Retail and Leisure Study Update 2014

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1.0 Introduction

1.1 Nathaniel Lichfield & Partners (NLP) has been commissioned by Rochford District Council to prepare a Retail and Leisure Study Update, and provide an assessment of the changes since the 2008 Rochford Retail and Leisure Study.

Study Objectives

1.2 The key objective of the Study is to provide a robust and credible evidence base to inform the Council's development plan, taking into account changes since the previous study. The study provides:

- a qualitative analysis of the existing retail and leisure facilities within Rochford District's town and local centres, identification of the role of each centre, catchment areas and the relationship between the centres; and
- a quantitative and qualitative assessment of the need for new retail facilities within Rochford District, and the need for leisure and other main town centre uses. This assessment will examine the need for both food and non-food retailing including a qualitative analysis for different forms of facilities such as retail warehousing, local shops, large food stores and traditional high street comparison shopping.

1.3 In addition, the study addresses the following in relation to specific geographical areas:

1. Rayleigh:
   - the impact of recent retail development outside of the centre on the town centre (in particular Asda store on Rawreth Lane and Tesco store on London Road);
   - the need and demand for additional retail and leisure development within proposed residential development (Allocations Plan, February 2014 – Policy SER1) arising from the development;
   - the potential impact implementation of the Rayleigh Area Action Plan would have on demand for additional retail and leisure development in the centre, versus a situation in which the Area Action Plan is not implemented;
2. Rochford:
   - the potential impact implementation of the Rochford Area Action Plan would have on demand for additional retail and leisure development in the centre, versus a situation in which the Area Action Plan is not implemented (looking in particular at proposed enhancements to the Market Square);
3. Hockley:
   - the potential impact implementation of the Hockley Area Action Plan would have on demand for additional retail and leisure development in the centre, versus a situation in which the Area Action Plan is not implemented. The Hockley Area Action Plan

proposes a maximum of 3,000 sq.m of additional retail development in Hockley centre, and the Retail and Leisure Study should consider what impacts there would be depending on the form this additional floorspace were to take;

4 Hullbridge:
- the extent to which the current retail and leisure provision in Hullbridge satisfies the level and nature of consumer demand;
- long-term viability of sustaining existing retail uses within Hullbridge, including actions that could be taken to ensure provision of local retail uses within the village;
- the need and demand for additional retail development within proposed residential development (Allocations Plan, February 2014 – Policy SER6), arising from the development;

5 Great Wakering:
- the extent to which the current retail and leisure provision in Great Wakering satisfies the level and nature of consumer demand;
- long-term viability of sustaining existing retail uses within Great Wakering, including actions that could be taken to ensure provision of local retail uses within the village;

6 Canewdon:
- the extent to which the current retail and leisure provision in Canewdon satisfies the level and nature of consumer demand;
- long-term viability of sustaining existing retail uses within Canewdon, including actions that could be taken to ensure provision of local retail uses within the village;

7 Ashingdon:
- the extent to which the current retail and leisure provision in Ashingdon satisfies the level and nature of consumer demand;
- long-term viability of sustaining existing retail uses within Ashingdon, including actions that could be taken to ensure provision of local retail uses within Ashingdon;
- the need and demand for additional retail development within proposed residential development (Allocations Plan, February 2014 – Policy SER8), arising from the development;

8 Rawreth:
- The viability of additional retail development to serve the local population within the area. If retail development is not currently viable, an assessment of what population growth in the area would be required in order to sustain local convenience retail uses.

Report Structure

1.4 Section 2 of this report describes the shopping hierarchy. Section 3 outlines retail trends and provides the updated retail capacity and need assessment, and Section 4 assesses the scope for commercial leisure uses and other town centre uses. Section 5 explores opportunities for accommodating growth.

Section 6 reviews the implications for Area Action Plans. Section 7 provides the recommendations and conclusions.

2.0 The Shopping Hierarchy

Introduction

2.1 The National Planning Policy Framework (NPPF) indicates (paragraph 23) that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. Local Plans are expected to define a network and hierarchy of centres that is resilient to anticipated future economic changes.

2.2 The recently published Planning Practice Guidance (PPG) places emphasis on developing strategies for town centres that are appropriate and realistic to the role of centres in the hierarchy. Town centre strategies should be based on the current state of a centre and opportunities to meet development needs (in full). These town centre strategies should seek to support the town centre vitality and viability, and should assess if changes to the role and hierarchy of centres are appropriate.

2.3 This section provides an overview of the shopping hierarchy in Rochford District and the surrounding sub-region.

Centres in Rochford and the Surrounding Area

2.4 Rochford District is bounded by Southend-on-Sea, Castle Point, Basildon and Chelmsford. The District contains three main settlements, and a number of smaller villages. Rayleigh town centre is defined as a principal town centre in the development plan. Hockley and Rochford's town centres are classed as smaller town centres catering for local needs.

2.5 The adopted Core Strategy (2011) sets out policies on retail and town centres, which seeks to enhance Rayleigh, Rochford and Hockley town centres' market share of retail spending. The planning framework for the three town centres is set out in the emerging Area Action Plans. These Area Action Plans are now at advanced stages. The potential to achieve these objectives and implement the Action Area Plans needs to be viewed in the context of the shopping hierarchy within the wider area.

2.6 Southend, Chelmsford and Basildon town centres are at the top of the shopping hierarchy in south east Essex, competing with other large regional/ sub-regional centres, i.e. intu Lakeside Shopping Centre and Colchester. Rayleigh is the main shopping centre within Rochford District, supported by smaller centres of Rochford and Hockley and village centres i.e. Hullbridge and Great Wakering.

2.7 Venuescore ranks the UK's top 2,500 plus retail destinations including town centres, malls, retail warehouse parks and factory outlet centres. Only Rayleigh and Southend Airport Retail Park within the District are listed within Venuescore's data. The results for these two destinations and other relevant centres are shown in Table 2.1.

Table 2.1 Venuescore UK Shopping Index 2013

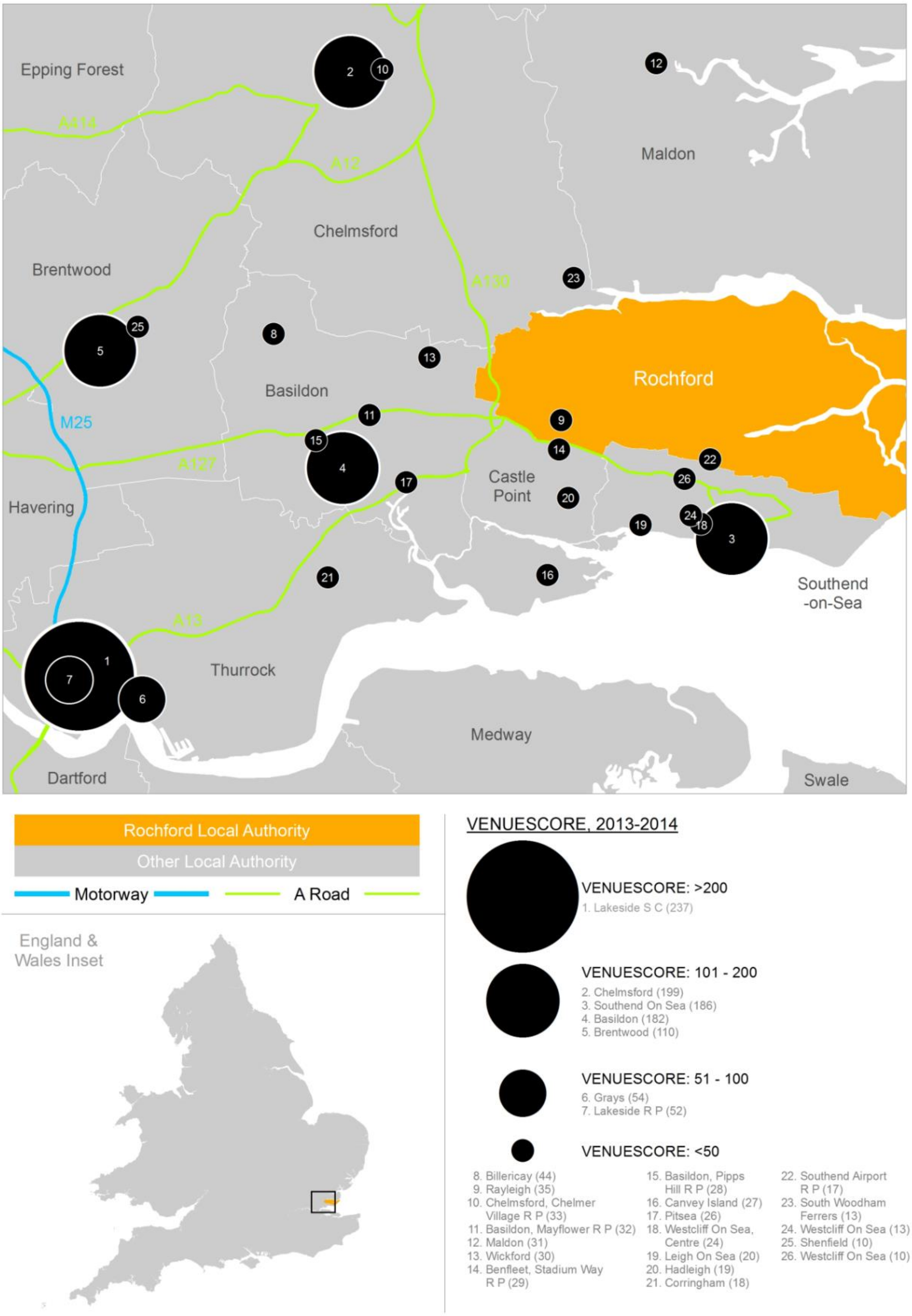
Centre	UK Rank	Venuescore
intu Lakeside Shopping Centre	49	237
Chelmsford	72	199
Southend on Sea	81	186
Basildon	870	182
Brentw ood	209	110
Grays	481	54
Lakeside Retail Park	510	52
Billericay	612	44
Rayleigh	**752**	**35**
Basildon Mayflow er Retail Park	833	32
Maldon	864	31
Wickford	901	30
Canvey Island	1,001	27
Pitsea	1,024	26
Westcliff on Sea	1,108	24
Leigh on Sea	1,322	20
Hadleigh	1,383	19
Corringham	1,452	18
Southend Airport Retail Park	**1,524**	**17**
South Woodham Ferrers	1,907	13

Source: Venuescore, Javelin Group 2013

2.8 Each destination is given a weighted score for the number of multiple retailers present, and the score attached to each retailer is weighted depending on their overall impact on shopping patterns. Rayleigh is a second tier centre that falls within the sub-regional shopping catchment area of Southend. Rayleigh competes primarily with other medium sized town centres such as Wickford and Hadleigh. Rochford and Hockley are much smaller town centres that serve more localised catchment areas than Rayleigh. The location of these Venuescore centres is shown in Figure 2.1 overleaf.

2.9 Figure 2.1 indicates that residents in Rochford District have good access to four sub-regional centres as well as having a choice of smaller centres for day to day shopping needs. The outflow of retail expenditure from the District, particularly comparison goods, is significant and this is likely to remain high in the future.

Figure 2.1 Venuescore Shopping Hierarchy



Existing Retail Provision in Rochford

2.10 An assessment of the existing retail and service provision in the main centres is provided in the centre audits included at Appendix 4. A summary of existing retail provision in provided in Table 2.2 below.

Table 2.2 Existing Retail Shop Provision

Centre	Centre Class A Shop Units	Convenience Goods Floorspace (sq.m net)	Comparison Goods Floorspace (sq.m net)
Rayleigh	200	6,120	7,490
Rochford	87	2,102	1,150
Hockley	60	812	1,290
Other centres	Over 50	1,318	600
Total	**approx. 400**	**10,352**	**10,530**

Source: 2013 Land Use Survey, VOA and NLP site surveys 2014

2.11 The audit of centres in Appendix 4 confirms that Rayleigh is the main shopping destination within the District, followed by Rochford and Hockley. The District falls within the sub-regional catchment area of Southend-on-Sea, and as a result the leakage of expenditure from the District is significant.

2.12 Rayleigh is a market town that provides a reasonable range of shops and facilities that serve the settlement and nearby villages. Rochford and Hockley are smaller town centres that serve their respective settlements and smaller rural catchment areas, providing a range of shops and non-retail services.

2.13 Local centres generally include a small range of shops of a local nature, serving a small catchment. They can include a small supermarket, newsagent, post office, takeaways and pharmacy. Facilities at Hullbridge, Great Wakering, Canewdon and other villages are more limited and serve local catchment areas.

2.14 Based on the number, scale and type of shops and services available in Rayleigh, Rochford and Hockley, these three centres should continue to be designated as town centres. Other village centres should continue to be designated as local centres.

2.15 National and local policy indicates that it is important for the District's town centres to maintain and strengthen their role in the retail hierarchy. The smaller centres should continue to perform a more local function meeting day to day shopping and service needs.

3.0 Assessment of Retail Need

Introduction

3.1 The National Planning Policy Framework (NPPF) indicates (paragraph 14) that local planning authorities should positively seek opportunities to meet the development needs of their area, and Local Plans should meet objectively assessed needs.

3.2 The Planning Policy Guidance (PPG) indicates that development plans should develop (and keep under review) town centre strategies that plan for a 3-5 year period, whilst also giving a Local Plan lifetime view. Plans should identify the scale of need for main town centre uses.

3.3 The PPG also introduces the requirement to consider a range of plausible scenarios, including a 'no development' scenario, which should not assume that all centres are likely to benefit from expenditure growth.

3.4 This section objectively assesses the quantitative and qualitative scope for new retail floorspace in Rochford District in the period from 2014 to 2034. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping. A qualitative assessment of the range and scale of existing shopping facilities has been undertaken as part of the town centre audits in Appendix 4.

