.52	1.52	1.51	1.51	1.50
Great Wakering	1.31	1.31	1.31	1.30	1.30
Hullbridge	0.92	0.92	0.91	0.91	0.90
Rochford out-of-centre	94.46	94.36	94.18	93.71	93.24
Other Rochford District	0.56	0.56	0.56	0.56	0.55
<b>Total</b>	<b>143.18</b>	<b>143.04</b>	<b>142.75</b>	<b>142.04</b>	<b>141.33</b>
<b>Surplus/deficit expenditure £M</b>					
Rochford town centre	0.00	0.15	0.52	0.93	1.37
Rayleigh town centre	0.00	-0.04	0.52	1.23	2.02
Hockley town centre	0.00	0.02	0.08	0.15	0.22
Ashingdon	0.00	0.02	0.06	0.11	0.17
Great Wakering	0.00	0.02	0.06	0.10	0.14
Hullbridge	0.00	0.01	0.03	0.06	0.09
Rochford out-of-centre	0.00	0.59	2.90	5.62	8.56
Other Rochford District	0.00	0.01	0.02	0.04	0.06
<b>Total</b>	<b>0.00</b>	<b>0.78</b>	<b>4.20</b>	<b>8.25</b>	<b>12.62</b>

Source: Tables 4 to 8B and Experian sales density growth rates from Retail Planner Briefing Note 22 - Figure 4a

**Table 11A - Convenience goods floorspace capacity - low growth**

	2023	2028	2033	2038	2043
<b>Turnover density new floorspace (£ per sq.m)</b>	£12,845	£12,832	£12,807	£12,743	£12,679
<b>Sales floorspace projection (sq.m net)</b>					
Rochford town centre	0	-16	-10	4	23
Rayleigh town centre	0	-49	-43	-25	-1
Hockley town centre	0	-3	-2	0	2
Ashingdon	0	-2	-1	1	4
Great Wakering	0	-2	-1	0	2
Hullbridge	0	-1	-1	0	1
Rochford out-of-centre	0	-131	-97	-28	67
Other Rochford District	0	-1	0	0	1
	<b>0</b>	<b>-203</b>	<b>-153</b>	<b>-47</b>	<b>99</b>
<b>Gross floorspace projection (sq.m gross)</b>					
Rochford town centre	0	-23	-14	6	33
Rayleigh town centre	0	-70	-61	-36	-1
Hockley town centre	0	-4	-2	0	2
Ashingdon	0	-2	-1	2	5
Great Wakering	0	-3	-2	0	3
Hullbridge	0	-1	-1	0	2
Rochford out-of-centre	0	-187	-138	-40	95
Other Rochford District	0	-1	0	1	2
	<b>0</b>	<b>-291</b>	<b>-219</b>	<b>-68</b>	<b>141</b>

Source: Table 10A and Experian sales density growth rates from Retail Planner Briefing Note 22 - Figure 4a.

\* combined company average sales density for 8 main food store operators (Aldi, Asda, Lidl, M&S, Morrisons, Sainsbury's, Tesco and Waitrose)

**Table 11B - Convenience goods floorspace capacity - high growth**

	2023	2028	2033	2038	2043
<b>Turnover density new floorspace (£ per sq.m)</b>	£12,845	£12,832	£12,807	£12,743	£12,679
<b>Sales floorspace projection (sq.m net)</b>					
Rochford town centre	0	12	40	73	108
Rayleigh town centre	0	-3	41	97	159
Hockley town centre	0	2	7	12	17
Ashingdon	0	1	5	9	13
Great Wakering	0	1	4	8	11
Hullbridge	0	1	2	5	7
Rochford out-of-centre	0	46	227	441	675
Other Rochford District	0	1	2	3	5
	<b>0</b>	<b>61</b>	<b>328</b>	<b>647</b>	<b>996</b>
<b>Gross floorspace projection (sq.m gross)</b>					
Rochford town centre	0	17	58	104	154
Rayleigh town centre	0	-4	58	138	227
Hockley town centre	0	3	9	17	25
Ashingdon	0	2	7	13	19
Great Wakering	0	2	6	11	16
Hullbridge	0	1	4	7	10
Rochford out-of-centre	0	66	324	630	964
Other Rochford District	0	1	3	5	7
	<b>0</b>	<b>87</b>	<b>468</b>	<b>925</b>	<b>1,422</b>

Source: Table 10B and Experian sales density growth rates from Retail Planner Briefing Note 22 - Figure 4a.

\* combined company average sales density for 8 main food store operators (Aldi, Asda, Lidl, M&S, Morrisons, Sainsbury's, Tesco and Waitrose)



## **Appendix 3 Comparison goods capacity**



**Table 1 - Comparison goods expenditure per person per annum (£)**

Zone	2023	2028	2033	2038	2043
1	2,696	2,766	3,065	3,403	3,831
2	2,880	2,955	3,274	3,635	4,093
3	3,207	3,290	3,645	4,047	4,556
4	3,760	3,857	4,273	4,745	5,342
5	3,000	3,078	3,410	3,786	4,263
6	3,470	3,560	3,944	4,379	4,930
7	3,540	3,631	4,023	4,467	5,029
8	3,422	3,511	3,889	4,319	4,863
9	3,147	3,229	3,577	3,972	4,472
10	3,215	3,298	3,654	4,058	4,568
11	2,994	3,072	3,403	3,779	4,255
12	2,981	3,058	3,388	3,763	4,236
13	3,257	3,342	3,702	4,111	4,628
14	2,876	2,950	3,268	3,629	4,086
15	2,789	2,861	3,170	3,520	3,963
16	2,737	2,808	3,110	3,454	3,889
17	3,945	4,047	4,484	4,979	5,606
18	3,460	3,549	3,932	4,367	4,916
19	3,405	3,493	3,870	4,297	4,838
20	3,441	3,531	3,911	4,344	4,890
21	3,529	3,621	4,011	4,454	5,015
22	2,459	2,523	2,795	3,104	3,495
23	3,003	3,081	3,414	3,791	4,268

Sources: *Experian Local Expenditure 2023 (2023 prices)*  
*Experian growth rates from Retail Planner Briefing Note 22 - Figure 1a*

*Excludes Special Forms of Trading - Experian adjusted SFT Retail Planner Briefing Note 22 - Figure 5*

**Table 2A - Total comparison goods expenditure (£m) - low growth**

Zone	2023	2028	2033	2038	2043
1	113.69	119.42	135.15	153.46	176.77
2	223.28	234.76	265.67	302.16	349.17
3	93.56	97.58	109.99	124.30	142.36
4	124.24	129.14	144.66	161.85	183.65
5	176.55	183.71	206.00	231.80	265.33
6	137.40	142.60	160.07	180.10	205.77
7	106.76	112.35	127.31	144.09	165.14
8	88.65	93.79	106.61	120.97	139.11
9	80.42	84.73	96.10	109.39	126.55
10	68.04	71.96	81.94	93.55	108.38
11	222.63	234.82	266.31	302.69	349.05
12	126.15	132.83	150.61	171.36	198.03
13	138.39	145.12	163.58	184.08	209.91
14	139.12	147.25	167.25	189.70	217.41
15	203.81	216.58	246.55	279.77	322.29
16	126.92	136.29	156.45	179.77	209.53
17	113.83	117.49	131.06	146.85	166.88
18	98.03	103.36	116.94	132.22	151.61
19	189.08	199.70	227.12	258.26	297.85
20	507.31	535.96	608.82	690.98	795.43
21	551.84	572.65	642.07	721.89	824.67
22	2123.02	2214.95	2495.50	2822.53	3239.10
23	1536.49	1614.32	1824.07	2063.94	2370.45
<b>Total</b>	<b>7,289.21</b>	<b>7,641.36</b>	<b>8,629.83</b>	<b>9,765.71</b>	<b>11,214.44</b>

Source: Tables 1A, Appendix 1 and Table 1, Appendix 2

**Table 2B - Total comparison goods expenditure (£m) - high growth**

Zone	2023	2028	2033	2038	2043
1	113.69	119.42	135.15	153.46	176.77
2	223.28	234.76	265.67	302.16	349.17
3	93.56	97.58	109.99	124.30	142.36
4	124.24	129.14	144.66	161.85	183.65
5	176.55	183.71	206.00	231.80	265.33
6	137.40	142.60	160.07	180.10	205.77
7	106.76	115.95	134.68	156.17	183.18
8	88.65	96.28	111.83	129.68	152.11
9	80.42	87.35	101.45	117.64	137.99
10	68.04	73.89	85.82	99.52	116.74
11	222.63	234.82	266.31	302.69	349.05
12	126.15	132.83	150.61	171.36	198.03
13	138.39	145.12	163.58	184.08	209.91
14	139.12	147.25	167.25	189.70	217.41
15	203.81	216.58	246.55	279.77	322.29
16	126.92	136.29	156.45	179.77	209.53
17	113.83	117.49	131.06	146.85	166.88
18	98.03	103.36	116.94	132.22	151.61
19	189.08	199.70	227.12	258.26	297.85
20	507.31	535.96	608.82	690.98	795.43
21	551.84	572.65	642.07	721.89	824.67
22	2123.02	2214.95	2495.50	2822.53	3239.10
23	1536.49	1614.32	1824.07	2063.94	2370.45
<b>Total</b>	<b>7,289.21</b>	<b>7,652.01</b>	<b>8,651.64</b>	<b>9,800.73</b>	<b>11,265.27</b>

Source: Tables 1B, Appendix 1 and Table 1, Appendix 2

**Table 3 - Base year comparison goods market shares (%)**

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23
<b>Southend-on-Sea</b>																								
Southend town centre		0.92	0.82	0.20	0.00	5.84	19.60	26.08	10.92	49.46	31.25	63.39	54.54	38.90	0.07	0.17	0.21	1.13	2.18	1.25	0.04	0.00	0.00	0.00
Southend out-of-centre		0.04	1.01	0.02	0.00	1.31	1.95	4.82	4.68	24.03	29.75	11.79	18.44	15.74	0.32	0.01	0.15	1.48	0.05	0.00	0.00	2.22	0.12	0.56
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.18	0.00	0.00	0.50	0.36	0.32	0.39	7.18	1.30	0.00	0.00	0.00	0.02	0.19	0.00	0.00	0.00	0.00	0.00
Westcliff-on-Sea out-of-centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.14	0.00	0.00	0.00	0.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Leigh-on-Sea		0.43	0.82	0.39	0.00	0.59	5.85	0.61	0.92	0.28	0.30	0.40	2.53	12.72	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.03	0.00	0.00	0.00	1.18	0.00	3.55	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.17	0.00	0.57	0.30	1.86	0.54	0.18	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.09	0.00	0.00
<b>Southend total</b>		<b>1.39</b>	<b>2.65</b>	<b>0.61</b>	<b>0.00</b>	<b>7.95</b>	<b>27.40</b>	<b>31.68</b>	<b>17.16</b>	<b>75.88</b>	<b>61.92</b>	<b>81.38</b>	<b>83.33</b>	<b>68.84</b>	<b>0.39</b>	<b>0.18</b>	<b>0.36</b>	<b>2.63</b>	<b>2.42</b>	<b>1.25</b>	<b>0.04</b>	<b>2.31</b>	<b>0.12</b>	<b>0.56</b>
<b>Rochford</b>																								
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.18	2.66	1.93	7.13	9.16	1.17	0.11	0.99	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.11	0.42	0.00
Rayleigh town centre		1.01	0.15	0.95	0.57	2.38	6.70	31.28	23.44	0.79	4.01	0.26	1.05	4.34	0.00	0.00	0.00	0.39	2.74	0.16	0.00	0.00	0.00	0.00
Rayleigh out-of-centre		0.19	0.18	0.47	0.04	7.49	6.15	2.50	6.32	0.73	1.31	0.05	0.33	2.13	0.01	0.00	0.06	0.02	0.38	0.01	0.16	0.00	0.01	0.22
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	3.90	2.70	0.12	0.57	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.02	0.17	4.87	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.50	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.94	3.37	0.00	0.00	0.18	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Rochford total</b>		<b>1.20</b>	<b>0.33</b>	<b>1.42</b>	<b>0.61</b>	<b>9.87</b>	<b>13.03</b>	<b>41.28</b>	<b>37.78</b>	<b>10.44</b>	<b>19.92</b>	<b>1.66</b>	<b>1.49</b>	<b>7.46</b>	<b>0.01</b>	<b>0.00</b>	<b>0.06</b>	<b>0.41</b>	<b>3.12</b>	<b>0.17</b>	<b>0.16</b>	<b>0.11</b>	<b>0.43</b>	<b>0.22</b>
Other destinations		97.41	97.02	97.97	99.39	82.18	59.57	27.04	45.06	13.68	18.16	16.96	15.18	23.70	99.60	99.82	99.58	96.96	94.46	98.58	99.80	97.58	99.45	99.22
<b>TOTAL</b>		<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>

Source: South Essex Retail Study Volume 2, Appendix C, Table C.