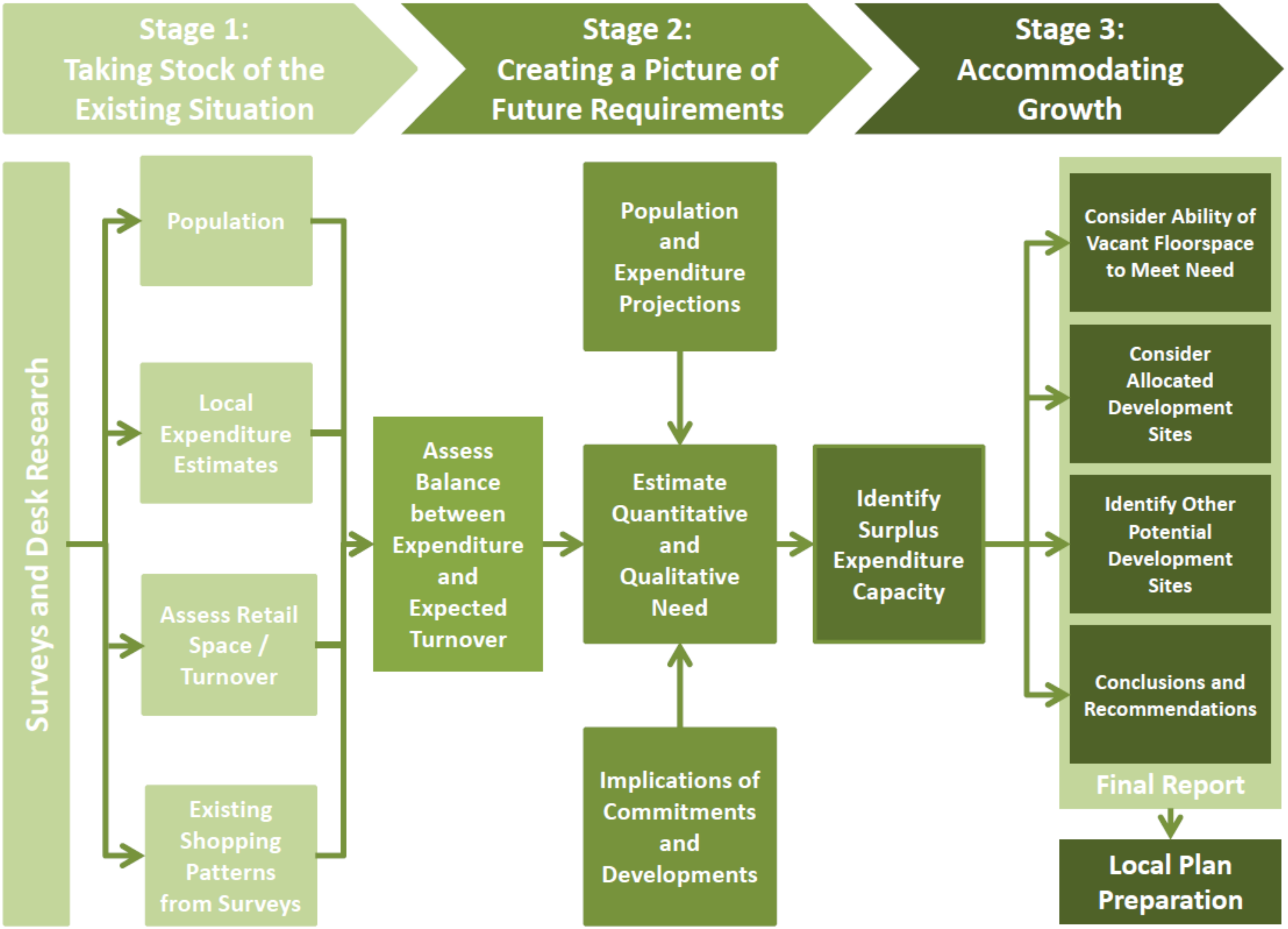
Study Area

3.5 The quantitative analysis is based on a defined study area that covers the catchment areas of the main shopping destinations in the District. The study area is sub-divided into five zones as shown in Appendix 1. The survey zones are based on postcode sectors and take into consideration the extent of the primary catchment areas of Rayleigh, Rochford and Hockley.

3.6 The primary catchment areas are the area where each centre will attract the vast majority of its retail trade. There will be retail expenditure leakage from the study area to centres outside, but conversely expenditure inflow from surrounding areas.

3.7 The methodology is summarised in Figure 3.1 overleaf and set out in more detail in Appendix 1.

Figure 3.1 Methodology for Estimating Future Requirements for Retail Floorspace



Retail Trends

3.8 This section considers the changes in the retail sector nationally and the implications for Rochford District.

3.9 The economic downturn had a significant impact on the retail sector. A large number of national operators failed (e.g. Blockbuster, Comet, HMV, JJB Sports, Jessops, Clinton Cards, Woolworths, MFI, Land of Leather, Borders, Game, Firetrap, Peacocks, La Senza, Past Times, Barratts and Habitat), leaving major voids within centres and retail parks. Many town centre development schemes have been delayed and the demand for traditional bulky goods retail warehouse operators was affected. Even some of the main food store operators have seen a reduction in growth, with discount operators taking market share from the main operators.

3.10 Assessing future expenditure levels within this study needs to take into account the likely timing and speed of the economic recovery, particularly in the short term. Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the plan period. This study takes a long term view for the plan period recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency also need to be carefully considered and a balanced approach taken. An overview of national tends within the retail sector is set out below.

Expenditure Growth

3.11 Historic retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future. However the recovery from the economic downturn is expected to result in slower growth in the short term.

3.12 In the past, expenditure growth has fuelled growth in retail floorspace, including major out-of-centre development, particularly in the 1980s and 1990s. The speed of recovery from the economic downturn suggests that high past rates of growth are unlikely to be achieved in the short term, but the underlying trend over the medium and long terms is expected to lead to a need for further modern retail floorspace, even allowing for continued growth in home shopping. These national trends are anticipated to be mirrored in Rochford District.

New Forms of Retailing

3.13 New forms of retailing have emerged in recent years as an alternative to more traditional shopping facilities. Home/electronic shopping has also emerged with the increasing growth in the use of personal computers, smart phones and the internet. Trends within this sector may well have implications for retailing within Rochford District. The continued growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street and in Rochford District.

3.14 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains an insignificant percentage of total retail expenditure.

3.15 The household survey results suggest 3.4% of households in the Rochford study area did their last main food and grocery shopping via the internet/ delivery, and 6.9% of households do most of their non-food shopping at home via the internet, TV or catalogue. These figures represent a lower proportion than the internet's national share of retail expenditure (about 11.5% in 2012 – Experian, September 2013).

3.16 More details on internet shopping habits in the District are set out in the results of the household survey, summarised in Appendix 5. The internet shopping figures for Rochford do not indicate higher levels of home shopping than the national average, however internet sales in Rochford should increase in the future and this assumption is reflected in the allowance made for a growth in the proportion of non-store spending, as set out in the retail capacity methodology in Appendix 1.

3.17 Recent trends suggest continued strong growth in this sector. Experian's Retail Planning Note 11 states:

"The strong increase in online shopping in the past decade has lifted the share of special forms of trading (SFT) to a level where it now accounts for around a tenth of total retail sales...

The rising share of internet sales in total retail transactions dominates the picture of SFT. Internet sales' share of total retail sales stood at near 10% in mid-2013 against 4.7% in June 2008 and just 2.9% as recently as March 2007…

Non-store retailing continues to grow rapidly, outpacing traditional forms of spending. We retain our assumption that non-store retailing will increase at a faster pace than total retail sales well into the long term. There were 52.7 million internet users in the UK (representing 84.1% of the population) in mid-year 2012 according to Internet World Stats. So growth of the internet user base will be less of a driver than in the past decade. But growth momentum will be sustained as new technology such as browsing and purchasing through mobile phones and the development of interactive TV shopping boost internet retailing. We expect that the SFT market share will continue to increase over the forecast period, although the pace of e-commerce growth will moderate markedly after about 2020. Our forecast has the SFT share of total retail sales reaching 17.4% by 2020 (15.4% in Retail Planner Briefing Note 9 of September 2011), rising to 20% by the end of the 2020s (15.5% previously)."

3.18 This Study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

3.19 The implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators, therefore growth in on-line sales may not always mean there is a reduction in the need for retail floorspace. Given the uncertainties relating to internet shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure (as set out in the retail capacity methodology, Appendix 1).

3.20 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. For example, extended opening hours and Sunday trading increased significantly in the 1990s. Retailers also responded to stricter planning controls by changing their trading formats to include smaller store formats capable of being accommodated within town centres (such as the Tesco Metro, Sainsbury Central/Local store and Marks & Spencer's Simply Food formats). This trend has been evident in Rochford District e.g. Sainsbury's Local Stores in Rochford and Hockley. The main food store operators have also increasingly sought representation in small towns in predominantly rural areas. The expansion of European discount food operators Aldi and Lidl has also been rapid during the last decade. There are currently no discount food operators located within Rochford District.

3.21 Food store operators have had a recent programme of store extensions, particularly Tesco, Sainsbury and Asda. These operators, faced with limited growth in food expenditure, have often increased the sale of non-food products within their food stores, including clothing and electrical goods. The recent recession halted this trend, and is now reversing it. There is limited physical potential to extend large food stores In Rochford District.

3.22 Comparison retailers have also responded to market conditions. The bulky goods warehouse sector has rationalised, including a number of mergers and failures, and scaled down store sizes. Other traditional high street retailers often seek large out-of-centre stores, for example Boots, TK Maxx and Poundstretcher. Matalan has also opened numerous discount clothing stores across Great Britain. Sports clothing retail warehouses including Decathlon have also expanded out-of-centre.

3.23 Within town centres, many high street multiple comparison retailers have changed their format. High street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation of activity into the larger regional and sub-regional centres, e.g. Southend, Chelmsford and intu Lakeside.

3.24 The economic downturn had a significant impact on the retail sector. A key effect the economic downturn has had on high streets is the increase in vacant shop units. The average unit vacancy rate increased from below 9% before the recession began in 2008 to the current figure of just under 14% (source: Experian Goad Plans).

3.25 Rochford District appears to have withstood the effects of the recession reasonably well in terms of shop vacancies. The current vacancy rate is significantly below the national average in Rayleigh, Rochford and Hockley and the number of vacant shop units in these three centres fell between 2008 and 2014.

3.26 The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods, was particularly weak during the recession. This has led to voids on retail warehouse parks and proposals to extend the range of goods sold to non-bulky goods. Southend Airport Retail Park has maintained high occupancy during the recession and benefits from a mix of bulky and non-bulky occupiers.

3.27 The continuation of national trends will influence future operator requirements across Rochford District with smaller vacant units becoming less attractive for new occupiers and existing retailers looking to relocate into larger units in higher order centres.

3.28 Operator demand for space has decreased during the recession, and of those retailers looking for space, many are likely to prefer to locate in larger centres, particularly multiple retailers. Demand from multiple retailers within Rochford District is likely to be weaker particularly in Rochford and Hockley, which will affect the appropriate strategies for these centres.

Population and Expenditure

3.29 The study area population for 2011 to 2034 is set out in Table 1 in Appendix 2. Population data has been obtained from Experian for each zone based on the 2011 Census. The 2011 base year population for each zone has been projected to 2034 based on the Edge Analytics Approved RSS projections and Thames Gateway/South Essex SHMA. This projection assumes 250 dwellings p.a. in Rochford, 630 dwellings p.a. in Basildon and 690 dwellings p.a. in Southend.

3.30 An alternative high population growth scenario has been tested using the ONS 2010 Interim Projections 2011 to 2021, and extrapolated to 2034, in Table A, Appendix 2.

3.31 Table 2 in Appendix 2 sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2034. Forecasts of comparison goods spending per capita are shown in Table 2 in Appendix 3.

3.32 Based on the baseline population projection, as a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 29% from £303.03 million in 2014 to £390.49 million in 2034, as shown in Table 3 (Appendix 2).

3.33 Based on the baseline population projection, comparison goods spending is forecast to increase by 91% between 2014 and 2034, increasing from £447.74 million in 2014 to £855.75 million in 2034, as shown in Table 3 (Appendix 3).

3.34 It should be noted that comparison goods spending is forecast to increase more than convenience spending as the amount spent on food and drink does not increase proportionately with disposable income, whereas spending on non-food goods is more closely linked to income.

3.35 These figures relate to real growth and exclude inflation.

Existing Retail Floorspace 2014

3.36 Existing convenience goods retail sales floorspace within Rochford District is 9,429 sq.m net, as set out in Table 10 in Appendix 2. This floorspace figure excludes comparison sales floorspace within food stores. About 58% of this food and grocery sales floorspace is located in Rayleigh, and 21% is located in Rochford.

3.37 Comparison goods retail floorspace within Rochford District is estimated to be 21,470 sq.m net, as shown in Table 10 in Appendix 3, of which 35% is located in Rayleigh and 20% is located in Rochford, including the Homebase store at Purdeys Way. Southend Airport Retail Park accounts for 33% of the comparison floorspace in the District, but this retail park also serves residents in Southend.

Existing Spending Patterns 2014

3.38 The results of the household shopper questionnaire survey undertaken by NEMS in April 2014 have been used to estimate existing shopping patterns within the study area zones. A summary of the methodology and results is shown in Appendix 5.

Convenience Shopping

3.39 The results of the household shopper survey relating to main and top-up food and grocery shopping have been used to estimate existing convenience goods shopping patterns. The estimates of market share or penetration within each study area zone are shown in Table 4, Appendix 2.

3.40 Table 4 (Appendix 2) indicates the proportion of convenience goods expenditure within each zone that is spent within Rochford District ranges from just 6.3% in Zone 5 (Great Wakering/Shoeburyness) up to 50.1% in Zone 2 (Rayleigh). The influence of stores outside the District is clearly evident, particularly stores in and around Southend and Basildon.

3.41 Rayleigh’s market share of expenditure in its zone (Zone 2) is reasonable at 49%, while the retention of convenience goods expenditure is relatively low within the primary catchment areas of Rochford (28%) and Hockley (15%). There appears to be some scope to increase the market share of expenditure for these three towns. Rayleigh’s market share includes the Asda store on Rawreth Lane.

3.42 The level of convenience goods expenditure attracted to shops/stores in Rochford District in 2014 is estimated to be £95.48 million as shown in Table 5, Appendix 2. This includes estimates of inflow from beyond the study area, applying the market shares set out in Table 4.

3.43 The total benchmark turnover of identified existing convenience sales floorspace within Rochford District is £83.21 million (Table 10, Appendix 2).

3.44 These figures suggest that convenience goods retail sales floorspace in the District is collectively trading about 15% above average, with a surplus of available convenience expenditure of £12.27 million. Most (about 85%) of this expenditure surplus is located within Rochford town, where food stores are currently trading around 70% above benchmark. Convenience goods shopping facilities are also trading above benchmark in Hockley (50%), whilst Rayleigh is trading around benchmark levels.

3.45 The results of the household survey suggest that convenience retail facilities within Rayleigh town centre are trading at satisfactory levels, following the development of the Asda store on Rawreth Lane and Tesco on London Road.

3.46 The household survey results suggest local shopping facilities are trading below benchmark (-27%). However surveys of this kind tend to overstate the market share of larger food stores and under-estimate the market share of local shops. If this is the case in Rochford District then the trading levels in Rayleigh, Rochford and Hockley may be slightly over-estimated, with more expenditure attracted to local shops.

3.47 On balance the estimate of global surplus expenditure (£12.27 million) within Rochford District as a whole, i.e. the difference between the actual spending at retail facilities in the District and the benchmark turnover of the facilities, is robust.

Comparison Shopping

3.48 Table 4 (Appendix 3) indicates the proportion of comparison goods expenditure within each zone that is spent within Rochford District ranges from 6.7% in Zones 1 and 5 (Wickford East/Hullbridge and Great Wakering/Shoeburyness) up to 29.3% in Zone 3 (Hockley). The retention of comparison goods expenditure is generally lower than for convenience goods. This reflects the propensity of customers to do food and grocery shopping locally, whilst for comparison shopping, customers are more likely to shop around and/or travel longer distances to visit larger centres that have more choice. The ability to increase comparison goods market share will be constrained by larger centres in the sub-region.

3.49 The estimated comparison goods expenditure currently attracted by shopping facilities within Rochford District is £96.98 million in 2014, as shown in Table 5, Appendix 3. This includes estimates of inflow from beyond the study area.

3.50 Based on this expenditure estimate, the average sales density for existing comparison goods sales floorspace in the District (21,470 sq.m net) is £4,517 per sq.m net. The analysis of existing comparison shopping patterns in 2014 suggests the following average sales density figures for the centres in Rochford District shown in Table 3.1 overleaf.

3.51 Rayleigh has the highest comparison goods average sales density, which reflects the stronger presence of national multiples. The relatively low sales density for Rochford reflects the inclusion of the Homebase DIY store at Purdeys Way (3,200 sq.m net). Retail Warehouse sales floorspace tends to trade at a much lower density than high street shops, and this is evident in the lower turnover of Southend Airport Retail Park. Local centres generally have a lower trading density, which reflects the predominance of independent traders, but again the household survey results will tend to under-estimate the market share of local shops.

Table 3.1: Comparison Goods Average Sales Densities

Centre	Average Sales Density 2014 (£ per sq.m net)
Rayleigh	£6,319
Rochford	£2,637
Hockley	£4,829
Southend Airport Retail Park	£3,976
Other Rochford District	£2,040
Rochford District Average	**£4,517**

3.52 There is no evidence to suggest existing comparison sales floorspace is over-trading anywhere in the District, or that there is surplus comparison expenditure available to support new development at present. Existing floorspace appears to be trading satisfactorily in difficult, but improving, market conditions.