**Table 4 - Base year comparison goods shopping patterns (£M)**

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
<b>Expenditure 2023</b>		113.69	223.28	93.56	124.24	176.55	137.40	106.76	88.65	80.42	68.04	222.63	126.15	138.39	139.12	203.81	126.92	113.83	98.03	189.08	507.31	551.84	2123.02	1536.49	7289.21
<b>Southend-on-Sea</b>																									
Southend town centre		1.05	1.83	0.19	0.00	10.31	26.93	27.84	9.68	39.78	21.26	141.12	68.80	53.83	0.10	0.35	0.27	1.29	2.14	2.36	0.20	0.00	0.00	0.00	409.33
Southend out-of-centre		0.05	2.26	0.02	0.00	2.31	2.68	5.15	4.15	19.33	20.24	26.25	23.26	21.78	0.45	0.02	0.19	1.68	0.05	0.00	0.00	12.25	2.55	8.60	153.26
Westcliff-on-Sea town centre		0.00	0.00	0.00	0.00	0.32	0.00	0.00	0.44	0.29	0.22	0.87	9.06	1.80	0.00	0.00	0.00	0.02	0.19	0.00	0.00	0.00	0.00	0.00	13.20
Westcliff-on-Sea out-of-centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.12	0.00	0.00	0.00	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.25
Leigh-on-Sea		0.49	1.83	0.36	0.00	1.04	8.04	0.65	0.82	0.23	0.20	0.89	3.19	17.60	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	35.35
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.05	0.00	0.00	0.00	0.95	0.00	7.90	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.91
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.18	0.00	0.46	0.20	4.14	0.68	0.25	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.50	0.00	0.00	6.41
<b>Southend total</b>		<b>1.58</b>	<b>5.92</b>	<b>0.57</b>	<b>0.00</b>	<b>14.04</b>	<b>37.65</b>	<b>33.82</b>	<b>15.21</b>	<b>61.03</b>	<b>42.13</b>	<b>181.18</b>	<b>105.12</b>	<b>95.27</b>	<b>0.54</b>	<b>0.37</b>	<b>0.46</b>	<b>2.99</b>	<b>2.37</b>	<b>2.36</b>	<b>0.20</b>	<b>12.75</b>	<b>2.55</b>	<b>8.60</b>	<b>626.70</b>
<b>Rochford</b>																									
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.25	2.84	1.71	5.73	6.23	2.60	0.14	1.37	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.61	8.92	0.00	30.40
Rayleigh town centre		1.15	0.33	0.89	0.71	4.20	9.21	33.40	20.78	0.64	2.73	0.58	1.32	6.01	0.00	0.00	0.00	0.44	2.69	0.30	0.00	0.00	0.00	0.00	85.37
Rayleigh out-of-centre		0.22	0.40	0.44	0.05	13.22	8.45	2.67	5.60	0.59	0.89	0.11	0.42	2.95	0.01	0.00	0.08	0.02	0.37	0.02	0.81	0.00	0.21	3.38	40.92
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	4.16	2.39	0.10	0.39	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.04
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.02	0.14	3.31	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.47
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.21	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.21
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	1.00	2.99	0.00	0.00	0.40	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.39
<b>Rochford total</b>		<b>1.36</b>	<b>0.74</b>	<b>1.33</b>	<b>0.76</b>	<b>17.43</b>	<b>17.90</b>	<b>44.07</b>	<b>33.49</b>	<b>8.40</b>	<b>13.55</b>	<b>3.70</b>	<b>1.88</b>	<b>10.32</b>	<b>0.01</b>	<b>0.00</b>	<b>0.08</b>	<b>0.47</b>	<b>3.06</b>	<b>0.32</b>	<b>0.81</b>	<b>0.61</b>	<b>9.13</b>	<b>3.38</b>	<b>172.79</b>
Other destinations		110.75	216.63	91.66	123.48	145.09	81.85	28.87	39.95	11.00	12.36	37.76	19.15	32.80	138.56	203.44	126.38	110.37	92.60	186.39	506.29	538.48	2111.34	1524.51	6489.71
<b>TOTAL</b>		<b>113.69</b>	<b>223.28</b>	<b>93.56</b>	<b>124.24</b>	<b>176.55</b>	<b>137.40</b>	<b>106.76</b>	<b>88.65</b>	<b>80.42</b>	<b>68.04</b>	<b>222.63</b>	<b>126.15</b>	<b>138.39</b>	<b>139.12</b>	<b>203.81</b>	<b>126.92</b>	<b>113.83</b>	<b>98.03</b>	<b>189.08</b>	<b>507.31</b>	<b>551.84</b>	<b>2123.02</b>	<b>1536.49</b>	<b>7289.21</b>

Source: Tables 2A and 3.

**Table 5A - Future 2028 comparison goods shopping patterns (£M) - low growth**

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
<b>Expenditure 2028</b>		119.42	234.76	97.58	129.14	183.71	142.60	112.35	93.79	84.73	71.96	234.82	132.83	145.12	147.25	216.58	136.29	117.49	103.36	199.70	535.96	572.65	2214.95	1614.32	7641.36
<b>Southend-on-Sea</b>																									
Southend town centre		1.10	1.93	0.20	0.00	10.73	27.95	29.30	10.24	41.91	22.49	148.85	72.44	56.45	0.10	0.37	0.29	1.33	2.25	2.50	0.21	0.00	0.00	0.00	430.63
Southend out-of-centre		0.05	2.37	0.02	0.00	2.41	2.78	5.42	4.39	20.36	21.41	27.69	24.49	22.84	0.47	0.02	0.20	1.74	0.05	0.00	0.00	12.71	2.66	9.04	161.12
Westcliff-on-Sea town centre		0.00	0.00	0.00	0.00	0.33	0.00	0.00	0.47	0.31	0.23	0.92	9.54	1.89	0.00	0.00	0.00	0.02	0.20	0.00	0.00	0.00	0.00	0.00	13.89
Westcliff-on-Sea out-of-centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.13	0.00	0.00	0.00	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.26
Leigh-on-Sea		0.51	1.93	0.38	0.00	1.08	8.34	0.69	0.86	0.24	0.22	0.94	3.36	18.46	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	37.01
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.06	0.00	0.00	0.00	1.00	0.00	8.34	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.39
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.19	0.00	0.48	0.22	4.37	0.72	0.26	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.52	0.00	0.00	6.75
<b>Southend total</b>		<b>1.66</b>	<b>6.22</b>	<b>0.60</b>	<b>0.00</b>	<b>14.60</b>	<b>39.07</b>	<b>35.59</b>	<b>16.09</b>	<b>64.29</b>	<b>44.56</b>	<b>191.10</b>	<b>110.69</b>	<b>99.90</b>	<b>0.57</b>	<b>0.39</b>	<b>0.49</b>	<b>3.09</b>	<b>2.50</b>	<b>2.50</b>	<b>0.21</b>	<b>13.23</b>	<b>2.66</b>	<b>9.04</b>	<b>659.06</b>
<b>Rochford</b>																									
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.26	2.99	1.81	6.04	6.59	2.75	0.15	1.44	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.63	9.30	0.00	31.95
Rayleigh town centre		1.21	0.35	0.93	0.74	4.37	9.55	35.14	21.98	0.67	2.89	0.61	1.39	6.30	0.00	0.00	0.00	0.46	2.83	0.32	0.00	0.00	0.00	0.00	89.74
Rayleigh out-of-centre		0.23	0.42	0.46	0.05	13.76	8.77	2.81	5.93	0.62	0.94	0.12	0.44	3.09	0.01	0.00	0.08	0.02	0.39	0.02	0.86	0.00	0.22	3.55	42.80
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	4.38	2.53	0.10	0.41	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.43
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.02	0.14	3.50	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.67
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.27	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.27
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	1.06	3.16	0.00	0.00	0.42	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.64
<b>Rochford total</b>		<b>1.43</b>	<b>0.77</b>	<b>1.39</b>	<b>0.79</b>	<b>18.13</b>	<b>18.58</b>	<b>46.38</b>	<b>35.43</b>	<b>8.85</b>	<b>14.33</b>	<b>3.90</b>	<b>1.98</b>	<b>10.83</b>	<b>0.01</b>	<b>0.00</b>	<b>0.08</b>	<b>0.48</b>	<b>3.22</b>	<b>0.34</b>	<b>0.86</b>	<b>0.63</b>	<b>9.52</b>	<b>3.55</b>	<b>181.49</b>
Other destinations		116.33	227.77	95.60	128.35	150.97	84.95	30.38	42.26	11.59	13.07	39.83	20.16	34.39	146.66	216.19	135.72	113.92	97.64	196.86	534.89	558.80	2202.77	1601.73	6800.81
<b>TOTAL</b>		<b>119.42</b>	<b>234.76</b>	<b>97.58</b>	<b>129.14</b>	<b>183.71</b>	<b>142.60</b>	<b>112.35</b>	<b>93.79</b>	<b>84.73</b>	<b>71.96</b>	<b>234.82</b>	<b>132.83</b>	<b>145.12</b>	<b>147.25</b>	<b>216.58</b>	<b>136.29</b>	<b>117.49</b>	<b>103.36</b>	<b>199.70</b>	<b>535.96</b>	<b>572.65</b>	<b>2214.95</b>	<b>1614.32</b>	<b>7641.36</b>

Source: Tables 2A and 3.



**Table 5B - Future 2028 comparison goods shopping patterns (£M) - high growth**

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
<b>Expenditure 2028</b>		119.42	234.76	97.58	129.14	183.71	142.60	115.95	96.28	87.35	73.89	234.82	132.83	145.12	147.25	216.58	136.29	117.49	103.36	199.70	535.96	572.65	2214.95	1614.32	7652.01
<b>Southend-on-Sea</b>																									
Southend town centre		1.10	1.93	0.20	0.00	10.73	27.95	30.24	10.51	43.20	23.09	148.85	72.44	56.45	0.10	0.37	0.29	1.33	2.25	2.50	0.21	0.00	0.00	0.00	433.74
Southend out-of-centre		0.05	2.37	0.02	0.00	2.41	2.78	5.59	4.51	20.99	21.98	27.69	24.49	22.84	0.47	0.02	0.20	1.74	0.05	0.00	0.00	12.71	2.66	9.04	162.61
Westcliff-on-Sea town centre		0.00	0.00	0.00	0.00	0.33	0.00	0.00	0.48	0.31	0.24	0.92	9.54	1.89	0.00	0.00	0.00	0.02	0.20	0.00	0.00	0.00	0.00	0.00	13.92
Westcliff-on-Sea out-of-centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.13	0.00	0.00	0.00	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.27
Leigh-on-Sea		0.51	1.93	0.38	0.00	1.08	8.34	0.71	0.89	0.24	0.22	0.94	3.36	18.46	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	37.06
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.06	0.00	0.00	0.00	1.03	0.00	8.34	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.42
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.20	0.00	0.50	0.22	4.37	0.72	0.26	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.52	0.00	0.00	6.78
<b>Southend total</b>		<b>1.66</b>	<b>6.22</b>	<b>0.60</b>	<b>0.00</b>	<b>14.60</b>	<b>39.07</b>	<b>36.73</b>	<b>16.52</b>	<b>66.28</b>	<b>45.75</b>	<b>191.10</b>	<b>110.69</b>	<b>99.90</b>	<b>0.57</b>	<b>0.39</b>	<b>0.49</b>	<b>3.09</b>	<b>2.50</b>	<b>2.50</b>	<b>0.21</b>	<b>13.23</b>	<b>2.66</b>	<b>9.04</b>	<b>663.81</b>
<b>Rochford</b>																									
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.26	3.08	1.86	6.23	6.77	2.75	0.15	1.44	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.63	9.30	0.00	32.46
Rayleigh town centre		1.21	0.35	0.93	0.74	4.37	9.55	36.27	22.57	0.69	2.96	0.61	1.39	6.30	0.00	0.00	0.00	0.46	2.83	0.32	0.00	0.00	0.00	0.00	91.55
Rayleigh out-of-centre		0.23	0.42	0.46	0.05	13.76	8.77	2.90	6.08	0.64	0.97	0.12	0.44	3.09	0.01	0.00	0.08	0.02	0.39	0.02	0.86	0.00	0.22	3.55	43.09
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	4.52	2.60	0.10	0.42	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.65
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.02	0.15	3.60	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.77
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.31	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.31
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	1.09	3.24	0.00	0.00	0.42	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.76
<b>Rochford total</b>		<b>1.43</b>	<b>0.77</b>	<b>1.39</b>	<b>0.79</b>	<b>18.13</b>	<b>18.58</b>	<b>47.87</b>	<b>36.37</b>	<b>9.12</b>	<b>14.72</b>	<b>3.90</b>	<b>1.98</b>	<b>10.83</b>	<b>0.01</b>	<b>0.00</b>	<b>0.08</b>	<b>0.48</b>	<b>3.22</b>	<b>0.34</b>	<b>0.86</b>	<b>0.63</b>	<b>9.52</b>	<b>3.55</b>	<b>184.58</b>
Other destinations		116.33	227.77	95.60	128.35	150.97	84.95	31.35	43.38	11.95	13.42	39.83	20.16	34.39	146.66	216.19	135.72	113.92	97.64	196.86	534.89	558.80	2202.77	1601.73	6803.62
<b>TOTAL</b>		<b>119.42</b>	<b>234.76</b>	<b>97.58</b>	<b>129.14</b>	<b>183.71</b>	<b>142.60</b>	<b>115.95</b>	<b>96.28</b>	<b>87.35</b>	<b>73.89</b>	<b>234.82</b>	<b>132.83</b>	<b>145.12</b>	<b>147.25</b>	<b>216.58</b>	<b>136.29</b>	<b>117.49</b>	<b>103.36</b>	<b>199.70</b>	<b>535.96</b>	<b>572.65</b>	<b>2214.95</b>	<b>1614.32</b>	<b>7652.01</b>

Source: Tables 2B and 3.

**Table 6A - Future 2033 comparison goods shopping patterns (£M) - low growth**

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
<b>Expenditure 2033</b>		135.15	265.67	109.99	144.66	206.00	160.07	127.31	106.61	96.10	81.94	266.31	150.61	163.58	167.25	246.55	156.45	131.06	116.94	227.12	608.82	642.07	2495.50	1824.07	8629.83
<b>Southend-on-Sea</b>																									
Southend town centre		1.24	2.18	0.22	0.00	12.03	31.37	33.20	11.64	47.53	25.61	168.81	82.14	63.63	0.12	0.42	0.33	1.48	2.55	2.84	0.24	0.00	0.00	0.00	487.60
Southend out-of-centre		0.05	2.68	0.02	0.00	2.70	3.12	6.14	4.99	23.09	24.38	31.40	27.77	25.75	0.54	0.02	0.23	1.94	0.06	0.00	0.00	14.25	2.99	10.21	182.35
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.37	0.00	0.00	0.53	0.35	0.26	1.04	10.81	2.13	0.00	0.00	0.00	0.03	0.22	0.00	0.00	0.00	0.00	0.00	15.74
Westcliffe-on-Sea out-of-centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.15	0.00	0.00	0.00	0.15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.30
Leigh-on-Sea		0.58	2.18	0.43	0.00	1.22	9.36	0.78	0.98	0.27	0.25	1.07	3.81	20.81	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	41.72
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.06	0.00	0.00	0.00	1.13	0.00	9.45	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.65
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.22	0.00	0.55	0.25	4.95	0.81	0.29	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.58	0.00	7.65
<b>Southend total</b>		<b>1.88</b>	<b>7.04</b>	<b>0.67</b>	<b>0.00</b>	<b>16.38</b>	<b>43.86</b>	<b>40.33</b>	<b>18.29</b>	<b>72.92</b>	<b>50.74</b>	<b>216.72</b>	<b>125.50</b>	<b>112.61</b>	<b>0.65</b>	<b>0.44</b>	<b>0.56</b>	<b>3.45</b>	<b>2.83</b>	<b>2.84</b>	<b>0.24</b>	<b>14.83</b>	<b>2.99</b>	<b>10.21</b>	<b>746.01</b>
<b>Rochford</b>																									
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.29	3.39	2.06	6.85	7.51	3.12	0.17	1.62	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.71	10.48	0.00	36.18
Rayleigh town centre		1.36	0.40	1.04	0.82	4.90	10.72	39.82	24.99	0.76	3.29	0.69	1.58	7.10	0.00	0.00	0.00	0.51	3.20	0.36	0.00	0.00	0.00	0.00	101.57
Rayleigh out-of-centre		0.26	0.48	0.52	0.06	15.43	9.84	3.18	6.74	0.70	1.07	0.13	0.50	3.48	0.02	0.00	0.09	0.03	0.44	0.02	0.97	0.00	0.25	4.01	48.23
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	4.97	2.88	0.12	0.47	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.43
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.02	0.16	3.99	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.18
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.44	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.44
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	1.20	3.59	0.00	0.00	0.48	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.27
<b>Rochford total</b>		<b>1.62</b>	<b>0.88</b>	<b>1.56</b>	<b>0.88</b>	<b>20.33</b>	<b>20.86</b>	<b>52.56</b>	<b>40.28</b>	<b>10.03</b>	<b>16.32</b>	<b>4.42</b>	<b>2.24</b>	<b>12.20</b>	<b>0.02</b>	<b>0.00</b>	<b>0.09</b>	<b>0.54</b>	<b>3.65</b>	<b>0.39</b>	<b>0.97</b>	<b>0.71</b>	<b>10.73</b>	<b>4.01</b>	<b>205.29</b>
Other destinations		131.65	257.75	107.76	143.78	169.29	95.35	34.43	48.04	13.15	14.88	45.17	22.86	38.77	166.59	246.10	155.79	127.07	110.47	223.90	607.60	626.53	2481.78	1809.84	7678.53
<b>TOTAL</b>		<b>135.15</b>	<b>265.67</b>	<b>109.99</b>	<b>144.66</b>	<b>206.00</b>	<b>160.07</b>	<b>127.31</b>	<b>106.61</b>	<b>96.10</b>	<b>81.94</b>	<b>266.31</b>	<b>150.61</b>	<b>163.58</b>	<b>167.25</b>	<b>246.55</b>	<b>156.45</b>	<b>131.06</b>	<b>116.94</b>	<b>227.12</b>	<b>608.82</b>	<b>642.07</b>	<b>2495.50</b>	<b>1824.07</b>	<b>8629.83</b>

Source: Tables 2A and 3.

**Table 6B - Future 2033 comparison goods shopping patterns (£M) - high growth**

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
<b>Expenditure 2033</b>		135.15	265.67	109.99	144.66	206.00	160.07	134.68	111.83	101.45	85.82	266.31	150.61	163.58	167.25	246.55	156.45	131.06	116.94	227.12	608.82	642.07	2495.50	1824.07	8651.64
<b>Southend-on-Sea</b>																									
Southend town centre		1.24	2.18	0.22	0.00	12.03	31.37	35.12	12.21	50.18	26.82	168.81	82.14	63.63	0.12	0.42	0.33	1.48	2.55	2.84	0.24	0.00	0.00	0.00	493.94
Southend out-of-centre		0.05	2.68	0.02	0.00	2.70	3.12	6.49	5.23	24.38	25.53	31.40	27.77	25.75	0.54	0.02	0.23	1.94	0.06	0.00	0.00	14.25	2.99	10.21	185.39
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.37	0.00	0.00	0.56	0.37	0.27	1.04	10.81	2.13	0.00	0.00	0.00	0.03	0.22	0.00	0.00	0.00	0.00	0.00	15.80
Westcliffe-on-Sea out-of-centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.16	0.00	0.00	0.00	0.15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.31
Leigh-on-Sea		0.58	2.18	0.43	0.00	1.22	9.36	0.82	1.03	0.28	0.26	1.07	3.81	20.81	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	41.84
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.06	0.00	0.00	0.00	1.20	0.00	9.45	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.71
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.23	0.00	0.58	0.26	4.95	0.81	0.29	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.58	0.00	0.00	7.70
<b>Southend total</b>		<b>1.88</b>	<b>7.04</b>	<b>0.67</b>	<b>0.00</b>	<b>16.38</b>	<b>43.86</b>	<b>42.67</b>	<b>19.19</b>	<b>76.98</b>	<b>53.14</b>	<b>216.72</b>	<b>125.50</b>	<b>112.61</b>	<b>0.65</b>	<b>0.44</b>	<b>0.56</b>	<b>3.45</b>	<b>2.83</b>	<b>2.84</b>	<b>0.24</b>	<b>14.83</b>	<b>2.99</b>	<b>10.21</b>	<b>755.70</b>
<b>Rochford</b>																									
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.29	3.58	2.16	7.23	7.86	3.12	0.17	1.62	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.71	10.48	0.00	37.21
Rayleigh town centre		1.36	0.40	1.04	0.82	4.90	10.72	42.13	26.21	0.80	3.44	0.69	1.58	7.10	0.00	0.00	0.00	0.51	3.20	0.36	0.00	0.00	0.00	0.00	105.29
Rayleigh out-of-centre		0.26	0.48	0.52	0.06	15.43	9.84	3.37	7.07	0.74	1.12	0.13	0.50	3.48	0.02	0.00	0.09	0.03	0.44	0.02	0.97	0.00	0.25	4.01	48.84
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	5.25	3.02	0.12	0.49	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.88
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.02	0.17	4.18	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.37
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.52	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.52
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	1.27	3.77	0.00	0.00	0.48	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.51
<b>Rochford total</b>		<b>1.62</b>	<b>0.88</b>	<b>1.56</b>	<b>0.88</b>	<b>20.33</b>	<b>20.86</b>	<b>55.59</b>	<b>42.25</b>	<b>10.59</b>	<b>17.10</b>	<b>4.42</b>	<b>2.24</b>	<b>12.20</b>	<b>0.02</b>	<b>0.00</b>	<b>0.09</b>	<b>0.54</b>	<b>3.65</b>	<b>0.39</b>	<b>0.97</b>	<b>0.71</b>	<b>10.73</b>	<b>4.01</b>	<b>211.64</b>
Other destinations		131.65	257.75	107.76	143.78	169.29	95.35	36.42	50.39	13.88	15.59	45.17	22.86	38.77	166.59	246.10	155.79	127.07	110.47	223.90	607.60	626.53	2481.78	1809.84	7684.31
<b>TOTAL</b>		<b>135.15</b>	<b>265.67</b>	<b>109.99</b>	<b>144.66</b>	<b>206.00</b>	<b>160.07</b>	<b>134.68</b>	<b>111.83</b>	<b>101.45</b>	<b>85.82</b>	<b>266.31</b>	<b>150.61</b>	<b>163.58</b>	<b>167.25</b>	<b>246.55</b>	<b>156.45</b>	<b>131.06</b>	<b>116.94</b>	<b>227.12</b>	<b>608.82</b>	<b>642.07</b>	<b>2495.50</b>	<b>1824.07</b>	<b>8651.64</b>

Source: Tables 2B and 3.

**Table 7A - Future 2038 comparison goods shopping patterns (£M) - low growth**

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total	
<b>Expenditure 2038</b>		153.46	302.16	124.30	161.85	231.80	180.10	144.09	120.97	109.39	93.55	302.69	171.36	184.08	189.70	279.77	179.77	146.85	132.22	258.26	690.98	721.89	2822.53	2063.94	9765.71	
<b>Southend-on-Sea</b>																										
Southend town centre		1.41	2.48	0.25	0.00	13.54	35.30	37.58	13.21	54.10	29.23	191.88	93.46	71.61	0.13	0.48	0.38	1.66	2.88	3.23	0.28	0.00	0.00	0.00	553.08	
Southend out-of-centre		0.06	3.05	0.02	0.00	3.04	3.51	6.95	5.66	26.29	27.83	35.69	31.60	28.97	0.61	0.03	0.27	2.17	0.07	0.00	0.00	16.03	3.39	11.56	206.78	
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.42	0.00	0.00	0.60	0.39	0.30	1.18	12.30	2.39	0.00	0.00	0.00	0.03	0.25	0.00	0.00	0.00	0.00	0.00	17.87	
Westcliffe-on-Sea out-of-centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.17	0.00	0.00	0.00	0.17	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.34	
Leigh-on-Sea		0.66	2.48	0.48	0.00	1.37	10.54	0.88	1.11	0.31	0.28	1.21	4.34	23.41	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	47.07	
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.07	0.00	0.00	0.00	1.29	0.00	10.75	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.11	
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.24	0.00	0.62	0.28	5.63	0.93	0.33	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.65	0.00	0.00	8.69	
<b>Southend total</b>		<b>2.13</b>	<b>8.01</b>	<b>0.76</b>	<b>0.00</b>	<b>18.43</b>	<b>49.35</b>	<b>45.65</b>	<b>20.76</b>	<b>83.00</b>	<b>57.92</b>	<b>246.33</b>	<b>142.80</b>	<b>126.72</b>	<b>0.74</b>	<b>0.50</b>	<b>0.65</b>	<b>3.86</b>	<b>3.20</b>	<b>3.23</b>	<b>0.28</b>	<b>16.68</b>	<b>3.39</b>	<b>11.56</b>	<b>845.93</b>	
<b>Rochford</b>																										
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.32	3.83	2.33	7.80	8.57	3.54	0.19	1.82	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.79	11.85	0.00	41.06	
Rayleigh town centre		1.55	0.45	1.18	0.92	5.52	12.07	45.07	28.36	0.86	3.75	0.79	1.80	7.99	0.00	0.00	0.00	0.57	3.62	0.41	0.00	0.00	0.00	0.00	114.92	
Rayleigh out-of-centre		0.29	0.54	0.58	0.06	17.36	11.08	3.60	7.65	0.80	1.23	0.15	0.57	3.92	0.02	0.00	0.11	0.03	0.50	0.03	1.11	0.00	0.28	4.54	54.44	
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	5.62	3.27	0.13	0.53	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.55	
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.02	0.19	4.56	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.77	
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.64	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.64	
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	1.35	4.08	0.00	0.00	0.54	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.98	
<b>Rochford total</b>		<b>1.84</b>	<b>1.00</b>	<b>1.77</b>	<b>0.99</b>	<b>22.88</b>	<b>23.47</b>	<b>59.48</b>	<b>45.70</b>	<b>11.42</b>	<b>18.63</b>	<b>5.02</b>	<b>2.55</b>	<b>13.73</b>	<b>0.02</b>	<b>0.00</b>	<b>0.11</b>	<b>0.60</b>	<b>4.13</b>	<b>0.44</b>	<b>1.11</b>	<b>0.79</b>	<b>12.14</b>	<b>4.54</b>	<b>232.36</b>	
Other destinations		149.48	293.16	121.78	160.86	190.49	107.28	38.96	54.51	14.96	16.99	51.34	26.01	43.63	188.94	279.27	179.01	142.39	124.90	254.60	689.60	704.42	2807.01	2047.84	8687.42	
<b>TOTAL</b>		<b>153.46</b>	<b>302.16</b>	<b>124.30</b>	<b>161.85</b>	<b>231.80</b>	<b>180.10</b>	<b>144.09</b>	<b>120.97</b>	<b>109.39</b>	<b>93.55</b>	<b>302.69</b>	<b>171.36</b>	<b>184.08</b>	<b>189.70</b>	<b>279.77</b>	<b>179.77</b>	<b>146.85</b>	<b>132.22</b>	<b>258.26</b>	<b>690.98</b>	<b>721.89</b>	<b>2822.53</b>	<b>2063.94</b>	<b>9765.71</b>	

Source: Tables 2A and 3.