Capacity for Convenience Goods Floorspace

3.53 As a minimum it is appropriate and realistic to plan to maintain the District's market share of convenience goods expenditure in the future. Planning for a decline in market share would not be sustainable and would not address the needs of local residents. It should be noted that as the forecast increase in internet spending is taken into account in projecting available expenditure in the future, this will have the effect of reducing the actual requirement for additional floorspace.

3.54 Based on constant market shares and baseline population projections, the future level of available convenience goods expenditure at 2019, 2024, 2029 and 2034 is shown at Tables 6, 7, 8 and 9 in Appendix 2.

3.55 The total level of convenience goods expenditure available for shops in the District between 2014 and 2034 is summarised in Table 11 (Appendix 2). Convenience expenditure available to shopping facilities in the District is expected to increase from £95.48 million in 2014 to £118.45 million in 2034.

3.56 Table 11 subtracts the benchmark turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further development. Within the District, there is an expenditure surplus of £12.27 million convenience goods expenditure in 2014. This surplus will increase to £16.53 million in 2019. Continued future growth produces a surplus of £22.06 million in 2024, increasing to £28.19 million in 2029 and £35.24 million in 2034.

3.57 The surplus expenditure projections have been converted into potential new floorspace estimates in Table 12. Surplus expenditure is converted into floorspace estimates based on an assumed average sales density figure of £13,000 per sq.m, based on the average turnover of the main food supermarket operators.

3.58 The short to medium term capacity figures up to 2024 suggest surplus of available convenience goods expenditure could support an additional 1,697 sq.m net (2,425 sq.m gross), primarily concentrated in Rochford. In the long term, surplus expenditure at 2034 could support 2,711 sq.m net of sales floorspace (3,873 sq.m gross) in the District as a whole, as shown in Table 11, Appendix 2.

3.59 By way of comparison, the previous Rochford Retail Study in 2008 suggested a slightly higher convenience goods floorspace requirement for the District of up to 3,000 sq.m net by 2026, based on constant market shares.

Alternative Population Growth Scenario

3.60 The convenience goods floorspace projections set out above are based on Edge Analytics Approved RSS projections and Thames Gateway/South Essex SHMA. The implications of adopting the higher growth scenario using the ONS 2010 Interim Projections have been tested.

3.61 Adopting the higher population growth forecast (Table A, Appendix 2) results in around a 1.5% increase in the total population in the study area by 2034. This in turn results in an increase in the level of surplus convenience goods expenditure to support new retail floorspace in the District, as shown in Table B, Appendix 2. By 2034, there is an additional £8.28 million of surplus convenience goods expenditure. The implications of this increase in surplus expenditure is a requirement for an additional 637 sq.m net (910 sq.m gross) of convenience goods floorspace in the District by 2034, as shown in Table C, Appendix 2. This increased requirement relates primarily to Rayleigh, where the floorspace requirement increases from 1,001 sq.m net (1,429 sq.m gross) to 1,484 sq.m net (2,120 sq.m gross).

Capacity for Comparison Goods Floorspace

3.62 The household survey suggests that the District's retention of comparison goods expenditure is generally lower than for convenience goods. The lower level of comparison expenditure retention is due to the strength of competing comparison goods facilities in neighbouring authorities, in particular Southend, Basildon and intu Lakeside.

3.63 Future improvements to comparison retail provision within the District could help to claw back some additional expenditure leakage from the study area. However, major developments in neighbouring authorities will limit the ability of shopping facilities in the District to increase their market share of expenditure.

Some retail development will be necessary in Rochford District in order to maintain existing market share in the future. An appropriate strategy for Rochford District should be to seek to maintain existing 2014 market shares for the District, in the face of increasing future competition in nearby centres, whilst maintaining the vitality and viability of centres.

3.64 It is realistic and appropriate for the District as a whole to plan to maintain market shares. However within the District it may be appropriate to readjust the shares of the main centres. For example, the provision of significant levels of retail floorspace in Hockley will increase the town's market share. In order to rebalance the distribution within the District, it is likely that the market share of Rochford town centre will decrease.

3.65 The Council should plan to maintain the existing role of centres, and in the case of Hockley seek to strengthen its retail role, recognising these centres fall within the catchment area of higher order regional and sub-regional centres. The centres in Rochford District will maintain a complementary role supporting these larger centres.

3.66 Based on the baseline population projections, available comparison goods expenditure has been projected forward to 2019, 2024, 2029 and 2034 in Tables 6, 7, 8 and 9 in Appendix 3, and summarised in Table 11. Available comparison expenditure to facilities within the District is expected to increase from £96.98 million in 2014 to £180.78 million in 2034.

3.67 For the purposes of this assessment, the existing comparison goods floorspace is estimated to be trading at equilibrium in 2014 (i.e. satisfactory levels), as shown in Table 12 (Appendix 3). Table 12 assumes that the turnover of comparison floorspace will increase in real terms in the future. A growth rate of 2% per annum is adopted, and this growth is required to maintain the health and viability of town centres, as recommended by Experian. Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio.

3.68 Within Rochford District as a whole, by 2019 there will be a small expenditure surplus of £3.19 million. This surplus increases to £11.12 million in 2024. By 2034, future expenditure growth generates an expenditure surplus of £36.68 million.

3.69 Surplus comparison expenditure has been converted into net comparison sales floorspace projections at Table 12 in Appendix 3, adopting an average sales density of £5,000 per sq.m in 2014, which is projected to grow by 2% in the future due to improved turnover efficiency. The surplus expenditure at 2034 could support 4,937 sq.m net of sales floorspace (6,582 sq.m gross).

3.70 The previous retail study in 2008 suggested a comparison goods floorspace requirement for the District of up to 20,140 sq.m net by 2026, based on constant market shares. The updated projections within this study update are significantly lower because of the effects of the recession on expenditure growth between 2008 and 2014 and lower future growth forecasts (i.e. 2.9% growth per annum rather than 5.3% growth).

Alternative Population Growth Scenarios

3.71 The comparison goods floorspace projections above are based on Edge Analytics Approved RSS projections and Thames Gateway/South Essex SHMA. The implications of adopting the higher growth scenario using the ONS 2010 Interim Projections have been tested.

3.72 As set out above, the higher population growth forecast (Table A, Appendix 3) results in around a 1.5% increase in the total population in the study area by 2034. This results in an increase in the level of surplus comparison goods expenditure to support new retail floorspace in the District, as shown in Table B, Appendix 3. By 2034, there is an additional £9.11 million of surplus comparison goods expenditure. The implications of this increase in surplus expenditure is a requirement for an additional 1,226 sq.m net (1,635 sq.m gross) of comparison goods floorspace in the District by 2034, as shown in Table C, Appendix 3. Again, this increased requirement relates primarily to Rayleigh, where the floorspace requirement increases from 2,291 sq.m net (3,055 sq.m gross) to 3,194 sq.m net (4,258 sq.m gross).

Qualitative Need for Retail Floorspace

3.73 Qualitative need can be assessed through consideration of the following factors:

- deficiencies or ‘gaps’ in existing provision;
- consumer choice and competition;
- overtrading, congestion and overcrowding of existing stores;
- location specific needs such as underserved markets; and
- the quality of existing provision.

Convenience Goods Shopping

3.74 The household survey results indicate that most residents in the study area undertake both a main shopping trip and top-up shopping trips. Main shopping trips are generally made once a week or less often, and the household survey identified that 87% of respondents travel to do their main food shopping by car (both driver and passenger). The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips. Large supermarkets or superstores are the usual destination for these types of shopping trip.

3.75 There is only one large food store of over 2,000 sq.m net within the District, i.e. Asda, Rawreth Lane (2,036 sq.m net) in Rayleigh, but the Co-op store at Eastwood Road in Rayleigh is marginally smaller (1,995 sq.m net). Larger stores are located just outside of the District boundary, in particular:

1 Sainsbury’s superstore at Rayleigh Weir (6,294 sq.m net);

2 Tesco Extra, Westcliff (5,599 sq.m net);

3 Waitrose, Eastern Avenue, Southend (5,196 sq.m net); and

4 Asda, Shoeburyness (4,459 sq.m net).

3.76 These four superstores are accessible to residents within Rochford District. The household survey results indicate that these four stores attracted 44% of main food and grocery shopping trips from households within the study area.

3.77 The larger food stores are supported by a range of smaller supermarkets and convenience stores within Rochford District. The discount food sector is not represented in the District, with the closest Aldi and Lidl stores located in Westcliff, Southend, Wickford, Hadleigh and Pitsea.

3.78 There is a reasonable choice of smaller food stores in Rayleigh, with Co-op, Iceland and Morrisons Local all located within the town centre. Rayleigh has a good selection of independent specialist food shops, as indicated in the audit of the town centre in Appendix 4.

3.79 Rochford also has a reasonable choice of small food stores for a town of its size, with Co-op, Sainsbury's Local and Spar stores. Food store provision in Hockley is more limited with small Co-op and Sainsbury's Local stores.

3.80 The retail capacity projections set out in Table 11 in Appendix 2 suggest there is surplus convenience goods expenditure in Rochford at 2014 (£10.53 million). There is limited surplus convenience goods expenditure in Rayleigh (£1.15 million) and Hockley (£3.15 million) based on existing market shares. This suggests that the short term quantitative capacity for further convenience goods floorspace is located within Rochford. In the medium to longer term, the surplus expenditure increases in Rayleigh (£13.01 million by 2034) and Hockley (£5.56 million by 2034).

3.81 The qualitative assessment suggests the priority for short to medium term food store development should be within Rochford and Hockley. In qualitative terms the choice of food stores in Rayleigh is good.

High Street Comparison Shopping

3.82 Rayleigh is the main high street comparison shopping destination within the District. Rochford and Hockley to a lesser extent provide residents with a more limited comparison goods offer. The centres in Rochford District are much smaller than larger centres surrounding the District, in particular Southend, Basildon and intu Lakeside, which are accessible to residents within the District and have a more extensive range of multiple retailers than Rayleigh.

3.83 The centre audits in Appendix 4 identify that none of the centres has a higher proportion of comparison retail units compared with the national average. Rayleigh has the best representation of comparison goods retailers, including a limited number of national multiples, complemented by a range of independent traders. Comparison retailers in Rochford and Hockley are predominantly small independent traders.

3.84 Rayleigh has representation in most comparison goods categories and there is generally a choice of outlets within each category (68 comparison shops in total). The clothing and footwear sector is well represented with 14 shops. Rayleigh has a reasonable mix of lower and higher order comparison goods. Lower order comparison goods are items bought on a regular basis, where customers are less likely to shop around or travel long distances to shop. Higher order goods tend to be higher value items bought occasionally, where customers window shop and compare prices and goods. Healthy town centres usually have a good mix of higher and lower order comparison goods shops.

3.85 There is a more limited range and choice of comparison shops in Rochford (28 in total), with very limited choice within each goods category. Rochford only has four clothing and footwear shops, and the comparison retail offer is dominated by shops selling lower order comparison goods.

3.86 Hockley also has a limited selection of comparison shops (19 in total), and most are small independent traders and shops selling lower order comparison goods, such as pharmaceutical goods, flowers and other day to day items.

Retail Warehouses and Bulky Goods

3.87 The main retail warehousing provision within Rochford District is at the Southend Airport Retail Park, at the southern edge of the District. Retailers within this park comprise Pets at Home, Dreams, Carpetright, Argos, Harveys, Home Bargains, B&M Bargains, Staples and Sports Direct. The retail park serves the wider Southend area. There is also a Homebase store at Purdeys Way, Rochford.

3.88 Apart from the Southend Airport Retail Park, Rochford District is predominantly served by bulky goods retail warehouse units located outside of the District, particularly around the Southend Arterial Road. There may be scope to improve bulky goods retail warehousing in the District when the economic climate improves.

3.89 Any out-of-centre retail warehouse proposal would need to be considered on its individual merits. The applicant would need to clearly demonstrate that the nature of retail floorspace proposed cannot be adequately accommodated within existing centres, allowing scope for disaggregation and flexibility, and that the development would not harm designated centres.

4.0 Requirements for Other Town Centre Uses

Introduction

4.1 This section assesses the potential for commercial leisure and other town centre uses in Rochford District, including for a cinema, tenpin bowling, bingo, nightclubs, private health and fitness clubs and catering, pubs and bars.

Commercial Leisure

4.2 Residents in the District have relatively good access to range of commercial leisure and entertainment, including facilities in neighbouring authorities, where most of the key sectors are represented.

4.3 Based on NLP's experience and household surveys from across the country, commercial leisure facilities usually draw the main part of their trade from residents up to a 20 minutes travel time. Major leisure facilities such as multiplex cinemas, ten-pin bowling centres and family entertainment centres require a large catchment population, and often benefit from locating together or on large out of centre leisure parks.

4.4 Rochford District's population has good access to major leisure facilities in Southend, Basildon, Chelmsford and intu Lakeside. The proximity of major leisure facilities in these surrounding local authorities may limit the potential for major commercial leisure facilities within the District.

Cinemas

4.5 There are no mainstream cinemas in Rochford District. The only cinema facility in the District is at the MegaCentre in Rayleigh, which has a single cinema screen, however this is generally used for private film screenings, and not to show films to the general public.

4.6 The household survey results indicate that most residents within the study area visit cinemas in Basildon (55%) and Southend (39%). The other recorded destinations were Chelmsford (4%), intu Lakeside (1%) and Canvey Island (1%).

4.7 Large multiplex cinemas in competing settlements, including Basildon, Southend, Chelmsford and intu Lakeside will restrict the catchment area of potential additional cinema provision within Rochford District.

4.8 To assess the theoretical demand for cinema provision within the District, it is assumed that a maximum of up to 20% of cinema trips can be retained within the area. The area's catchment population has been converted into a total number of cinema screens and seats based on the current national average (16,300 people per screen and 78 people per seat – NLP CineScope). The results are shown in Table 4.1 below.

Table 4.1 Cinema Potential in Rochford

	2019	2024	2029	2034
Study Area Population	164,809	170,465	176,120	181,755
Market Retention	20%	20%	20%	20%
Catchment potential	32,962	34,093	35,224	36,351
Cinema Screen Potential	2.0	2.1	2.2	2.2
Cinema Seat Potential	423	437	452	466

4.9 The analysis above suggests there is theoretical scope for a small cinema, if the District can attract 20% of cinema trips within the study area, although the commercial viability of this form of development is questionable given the proximity of large cinemas in Basildon and Southend.

Private Health and Fitness Clubs

4.10 There are a number of gyms and health clubs within the District, as highlighted by the household survey results, as follows:

1. Curves For Woman, Websters Way, Rayleigh;
2. Fungi Fitness, Hullbridge Road, Rayleigh;
3. Rayleigh Leisure Centre, Rawreth Lane, Rayleigh;
4. Aspire Fitness Gym, Brook Road Industrial Estate, Rayleigh;
5. Elite Fitness, Purdeys Industrial Estate, Rochford;
6. Virgin Active, Priory Chase, Rayleigh;
7. Hockley Health Club/Cullys Access to Fitness, Eldon Way Industrial Estate, Hockley;
8. Clements Hall Leisure Centre, Hawkwell; and
9. New Body Health & Fitness, Rayleigh.

4.11 Rochford District's adult population (18 and over) is approximately 68,000 in 2014, which could generate demand for about 8,200 public and private gym membership places, based on the national average membership rate (12%). Information provided by Sport England's Local Sport Profile Tool suggests that the proportion of adults in Rochford who are physically active (56.0%) is similar to the England average (56.6%). Similarly, the participation in sport (at least once a week) in Rochford is 35.4%, compared to the England average of 35.7%. On this basis, it is appropriate to adopt the national average membership and participation rates.