**Table 7B - Future 2038 comparison goods shopping patterns (£M) - high growth**

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total	
<b>Expenditure 2038</b>		153.46	302.16	124.30	161.85	231.80	180.10	156.17	129.68	117.64	99.52	302.69	171.36	184.08	189.70	279.77	179.77	146.85	132.22	258.26	690.98	721.89	2822.53	2063.94	9800.73	
<b>Southend-on-Sea</b>																										
Southend town centre		1.41	2.48	0.25	0.00	13.54	35.30	40.73	14.16	58.19	31.10	191.88	93.46	71.61	0.13	0.48	0.38	1.66	2.88	3.23	0.28	0.00	0.00	0.00	0.00	563.13
Southend out-of-centre		0.06	3.05	0.02	0.00	3.04	3.51	7.53	6.07	28.27	29.61	35.69	31.60	28.97	0.61	0.03	0.27	2.17	0.07	0.00	0.00	16.03	3.39	11.56	0.00	211.54
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.42	0.00	0.00	0.65	0.42	0.32	1.18	12.30	2.39	0.00	0.00	0.00	0.03	0.25	0.00	0.00	0.00	0.00	0.00	0.00	17.97
Westcliffe-on-Sea out-of-centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.18	0.00	0.00	0.00	0.17	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.35
Leigh-on-Sea		0.66	2.48	0.48	0.00	1.37	10.54	0.95	1.19	0.33	0.30	1.21	4.34	23.41	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	47.26
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.07	0.00	0.00	0.00	1.39	0.00	10.75	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.20
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.27	0.00	0.67	0.30	5.63	0.93	0.33	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.65	0.00	0.00	8.77
<b>Southend total</b>		<b>2.13</b>	<b>8.01</b>	<b>0.76</b>	<b>0.00</b>	<b>18.43</b>	<b>49.35</b>	<b>49.48</b>	<b>22.25</b>	<b>89.27</b>	<b>61.62</b>	<b>246.33</b>	<b>142.80</b>	<b>126.72</b>	<b>0.74</b>	<b>0.50</b>	<b>0.65</b>	<b>3.86</b>	<b>3.20</b>	<b>3.23</b>	<b>0.28</b>	<b>16.68</b>	<b>3.39</b>	<b>11.56</b>	<b>861.22</b>	
<b>Rochford</b>																										
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.32	4.15	2.50	8.39	9.12	3.54	0.19	1.82	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.79	11.85	0.00	0.00	42.69
Rayleigh town centre		1.55	0.45	1.18	0.92	5.52	12.07	48.85	30.40	0.93	3.99	0.79	1.80	7.99	0.00	0.00	0.00	0.57	3.62	0.41	0.00	0.00	0.00	0.00	0.00	121.04
Rayleigh out-of-centre		0.29	0.54	0.58	0.06	17.36	11.08	3.90	8.20	0.86	1.30	0.15	0.57	3.92	0.02	0.00	0.11	0.03	0.50	0.03	1.11	0.00	0.28	4.54	0.00	55.44
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	6.09	3.50	0.14	0.57	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.30
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.03	0.20	4.85	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.07
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.76	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.76
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	1.47	4.37	0.00	0.00	0.54	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.38
<b>Rochford total</b>		<b>1.84</b>	<b>1.00</b>	<b>1.77</b>	<b>0.99</b>	<b>22.88</b>	<b>23.47</b>	<b>64.47</b>	<b>48.99</b>	<b>12.28</b>	<b>19.82</b>	<b>5.02</b>	<b>2.55</b>	<b>13.73</b>	<b>0.02</b>	<b>0.00</b>	<b>0.11</b>	<b>0.60</b>	<b>4.13</b>	<b>0.44</b>	<b>1.11</b>	<b>0.79</b>	<b>12.14</b>	<b>4.54</b>	<b>242.68</b>	
Other destinations		149.48	293.16	121.78	160.86	190.49	107.28	42.23	58.43	16.09	18.07	51.34	26.01	43.63	188.94	279.27	179.01	142.39	124.90	254.60	689.60	704.42	2807.01	2047.84	0.00	8696.83
<b>TOTAL</b>		<b>153.46</b>	<b>302.16</b>	<b>124.30</b>	<b>161.85</b>	<b>231.80</b>	<b>180.10</b>	<b>156.17</b>	<b>129.68</b>	<b>117.64</b>	<b>99.52</b>	<b>302.69</b>	<b>171.36</b>	<b>184.08</b>	<b>189.70</b>	<b>279.77</b>	<b>179.77</b>	<b>146.85</b>	<b>132.22</b>	<b>258.26</b>	<b>690.98</b>	<b>721.89</b>	<b>2822.53</b>	<b>2063.94</b>	<b>9800.73</b>	

Source: Tables 2B and 3.

**Table 8A - Future 2043 comparison goods shopping patterns (£M) - low growth**

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
<b>Expenditure 2043</b>		176.77	349.17	142.36	183.65	265.33	205.77	165.14	139.11	126.55	108.38	349.05	198.03	209.91	217.41	322.29	209.53	166.88	151.61	297.85	795.43	824.67	3239.10	2370.45	11214.44
<b>Southend-on-Sea</b>																									
Southend town centre		1.63	2.86	0.28	0.00	15.50	40.33	43.07	15.19	62.59	33.87	221.27	108.01	81.65	0.15	0.55	0.44	1.89	3.31	3.72	0.32	0.00	0.00	0.00	636.62
Southend out-of-centre		0.07	3.53	0.03	0.00	3.48	4.01	7.96	6.51	30.41	32.24	41.15	36.52	33.04	0.70	0.03	0.31	2.47	0.08	0.00	0.00	18.31	3.89	13.27	238.00
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.48	0.00	0.00	0.70	0.46	0.35	1.36	14.22	2.73	0.00	0.00	0.00	0.03	0.29	0.00	0.00	0.00	0.00	0.00	20.61
Westcliffe-on-Sea out-of-centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.19	0.00	0.00	0.00	0.20	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.39
Leigh-on-Sea		0.76	2.86	0.56	0.00	1.57	12.04	1.01	1.28	0.35	0.33	1.40	5.01	26.70	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	53.85
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.08	0.00	0.00	0.00	1.49	0.00	12.39	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	13.96
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.28	0.00	0.72	0.33	6.49	1.07	0.38	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.74	0.00	0.00	10.01
<b>Southend total</b>		<b>2.46</b>	<b>9.25</b>	<b>0.87</b>	<b>0.00</b>	<b>21.09</b>	<b>56.38</b>	<b>52.32</b>	<b>23.87</b>	<b>96.03</b>	<b>67.11</b>	<b>284.06</b>	<b>165.02</b>	<b>144.50</b>	<b>0.85</b>	<b>0.58</b>	<b>0.75</b>	<b>4.39</b>	<b>3.67</b>	<b>3.72</b>	<b>0.32</b>	<b>19.05</b>	<b>3.89</b>	<b>13.27</b>	<b>973.45</b>
<b>Rochford</b>																									
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.37	4.39	2.68	9.02	9.93	4.08	0.22	2.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.91	13.60	0.00	47.29
Rayleigh town centre		1.79	0.52	1.35	1.05	6.31	13.79	51.65	32.61	1.00	4.35	0.91	2.08	9.11	0.00	0.00	0.00	0.65	4.15	0.48	0.00	0.00	0.00	0.00	131.80
Rayleigh out-of-centre		0.34	0.63	0.67	0.07	19.87	12.65	4.13	8.79	0.92	1.42	0.17	0.65	4.47	0.02	0.00	0.13	0.03	0.58	0.03	1.27	0.00	0.32	5.21	62.40
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	6.44	3.76	0.15	0.62	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.97
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.03	0.22	5.28	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.52
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.90	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.90
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	1.55	4.69	0.00	0.00	0.63	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.87
<b>Rochford total</b>		<b>2.12</b>	<b>1.15</b>	<b>2.02</b>	<b>1.12</b>	<b>26.19</b>	<b>26.81</b>	<b>68.17</b>	<b>52.56</b>	<b>13.21</b>	<b>21.59</b>	<b>5.79</b>	<b>2.95</b>	<b>15.66</b>	<b>0.02</b>	<b>0.00</b>	<b>0.13</b>	<b>0.68</b>	<b>4.73</b>	<b>0.51</b>	<b>1.27</b>	<b>0.91</b>	<b>13.93</b>	<b>5.21</b>	<b>266.74</b>
Other destinations		172.19	338.76	139.47	182.53	218.05	122.58	44.65	62.68	17.31	19.68	59.20	30.06	49.75	216.54	321.71	208.65	161.81	143.22	293.62	793.84	804.71	3221.28	2351.96	9974.25
<b>TOTAL</b>		<b>176.77</b>	<b>349.17</b>	<b>142.36</b>	<b>183.65</b>	<b>265.33</b>	<b>205.77</b>	<b>165.14</b>	<b>139.11</b>	<b>126.55</b>	<b>108.38</b>	<b>349.05</b>	<b>198.03</b>	<b>209.91</b>	<b>217.41</b>	<b>322.29</b>	<b>209.53</b>	<b>166.88</b>	<b>151.61</b>	<b>297.85</b>	<b>795.43</b>	<b>824.67</b>	<b>3239.10</b>	<b>2370.45</b>	<b>11214.44</b>

Source: Tables 2A and 3.

**Table 8B - Future 2043 comparison goods shopping patterns (£M) - high growth**

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
<b>Expenditure 2043</b>		176.77	349.17	142.36	183.65	265.33	205.77	183.18	152.11	137.99	116.74	349.05	198.03	209.91	217.41	322.29	209.53	166.88	151.61	297.85	795.43	824.67	3239.10	2370.45	11265.27
<b>Southend-on-Sea</b>																									
Southend town centre		1.63	2.86	0.28	0.00	15.50	40.33	47.77	16.61	68.25	36.48	221.27	108.01	81.65	0.15	0.55	0.44	1.89	3.31	3.72	0.32	0.00	0.00	0.00	651.01
Southend out-of-centre		0.07	3.53	0.03	0.00	3.48	4.01	8.83	7.12	33.16	34.73	41.15	36.52	33.04	0.70	0.03	0.31	2.47	0.08	0.00	0.00	18.31	3.89	13.27	244.72
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.48	0.00	0.00	0.76	0.50	0.37	1.36	14.22	2.73	0.00	0.00	0.00	0.03	0.29	0.00	0.00	0.00	0.00	0.00	20.74
Westcliffe-on-Sea out-of-centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.21	0.00	0.00	0.00	0.20	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.41
Leigh-on-Sea		0.76	2.86	0.56	0.00	1.57	12.04	1.12	1.40	0.39	0.35	1.40	5.01	26.70	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	54.14
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.08	0.00	0.00	0.00	1.63	0.00	12.39	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	14.10
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.31	0.00	0.79	0.35	6.49	1.07	0.38	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.74	0.00	0.00	10.13
<b>Southend total</b>		<b>2.46</b>	<b>9.25</b>	<b>0.87</b>	<b>0.00</b>	<b>21.09</b>	<b>56.38</b>	<b>58.03</b>	<b>26.10</b>	<b>104.71</b>	<b>72.28</b>	<b>284.06</b>	<b>165.02</b>	<b>144.50</b>	<b>0.85</b>	<b>0.58</b>	<b>0.75</b>	<b>4.39</b>	<b>3.67</b>	<b>3.72</b>	<b>0.32</b>	<b>19.05</b>	<b>3.89</b>	<b>13.27</b>	<b>995.25</b>
<b>Rochford</b>																									
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.37	4.87	2.94	9.84	10.69	4.08	0.22	2.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.91	13.60	0.00	49.60
Rayleigh town centre		1.79	0.52	1.35	1.05	6.31	13.79	57.30	35.65	1.09	4.68	0.91	2.08	9.11	0.00	0.00	0.00	0.65	4.15	0.48	0.00	0.00	0.00	0.00	140.91
Rayleigh out-of-centre		0.34	0.63	0.67	0.07	19.87	12.65	4.58	9.61	1.01	1.53	0.17	0.65	4.47	0.02	0.00	0.13	0.03	0.58	0.03	1.27	0.00	0.32	5.21	63.86
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	7.14	4.11	0.17	0.67	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.08
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.03	0.23	5.69	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.95
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.07
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	1.72	5.13	0.00	0.00	0.63	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.48
<b>Rochford total</b>		<b>2.12</b>	<b>1.15</b>	<b>2.02</b>	<b>1.12</b>	<b>26.19</b>	<b>26.81</b>	<b>75.62</b>	<b>57.47</b>	<b>14.41</b>	<b>23.25</b>	<b>5.79</b>	<b>2.95</b>	<b>15.66</b>	<b>0.02</b>	<b>0.00</b>	<b>0.13</b>	<b>0.68</b>	<b>4.73</b>	<b>0.51</b>	<b>1.27</b>	<b>0.91</b>	<b>13.93</b>	<b>5.21</b>	<b>281.95</b>
Other destinations		172.19	338.76	139.47	182.53	218.05	122.58	49.53	68.54	18.88	21.20	59.20	30.06	49.75	216.54	321.71	208.65	161.81	143.22	293.62	793.84	804.71	3221.28	2351.96	9988.06
<b>TOTAL</b>		<b>176.77</b>	<b>349.17</b>	<b>142.36</b>	<b>183.65</b>	<b>265.33</b>	<b>205.77</b>	<b>183.18</b>	<b>152.11</b>	<b>137.99</b>	<b>116.74</b>	<b>349.05</b>	<b>198.03</b>	<b>209.91</b>	<b>217.41</b>	<b>322.29</b>	<b>209.53</b>	<b>166.88</b>	<b>151.61</b>	<b>297.85</b>	<b>795.43</b>	<b>824.67</b>	<b>3239.10</b>	<b>2370.45</b>	<b>11265.27</b>

Source: Tables 2B and 3.