4.12 This potential membership estimate and the nine health and fitness clubs identified above, imply an average of around 900 members per club, which is slightly lower than the national average for private fitness clubs (1,375 members). These figures suggest there is an adequate supply of gyms and health clubs within the District for the foreseeable future.

Tenpin Bowling

4.13 The District has one tenpin bowling facility i.e. CJ's Bowling in Hockley (12 lanes). Residents in the District also have access to facilities in Southend (Tenpin Ltd) and Basildon (Hollywood Bowl and Basildon Bowl).

4.14 The household survey results suggest Rochford retains just under half of tenpin bowling trips within the study area. The study area population (159,000 in 2014) can in theory support about 13 lanes, based on the national average of one lane per 12,000 people. Based on 50% retention, Rochford's current potential is only 6-7 lanes. This potential will only increase marginally to 8 lanes based on population growth up to 2034.

4.15 Even assuming 100% retention of tenpin bowling trips in the District the potential at 2034 is only 15 lanes, suggesting that current provision should meet the future needs of residents over the plan period. Furthermore, bowling facilities in Southend and Basildon will also limit the commercial potential in Rochford.

Bingo

4.16 There are no mainstream bingo facilities in Rochford District. Residents in the District have access to facilities in Southend (Mecca), Basildon (Gala) and Canvey Island (Rio Bingo).

4.17 Rochford District's adult population (about 68,000 adults) could generate about 119,000 admissions based on the national participation rate (1.75 per adult), compared with the national average of 113,000 admissions per club. There is no available information on local participation rates.

4.18 In theory Rochford's population could support one bingo hall, however existing bingo facilities in Basildon, Canvey Island and Southend are likely to reduce the commercial viability of new facilities in Rochford.

Nightclubs

4.19 There are approximately 1,750 nightclubs in the UK, approximately one per 30,000 people (source: Mintel). Large nightclubs (capacity up to 2,000 people) are generally located in large towns with a population of over 100,000 people. There are two nightclubs in Rayleigh (The Pink Toothbrush and Linx). Residents in the District also have access to a large number of nightclubs in Southend. There appears to be limited potential for large nightclubs in the Rochford District.

Casinos

4.20 Betting and gaming is a popular activity in the UK - each year over 32 million adults participate in some form of gambling (UK Gambling Commission 2011). There are around 140 licensed casinos operating in Great Britain, about one casino per 400,000 people.

4.21 There are no casinos within Rochford, but Southend has two casinos. Rochford is unlikely to have a catchment population large enough to support a casino. It is also likely that casino operators would prefer to locate in Basildon or Southend.

Other Services, Restaurants, Bars and Takeaways

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

- **Class A1 services** cover a range of uses, including hairdressers, dry cleaners, travel agents, some sandwich shops (those not categorised as Class A3), funeral parlours and post offices.
- **Class A2 services** include banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies.
- **Class A3/A5** includes restaurants, cafés (A3) and takeaways (A5).
- **Class A4** pubs/bars (Class A4).

4.23 Food and beverages is a fast moving and creative sector, with a steady flow of new concepts emerging. Within this sector there has been a significant increase in the number of national multiple chains. These national chains have sought to increase their geographical coverage. These types of food and drink operators (Class A3 and A4) i.e. restaurants, bars and pubs have supported other major leisure uses, in particular cinema developments. Within town centres the demand has increased, including a significant expansion in the number of coffee shops, such as Starbucks, Costa Coffee and Coffee Republic.

4.24 National branded pub/restaurant chains have invested heavily and not exclusively in larger centres. Themed restaurants have also expanded rapidly. The key categories for food and beverage offers are:

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

4.25 Food and drink establishments (Class A3, A4 and A5) including restaurants, bars and pubs have supported other major leisure uses on leisure and retail parks and are important services within town and local centres. National information available from Experian Goad indicates that the proportion of non-retail uses within town centres across the country has increased significantly. A balance between Class A1 and Class A3 to A5 uses needs to be maintained. The mix of uses in the main centres in the District is shown in Table 4.2.

4.26 The proportions of Class A5 takeaways within all three centres are slightly higher than the national average. Rochford has a high proportion of pubs/bars and restaurants. Hockley has a low proportion of restaurants and pubs/bars.

Table 4.2 Rochford District Centres Use Class Mix

Type of Unit	Proportion of Total Number of Units (%)			
	Rayleigh	Rochford	Hockley	UK
Class A1 (Retail)	42.0	43.7	43.4	44.1
Class A1 (Services)	16.5	16.1	21.7	14.1
Class A2	18.5	9.2	13.3	12.1
Class A3	10.0	12.6	6.7	11.3
Class A4	2.0	6.9	1.7	2.9
Class A5	6.5	4.6	10.0	3.4
Vacant/under const.	4.5	6.9	3.3	12.1
Total	**100.0**	**100.0**	**100.0**	**100.0**

Source: Experian Goad

4.27 The Experian's latest 2012 local expenditure figures indicate that the average expenditure in the study area for food and drink consumed away from the home is £943 per capita in 2014. The total expenditure in the study area is £150 million. Food and drink expenditure per capita is expected to increase in real terms (excluding inflation) by 32% between 2014 and 2034. Taking into account population growth, food and drink expenditure within the study area is expected to increase from £150 million in 2014 to over £225 million in 2024, an increase of about 50%.

4.28 Assuming Rochford District attracts around 20% of food and drink expenditure, similar to the market share for comparison goods, then the estimated expenditure currently attracted by facilities within the District is £30 million in 2014. This is projected to increase to £45 million by 2034. As noted in the previous section, the distribution of market shares within the District can be rebalanced, with more of the forecast retail growth and floorspace requirements directed to Hockley. This rebalancing should also apply to food and drink needs.

4.29 The additional £15 million expenditure has been converted into floorspace projections based on an average sales density of £5,000 per sq.m, as shown in Table 4.3.

Table 4.3 Food and Drink Floorspace Projections

Centre	Floorspace (sq.m gross)			
	By 2019	By 2024	By 2029	By 2034
Rayleigh	435	911	1,434	2,006
Rochford	103	215	338	473
Hockley	54	114	180	252
Rest of District	62	130	204	285
Total	**654**	**1,370**	**2,156**	**3,016**

Other Class A1 and A2 Service Uses

4.30 The retail, food and drink floorspace projections do not include non-retail Class A1 services or Class A2 services. Based on the Goad national average, one would expect around 20% of shop premises to be occupied by these uses within centres, or about 15% of total floorspace.

4.31 The proportion of Class A1 and Class A2 services is relatively high in the District, with 35.0% in Rayleigh, 25.3% in Rochford and 35.0% in Hockley, compared with the Goad national average of 26.2%.

4.32 Given the current high provision of Class A1/A2 service uses in the District, development should provide less than 15% of floorspace for these uses. A figure of 5% may be more appropriate.

Conclusions

4.33 It is important to maintain a reasonable proportion of leisure and service uses in the District and additional floorspace should be provided over the plan period.

4.34 There is a potential requirement for an additional 3,000 sq.m gross of Class A3/A4/A5 floorspace in the District up to 2034, with the priority for Class A3 restaurant/café space within Rayleigh and Hockley.

4.35 The commercial leisure assessment concludes there is limited potential for additional large scale facilities over the plan period due to existing provision both within Rochford District and neighbouring authorities.

5.0 Accommodating Growth

Introduction

5.1 The National Planning Policy Framework (NPPF) indicates (paragraph 23) that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres. The need for development should be met in full and should not be compromised by limited site supply. In order to accommodate growth, local planning authorities should assess the need to expand town centres to ensure a sufficient supply of suitable sites. The NPPF (paragraphs 23 and 24) indicates local planning authorities should apply a sequential approach for development.

5.2 The National Planning Policy Guidance indicates that development plans should develop (and keep under review) town centre strategies that plan for a 3-5 year period, whilst also giving a Local Plan lifetime view. Plans should identify the scale of need for main town centre uses and assess whether the need can be met on town centre sites or through expanding centres, with the sequential test to be followed.

5.3 The PPG acknowledges that not all successful town centre regeneration projects are retail-led, or will involve significant new developments. Public realm, transport and accessibility improvements can play important roles. Town centre car parking strategies, in a move away from resisting parking in town centres, are to encourage improvements to both the quality and quantity of car parking provision, where required to enhance the performance of town centres.

5.4 This section assesses the scope to accommodate growth within and on the edge of Rochford District's main town centres.

Floorspace Projections

5.5 The floorspace projections set out in the previous sections assume that new shopping facilities within Rochford District can maintain their current market share of expenditure within the study area, recognising that other competing centres will improve in the future. There are a number of issues that may influence the scope for new floorspace and the appropriate location for this development, as follows:

- major retail developments in competing centres;
- the re-occupation of vacant retail floorspace;
- the availability of land to accommodate new development;
- the reliability of long term expenditure projections;
- the effect of internet/home shopping on the demand for retail property;
- the level of operator demand for floorspace in Rochford District;

- the likelihood that Rochford District's existing market share of expenditure will change in the future in the face of increasing competition;
- the potential impact new development may have on existing centres.

5.6 The PPG suggests town centre strategies should plan for a 3-5 year period, but the longer term plan period should be considered. Projections up to 2024 are realistic and are based on up to date forecasts, which take into account the effects of the recession. The long term floorspace projections (up to 2029 and beyond) should be treated with caution and should only be used as a broad guide, particularly when translated into the development plan allocations or when used to guide development management decisions. Long term forecasts may be subject to change due to unforeseen circumstances. Projected surplus expenditure is primarily attributable to projected growth in spending per capita. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under review.

5.7 The expenditure projections in this study take into account home shopping made through non-retail businesses, because special forms of trading have been excluded. The study assumes that special forms of trading will increase in the future, including the growth of internet shopping. The impact of internet growth on the demand for retail floorspace is unclear. Some retailers' home delivery and internet services utilise existing stores rather than warehouses, for example Tesco Direct. Growth in internet sales will not always reduce the demand for shop floorspace. In addition, some of the growth in internet sales may divert trade away from mail order companies rather than retail operators. Overall the long term impact of home shopping on expenditure projections is uncertain.

5.8 The quantitative and qualitative assessment of the potential for new retail floorspace within the previous sections suggests there is scope for new retail development within Rochford District during the Plan period (to 2034). This section examines the opportunities for accommodating this projected growth and assesses potential to accommodate this floorspace.

5.9 The projections up to 2034 suggest there is scope for 3,873 sq.m gross of convenience goods floorspace, 6,582 sq.m gross of comparison goods floorspace and 3,016 sq.m gross of Class A3 to A5 space.

5.10 These projections relate to Class A1 retail uses and Class A3 to A5 uses only. Based on the current mix of floorspace within town centres in Rochford District, there should also be scope for around 5% of additional floorspace that can be occupied by Class A1 non-retail services and Class A2 uses. Table 5.1 below summarises the floorspace projections by centre in 2034.

Table 5.1: Summary of Floorspace Projections 2034 (sq.m gross)

Centre	Convenience	Comparison	Food/Drink	Service Uses	Total
Rayleigh	1,429	3,055	2,006	342	6,832
Rochford	1,865	855	473	168	3,361
Hockley	611	423	252	68	1,354
Airport RP	n/a	2,073	n/a	n/a	2,073
Other Rochford	- 33	177	285	23	452
Total	**3,873**	**6,582**	**3,016**	**601**	**14,072**

Source: Table 11 in Appendix 2 and Appendix 3, Table 4.3, Section 4

Accommodating Future Growth

5.11 The sequential approach suggests that designated town centres should be the first choice for retail and leisure development. In accommodating future growth, the following issues should be taken into consideration:

- What is the locational area of need the development seeks to serve and what existing centre could potentially fulfil the identified area of need?
- Is the nature and scale of development likely to serve a wide catchment area?
- Is a site available in one of the designated centres, including vacant premises and will this site meet the identified need?
- If the development has a more localised catchment area, is a site available in a local centre and will this site meet the identified need?

5.12 All development should be appropriate in terms of scale and nature to the centre in which it is located.

5.13 The existing stock of premises will have a role to play in accommodating projected growth, during the economic recovery. The retail capacity analysis in this report assumes that existing retail floorspace can, on average, increase its turnover to sales floorspace densities. For comparison goods, a growth rate of 2% per annum is assumed. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.

5.14 There are currently 17 vacant shop units within the three main centres (Rayleigh, Rochford and Hockley), which equates to an overall vacancy rate of just 4.9%, which is much lower than the Goad national average (12.1%). Given the existing low levels of vacant floorspace within the centres, it is unrealistic to plan to achieve a reduction in vacancy rate.

Development Opportunities

Rayleigh

5.15 Rayleigh is the main town centre in the District and it has the best prospects for attracting investment. The town centre should be the main focus for future town centre development, particularly comparison retail floorspace.

5.16 As set out in Table 5.1 above, the capacity assessment identifies that there is a projection for around 6,800 sq.m gross of A1-A5 floorspace in Rayleigh by 2034, based on constant market shares.

5.17 Within Rayleigh town centre, development options appear to be limited in the short term. The development potential of the town centre is constrained by its historic environment, street layout and neighbouring residential areas.

5.18 In the medium to long term, there may be scope to redevelop sites to the rear of properties on the east High Street on Websters Way. Any developments would need to ensure there are pedestrian links through to the High Street.

5.19 The Websters Way car park (about 350 spaces) has an important role serving the town centre, however this large surface car park could be considered a significant longer term development opportunity. A development area of around one hectare could be assembled. Any redevelopment scheme would need to re-provide car parking on part of the site in the form of multi-level parking. The provision of multi-level car parking could free up a significant part of the site for new town centre uses. The area could potentially accommodate over 5,000 sq.m gross of commercial floorspace at ground floor level. If developed comprehensively this area could accommodate a significant proportion of the projected capacity for Class A uses in Rayleigh up to 2034.

5.20 There may be other development opportunities towards the northern end of Eastwood Road and the western end of the High Street, subject to multiple land ownerships and site assembly. For example, the Dairy Crest depot site to the rear of 128 High Street could also be redeveloped for town centre uses, if the occupier chooses to relocate in the future. This site represents a potential long term development opportunity. Windfall opportunities may become available, but are likely to be small scale (less than 500 sq.m gross). The future focus for the existing primary shopping area is likely to be small scale intensification and extensions, e.g. extension in to services areas to the rear.

5.21 If Rayleigh cannot accommodate the floorspace projection within the town centre, then the Council could seek to allocate sites elsewhere within the District to meet accommodate the long term projections. For example it may be appropriate to direct an element of Rayleigh’s floorspace projections to other towns, such as Hockley and/or major residential developments. This potential is considered below. An element of new floorspace could also be directed to existing local centres within the District.

Rochford

5.22 As set out in Table 5.1 above, the capacity assessment indicates over 3,300 sq.m gross of Class A1-A5 floorspace could be provided in Rochford by 2034.

5.23 Within Rochford town centre development options appear to be limited, particularly in the short to medium term. The town centre is constrained by listed buildings and the conservation area.

5.24 The existing Spar building adjacent to the Market Square is a potential redevelopment opportunity, as this building does not contribute towards the conservation area. This building is currently in retail use and its redevelopment would not significantly increase retail floorspace.

5.25 There may be potential to develop land adjacent to Freight House for office or other commercial uses that could include an element of retail, although this is likely to be relatively small scale and peripheral to the rest of the town centre. It would also be necessary to ensure sufficient car parking is retained to serve the rail station.

5.26 Small windfall opportunities may become available. The future focus for the primary shopping area is likely to be small scale intensification and extensions. If this cannot be accommodated within the town centre, then the Council should look to allocate sites elsewhere within the District to meet the forecast projections. It may be appropriate to direct an element of these floorspace projections to Hockley and/or new residential developments.