**Table 9A - Summary of comparison goods expenditure 2023 to 2043 (£M) - low growth**

	2023	2028	2033	2038	2043
<b>Available expenditure</b>					
Rochford town centre	30.40	31.95	36.18	41.06	47.29
Rayleigh	126.28	132.54	149.80	169.36	194.19
Hockley town centre	7.04	7.43	8.43	9.55	10.97
Ashingdon	3.47	3.67	4.18	4.77	5.52
Great Wakering	1.21	1.27	1.44	1.64	1.90
Other Rochford District	4.39	4.64	5.27	5.98	6.87
<b>Total</b>	<b>172.79</b>	<b>181.49</b>	<b>205.29</b>	<b>232.36</b>	<b>266.74</b>
<b>Turnover of existing facilities</b>					
Rochford town centre	30.40	32.42	36.33	40.70	45.60
Rayleigh	126.28	134.68	150.89	169.06	189.42
Hockley town centre	7.04	7.51	8.41	9.43	10.56
Ashingdon	3.47	3.70	4.14	4.64	5.20
Great Wakering	1.21	1.29	1.44	1.62	1.81
Other Rochford District	4.39	4.68	5.25	5.88	6.59
<b>Total</b>	<b>172.79</b>	<b>184.28</b>	<b>206.47</b>	<b>231.33</b>	<b>259.18</b>
<b>Surplus/deficit expenditure £M</b>					
Rochford town centre	0.00	-0.47	-0.15	0.36	1.69
Rayleigh	0.00	-2.14	-1.09	0.30	4.77
Hockley town centre	0.00	-0.08	0.01	0.12	0.40
Ashingdon	0.00	-0.03	0.03	0.12	0.32
Great Wakering	0.00	-0.02	0.00	0.03	0.09
Other Rochford District	0.00	-0.04	0.02	0.10	0.28
<b>Total</b>	<b>0.00</b>	<b>-2.78</b>	<b>-1.17</b>	<b>1.03</b>	<b>7.55</b>

Source: Tables 4 to 8A and Experian sales density growth rates from Retail Planner Briefing Note 22 - Figure 4b.



**Table 9B - Summary of comparison goods expenditure 2023 to 2043 (£M) - high growth**

	2023	2028	2033	2038	2043
<b>Available expenditure</b>					
Rochford town centre	30.40	32.46	37.21	42.69	49.60
Rayleigh	126.28	134.64	154.13	176.48	204.77
Hockley town centre	7.04	7.65	8.88	10.30	12.08
Ashingdon	3.47	3.77	4.37	5.07	5.95
Great Wakering	1.21	1.31	1.52	1.76	2.07
Other Rochford District	4.39	4.76	5.51	6.38	7.48
<b>Total</b>	<b>172.79</b>	<b>184.58</b>	<b>211.64</b>	<b>242.68</b>	<b>281.95</b>
<b>Turnover of existing facilities</b>					
Rochford town centre	30.40	32.42	36.33	40.70	45.60
Rayleigh	126.28	134.68	150.89	169.06	189.42
Hockley town centre	7.04	7.51	8.41	9.43	10.56
Ashingdon	3.47	3.70	4.14	4.64	5.20
Great Wakering	1.21	1.29	1.44	1.62	1.81
Other Rochford District	4.39	4.68	5.25	5.88	6.59
<b>Total</b>	<b>172.79</b>	<b>184.28</b>	<b>206.47</b>	<b>231.33</b>	<b>259.18</b>
<b>Surplus/deficit expenditure £M</b>					
Rochford town centre	0.00	0.04	0.89	1.99	4.00
Rayleigh	0.00	-0.04	3.24	7.41	15.35
Hockley town centre	0.00	0.14	0.47	0.87	1.52
Ashingdon	0.00	0.07	0.23	0.43	0.75
Great Wakering	0.00	0.02	0.08	0.15	0.26
Other Rochford District	0.00	0.07	0.27	0.50	0.89
<b>Total</b>	<b>0.00</b>	<b>0.30</b>	<b>5.17</b>	<b>11.36</b>	<b>22.77</b>

Source: Tables 4 to 8B and Experian sales density growth rates from Retail Planner Briefing Note 22 - Figure 4b.

**Table 10A - Comparison goods floorspace capacity - low growth**

	2023	2028	2033	2038	2043
<b>Turnover density new floorspace (£ per sq.m)</b>	£7,000	£7,465	£8,364	£9,371	£10,500
<b>Sales floorspace projection (sq.m net)</b>					
Rochford town centre	0	-63	-18	38	161
Rayleigh	0	-286	-130	32	455
Hockley town centre	0	-11	1	13	38
Ashingdon	0	-4	4	13	30
Great Wakering	0	-2	0	3	8
Other Rochford District	0	-6	3	10	27
	<b>0</b>	<b>-373</b>	<b>-140</b>	<b>110</b>	<b>719</b>
<b>Gross floorspace projection (sq.m gross)</b>					
Rochford town centre	0	-90	-25	55	230
Rayleigh	0	-409	-186	45	649
Hockley town centre	0	-16	2	19	55
Ashingdon	0	-6	5	19	43
Great Wakering	0	-3	0	4	12
Other Rochford District	0	-8	4	15	38
	<b>0</b>	<b>-533</b>	<b>-200</b>	<b>157</b>	<b>1,028</b>

Source: Table 9A and Experian sales density growth rates from Retail Planner Briefing Note 22 - Figure 4b.

**Table 10B - Comparison goods floorspace capacity - high growth**

	2023	2028	2033	2038	2043
<b>Turnover density new floorspace (£ per sq.m)</b>	£7,000	£7,465	£8,364	£9,371	£10,500
<b>Sales floorspace projection (sq.m net)</b>					
Rochford town centre	0	5	106	212	381
Rayleigh	0	-5	387	791	1,462
Hockley town centre	0	19	56	93	145
Ashingdon	0	9	28	46	71
Great Wakering	0	3	10	16	25
Other Rochford District	0	10	32	54	85
	<b>0</b>	<b>41</b>	<b>618</b>	<b>1,212</b>	<b>2,169</b>
<b>Gross floorspace projection (sq.m gross)</b>					
Rochford town centre	0	7	151	303	544
Rayleigh	0	-7	553	1,130	2,089
Hockley town centre	0	26	80	133	207
Ashingdon	0	13	39	66	102
Great Wakering	0	5	14	23	35
Other Rochford District	0	14	45	77	121
	<b>0</b>	<b>58</b>	<b>883</b>	<b>1,731</b>	<b>3,098</b>

Source: Table 9B and Experian sales density growth rates from Retail Planner Briefing Note 22 - Figure 4b.



## **Appendix 4 Food/beverage capacity**



**Table 1 - Food/beverage expenditure per person per annum (£)**

Zone	2023	2028	2033	2038	2043
1	1,387	1,385	1,430	1,481	1,534
2	1,542	1,540	1,590	1,647	1,705
3	1,923	1,921	1,983	2,054	2,126
4	2,236	2,234	2,306	2,388	2,473
5	1,724	1,722	1,778	1,841	1,906
6	2,094	2,091	2,159	2,236	2,315
7	2,067	2,064	2,131	2,207	2,285
8	1,969	1,966	2,030	2,102	2,177
9	1,702	1,700	1,755	1,817	1,882
10	1,762	1,760	1,817	1,882	1,948
11	1,672	1,671	1,725	1,786	1,849
12	1,796	1,794	1,852	1,918	1,986
13	2,013	2,011	2,076	2,149	2,226
14	1,600	1,598	1,650	1,708	1,769
15	1,567	1,565	1,616	1,674	1,733
16	1,589	1,587	1,638	1,696	1,756
17	2,314	2,311	2,386	2,471	2,559
18	1,948	1,945	2,008	2,080	2,153
19	1,812	1,809	1,868	1,934	2,003
20	2,119	2,117	2,186	2,263	2,343
21	2,120	2,117	2,186	2,263	2,344
22	1,365	1,363	1,408	1,457	1,509
23	1,752	1,750	1,807	1,871	1,937

Sources: *Experian Local Expenditure 2023(2023 prices)*  
*Experian growth rates from Retail Planner Briefing Note 22 - Figure 1a*

**Table 2A - Total food/beverage expenditure (£m) - low growth**

Zone	2023	2028	2033	2038	2043
1	58.48	59.81	63.07	66.78	70.76
2	119.55	122.38	129.07	136.88	145.48
3	56.11	56.98	59.85	63.07	66.44
4	73.90	74.79	78.07	81.45	85.01
5	101.47	102.80	107.42	112.71	118.66
6	82.92	83.79	87.64	91.95	96.63
7	62.34	63.87	67.45	71.18	75.03
8	50.99	52.53	55.64	58.87	62.27
9	43.49	44.61	47.15	50.04	53.25
10	37.29	38.40	40.75	43.38	46.23
11	124.35	127.70	134.96	143.04	151.71
12	76.01	77.92	82.34	87.36	92.85
13	85.52	87.32	91.72	96.24	100.94
14	77.39	79.75	84.42	89.28	94.11
15	114.52	118.49	125.70	133.01	140.93
16	73.67	77.02	82.40	88.28	94.64
17	66.77	67.10	69.75	72.87	76.17
18	55.19	56.65	59.73	62.97	66.42
19	100.60	103.44	109.64	116.25	123.32
20	312.41	321.35	340.18	360.01	381.19
21	331.42	334.85	349.88	366.81	385.42
22	1178.20	1196.80	1256.57	1325.24	1398.85
23	896.40	916.96	965.54	1018.72	1076.17
<b>Total</b>	<b>4,178.99</b>	<b>4,265.30</b>	<b>4,488.93</b>	<b>4,736.40</b>	<b>5,002.50</b>

Source: Tables 1A, Appendix 1 and Table 1, Appendix 3



**Table 2B - Total food/beverage expenditure (£m) - high growth**

Zone	2023	2028	2033	2038	2043
1	58.48	59.81	63.07	66.78	70.76
2	119.55	122.38	129.07	136.88	145.48
3	56.11	56.98	59.85	63.07	66.44
4	73.90	74.79	78.07	81.45	85.01
5	101.47	102.80	107.42	112.71	118.66
6	82.92	83.79	87.64	91.95	96.63
7	62.34	65.92	71.35	77.15	83.23
8	50.99	53.92	58.36	63.11	68.09
9	43.49	45.99	49.78	53.82	58.07
10	37.29	39.43	42.68	46.15	49.79
11	124.35	127.70	134.96	143.04	151.71
12	76.01	77.92	82.34	87.36	92.85
13	85.52	87.32	91.72	96.24	100.94
14	77.39	79.75	84.42	89.28	94.11
15	114.52	118.49	125.70	133.01	140.93
16	73.67	77.02	82.40	88.28	94.64
17	66.77	67.10	69.75	72.87	76.17
18	55.19	56.65	59.73	62.97	66.42
19	100.60	103.44	109.64	116.25	123.32
20	312.41	321.35	340.18	360.01	381.19
21	331.42	334.85	349.88	366.81	385.42
22	1178.20	1196.80	1256.57	1325.24	1398.85
23	896.40	916.96	965.54	1018.72	1076.17
<b>Total</b>	<b>4,178.99</b>	<b>4,271.15</b>	<b>4,500.11</b>	<b>4,753.15</b>	<b>5,024.89</b>