Hockley

5.27 The capacity assessment summarised in Table 5.1, shows a Class A1 to A5 projection of over 1,300 sq.m gross in Hockley by 2034, based on constant market shares. As indicated above, there may be some potential to redirect floorspace capacity from Rayleigh and Rochford to Hockley.

5.28 The adopted Hockley Area Action Plan identifies the Eldon Way Opportunity Site for redevelopment, to provide up to 3,000 sq.m gross of retail floorspace, which exceeds the overall Class A1 to A5 projection for the town set out in Table 5.1.

5.29 The AAP notes that there is a particular requirement for convenience goods retail within Hockley. If implemented, this site would be sufficient to more than meet Hockley's floorspace projection up to 2034.The redevelopment of the Eldon Way site would result in a qualitative improvement in the retail offer of the town centre to serve local residents.

Southend Airport Retail Park

5.30 The capacity assessment identifies a comparison goods floorspace requirement of around 2,000 sq.m gross at the Southend Area Retail Park by 2034. This retail park is located immediately adjacent to the boundary with Southend-on-Sea Borough Council, and it attracts a significant proportion of its trade from the residents who live in Southend rather than Rochford District.

5.31 The floorspace projection for this retail park includes expenditure growth within Southend. It may be more appropriate to accommodate this growth within town centres within Southend. Additional retail floorspace at the retail park would serve the Southend urban area as well as residents within Rochford District.

Residential Allocations

5.32 The adopted Allocations Plan (February 2014) identifies a number of settlement extension residential land allocations, as set out below.

Figure 5.1: Summary of Residential Land Allocations

Area	Dwellings by 2015	Dwellings 2015-2021	Dwellings post 2021
North of London Road, Rayleigh		550	
West Rochford	450	150	
West Hockley	50		
South Hawkwell	175		
East Ashingdon	100		
South West Hullbridge		250	250
South Canewdon		60	
South East Ashingdon			500
West Great Wakering			250
Total	**775**	**1010**	**1000**

Source: Table 2, Rochford Allocations Plan, February 2014

5.33 It should be noted that these proposed new dwellings (and the population it will accommodate) have been taken into account within the capacity projections within this study.

5.34 The Study Brief for this Retail and Leisure Update includes an assessment of the need for additional retail development within the proposed residential allocations, specifically in relation to the above allocations at North of London Road in Rayleigh (550 dwellings, Policy SER1), South West Hullbridge (500 dwellings, Policy SER6) and South East Ashingdon (500 dwellings, Policy SER8).

5.35 Table 5.2 below estimates the retail expenditure that will be generated by these residential allocations in total, and then estimates how much of this spending that could realistically be retained within any local provision provided within these developments. Table 5.2 converts retained expenditure into floorspace requirements. In undertaking these calculations, the following assumptions have been made:

1 the needs of the new residential development has been considered in isolation, with no inflow from existing residents in the surrounding area;

2 development will be completed between 2014 and 2034, and the UK average household size (2.4) for the proposed new development is adopted;

3 available convenience and comparison goods expenditure per person is based on the average for the five study area zones in 2034 (Table 2, Appendix 2 and 3);

4 not all of the convenience and comparison goods expenditure will be available to support local retail facilities in the proposed new housing development, as expenditure will continue to be attracted to other centres and existing superstores;

5 given the size of the residential developments and using our judgement based on schemes elsewhere, up to 30% of convenience goods

expenditure and 10% of comparison goods expenditure could be retained to support the proposed local retail floorspace;

6 for convenience goods, the estimated retention figure reflects the fact that top-up convenience shopping in particular can be carried out locally where appropriate facilities are provided;

7 for comparison goods, a much lower proportion of available expenditure will be retained, recognising that while the scale of any centres proposed within the residential development are such as to justify an element of comparison shopping, consistent with the role of the centres, they would not offer the full range of higher order comparison shopping provided by centres at the upper end of the retail hierarchy; and

8 an average sales density for local shopping facilities of £5,000 per sq.m have been applied, to convert the retained expenditure to floorspace requirements.

Table 5.2: Potential Retail Floorspace Requirements within Residential Developments

	North of London Road, Rayleigh	South West Hullbridge	South East Ashingdon
Population			
No. of dwellings	550	500	500
Average household	2.4	2.4	2.4
Total Population	1,320	1,200	1,200
Convenience Goods			
Convenience Goods Expenditure per capita at 2034	£2,185	£2,185	£2,185
Total Available Convenience Goods Expenditure	£2.88 million	£2.62 million	£2.62 million
Retained Convenience Goods Expenditure (25%)	£0.86 million	£0.79 million	£0.79 million
Convenience Goods Floorspace Turnover, £ per sq.m	£5,000	£5,000	£5,000
Floorspace sq.m net	172 sq.m net	158 sq.m net	158 sq.m net
Floorspace sq.m gross	246 sq.m gross	226 sq.m gross	226 sq.m gross
Comparison Goods			
Comparison Goods Expenditure per capita (2034)	£4,844	£4,844	£4,844
Total Available Comparison Goods Expenditure	£6.39 million	£5.81 million	£5.81 million
Retained Comparison Goods Expenditure (10%)	£0.64 million	£0.58 million	£0.58 million
Comparison Goods Floorspace Turnover, £ per sq.m	£5,000	£5,000	£5,000
Floorspace sq.m net	128 sq.m net	116 sq.m net	116 sq.m net
Floorspace sq.m gross	170 sq.m gross	155 sq.m gross	155 sq.m gross

5.36 In relation to these new residential development areas, the Allocations Plan states that the provision of small scale retail units in the form of neighbourhood shops should be explored at the application stage, and if considered to be viable, should be integrated into the developments. The provision of local shopping facilities is appropriate within developments of this size, in order to ensure residents have day to day shops and services within walking distance of their home, which will reduce car travel.

5.37 Table 5.2 indicates that the number of new dwellings proposed in each location (500 to 550 dwellings) is only sufficient to support a small scale local shopping centre, with around 400 sq.m gross of retail floorspace (around five small shop units). In total, three local centres of this size would account for around 10% of the District's total retail floorspace projection up to 2034 (around 10,400 sq.m gross).

5.38 Small local centres of this scale would not be capable of meeting both main and top-up convenience shopping needs. Typically, local centres serving relatively small catchments would primarily serve top-up food shopping needs.

5.39 Local centres may typically include a small convenience store under the Sunday Trading Act threshold (280 sq.m net), supported by small units such as a butchers, greengrocers, newsagents etc. and a limited range of comparison and service units typically found in local centres such as a chemist, hairdressers, post office, take away, dry cleaners etc.

5.40 The figures in Table 5.2 suggest a total requirement of around 400 sq.m gross of retail floorspace in each centre. Non-retail services (Class A2 to A5) could increase the size of centre to over 600 sq.m gross.

5.41 Although the population within the residential development schemes could support a small local centre, it is essential to ensure that any local centre proposed is both commercially viable and capable of delivery. For example, the proximity of the existing Asda store on Rawreth Lane may mean that a new food store within the adjacent residential development is not attractive to retail operators, which could make a local centre within this scheme unviable. Further work would need to be produced to support any planning application for retail floorspace in these locations to demonstrate that the development proposed is appropriate in terms of its scale and position within the development, the context of the surrounding area, and whether it is likely to be of interest to retailers.

Rawreth

5.42 The Study Brief refers to the viability of additional retail development to serve the local population within the Rawreth area, and if retail development is not currently viable, what population growth in the area would be required in order to sustain local convenience retail uses.

5.43 Rawreth is a small village to the north west of Rayleigh and east of Wickford. The catchment area of these two towns will constrain the potential for retail facilities within Rawreth village.

5.44 The local population in the village (2011 Census - 500 metre radius) is only 250. Based on the 30% and 10% expenditure retention estimates and methodology adopted in Table 5.1, at 2034 this population could support about 50 sq.m gross of convenience retail floorspace and 30 sq.m gross of comparison goods floorspace. This suggests in theory Rawreth could only support one small village shop.

5.45 In order to create a local centre of around 500 sq.m gross (including non-retail services) about 400 additional dwellings would need to be provided at Rawreth village.

5.46 As noted above, it would be essential to ensure that any local centre proposed is both commercially viable and capable of delivery. Further work would need to be produced to support any planning application for retail floorspace in Rawreth.

6.0 Implications for Action Area Plans

Introduction

6.1 This section reviews the implications of the updated Retail and Leisure Study for the District's Area Action Plans (AAPs) for Rayleigh, Rochford and Hockley. In line with the NPPF and PPG, the three AAPs are proactive in promoting the town centres and the policies set out a positive approach to ensuring the vitality of the centres is supported.

Rayleigh Area Action Plan

6.2 The Rayleigh Area Action Plan Submission Draft Document was issued in November 2013. The draft AAP identifies Rayleigh's role as the main town centre in the District, and that the demand for additional retail floorspace and supporting leisure facilities to help meet shopping needs locally and across the wider district needs to be addressed. Policy 1 of the draft AAP states that new opportunities for retail development or other town centre uses, together with environmental improvements will help to strengthen the role of the town centre.

6.3 The AAP sets out a framework for bringing forward retail and other development within the town centre, along with improvements to the town centre environment. The key elements of the framework (Policy 1) are:

1. a consolidated and strengthened primary retail core along High Street;
2. opportunities for new and intensified retail and other mixed-use development as sites become available;
3. the promotion of appropriate proportions and concentrations of uses other than A1 including A2-5, leisure, cultural and community uses, particularly in locations outside the primary retail core, including Bellingham Lane and Eastwood Road;
4. new and improved routes within the AAP area and linking the centre with the railway station and the surrounding area; and
5. new and improved public realm and environmental improvements throughout the centre as identified on the spatial framework.

6.4 Policy 2 supports proposals that retain or strengthen Rayleigh's position in the local retail hierarchy. Policy 3 states that retail uses will be acceptable in the town centre's primary and secondary shopping frontages, and that proposed change of use to non-A1 purposes will only be permitted where it would not have a detrimental impact on, or undermine, the predominance of A1 uses within the centre; would not create clusters of non-A1 uses; and would contribute positively to the overall offer and encourage people into the centre. The policy generally seeks to ensure 75% of the primary shopping frontage and 50% of the secondary shopping frontage is in retail (A1) use. The AAP recognises that centres are dynamic and that there is a need for flexibility.

6.5 In terms of new floorspace, the AAP suggests that the High Street South/ Eastwood Road area is considered the most appropriate location for additional retail floorspace, in particular convenience retail. Additional floorspace could also be created along Websters Way.

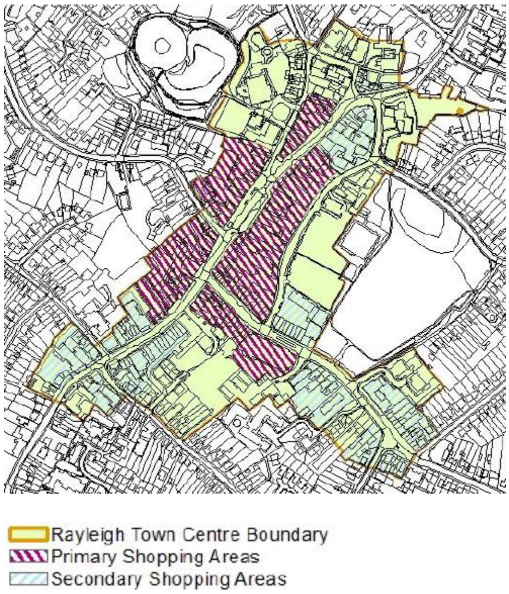
Figure 6.1: Extract from Rayleigh Draft Area Action Plan

6.6 The AAP suggests that in the longer term, the Dairy Crest depot site (to the rear of 128 High Street, identified in Figure 6.1 above) could be redeveloped for a mixed use development. However, the AAP does not make any major site allocations for development. A significant proportion of the town centre lies within a conservation area, and development of any large scale retail development would be constrained by this designation.

6.7 The AAP proposes a much tighter primary shopping frontage than the primary shopping area identified in the adopted Allocations Plan, as shown in Figures 6.2 A and B below.

Figure 6.2 A: Extract from draft AAP

B: Extract from Allocations Plan



6.8 The NPPF does not suggest that shopping frontage policies must be adopted in all town centres. However, a *laissez faire* approach could result in the deterioration of shopping frontages and could undermine their role as shopping centres. This approach could lead to a significant increase in the proportion of non-shop uses. The emergence of a large number of vacant premises within shopping frontages may be the only circumstances where this approach could be appropriate. There is a limited number of vacant units within Rayleigh town centre, and there is no need to relax shopping policies in order to encourage non-Class A1 to reoccupy vacant units or to regenerate rundown areas.

6.9 In our view, frontage policies are still required to maintain the appropriate mix of town centres, in order to maintain the vitality and viability of centres and prevent adverse impacts on residential amenity. However, a ban on changes of use from Class A1 across frontages would not promote diversity and could stifle investment, which would be potentially damaging to the vitality and viability of centres. In secondary shopping areas the introduction of more restrictive shop frontage policies may be inappropriate as it could lead to an increase in vacant units, because demand for Class A1 retail occupiers is unlikely to be as strong within peripheral parts of the town centres. In addition there is no evidence that suggests Rayleigh town centre has a harmful or disproportionately high level of non-shop uses at present.

6.10 In our view the designation of primary and secondary frontages remains an appropriate approach in Rayleigh and a clear policy is required relating to these frontages. The wording of this policy should provide sufficient flexibility to allow non-retail uses to secure representation in town centres, where the proposed use would not be harmful to the town centres vitality and viability or residential amenity. The wording of Policy 3 of the AAP is appropriate and sufficiently flexible to achieve these aims.

6.11 In order to achieve the desired improvements to the town centre and strengthen its retail function, it is necessary that the AAP is delivered and the framework is put in place to encourage investment and development.

6.12 Delivery and implementation of the AAP allows for changes such as the consolidation of the primary shopping frontages that should strengthen the overall retail function of Rayleigh town centre, and will sit alongside the Allocations Plan.

Rochford Area Action Plan

6.13 The Rochford Area Action Plan Submission Draft Document was issued in July 2013. The draft AAP identifies Rochford's existing position as a small market town serving the retail needs of the local population. The AAP acknowledges that the small size of the majority of retail units in the centre impact on Rochford's function as a town centre. The whole of the town centre is within a conservation area, and the AAP seeks to protect the historic character of the centre.

6.14 The AAP sets out a framework for Rochford town centre. The key elements of the framework (Policy 1) are:

1 the focus of retail uses in the centre, with the highest concentration of A1 uses in the Market Square area;

2 the creation of a more vibrant and attractive Market Square, with public realm improvements and the encouragement of additional restaurant and café uses;

3 the protection of office-based employment uses in the Locks Hill area;

4 opportunities for new mixed-use development as sites become available;

5 new and enhanced routes and key junctions within the AAP area and linking the centre with the rail station and the surrounding area; and

6 new and improved public realm and environmental improvements throughout the centre.

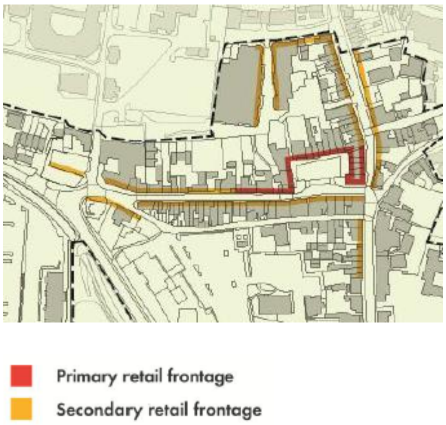
Figure 6.3: Extract from Rochford Draft Area Action Plan

Figure 6 – Rochford AAP framework plan

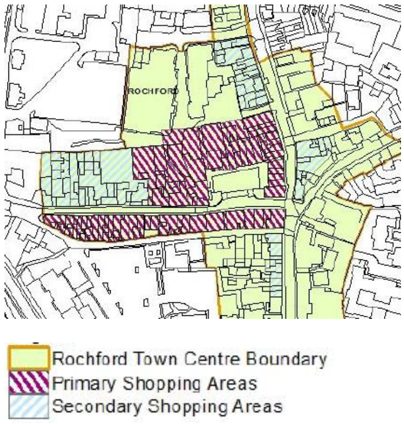
6.15 In relation to retail policies, Policy 2 states that retail uses will be acceptable in the town centre's primary shopping frontages, and that proposed change of use to A3 and A4 purposes will only be permitted where it would maintain 65% of the primary shopping frontage. New A5 uses are not considered acceptable. The AAP will only allow non-A1 uses in the primary shopping frontage where it would not have a detrimental impact on, or undermine, the predominance of A1 uses within the centre; would not create clusters of non-A1 uses; and would contribute positively to the overall offer and encourage people into the centre. For secondary shopping frontages (Policy 3), a wider range of non-A1 uses is considered acceptable.