Source: Tables 1B, Appendix 1 and Table 1, Appendix 3

**Table 3 - Base year food/beverage market shares (%)**

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	
<b>Southend-on-Sea</b>																									
Southend town centre		0.00	1.66	3.29	0.00	1.65	10.86	12.77	1.00	31.78	12.77	61.70	54.01	26.01	1.29	0.00	2.25	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Westcliffe-on-Sea		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	14.09	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Leigh-on-Sea		5.49	0.00	1.45	1.13	0.00	28.31	1.58	1.00	3.97	1.06	1.55	18.00	62.04	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Shoeburyness		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.50	0.00	8.93	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other Southend		1.83	0.00	30.40	0.00	0.00	0.00	0.00	0.00	2.34	1.06	1.55	0.00	3.87	0.00	0.00	0.00	0.00	0.00	29.53	0.00	0.00	0.00	0.00	0.00
<b>Southend total</b>		<b>7.32</b>	<b>1.66</b>	<b>35.14</b>	<b>1.13</b>	<b>1.65</b>	<b>39.17</b>	<b>14.35</b>	<b>2.00</b>	<b>41.59</b>	<b>14.89</b>	<b>73.73</b>	<b>86.10</b>	<b>91.92</b>	<b>1.29</b>	<b>0.00</b>	<b>2.25</b>	<b>0.00</b>	<b>29.53</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>Rochford</b>																									
Rochford town centre		0.00	0.93	0.00	0.00	0.00	0.00	1.22	6.57	28.74	30.14	0.00	0.85	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Rayleigh town centre		3.66	2.79	7.25	0.00	0.00	13.22	45.99	63.29	0.00	14.89	0.00	0.00	5.01	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Hockley		0.00	0.73	0.00	0.00	0.00	0.00	33.21	13.57	0.00	4.96	0.00	7.96	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Hullbridge		0.00	0.00	0.00	0.00	0.00	1.07	0.00	4.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	22.43	0.00	2.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.00	4.91	22.70	0.00	0.00	1.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Rochford total</b>		<b>3.66</b>	<b>4.45</b>	<b>7.25</b>	<b>0.00</b>	<b>0.00</b>	<b>14.29</b>	<b>80.42</b>	<b>88.57</b>	<b>56.08</b>	<b>72.69</b>	<b>2.07</b>	<b>8.81</b>	<b>6.06</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
Other destinations		89.02	93.89	57.61	98.87	98.35	46.54	5.23	9.43	2.33	12.42	24.20	5.09	2.02	98.71	100.00	97.75	100.00	70.47	100.00	100.00	100.00	100.00	100.00	100.00
<b>TOTAL</b>		<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>

Source: South Essex Retail Study Volume 2, Appendix F, Tables L3Aa and L4Aa.

**Table 4 - Base year food/beverage expenditure patterns (£M)**

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total	
<b>Expenditure 2023</b>		58.48	119.55	56.11	73.90	101.47	82.92	62.34	50.99	43.49	37.29	124.35	76.01	85.52	77.39	114.52	73.67	66.77	55.19	100.60	312.41	331.42	1178.20	896.40	4178.99	
<b>Southend-on-Sea</b>																										
Southend town centre		0.00	1.98	1.85	0.00	1.67	9.00	7.96	0.51	13.82	4.76	76.72	41.05	22.24	1.00	0.00	1.66	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	184.24
Westcliffe-on-Sea		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.71	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.71
Leigh-on-Sea		3.21	0.00	0.81	0.84	0.00	23.47	0.98	0.51	1.73	0.40	1.93	13.68	53.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	100.62
Shoeburyness		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.52	0.00	11.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.63
Other Southend		1.07	0.00	17.06	0.00	0.00	0.00	0.00	0.00	1.02	0.40	1.93	0.00	3.31	0.00	0.00	0.00	0.00	16.30	0.00	0.00	0.00	0.00	0.00	0.00	41.07
<b>Southend total</b>		<b>4.28</b>	<b>1.98</b>	<b>19.72</b>	<b>0.84</b>	<b>1.67</b>	<b>32.48</b>	<b>8.95</b>	<b>1.02</b>	<b>18.09</b>	<b>5.55</b>	<b>91.68</b>	<b>65.44</b>	<b>78.61</b>	<b>1.00</b>	<b>0.00</b>	<b>1.66</b>	<b>0.00</b>	<b>16.30</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>349.27</b>
<b>Rochford</b>																										
Rochford town centre		0.00	1.11	0.00	0.00	0.00	0.00	0.76	3.35	12.50	11.24	0.00	0.65	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	29.61
Rayleigh town centre		2.14	3.34	4.07	0.00	0.00	10.96	28.67	32.27	0.00	5.55	0.00	0.00	4.28	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	91.29
Hockley		0.00	0.87	0.00	0.00	0.00	0.00	20.70	6.92	0.00	1.85	0.00	6.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	36.39
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.89	0.00	2.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.00
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.75	0.00	2.57	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.33
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.51	2.14	8.47	0.00	0.00	0.90	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.01
<b>Rochford total</b>		<b>2.14</b>	<b>5.32</b>	<b>4.07</b>	<b>0.00</b>	<b>0.00</b>	<b>11.85</b>	<b>50.13</b>	<b>45.16</b>	<b>24.39</b>	<b>27.11</b>	<b>2.57</b>	<b>6.70</b>	<b>5.18</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>184.62</b>
Other destinations		52.06	112.25	32.33	73.07	99.79	38.59	3.26	4.81	1.01	4.63	30.09	3.87	1.73	76.39	114.52	72.01	66.77	38.89	100.60	312.41	331.42	1178.20	896.40	3645.10	
<b>TOTAL</b>		<b>58.48</b>	<b>119.55</b>	<b>56.11</b>	<b>73.90</b>	<b>101.47</b>	<b>82.92</b>	<b>62.34</b>	<b>50.99</b>	<b>43.49</b>	<b>37.29</b>	<b>124.35</b>	<b>76.01</b>	<b>85.52</b>	<b>77.39</b>	<b>114.52</b>	<b>73.67</b>	<b>66.77</b>	<b>55.19</b>	<b>100.60</b>	<b>312.41</b>	<b>331.42</b>	<b>1178.20</b>	<b>896.40</b>	<b>4178.99</b>	

Source: Tables 2A and 3.

**Table 5A - Future 2028 food/beverage expenditure patterns (£M) - low growth**

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total	
<b>Expenditure 2028</b>		59.81	122.38	56.98	74.79	102.80	83.79	63.87	52.53	44.61	38.40	127.70	77.92	87.32	79.75	118.49	77.02	67.10	56.65	103.44	321.35	334.85	1196.80	916.96	4265.30	
<b>Southend-on-Sea</b>																										
Southend town centre		0.00	2.03	1.87	0.00	1.70	9.10	8.16	0.53	14.18	4.90	78.79	42.09	22.71	1.03	0.00	1.73	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	188.81
Westcliffe-on-Sea		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.98	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.98
Leigh-on-Sea		3.28	0.00	0.83	0.85	0.00	23.72	1.01	0.53	1.77	0.41	1.98	14.03	54.17	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	102.56
Shoeburyness		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.56	0.00	11.40	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.96
Other Southend		1.09	0.00	17.32	0.00	0.00	0.00	0.00	0.00	1.04	0.41	1.98	0.00	3.38	0.00	0.00	0.00	0.00	16.73	0.00	0.00	0.00	0.00	0.00	0.00	41.95
<b>Southend total</b>		<b>4.38</b>	<b>2.03</b>	<b>20.02</b>	<b>0.85</b>	<b>1.70</b>	<b>32.82</b>	<b>9.16</b>	<b>1.05</b>	<b>18.55</b>	<b>5.72</b>	<b>94.15</b>	<b>67.09</b>	<b>80.26</b>	<b>1.03</b>	<b>0.00</b>	<b>1.73</b>	<b>0.00</b>	<b>16.73</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>357.27</b>
<b>Rochford</b>																										
Rochford town centre		0.00	1.14	0.00	0.00	0.00	0.00	0.78	3.45	12.82	11.57	0.00	0.66	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	30.43
Rayleigh town centre		2.19	3.41	4.13	0.00	0.00	11.08	29.37	33.24	0.00	5.72	0.00	0.00	4.37	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	93.52
Hockley		0.00	0.89	0.00	0.00	0.00	0.00	21.21	7.13	0.00	1.90	0.00	6.20	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	37.34
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.90	0.00	2.17	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.07
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.01	0.00	2.64	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.65
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.53	2.19	8.72	0.00	0.00	0.92	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.35
<b>Rochford total</b>		<b>2.19</b>	<b>5.45</b>	<b>4.13</b>	<b>0.00</b>	<b>0.00</b>	<b>11.97</b>	<b>51.36</b>	<b>46.52</b>	<b>25.02</b>	<b>27.91</b>	<b>2.64</b>	<b>6.86</b>	<b>5.29</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>189.35</b>
Other destinations		53.24	114.91	32.82	73.94	101.10	38.99	3.34	4.95	1.04	4.77	30.90	3.97	1.76	78.72	118.49	75.29	67.10	39.92	103.44	321.35	334.85	1196.80	916.96	3718.67	
<b>TOTAL</b>		<b>59.81</b>	<b>122.38</b>	<b>56.98</b>	<b>74.79</b>	<b>102.80</b>	<b>83.79</b>	<b>63.87</b>	<b>52.53</b>	<b>44.61</b>	<b>38.40</b>	<b>127.70</b>	<b>77.92</b>	<b>87.32</b>	<b>79.75</b>	<b>118.49</b>	<b>77.02</b>	<b>67.10</b>	<b>56.65</b>	<b>103.44</b>	<b>321.35</b>	<b>334.85</b>	<b>1196.80</b>	<b>916.96</b>	<b>4265.30</b>	

Source: Tables 2A and 3.

**Table 5B - Future 2028 food/beverage expenditure patterns (£M) - high growth**

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total	
<b>Expenditure 2028</b>		59.81	122.38	56.98	74.79	102.80	83.79	65.92	53.92	45.99	39.43	127.70	77.92	87.32	79.75	118.49	77.02	67.10	56.65	103.44	321.35	334.85	1196.80	916.96	4271.15	
<b>Southend-on-Sea</b>																										
Southend town centre		0.00	2.03	1.87	0.00	1.70	9.10	8.42	0.54	14.61	5.04	78.79	42.09	22.71	1.03	0.00	1.73	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	189.66
Westcliffe-on-Sea		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.98	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.98
Leigh-on-Sea		3.28	0.00	0.83	0.85	0.00	23.72	1.04	0.54	1.83	0.42	1.98	14.03	54.17	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	102.68
Shoeburyness		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.61	0.00	11.40	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	13.01
Other Southend		1.09	0.00	17.32	0.00	0.00	0.00	0.00	0.00	1.08	0.42	1.98	0.00	3.38	0.00	0.00	0.00	0.00	16.73	0.00	0.00	0.00	0.00	0.00	0.00	42.00
<b>Southend total</b>		<b>4.38</b>	<b>2.03</b>	<b>20.02</b>	<b>0.85</b>	<b>1.70</b>	<b>32.82</b>	<b>9.46</b>	<b>1.08</b>	<b>19.13</b>	<b>5.87</b>	<b>94.15</b>	<b>67.09</b>	<b>80.26</b>	<b>1.03</b>	<b>0.00</b>	<b>1.73</b>	<b>0.00</b>	<b>16.73</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>358.32</b>
<b>Rochford</b>																										
Rochford town centre		0.00	1.14	0.00	0.00	0.00	0.00	0.80	3.54	13.22	11.88	0.00	0.66	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	31.25
Rayleigh town centre		2.19	3.41	4.13	0.00	0.00	11.08	30.32	34.13	0.00	5.87	0.00	0.00	4.37	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	95.50
Hockley		0.00	0.89	0.00	0.00	0.00	0.00	21.89	7.32	0.00	1.96	0.00	6.20	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	38.26
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.90	0.00	2.23	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.13
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.31	0.00	2.64	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.96
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.54	2.26	8.95	0.00	0.00	0.92	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.67
<b>Rochford total</b>		<b>2.19</b>	<b>5.45</b>	<b>4.13</b>	<b>0.00</b>	<b>0.00</b>	<b>11.97</b>	<b>53.01</b>	<b>47.76</b>	<b>25.79</b>	<b>28.66</b>	<b>2.64</b>	<b>6.86</b>	<b>5.29</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>193.76</b>
Other destinations		53.24	114.91	32.82	73.94	101.10	38.99	3.45	5.08	1.07	4.90	30.90	3.97	1.76	78.72	118.49	75.29	67.10	39.92	103.44	321.35	334.85	1196.80	916.96	3719.07	
<b>TOTAL</b>		<b>59.81</b>	<b>122.38</b>	<b>56.98</b>	<b>74.79</b>	<b>102.80</b>	<b>83.79</b>	<b>65.92</b>	<b>53.92</b>	<b>45.99</b>	<b>39.43</b>	<b>127.70</b>	<b>77.92</b>	<b>87.32</b>	<b>79.75</b>	<b>118.49</b>	<b>77.02</b>	<b>67.10</b>	<b>56.65</b>	<b>103.44</b>	<b>321.35</b>	<b>334.85</b>	<b>1196.80</b>	<b>916.96</b>	<b>4271.15</b>	

Source: Tables 2B and 3.

**Table 6A - Future 2033 food/beverage expenditure patterns (£M) - low growth**

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total	
<b>Expenditure 2033</b>		63.07	129.07	59.85	78.07	107.42	87.64	67.45	55.64	47.15	40.75	134.96	82.34	91.72	84.42	125.70	82.40	69.75	59.73	109.64	340.18	349.88	1256.57	965.54	4488.93	
<b>Southend-on-Sea</b>																										
Southend town centre		0.00	2.14	1.97	0.00	1.77	9.52	8.61	0.56	14.99	5.20	83.27	44.47	23.86	1.09	0.00	1.85	0.00	0.00	0.00	0.00	0.00	0.00	0.00	199.30	
Westcliffe-on-Sea		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.60	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.60
Leigh-on-Sea		3.46	0.00	0.87	0.88	0.00	24.81	1.07	0.56	1.87	0.43	2.09	14.82	56.90	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	107.77
Shoeburyness		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.65	0.00	12.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	13.70
Other Southend		1.15	0.00	18.19	0.00	0.00	0.00	0.00	0.00	1.10	0.43	2.09	0.00	3.55	0.00	0.00	0.00	0.00	17.64	0.00	0.00	0.00	0.00	0.00	0.00	44.16
<b>Southend total</b>		<b>4.62</b>	<b>2.14</b>	<b>21.03</b>	<b>0.88</b>	<b>1.77</b>	<b>34.33</b>	<b>9.68</b>	<b>1.11</b>	<b>19.61</b>	<b>6.07</b>	<b>99.50</b>	<b>70.89</b>	<b>84.31</b>	<b>1.09</b>	<b>0.00</b>	<b>1.85</b>	<b>0.00</b>	<b>17.64</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>376.53</b>
<b>Rochford</b>																										
Rochford town centre		0.00	1.20	0.00	0.00	0.00	0.00	0.82	3.66	13.55	12.28	0.00	0.70	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	32.21
Rayleigh town centre		2.31	3.60	4.34	0.00	0.00	11.59	31.02	35.21	0.00	6.07	0.00	0.00	4.60	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	98.73
Hockley		0.00	0.94	0.00	0.00	0.00	0.00	22.40	7.55	0.00	2.02	0.00	6.55	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	39.47
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.94	0.00	2.30	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.24
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.58	0.00	2.79	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	13.37
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.56	2.32	9.25	0.00	0.00	0.96	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	13.09
<b>Rochford total</b>		<b>2.31</b>	<b>5.74</b>	<b>4.34</b>	<b>0.00</b>	<b>0.00</b>	<b>12.52</b>	<b>54.24</b>	<b>49.28</b>	<b>26.44</b>	<b>29.62</b>	<b>2.79</b>	<b>7.25</b>	<b>5.56</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>200.11</b>
Other destinations		56.15	121.18	34.48	77.19	105.65	40.79	3.53	5.25	1.10	5.06	32.66	4.19	1.85	83.33	125.70	80.54	69.75	42.09	109.64	340.18	349.88	1256.57	965.54	3912.29	
<b>TOTAL</b>		<b>63.07</b>	<b>129.07</b>	<b>59.85</b>	<b>78.07</b>	<b>107.42</b>	<b>87.64</b>	<b>67.45</b>	<b>55.64</b>	<b>47.15</b>	<b>40.75</b>	<b>134.96</b>	<b>82.34</b>	<b>91.72</b>	<b>84.42</b>	<b>125.70</b>	<b>82.40</b>	<b>69.75</b>	<b>59.73</b>	<b>109.64</b>	<b>340.18</b>	<b>349.88</b>	<b>1256.57</b>	<b>965.54</b>	<b>4488.93</b>	

Source: Tables 2A and 3.

**Table 6B - Future 2033 food/beverage expenditure patterns (£M) - high growth**

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total	
<b>Expenditure 2033</b>		63.07	129.07	59.85	78.07	107.42	87.64	71.35	58.36	49.78	42.68	134.96	82.34	91.72	84.42	125.70	82.40	69.75	59.73	109.64	340.18	349.88	1256.57	965.54	4500.11	
<b>Southend-on-Sea</b>																										
Southend town centre		0.00	2.14	1.97	0.00	1.77	9.52	9.11	0.58	15.82	5.45	83.27	44.47	23.86	1.09	0.00	1.85	0.00	0.00	0.00	0.00	0.00	0.00	0.00	200.90	
Westcliffe-on-Sea		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.60	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.60
Leigh-on-Sea		3.46	0.00	0.87	0.88	0.00	24.81	1.13	0.58	1.98	0.45	2.09	14.82	56.90	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	107.98
Shoeburyness		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.74	0.00	12.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	13.79
Other Southend		1.15	0.00	18.19	0.00	0.00	0.00	0.00	0.00	1.16	0.45	2.09	0.00	3.55	0.00	0.00	0.00	0.00	17.64	0.00	0.00	0.00	0.00	0.00	0.00	44.25
<b>Southend total</b>		<b>4.62</b>	<b>2.14</b>	<b>21.03</b>	<b>0.88</b>	<b>1.77</b>	<b>34.33</b>	<b>10.24</b>	<b>1.17</b>	<b>20.70</b>	<b>6.36</b>	<b>99.50</b>	<b>70.89</b>	<b>84.31</b>	<b>1.09</b>	<b>0.00</b>	<b>1.85</b>	<b>0.00</b>	<b>17.64</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>378.52</b>
<b>Rochford</b>																										
Rochford town centre		0.00	1.20	0.00	0.00	0.00	0.00	0.87	3.83	14.31	12.86	0.00	0.70	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	33.77
Rayleigh town centre		2.31	3.60	4.34	0.00	0.00	11.59	32.81	36.94	0.00	6.36	0.00	0.00	4.60	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	102.54
Hockley		0.00	0.94	0.00	0.00	0.00	0.00	23.69	7.92	0.00	2.12	0.00	6.55	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	41.23
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.94	0.00	2.42	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.35
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.16	0.00	2.79	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	13.96
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.58	2.44	9.69	0.00	0.00	0.96	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	13.68
<b>Rochford total</b>		<b>2.31</b>	<b>5.74</b>	<b>4.34</b>	<b>0.00</b>	<b>0.00</b>	<b>12.52</b>	<b>57.38</b>	<b>51.69</b>	<b>27.91</b>	<b>31.02</b>	<b>2.79</b>	<b>7.25</b>	<b>5.56</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>208.53</b>
Other destinations		56.15	121.18	34.48	77.19	105.65	40.79	3.73	5.50	1.16	5.30	32.66	4.19	1.85	83.33	125.70	80.54	69.75	42.09	109.64	340.18	349.88	1256.57	965.54	3913.05	
<b>TOTAL</b>		<b>63.07</b>	<b>129.07</b>	<b>59.85</b>	<b>78.07</b>	<b>107.42</b>	<b>87.64</b>	<b>71.35</b>	<b>58.36</b>	<b>49.78</b>	<b>42.68</b>	<b>134.96</b>	<b>82.34</b>	<b>91.72</b>	<b>84.42</b>	<b>125.70</b>	<b>82.40</b>	<b>69.75</b>	<b>59.73</b>	<b>109.64</b>	<b>340.18</b>	<b>349.88</b>	<b>1256.57</b>	<b>965.54</b>	<b>4500.11</b>	

Source: Tables 2B and 3.

**Table 7A - Future 2038 food/beverage expenditure patterns (£M) - low growth**

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
<b>Expenditure 2038</b>		66.78	136.88	63.07	81.45	112.71	91.95	71.18	58.87	50.04	43.38	143.04	87.36	96.24	89.28	133.01	88.28	72.87	62.97	116.25	360.01	366.81	1325.24	1018.72	4736.40
<b>Southend-on-Sea</b>																									
Southend town centre		0.00	2.27	2.08	0.00	1.86	9.99	9.09	0.59	15.90	5.54	88.25	47.18	25.03	1.15	0.00	1.99	0.00	0.00	0.00	0.00	0.00	0.00	0.00	210.92
Westcliffe-on-Sea		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.31	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.31
Leigh-on-Sea		3.67	0.00	0.91	0.92	0.00	26.03	1.12	0.59	1.99	0.46	2.22	15.72	59.71	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	113.34
Shoeburyness		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.75	0.00	12.77	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	14.52
Other Southend		1.22	0.00	19.17	0.00	0.00	0.00	0.00	0.00	1.17	0.46	2.22	0.00	3.72	0.00	0.00	0.00	0.00	18.60	0.00	0.00	0.00	0.00	0.00	46.56
<b>Southend total</b>		<b>4.89</b>	<b>2.27</b>	<b>22.16</b>	<b>0.92</b>	<b>1.86</b>	<b>36.02</b>	<b>10.21</b>	<b>1.18</b>	<b>20.81</b>	<b>6.46</b>	<b>105.46</b>	<b>75.21</b>	<b>88.47</b>	<b>1.15</b>	<b>0.00</b>	<b>1.99</b>	<b>0.00</b>	<b>18.60</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>397.66</b>
<b>Rochford</b>																									
Rochford town centre		0.00	1.27	0.00	0.00	0.00	0.00	0.87	3.87	14.38	13.07	0.00	0.74	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	34.21
Rayleigh town centre		2.44	3.82	4.57	0.00	0.00	12.16	32.74	37.26	0.00	6.46	0.00	0.00	4.82	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	104.27
Hockley		0.00	1.00	0.00	0.00	0.00	0.00	23.64	7.99	0.00	2.15	0.00	6.95	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	41.73
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.98	0.00	2.44	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.42
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.22	0.00	2.96	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	14.19
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.59	2.46	9.85	0.00	0.00	1.01	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	13.90
<b>Rochford total</b>		<b>2.44</b>	<b>6.09</b>	<b>4.57</b>	<b>0.00</b>	<b>0.00</b>	<b>13.14</b>	<b>57.24</b>	<b>52.14</b>	<b>28.06</b>	<b>31.53</b>	<b>2.96</b>	<b>7.70</b>	<b>5.83</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>211.72</b>
Other destinations		59.45	128.52	36.33	80.53	110.85	42.79	3.72	5.55	1.17	5.39	34.61	4.45	1.94	88.13	133.01	86.30	72.87	44.38	116.25	360.01	366.81	1325.24	1018.72	4127.02
<b>TOTAL</b>		<b>66.78</b>	<b>136.88</b>	<b>63.07</b>	<b>81.45</b>	<b>112.71</b>	<b>91.95</b>	<b>71.18</b>	<b>58.87</b>	<b>50.04</b>	<b>43.38</b>	<b>143.04</b>	<b>87.36</b>	<b>96.24</b>	<b>89.28</b>	<b>133.01</b>	<b>88.28</b>	<b>72.87</b>	<b>62.97</b>	<b>116.25</b>	<b>360.01</b>	<b>366.81</b>	<b>1325.24</b>	<b>1018.72</b>	<b>4736.40</b>

Source: Tables 2A and 3.



**Table 7B - Future 2038 food/beverage expenditure patterns (£M) - high growth**

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total	
<b>Expenditure 2038</b>		66.78	136.88	63.07	81.45	112.71	91.95	77.15	63.11	53.82	46.15	143.04	87.36	96.24	89.28	133.01	88.28	72.87	62.97	116.25	360.01	366.81	1325.24	1018.72	4753.15	
<b>Southend-on-Sea</b>																										
Southend town centre		0.00	2.27	2.08	0.00	1.86	9.99	9.85	0.63	17.10	5.89	88.25	47.18	25.03	1.15	0.00	1.99	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	213.28
Westcliffe-on-Sea		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.31	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.31
Leigh-on-Sea		3.67	0.00	0.91	0.92	0.00	26.03	1.22	0.63	2.14	0.49	2.22	15.72	59.71	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	113.66
Shoeburyness		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.88	0.00	12.77	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	14.66
Other Southend		1.22	0.00	19.17	0.00	0.00	0.00	0.00	0.00	1.26	0.49	2.22	0.00	3.72	0.00	0.00	0.00	0.00	18.60	0.00	0.00	0.00	0.00	0.00	0.00	46.68
<b>Southend total</b>		<b>4.89</b>	<b>2.27</b>	<b>22.16</b>	<b>0.92</b>	<b>1.86</b>	<b>36.02</b>	<b>11.07</b>	<b>1.26</b>	<b>22.38</b>	<b>6.87</b>	<b>105.46</b>	<b>75.21</b>	<b>88.47</b>	<b>1.15</b>	<b>0.00</b>	<b>1.99</b>	<b>0.00</b>	<b>18.60</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>400.58</b>
<b>Rochford</b>																										
Rochford town centre		0.00	1.27	0.00	0.00	0.00	0.00	0.94	4.15	15.47	13.91	0.00	0.74	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	36.48
Rayleigh town centre		2.44	3.82	4.57	0.00	0.00	12.16	35.48	39.94	0.00	6.87	0.00	0.00	4.82	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	110.11
Hockley		0.00	1.00	0.00	0.00	0.00	0.00	25.62	8.56	0.00	2.29	0.00	6.95	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	44.43
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.98	0.00	2.61	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.60
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.07	0.00	2.96	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	15.03
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.63	2.64	10.48	0.00	0.00	1.01	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	14.76
<b>Rochford total</b>		<b>2.44</b>	<b>6.09</b>	<b>4.57</b>	<b>0.00</b>	<b>0.00</b>	<b>13.14</b>	<b>62.04</b>	<b>55.90</b>	<b>30.18</b>	<b>33.55</b>	<b>2.96</b>	<b>7.70</b>	<b>5.83</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>224.41</b>
Other destinations		59.45	128.52	36.33	80.53	110.85	42.79	4.03	5.95	1.25	5.73	34.61	4.45	1.94	88.13	133.01	86.30	72.87	44.38	116.25	360.01	366.81	1325.24	1018.72	4128.17	
<b>TOTAL</b>		<b>66.78</b>	<b>136.88</b>	<b>63.07</b>	<b>81.45</b>	<b>112.71</b>	<b>91.95</b>	<b>77.15</b>	<b>63.11</b>	<b>53.82</b>	<b>46.15</b>	<b>143.04</b>	<b>87.36</b>	<b>96.24</b>	<b>89.28</b>	<b>133.01</b>	<b>88.28</b>	<b>72.87</b>	<b>62.97</b>	<b>116.25</b>	<b>360.01</b>	<b>366.81</b>	<b>1325.24</b>	<b>1018.72</b>	<b>4753.15</b>	

Source: Tables 2B and 3.