6.16 The AAP proposes a much tighter primary shopping frontage than the primary shopping area identified in the adopted Allocations Plan, as shown in Figures 6.4 A and B below.

Figure 6.4 A: Extract from draft AAP



B: Extract from Allocations Plan



6.17 Policy 6 supports development in the central area that will strengthen the retail function and character of the area. In terms of new floorspace, the AAP suggests that the existing Spar building on the eastern side of Market Square could potentially be redeveloped. The Council is considering options for improvements to Market Square

6.18 In our view, the wording of Policies 2 and 3 of the AAP are appropriate and sufficiently flexible to allow non-retail uses to secure representation in the town centre, while protecting the core retail function.

6.19 In order to achieve the desired improvements to the town centre and strengthen its retail function, it is necessary that the AAP is delivered and the framework is put in place to encourage investment and development.

6.20 Delivery and implementation of the AAP allows for changes such as the consolidation of the primary shopping frontages that should strengthen the overall retail function of Rochford town centre, and will sit alongside the Allocations Plan.

Hockley Area Action Plan

6.21 The Hockley Area Action Plan was adopted in February 2014. The AAP identifies Hockley as an area for change and improvement that would benefit from an enhanced retail offer. The AAP notes that the retail offer is relatively limited compared to other nearby towns, with few high street multiples.

6.22 The AAP sets out a framework for Hockley town centre. The key elements of the framework (Policy 1) are:

1. new and improved public spaces throughout the centre, including a public open space associated with the redevelopment of the Eldon Way Opportunity Site and improvements to Spa Road mini-roundabout;
2. new and enhanced routes linking the centre with the rail station and the surrounding area, making the Eldon Way Opportunity Site more accessible and integrated into the rest of Hockley centre;
3. enhanced car parking that will serve the centre as a whole;

4 opportunities for new housing as part of the Eldon Way Opportunity Site redevelopment;

5 the focus of retail uses in the centre, with an opportunity for a new retail development within the Eldon Way Opportunity Site; and

6 the protection of some existing employment and leisure uses within the Eldon Way Opportunity Site and on the Foundry Business Park.

Figure 6.5: Extract from Hockley Area Action Plan

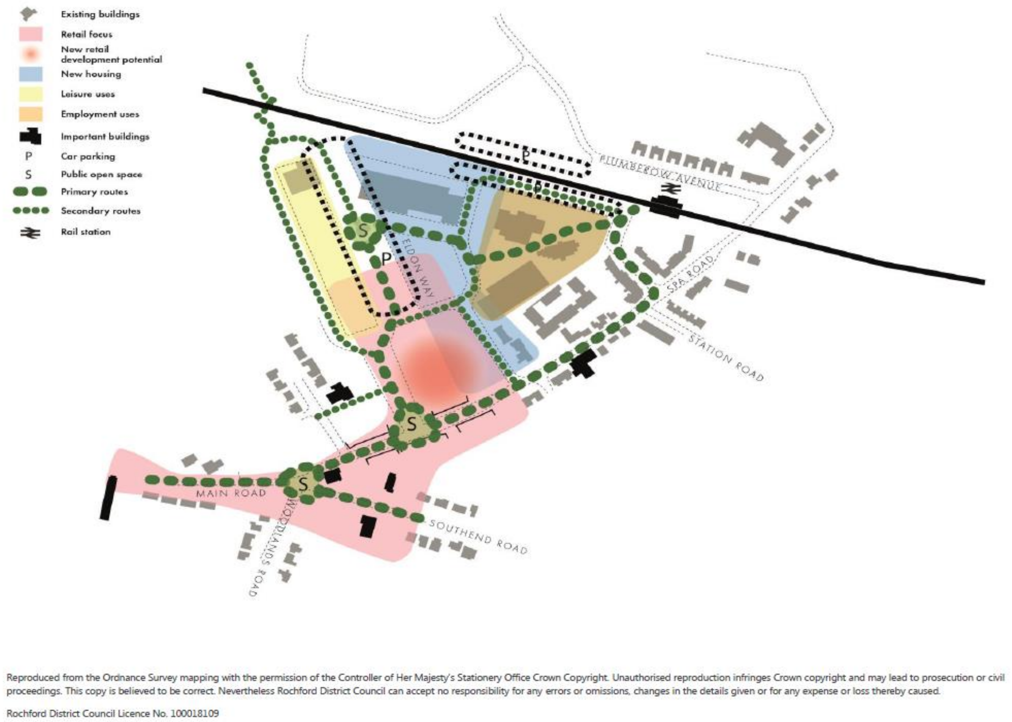


Figure 13 Hockley AAP framework plan

6.23 The mixed use redevelopment of the Eldon Way Opportunity Site is key to achieving the framework objectives.

6.24 Policy 6 seeks to improve the retail offer of Hockley and strengthen its role as a shopping destination for local residents. In relation to the Eldon Way Opportunity Site, the Policy states that new retail development will be permitted where it would:

a provide a range of unit sizes, including smaller units;

b not exceed a maximum overall additional retail capacity for the centre of 3,000 sq.m (gross);

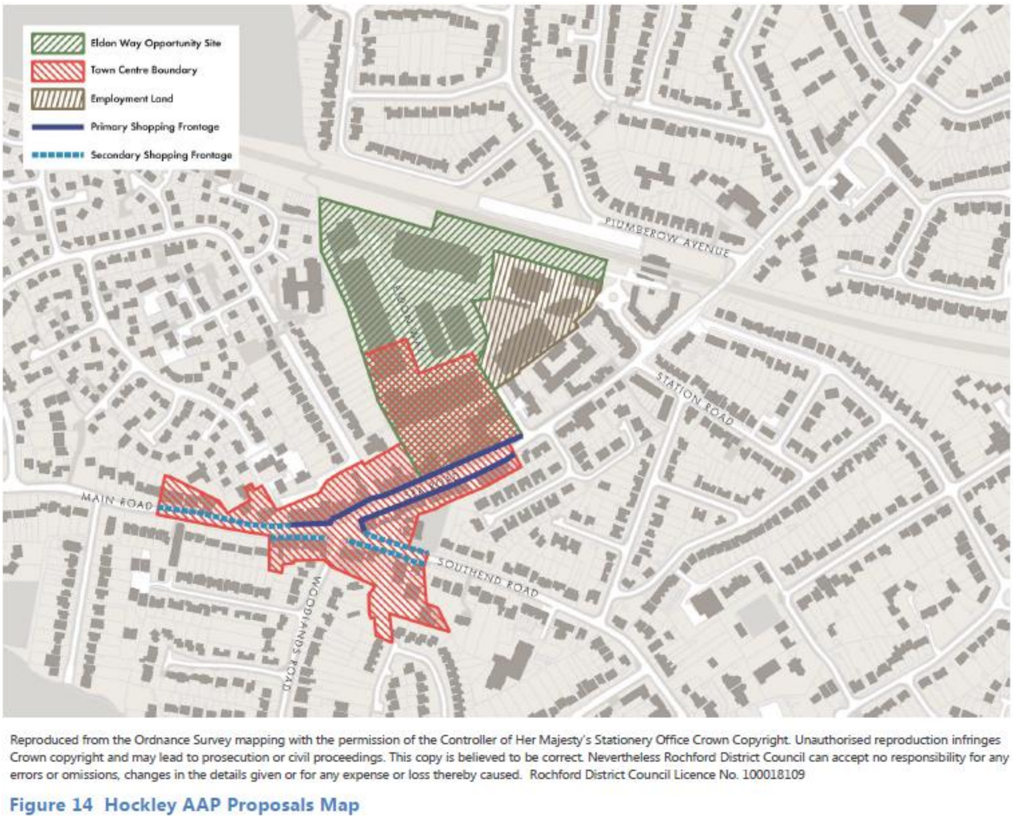
c fully integrate with Spa Road, and allow for direct pedestrian links through the site to the redeveloped Eldon Way Opportunity Site, rail station and other areas of Hockley; and

d contribute positively towards the redevelopment of the Eldon Way Opportunity Site for a mix of uses, including residential, retail, leisure and office.

6.25 The Policy notes that the Council will favour smaller developments and the expansion of existing retail units. A proposal for a larger, single store would be considered favourably, provided it would also meet the above criteria and assesses the implications for other centres as a result of any claw back of expenditure. The AAP refers to Hockley having convenience goods floorspace capacity, as identified in the 2008 Retail and Leisure Study, and implies that the majority of the 3,000 sq.m gross referred to in the Policy should be convenience floorspace. Leisure uses are also supported within the Opportunity Site (Policy 8).

6.26 The Allocations Plan does not define primary or secondary shopping areas for Hockley, and these are defined solely within the AAP as shown in Figure 6.6 below. The town centre boundary includes part of the Eldon Way Opportunity Site as an appropriate location for new retail floorspace.

Figure 6.6: Extract from AAP



6.27 Policy 7 of the AAP will only allow non-A1 uses in the primary and secondary shopping frontages where it would not have a detrimental impact on, or undermine, the predominance of A1 uses within the centre; would not create clusters of non-A1 uses; and would contribute positively to the overall offer and encourage people into the centre.

6.28 The AAP notes that currently 58% of the primary and 44% of the secondary frontages are in retail use, however the target for Hockley is to increase this to 75% for the primary shopping frontage and 50% for the secondary shopping frontage. The AAP recognises that centres are dynamic and that there is a need for flexibility.

6.29 In our view, the wording of Policy 7 of the AAP is appropriate and sufficiently flexible to allow non-retail uses to secure representation in the town centre, while protecting the core retail function.

6.30 In order to achieve the desired improvements to the town centre and strengthen its retail function, it is necessary that the AAP is delivered and the framework is put in place to encourage investment and development. This is particularly important in relation to the delivery of the Eldon Way Opportunity Site, which is essential to achieve the framework objectives for Hockley town centre.

Summary

6.31 The overall conclusions of the Retail and Leisure Study Update accord with the AAPs for the three main centres in Rochford District.

6.32 The implications of the AAPs not being implemented are that the desired improvements to all three town centres may not be realised. The AAPs are important in terms of defining the primary and secondary retail frontages for all three centres, and setting realistic and measurable targets for maintaining the proportion of A1 retail units. The AAP policies also recognise the need for flexibility.

6.33 In terms of both Rayleigh and Rochford, the AAPs do not identify any major sites for redevelopment that would see a significant increase in retail floorspace within the town centres. On this basis, the implementation of the AAPs is unlikely to have a significant impact on the demand for additional retail and leisure development in either centre.

6.34 This is most relevant for Hockley, where there is an allocation for up to 3,000 sq.m gross of retail floorspace. While the Retail and Leisure Study Update did not identify this level of floorspace requirement for Hockley over the study period, this centre has the greatest qualitative need to improve its retail offer for surrounding local residents and claw back some of the expenditure currently going elsewhere. The implications of not implementing the AAP are that the Eldon Way Opportunity Site is not progressed.

6.35 The NPPF requires Local Plans to be positively prepared and seek to meet the objectively assessed needs for development. The retail floorspace requirements identified within the capacity assessment in this Study update should be met within Rochford District. Given the limited opportunities to accommodate floorspace growth within Rochford town centre, it is appropriate for some of the objectively assessed retail needs for the District to be reallocated and directed to Hockley. The delivery of the Eldon Way Opportunity Site within the AAP is therefore essential to meet these needs.

7.0 # Conclusions and Recommendations

Introduction

7.1 This report provides an update of the District wide needs assessment for retail development in Rochford District. The principal conclusions of the analysis contained within this study are summarised below.

Meeting Shopping Needs in Rochford District

7.2 The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail development over the plan period up to 2034.

7.3 When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.

7.4 Long term forecasts up to and beyond 2024 may be more susceptible to change, due to unforeseen circumstances. Long term projections should be monitored and kept under review. The implications of major retail development within and surrounding the District should be monitored along with the effect proposals may have on the demand for additional development in Rochford District.

Floorspace Projections

7.5 The quantitative assessment of the potential capacity for retail floorspace suggests that there is scope for new development within Rochford District. As the 3,000 sq.m gross retail floorspace that could be included within the Eldon Way Opportunity Area is not a commitment, it has not been taken into account in the following floorspace projections.

7.6 The convenience goods projections, based on constant markets shares, suggest new floorspace could be distributed as follows:

Table 7.1: Convenience Goods Retail Floorspace Projections (Gross)

Location	Additional Convenience Retail Floorspace (sq.m gross)				
	2014 - 2019	2019 - 2024	2024 - 2029	2029 - 2034	Total 2014 - 2034
Rayleigh	363	314	349	403	**1,429**
Rochford	1,290	170	189	216	**1,865**
Hockley	396	64	71	80	**611**
Other Rochford [1]	-	-	-	-	**-**
Total	**2,049**	**548**	**609**	**699**	**3,905**

Source: Table 12, Appendix 2
[1] Negative floorspace requirement excluded

7.7 The comparison goods projections, based on constant markets shares, suggest new floorspace could be distributed as follows:

Table 7.2: Comparison Goods Retail Floorspace Projections (Gross)

Location	Additional Comparison Retail Floorspace (sq.m gross)				
	2014 - 2019	2019 - 2024	2024 - 2029	2029 - 2034	Total 2014 - 2034
Rayleigh	327	776	939	1,013	**3,055**
Rochford	108	215	255	277	**855**
Hockley	50	106	129	138	**423**
Southend Airport RP	261	520	621	671	**2,073**
Other Rochford	25	44	52	56	**177**
Total	**770**	**1,661**	**1,996**	**2,155**	**6,582**

Source: Table 12, Appendix 3

7.8 The Class A3/A5 food/drink and other non-retail services projections, suggest new floorspace could be distributed as follows:

Table 7.3: Non-Retail Service Floorspace Projections (Gross)

Location	Additional Non-Retail Service Floorspace (sq.m gross)				
	2014 - 2019	2019 - 2024	2024 - 2029	2029 - 2034	Total 2014 - 2034
Rayleigh	509	557	612	670	**2,348**
Rochford	139	152	167	183	**641**
Hockley	69	76	84	91	**320**
Other Rochford	67	74	80	87	**308**
Total	**784**	**859**	**943**	**1,031**	**3,617**

Source: Tables 4.3 and 5.1

7.9 There are potential development sites in Rayleigh and Hockley town centre that, if assembled, could accommodate the medium to long term projections. The key sites comprise the Eldon Way Opportunity Area in Hockley and the Websters Way car park site in Rayleigh. As set out in Section 5 above, up to 1,800 sq.m gross of the floorspace projections could be provided within local/neighbourhood centres to serve proposed new large residential developments within the growth areas identified North of London Road, Rayleigh, South West Hullbridge and South East Ashingdon.

Strategy Recommendations

Rayleigh

7.10 The floorspace capacity projection is around 6,800 sq.m gross of additional Class A1 to A5 floorspace in Rayleigh up to 2034. The short term projection is around 1,200 sq,m gross up to 2019.