**Table 8A - Future 2043 food/beverage expenditure patterns (£M) - low growth**

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total	
<b>Expenditure 2043</b>		70.76	145.48	66.44	85.01	118.66	96.63	75.03	62.27	53.25	46.23	151.71	92.85	100.94	94.11	140.93	94.64	76.17	66.42	123.32	381.19	385.42	1398.85	1076.17	5002.50	
<b>Southend-on-Sea</b>																										
Southend town centre		0.00	2.42	2.19	0.00	1.96	10.49	9.58	0.62	16.92	5.90	93.61	50.15	26.26	1.21	0.00	2.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	223.44
Westcliffe-on-Sea		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	13.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	13.08
Leigh-on-Sea		3.88	0.00	0.96	0.96	0.00	27.36	1.19	0.62	2.11	0.49	2.35	16.71	62.63	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	119.27
Shoeburyness		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.86	0.00	13.55	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	15.41
Other Southend		1.29	0.00	20.20	0.00	0.00	0.00	0.00	0.00	1.25	0.49	2.35	0.00	3.91	0.00	0.00	0.00	0.00	19.61	0.00	0.00	0.00	0.00	0.00	0.00	49.10
<b>Southend total</b>		<b>5.18</b>	<b>2.42</b>	<b>23.35</b>	<b>0.96</b>	<b>1.96</b>	<b>37.85</b>	<b>10.77</b>	<b>1.25</b>	<b>22.15</b>	<b>6.88</b>	<b>111.86</b>	<b>79.95</b>	<b>92.79</b>	<b>1.21</b>	<b>0.00</b>	<b>2.13</b>	<b>0.00</b>	<b>19.61</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>420.30</b>
<b>Rochford</b>																										
Rochford town centre		0.00	1.35	0.00	0.00	0.00	0.00	0.92	4.09	15.31	13.93	0.00	0.79	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	36.39
Rayleigh town centre		2.59	4.06	4.82	0.00	0.00	12.77	34.51	39.41	0.00	6.88	0.00	0.00	5.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	110.10
Hockley		0.00	1.06	0.00	0.00	0.00	0.00	24.92	8.45	0.00	2.29	0.00	7.39	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	44.11
Hullbridge		0.00	0.00	0.00	0.00	0.00	1.03	0.00	2.58	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.61
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.94	0.00	3.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	15.09
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.62	2.61	10.49	0.00	0.00	1.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	14.79
<b>Rochford total</b>		<b>2.59</b>	<b>6.47</b>	<b>4.82</b>	<b>0.00</b>	<b>0.00</b>	<b>13.81</b>	<b>60.34</b>	<b>55.15</b>	<b>29.87</b>	<b>33.60</b>	<b>3.14</b>	<b>8.18</b>	<b>6.12</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>224.09</b>
Other destinations		62.99	136.60	38.28	84.05	116.71	44.97	3.92	5.87	1.24	5.74	36.71	4.73	2.04	92.90	140.93	92.52	76.17	46.80	123.32	381.19	385.42	1398.85	1076.17	4358.10	
<b>TOTAL</b>		<b>70.76</b>	<b>145.48</b>	<b>66.44</b>	<b>85.01</b>	<b>118.66</b>	<b>96.63</b>	<b>75.03</b>	<b>62.27</b>	<b>53.25</b>	<b>46.23</b>	<b>151.71</b>	<b>92.85</b>	<b>100.94</b>	<b>94.11</b>	<b>140.93</b>	<b>94.64</b>	<b>76.17</b>	<b>66.42</b>	<b>123.32</b>	<b>381.19</b>	<b>385.42</b>	<b>1398.85</b>	<b>1076.17</b>	<b>5002.50</b>	

Source: Tables 2A and 3.

**Table 8B - Future 2043 food/beverage expenditure patterns (£M) - high growth**

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total	
<b>Expenditure 2043</b>		70.76	145.48	66.44	85.01	118.66	96.63	83.23	68.09	58.07	49.79	151.71	92.85	100.94	94.11	140.93	94.64	76.17	66.42	123.32	381.19	385.42	1398.85	1076.17	5024.89	
<b>Southend-on-Sea</b>																										
Southend town centre		0.00	2.42	2.19	0.00	1.96	10.49	10.63	0.68	18.45	6.36	93.61	50.15	26.26	1.21	0.00	2.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	226.53
Westcliffe-on-Sea		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	13.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	13.08
Leigh-on-Sea		3.88	0.00	0.96	0.96	0.00	27.36	1.32	0.68	2.31	0.53	2.35	16.71	62.63	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	119.68
Shoeburyness		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.03	0.00	13.55	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	15.58
Other Southend		1.29	0.00	20.20	0.00	0.00	0.00	0.00	0.00	1.36	0.53	2.35	0.00	3.91	0.00	0.00	0.00	0.00	19.61	0.00	0.00	0.00	0.00	0.00	0.00	49.25
<b>Southend total</b>		<b>5.18</b>	<b>2.42</b>	<b>23.35</b>	<b>0.96</b>	<b>1.96</b>	<b>37.85</b>	<b>11.94</b>	<b>1.36</b>	<b>24.15</b>	<b>7.41</b>	<b>111.86</b>	<b>79.95</b>	<b>92.79</b>	<b>1.21</b>	<b>0.00</b>	<b>2.13</b>	<b>0.00</b>	<b>19.61</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>424.13</b>
<b>Rochford</b>																										
Rochford town centre		0.00	1.35	0.00	0.00	0.00	0.00	1.02	4.47	16.69	15.01	0.00	0.79	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	39.33
Rayleigh town centre		2.59	4.06	4.82	0.00	0.00	12.77	38.28	43.09	0.00	7.41	0.00	0.00	5.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	118.08
Hockley		0.00	1.06	0.00	0.00	0.00	0.00	27.64	9.24	0.00	2.47	0.00	7.39	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	47.80
Hullbridge		0.00	0.00	0.00	0.00	0.00	1.03	0.00	2.82	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.85
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	13.02	0.00	3.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	16.17
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.68	2.85	11.30	0.00	0.00	1.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	15.89
<b>Rochford total</b>		<b>2.59</b>	<b>6.47</b>	<b>4.82</b>	<b>0.00</b>	<b>0.00</b>	<b>13.81</b>	<b>66.94</b>	<b>60.30</b>	<b>32.56</b>	<b>36.19</b>	<b>3.14</b>	<b>8.18</b>	<b>6.12</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>241.13</b>
Other destinations		62.99	136.60	38.28	84.05	116.71	44.97	4.35	6.42	1.35	6.18	36.71	4.73	2.04	92.90	140.93	92.52	76.17	46.80	123.32	381.19	385.42	1398.85	1076.17	4359.64	
<b>TOTAL</b>		<b>70.76</b>	<b>145.48</b>	<b>66.44</b>	<b>85.01</b>	<b>118.66</b>	<b>96.63</b>	<b>83.23</b>	<b>68.09</b>	<b>58.07</b>	<b>49.79</b>	<b>151.71</b>	<b>92.85</b>	<b>100.94</b>	<b>94.11</b>	<b>140.93</b>	<b>94.64</b>	<b>76.17</b>	<b>66.42</b>	<b>123.32</b>	<b>381.19</b>	<b>385.42</b>	<b>1398.85</b>	<b>1076.17</b>	<b>5024.89</b>	

Source: Tables 2B and 3.

**Table 9A - Summary of food/beverage expenditure 2023 to 2043 (£M) - low growth**

	2023	2028	2033	2038	2043
<b>Available expenditure</b>					
Rochford town centre	29.61	30.43	32.21	34.21	36.39
Rayleigh town centre	91.29	93.52	98.73	104.27	110.10
Hockley	36.39	37.34	39.47	41.73	44.11
Hullbridge	3.00	3.07	3.24	3.42	3.61
Great Wakering	12.33	12.65	13.37	14.19	15.09
Other Rochford District	12.01	12.35	13.09	13.90	14.79
<b>Total</b>	<b>184.62</b>	<b>189.35</b>	<b>200.11</b>	<b>211.72</b>	<b>224.09</b>
<b>Turnover of existing facilities</b>					
Rochford town centre	29.61	29.61	29.76	29.90	30.05
Rayleigh town centre	91.29	91.29	91.74	92.20	92.66
Hockley	36.39	36.39	36.58	36.76	36.94
Hullbridge	3.00	3.00	3.01	3.03	3.04
Great Wakering	12.33	12.33	12.39	12.45	12.51
Other Rochford District	12.01	12.01	12.07	12.13	12.19
<b>Total</b>	<b>184.62</b>	<b>184.62</b>	<b>185.55</b>	<b>186.48</b>	<b>187.41</b>
<b>Surplus/deficit expenditure £M</b>					
Rochford town centre	0.00	0.82	2.46	4.30	6.33
Rayleigh town centre	0.00	2.23	6.99	12.07	17.44
Hockley	0.00	0.94	2.89	4.97	7.17
Hullbridge	0.00	0.07	0.23	0.39	0.57
Great Wakering	0.00	0.32	0.98	1.73	2.57
Other Rochford District	0.00	0.34	1.02	1.77	2.60
<b>Total</b>	<b>0.00</b>	<b>4.73</b>	<b>14.56</b>	<b>25.24</b>	<b>36.68</b>

Source: Tables 4 to 8A and Experian sales density growth rates from Retail Planner Briefing Note 22 - Figure 4b.

**Table 9B - Summary of food/beverage expenditure 2023 to 2043 (£M) - high growth**

	2023	2028	2033	2038	2043
<b>Available expenditure</b>					
Rochford town centre	29.61	31.25	33.77	36.48	39.33
Rayleigh town centre	91.29	95.50	102.54	110.11	118.08
Hockley	36.39	38.26	41.23	44.43	47.80
Hullbridge	3.00	3.13	3.35	3.60	3.85
Great Wakering	12.33	12.96	13.96	15.03	16.17
Other Rochford District	12.01	12.67	13.68	14.76	15.89
<b>Total</b>	<b>184.62</b>	<b>193.76</b>	<b>208.53</b>	<b>224.41</b>	<b>241.13</b>
<b>Turnover of existing facilities</b>					
Rochford town centre	29.61	29.61	29.76	29.90	30.05
Rayleigh town centre	91.29	91.29	91.74	92.20	92.66
Hockley	36.39	36.39	36.58	36.76	36.94
Hullbridge	3.00	3.00	3.01	3.03	3.04
Great Wakering	12.33	12.33	12.39	12.45	12.51
Other Rochford District	12.01	12.01	12.07	12.13	12.19
<b>Total</b>	<b>184.62</b>	<b>184.62</b>	<b>185.55</b>	<b>186.48</b>	<b>187.41</b>
<b>Surplus/deficit expenditure £M</b>					
Rochford town centre	0.00	1.64	4.02	6.58	9.27
Rayleigh town centre	0.00	4.21	10.79	17.90	25.42
Hockley	0.00	1.87	4.65	7.67	10.86
Hullbridge	0.00	0.13	0.34	0.57	0.81
Great Wakering	0.00	0.63	1.57	2.58	3.65
Other Rochford District	0.00	0.66	1.61	2.63	3.70
<b>Total</b>	<b>0.00</b>	<b>9.14</b>	<b>22.98</b>	<b>37.93</b>	<b>53.71</b>

Source: Tables 4 to 8B and Experian sales density growth rates from Retail Planner Briefing Note 22 - Figure 4b.

**Table 10A - Food/beverage floorspace capacity - low growth**

	2023	2028	2033	2038	2043
<b>Turnover density new floorspace (£ per sq.m)</b>	£6,000	£6,000	£6,030	£6,060	£6,091
<b>Sales floorspace projection (sq.m gross)</b>					
Rochford town centre	0	136	408	710	1,040
Rayleigh town centre	0	372	1,159	1,991	2,863
Hockley	0	157	479	820	1,177
Hullbridge	0	12	38	65	93
Great Wakering	0	53	162	286	422
Other Rochford District	0	57	169	293	427
	<b>0</b>	<b>789</b>	<b>2,415</b>	<b>4,165</b>	<b>6,022</b>

Source: Table 9A.

**Table 10B - Food/beverage floorspace capacity - high growth**

	2023	2028	2033	2038	2043
<b>Turnover density new floorspace (£ per sq.m)</b>	£6,000	£6,000	£6,030	£6,060	£6,091
<b>Sales floorspace projection (sq.m gross)</b>					
Rochford town centre	0	274	667	1,085	1,522
Rayleigh town centre	0	702	1,790	2,954	4,173
Hockley	0	311	771	1,265	1,783
Hullbridge	0	22	57	94	133
Great Wakering	0	105	260	426	599
Other Rochford District	0	109	267	434	608
	<b>0</b>	<b>1,523</b>	<b>3,812</b>	<b>6,258</b>	<b>8,819</b>

Source: Table 9B.