7.11 Vacant shop units are only likely to accommodate a small element of this floorspace projection. Small scale developments e.g. extensions, in-fill and changes of use could help to accommodate short term requirements.

7.12 In the medium and longer term the redevelopment potential of the Websters Way car park and edge of centre sites towards the northern end of Eastwood Road and the western end of the High Street, e.g. the Dairy Crest depot site should be explored. If delivered, these sites are capable of meeting the floorspace projection in Rayleigh up to 2034.

7.13 The potential residential development North of London Road in Rayleigh could provide a local centre of at least 600 sq.m gross. A larger neighbourhood centre could be provided if the need for new development cannot be fully met within the town centre.

Rochford Town Centre

7.14 The floorspace capacity projection is just over 3,300 sq.m gross of additional Class A1 to A5 floorspace in Rochford up to 2034. There is short term capacity to improve food store provision within the town (1,300 sq.m gross by 2019).

7.15 Vacant shop units in Rochford are only likely to accommodate a small element of this projection. In the short term, development options in or near the town centre are very limited. The short term priority should be improvements to the Market Square and the redevelopment of the Spar building, however this would not lead to any substantial increase in floorspace. Medium to long term opportunities are also limited, therefore some of the identified floorspace capacity could be directed to Hockley and/or local retail facilities within new large residential developments.

Hockley Town Centre

7.16 The retail floorspace capacity projection is just over 1,300 sq.m gross of additional Class A1 to A5 floorspace in Hockley up to 2034. Sites near Hockley town centre provide opportunities to improve its retail offer and strengthen the town centre.

7.17 The Hockley AAP identifies the Eldon Way Opportunity Site for redevelopment to provide up to 3,000 sq.m gross A1 retail floorspace. If delivered, this site would meet all of the floorspace projection for Hockley up to 2034 plus absorb some of the surplus capacity elsewhere in the District. Development of this level of floorspace within Hockley would help to claw back expenditure that is currently being spent elsewhere.

Other Local Centres

7.18 Other local centres in the District have an important role in providing day to day shops and services that are accessible to residents in villages and rural parts of the District. In our view, the Council's policy protecting local shops in village centres is appropriate, because it promotes more sustainable shopping/travel patterns.

7.19 Hullbridge local centre provides a reasonable range of units, serving local retail needs of surrounding residents, primarily providing a convenience retail function. However, the results of the household survey suggest that these stores attract only a limited amount of top-up spending. This implies that the local centre is not currently meeting the day to day needs of local residents, and it may be appropriate to seek to increase retail and service floorspace within Hullbridge.

7.20 If the large residential development at South West Hullbridge is delivered then a new local centre of around 600 sq.m gross would be appropriate to support the new residents. This would need to ensure that it would complement rather than compete directly with the existing local centre.

7.21 Retail provision within Ashingdon is focused around the Golden Cross Parade, Ashingdon Road, which provides a local, primarily convenience goods offer to surrounding residents. The household survey results show that the Co-op store attracts a reasonable amount of both main and top-up trade, suggesting that this store provides an important local role.

7.22 If the large residential development at South East Ashingdon is delivered, our analysis suggests that a new local centre of around 600 sq.m gross would be appropriate to support the new residents. This would need to ensure that it would complement rather than compete directly with the existing parade.

7.23 Great Wakering is a reasonably large village centre, anchored by a Co-op convenience store and a Premier store. The centre provides a range of local shops and services to meet the needs of local residents in the surrounding area. The household survey results show that the Co-op store attracts a reasonable amount of top-up trade, suggesting that this store provides an important local role. The Co-op store appears to adequately meet the demand for local shopping. There is limited scope for further retail development within Great Wakering, however small scale extensions to the existing retail facilities could be appropriate.

7.24 Canewdon is a very small village centre, including a public house, a Costcutter convenience store, village shop and church hall. The results of the household survey show that the convenience store in Canewdon attracts only a very limited amount of top-up spending, suggesting that the village centre is not currently meeting the day to day needs of local residents. Given Canewdon’s limited population, it is not necessary to significantly increase retail floorspace within Canewdon.

Future Strategy Implementation and Monitoring

7.25 There are a number of broad areas of possible action the Council could pursue in order to maintain and enhance the role of shopping centres within the District, as follows:

- application of guidance within the NPPF, particularly relating to the sequential approach and impact tests for locally set thresholds in determining out-of-centre retail and other development proposals that generate significant numbers of trips;

- in overview, and taking account of the government's ongoing changes to the Use Classes Order, the Council aspires to seek improvements to the range and choice of shops and services in all centres; and bring forward development through the Local Plan Process to make modern premises available to new occupiers.

7.26 The recommendations and projections within this study are expected to assist the Council in reviewing development plan policies over the coming years and to assist development control decisions during this period. The study provides a broad overview of the potential need for further retail development up to 2019, with longer term forecast up to 2024, 2029 and 2034. Projections are subject to uncertainty and forecasts may need to be amended to reflect emerging changes as and when new information becomes available, in particular longer-term projections up to 2034 should be treated with caution.

7.27 Projections should be monitored and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

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

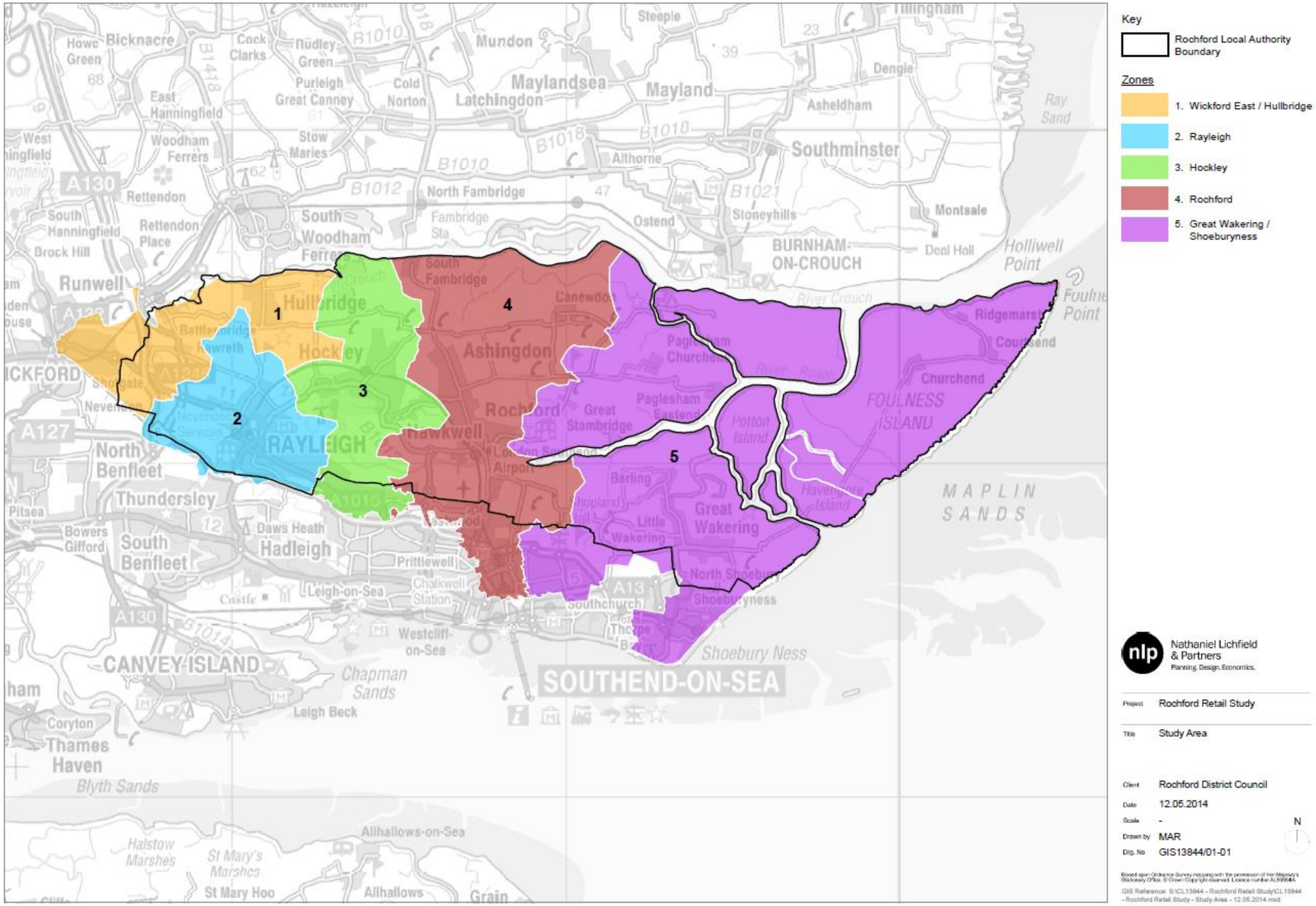
7.28 These key inputs into the retail capacity assessment can be amended to provide revised capacity projections.

Appendix 1 Study Area and Methodology

Rochford Study Area Zones

Zone		Postcode Sector
1	Wickford East/Hullbridge	SS5 6 SS11 8
2	Rayleigh	SS6 7 SS6 8 SS6 9
3	Hockley	SS5 4 SS5 5 SS9 5
4	Rochford	SS2 5 SS2 6 SS4 1 SS4 3
5	Great Wakering/Shoeburyness	SS2 4 SS3 0 SS3 9 SS4 2

Plan 1: Study Area



Retail Capacity Assessment – Methodology and Data

Price Base

1 All monetary values expressed in this study are at 2012 prices, consistent with Experian's base year expenditure figures for 2012 (Retail Planner Briefing Note 11) which is the most up to date information available.

Study Area

2 The quantitative analysis is based on the District study area, which covers the primary catchment areas of the main shopping destinations in Rochford District. The study area is sub-divided into five zones based on postcode sectors as shown above. The survey zones take into consideration the extent of the catchment area of the main centres in the District.

Retail Expenditure

3 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2012 have been obtained.

4 Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 11, October 2013) has been used to forecast expenditure within the study area. Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.

5 Experian's EBS growth forecast rates for 2012 to 2015 reflect the current economic circumstances and provide an appropriate growth rate for the short term (for convenience goods: -0.6% for 2012-2013, -0.3% for 2013 to 2014 and +0.1% for 2014 to 2015; for comparison goods: 3.2% for 2012-2013, 2.3% for 2013-2014 and 2.8% for 2014-2015).

6 In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's longer term growth average forecasts have been adopted i.e. 0.8% per annum for convenience goods after 2015 and 2.9% per annum growth for comparison goods. These growth rates are relatively cautious when compared with past growth rates, but in our view represent realistic forecast for future growth. These growth figures relate to real growth and exclude inflation.

7 Special Forms of Trading (SFT) or non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. SFT includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship with the demand for retail floorspace. The growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Experian provides projections for special forms of trading and e-tailing. This Experian information suggests that non-store retail sales in 2012 is:

- 7% of convenience goods expenditure; and
- 14% of comparison goods expenditure.

8 Experian predicts that these figures will increase in the future. However, Experian recognises that not all of this SFT expenditure should be excluded from a retail capacity analysis, because some of it relates to internet sales through traditional retail businesses, rather than internet companies. The turnover attributable to e-tail through retail businesses is included in the company average turnovers, and therefore expenditure figures should not exclude this expenditure. Experian has provided adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace. The adjusted figures suggest that SFT sales in 2012 are:

- 2.1% of convenience goods expenditure; and
- 10.5% of comparison goods expenditure.

9 The projections provided by Experian suggest that these percentages could increase to 4% and 15.1% by 2019 respectively, and estimated at 5.9% and 15.9% by 2024. These figures have been adopted in this assessment.

10 Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the internet. This study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

11 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains an insignificant percentage of total retail expenditure. Recent trends suggest continued strong growth in this sector, but Experian's projections suggest this growth will level off by 2020.

12 The implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators. Therefore, growth in on-line sales

may not always mean there is a reduction in the need for retail floorspace. Given the uncertainties relating to internet shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure.

Market Shares/Penetration Rates

13 To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors but primarily information gathered through the April 2014 household survey.

14 The total turnover of shops within the District is estimated based on penetration rates. For convenience goods shopping turnover estimates are then compared to average company benchmark or average sales floorspace densities derived from Verdict (UK Food and Grocery Retailers) and Mintel Retail Rankings information, which provide an indication of how individual retail stores and centres are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.

Benchmark Turnover Levels

15 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Verdict. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.

16 The estimated convenience goods sales areas have been derived from a combination of the Institute of Grocery Distribution (IGD), GOAD plans, Valuation Office data and NLP estimates based on site visits. Estimates for comparison sales floorspace within large food stores has been deducted, for consistency with the use of goods based expenditure figures.

17 Average sales densities are not widely available for small convenience shops, particularly independent retailers. Based on the mix of shops present in each centre within the District and our experience of trading levels of small independent shops informed by household shopper surveys elsewhere, we have adopted an average sales density of £5,000 per sq.m net for convenience shops/stores in the study area. This is consistent with NLP’s experience of retail studies across the South East and East regions. The total benchmark turnover of identified convenience sales floorspace within Rochford District is £83.21 million (Table 10, Appendix 2).

18 Mintel's Retail Rankings provides company average sales density information for a selection of national comparison retailers. This data suggests a notional average sales density for national high street comparison retailers of around £5,000 per sq.m net. For retail warehouse operators the average sales density is generally lower at around £2,500 per sq.m net.

Appendix 2 Convenience Goods Capacity

Table 1: Study Area Population - Baseline Projections

Zone	2011	2014	2019	2024	2029	2034
Zone 1 - Wickford East/Hullbridge	16,115	16,387	16,841	17,295	17,749	18,203
Zone 2 - Rayleigh	32,020	32,332	32,852	33,373	33,893	34,413
Zone 3 - Hockley	27,248	27,706	28,470	29,234	29,998	30,762
Zone 4 - Rochford/Ashingdon/Canewdon	40,009	40,577	41,525	42,472	43,419	44,366
Zone 5 - Gt. Wakering/Shoeburyness	40,369	42,151	45,121	48,090	51,060	54,030
Total	**155,761**	**159,154**	**164,809**	**170,465**	**176,120**	**181,775**

Sources:

Experian 2011 Census of Population - Edge Analytics Approved RSS projections and Thames Gateway/South Essex SHMA

Population growth assumes 250 dwellings p.a. in Rochford, 630 dwellings p.a. in Basildon and 690 dwellings p.a. in Southend

Table 2: Convenience Goods Expenditure per person (£)

Zone	2014	2019	2024	2029	2034
Zone 1 - Wickford East/Hullbridge	2,037	2,076	2,141	2,214	2,301
Zone 2 - Rayleigh	1,970	2,009	2,071	2,141	2,226
Zone 3 - Hockley	2,047	2,087	2,152	2,225	2,313
Zone 4 - Rochford/Ashingdon/Canewdon	1,818	1,853	1,911	1,976	2,054
Zone 5 - Gt. Wakering/Shoeburyness	1,797	1,833	1,889	1,954	2,031

Sources:
Experian Local Expenditure 2012 (2012 prices)
Growth Rates: -0.6% 2012-2013, -0.3% 2013-2014, 0.1% 2014-2015 and 0.8% p.a. from 2015
Excludes Special Forms of Trading

Table 3: Total Convenience Goods Expenditure (£m) – Baseline Population

Zone	2014	2019	2024	2029	2034
Zone 1 - Wickford East/Hullbridge	33.37	34.97	37.02	39.29	41.89
Zone 2 - Rayleigh	63.69	65.99	69.10	72.57	76.60
Zone 3 - Hockley	56.72	59.43	62.90	66.75	71.16
Zone 4 - Rochford/Ashingdon/Canewdon	73.75	76.96	81.14	85.78	91.12
Zone 5 - Gt. Wakering/Shoeburyness	75.76	82.69	90.85	99.75	109.73
Total	**303.30**	**320.03**	**341.03**	**364.14**	**390.49**

Source: Tables 1 and 2

Table 4: Base Year 2014 Convenience Goods Market Shares (%)

Centre/Facility	Zone 1 Wickford East/Hullbridge	Zone 2 Rayleigh	Zone 3 Hockley	Zone 4 Rochford/ Ashingdon/ Canewdon	Zone 5 Gt. Wakering/ Shoeburyness	% Inflow
Asda, Rawreth Lane	14.8%	20.7%	9.9%	1.7%	0.0%	10.0%
Co-op, 12-24 Eastwood Road	0.0%	6.5%	0.4%	0.0%	0.0%	10.0%
Other convenience shops, Rayleigh	2.7%	22.2%	5.1%	0.9%	0.4%	10.0%
Rayleigh Sub-Total	**17.5%**	**49.4%**	**15.4%**	**2.6%**	**0.4%**	
Rochford	0.3%	0.7%	2.1%	27.9%	2.5%	5.0%
Hockley	0.3%	0.0%	15.2%	0.4%	0.0%	5.0%
Other local shops Rochford District	2.7%	0.0%	4.1%	1.0%	3.4%	5.0%
Sub-Total	**3.3%**	**0.7%**	**21.4%**	**29.3%**	**5.9%**	
Rochford District Total	**20.8%**	**50.1%**	**36.8%**	**31.9%**	**6.3%**	
Tesco Extra, Westcliff-on-Sea	0.6%	5.6%	23.0%	22.2%	1.9%	n/a
Sainsbury's, Rayleigh Weir	4.4%	20.8%	4.9%	1.1%	1.0%	n/a
Food Stores in Southend on Sea/Leigh on Sea/Shoeburyness	6.6%	9.3%	32.9%	43.8%	88.6%	n/a
Food Stores in Hadleigh/South Benfleet/Canvey Island	0.0%	5.6%	1.0%	0.6%	1.0%	n/a
Food Stores in Basildon/Pitsea/Wickford	62.5%	5.5%	1.1%	0.2%	0.4%	n/a
Other	5.1%	3.1%	0.3%	0.2%	0.8%	n/a
Other Sub-Total	**79.2%**	**49.9%**	**63.2%**	**68.1%**	**93.7%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey April 2014

Table 5: Base Year 2014 Convenience Goods Expenditure (£m)

Centre/Facility	Zone 1 Wickford East/Hullbridge	Zone 2 Rayleigh	Zone 3 Hockley	Zone 4 Rochford/ Ashingdon/ Canewdon	Zone 5 Gt. Wakering/ Shoeburyness	Inflow	Total
Expenditure 2014	**33.37**	**63.69**	**56.72**	**73.75**	**75.76**		
Asda, Rawreth Lane	4.94	13.18	5.62	1.25	0.00	2.78	27.77
Co-op, 12-24 Eastwood Road	0.00	4.14	0.23	0.00	0.00	0.49	4.85
Other convenience shops, Rayleigh	0.90	14.14	2.89	0.66	0.30	2.10	21.00
Rayleigh Sub-Total	**5.84**	**31.46**	**8.73**	**1.92**	**0.30**	**5.36**	**53.62**
Rochford	0.10	0.45	1.19	20.58	1.89	1.27	25.48
Hockley	0.10	0.00	8.62	0.30	0.00	0.47	9.49
Other local shops Rochford District	0.90	0.00	2.33	0.74	2.58	0.34	6.88
Sub-Total	**1.10**	**0.45**	**12.14**	**21.61**	**4.47**	**2.09**	**41.86**
Rochford District Total	**6.94**	**31.91**	**20.87**	**23.53**	**4.77**	**7.46**	**95.48**
Tesco Extra, Westcliff-on-Sea	0.20	3.57	13.05	16.37	1.44	n/a	34.63
Sainsbury's, Rayleigh Weir	1.47	13.25	2.78	0.81	0.76	n/a	19.06
Food Stores in Southend on Sea/Leigh on Sea/Shoeburyness	2.20	5.92	18.66	32.30	67.12	n/a	126.22
Food Stores in Hadleigh/South Benfleet/Canvey Island	0.00	3.57	0.57	0.44	0.76	n/a	5.33
Food Stores in Basildon/Pitsea/Wickford	20.86	3.50	0.62	0.15	0.30	n/a	25.44
Other	1.70	1.97	0.17	0.15	0.61	n/a	4.60
Other Sub-Total	**26.43**	**31.78**	**35.85**	**50.23**	**70.99**		**215.28**
TOTAL	**33.37**	**63.69**	**56.72**	**73.75**	**75.76**		**310.76**

Source: Table 3 and 4

Table 6: Convenience Goods Expenditure 2019 (£m)

Centre/Facility	Zone 1 Wickford East/Hullbridge	Zone 2 Rayleigh	Zone 3 Hockley	Zone 4 Rochford/ Ashingdon/ Canewdon	Zone 5 Gt. Wakering/ Shoeburyness	Inflow	Total
Expenditure 2019	**34.97**	**65.99**	**59.43**	**76.96**	**82.69**		
Asda, Rawreth Lane	5.18	13.66	5.88	1.31	0.00	2.89	28.92
Co-op, 12-24 Eastwood Road	0.00	4.29	0.24	0.00	0.00	0.50	5.03
Other convenience shops, Rayleigh	0.94	14.65	3.03	0.69	0.33	2.18	21.83
Rayleigh Sub-Total	**6.12**	**32.60**	**9.15**	**2.00**	**0.33**	**5.58**	**55.78**
Rochford	0.10	0.46	1.25	21.47	2.07	1.33	26.69
Hockley	0.10	0.00	9.03	0.31	0.00	0.50	9.94
Other local shops Rochford District	0.94	0.00	2.44	0.77	2.81	0.37	7.33
Sub-Total	**1.15**	**0.46**	**12.72**	**22.55**	**4.88**	**2.20**	**43.96**
Rochford District Total	**7.27**	**33.06**	**21.87**	**24.55**	**5.21**	**7.78**	**99.74**
Tesco Extra, Westcliff-on-Sea	0.21	3.70	13.67	17.08	1.57	n/a	36.23
Sainsbury's, Rayleigh Weir	1.54	13.73	2.91	0.85	0.83	n/a	19.85
Food Stores in Southend on Sea/Leigh on Sea/Shoeburyness	2.31	6.14	19.55	33.71	73.26	n/a	134.97
Food Stores in Hadleigh/South Benfleet/Canvey Island	0.00	3.70	0.59	0.46	0.83	n/a	5.58
Food Stores in Basildon/Pitsea/Wickford	21.86	3.63	0.65	0.15	0.33	n/a	26.62
Other	1.78	2.05	0.18	0.15	0.66	n/a	4.82
Other Sub-Total	**27.70**	**32.93**	**37.56**	**52.41**	**77.48**		**228.07**
TOTAL	**34.97**	**65.99**	**59.43**	**76.96**	**82.69**		**327.81**

Source: Table 3 and 4

Table 7: Convenience Goods Expenditure 2024 (£m)

Centre/Facility	Zone 1 Wickford East/Hullbridge	Zone 2 Rayleigh	Zone 3 Hockley	Zone 4 Rochford/ Ashingdon/ Canewdon	Zone 5 Gt. Wakering/ Shoeburyness	Inflow	Total
Expenditure 2024	**37.02**	**69.10**	**62.90**	**81.14**	**90.85**		
Asda, Rawreth Lane	5.48	14.30	6.23	1.38	0.00	3.04	30.43
Co-op, 12-24 Eastwood Road	0.00	4.49	0.25	0.00	0.00	0.53	5.27
Other convenience shops, Rayleigh	1.00	15.34	3.21	0.73	0.36	2.29	22.94
Rayleigh Sub-Total	**6.48**	**34.14**	**9.69**	**2.11**	**0.36**	**5.86**	**58.64**
Rochford	0.11	0.48	1.32	22.64	2.27	1.41	28.24
Hockley	0.11	0.00	9.56	0.32	0.00	0.53	10.52
Other local shops Rochford District	1.00	0.00	2.58	0.81	3.09	0.39	7.87
Sub-Total	**1.22**	**0.48**	**13.46**	**23.78**	**5.36**	**2.33**	**46.63**
Rochford District Total	**7.70**	**34.62**	**23.15**	**25.88**	**5.72**	**8.20**	**105.28**
Tesco Extra, Westcliff-on-Sea	0.22	3.87	14.47	18.01	1.73	n/a	38.30
Sainsbury's, Rayleigh Weir	1.63	14.37	3.08	0.89	0.91	n/a	20.89
Food Stores in Southend on Sea/Leigh on Sea/Shoeburyness	2.44	6.43	20.70	35.54	80.50	n/a	145.60
Food Stores in Hadleigh/South Benfleet/Canvey Island	0.00	3.87	0.63	0.49	0.91	n/a	5.89
Food Stores in Basildon/Pitsea/Wickford	23.14	3.80	0.69	0.16	0.36	n/a	28.16
Other	1.89	2.14	0.19	0.16	0.73	n/a	5.11
Other Sub-Total	**29.32**	**34.48**	**39.76**	**55.26**	**85.13**		**243.95**
TOTAL	**37.02**	**69.10**	**62.90**	**81.14**	**90.85**		**349.22**

Source: Table 3 and 4

Table 8: Convenience Goods Expenditure 2029 (£m)

Centre/Facility	Zone 1 Wickford East/Hullbridge	Zone 2 Rayleigh	Zone 3 Hockley	Zone 4 Rochford/ Ashingdon/ Canewdon	Zone 5 Gt. Wakering/ Shoeburyness	Inflow	Total
Expenditure 2029	**39.29**	**72.57**	**66.75**	**85.78**	**99.75**		
Asda, Rawreth Lane	5.81	15.02	6.61	1.46	0.00	3.21	32.12
Co-op, 12-24 Eastwood Road	0.00	4.72	0.27	0.00	0.00	0.55	5.54
Other convenience shops, Rayleigh	1.06	16.11	3.40	0.77	0.40	2.42	24.16
Rayleigh Sub-Total	**6.88**	**35.85**	**10.28**	**2.23**	**0.40**	**6.18**	**61.82**
Rochford	0.12	0.51	1.40	23.93	2.49	1.50	29.95
Hockley	0.12	0.00	10.15	0.34	0.00	0.56	11.17
Other local shops Rochford District	1.06	0.00	2.74	0.86	3.39	0.42	8.47
Sub-Total	**1.30**	**0.51**	**14.28**	**25.13**	**5.89**	**2.48**	**49.59**
Rochford District Total	**8.17**	**36.36**	**24.56**	**27.36**	**6.28**	**8.66**	**111.40**
Tesco Extra, Westcliff-on-Sea	0.24	4.06	15.35	19.04	1.90	n/a	40.59
Sainsbury's, Rayleigh Weir	1.73	15.10	3.27	0.94	1.00	n/a	22.04
Food Stores in Southend on Sea/Leigh on Sea/Shoeburyness	2.59	6.75	21.96	37.57	88.38	n/a	157.25
Food Stores in Hadleigh/South Benfleet/Canvey Island	0.00	4.06	0.67	0.51	1.00	n/a	6.24
Food Stores in Basildon/Pitsea/Wickford	24.56	3.99	0.73	0.17	0.40	n/a	29.85
Other	2.00	2.25	0.20	0.17	0.80	n/a	5.42
Other Sub-Total	**31.12**	**36.21**	**42.19**	**58.42**	**93.47**		**261.40**
TOTAL	**39.29**	**72.57**	**66.75**	**85.78**	**99.75**		**372.80**

Source: Table 3 and 4

Table 9: Convenience Goods Expenditure 2034 (£m)

Centre/Facility	Zone 1 Wickford East/Hullbridge	Zone 2 Rayleigh	Zone 3 Hockley	Zone 4 Rochford/ Ashingdon/ Canewdon	Zone 5 Gt. Wakering/ Shoeburyness	Inflow	Total
Expenditure 2034	**41.89**	**76.60**	**71.16**	**91.12**	**109.73**		
Asda, Rawreth Lane	6.20	15.86	7.04	1.55	0.00	3.41	34.05
Co-op, 12-24 Eastwood Road	0.00	4.98	0.28	0.00	0.00	0.58	5.85
Other convenience shops, Rayleigh	1.13	17.01	3.63	0.82	0.44	2.56	25.58
Rayleigh Sub-Total	**7.33**	**37.84**	**10.96**	**2.37**	**0.44**	**6.55**	**65.49**
Rochford	0.13	0.54	1.49	25.42	2.74	1.60	31.92
Hockley	0.13	0.00	10.82	0.36	0.00	0.60	11.90
Other local shops Rochford District	1.13	0.00	2.92	0.91	3.73	0.46	9.15
Sub-Total	**1.38**	**0.54**	**15.23**	**26.70**	**6.47**	**2.65**	**52.97**
Rochford District Total	**8.71**	**38.38**	**26.19**	**29.07**	**6.91**	**9.20**	**118.45**
Tesco Extra, Westcliff-on-Sea	0.25	4.29	16.37	20.23	2.08	n/a	43.22
Sainsbury's, Rayleigh Weir	1.84	15.93	3.49	1.00	1.10	n/a	23.36
Food Stores in Southend on Sea/Leigh on Sea/Shoeburyness	2.76	7.12	23.41	39.91	97.22	n/a	170.43
Food Stores in Hadleigh/South Benfleet/Canvey Island	0.00	4.29	0.71	0.55	1.10	n/a	6.65
Food Stores in Basildon/Pitsea/Wickford	26.18	4.21	0.78	0.18	0.44	n/a	31.80
Other	2.14	2.37	0.21	0.18	0.88	n/a	5.78
Other Sub-Total	**33.17**	**38.22**	**44.97**	**62.05**	**102.82**		**281.23**
TOTAL	**41.89**	**76.60**	**71.16**	**91.12**	**109.73**		**399.69**

Source: Table 3 and 4

Table 10: Convenience Goods Floorspace and Benchmark Turnover 2014

Centre	Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Rayleigh	Co-op, 12-24 Eastwood Road	1,995	85%	1,696	£7,661	£12.99
	Iceland, High Street	437	90%	393	£7,295	£2.87
	Morrison Local, High Street	200	95%	190	£12,650	£2.40
	Other convenience shops, Rayleigh Town Centre	800	100%	800	£5,000	£4.00
	Asda, Rawreth Lane	2,036	85%	1,731	£13,418	£23.22
	Co-op, 231-233 Eastwood Road	157	95%	149	£7,661	£1.14
	Tesco Express, London Road	230	95%	219	£11,080	£2.42
	Sainsbury's Local, Eastwood Road	265	95%	252	£13,619	£3.43
	Sub-Total	**6,120**		**5,429**		**£52.48**
Rochford	Co-op, Roche Close	950	90%	855	£7,661	£6.55
	Sainsbury's Local, West Street	250	95%	238	£13,619	£3.23
	Other convenience shops, Rochford	459	100%	459	£5,000	£2.30
	Londis, Rectory Road	80	95%	76	£6,000	£0.46
	Co-op, Golden Cross Parade, Ashingdon Road	263	95%	250	£7,661	£1.91
	Other convenience shops, Golden Cross Parade	100	100%	100	£5,000	£0.50
	Sub-Total	**2,102**		**1,977**		**£14.95**
Hockley	Co-op, Spa Road	372	95%	353	£7,661	£2.71
	Sainsbury Local, Spa Road	180	95%	171	£13,619	£2.33
	Other convenience shops, Hockley	260	100%	260	£5,000	£1.30
	Sub-Total	**812**		**784**		**£6.34**
Other	Budgens, Ferry Road	436	90%	392	£7,000	£2.75
	Co-op, Ferry Road	210	95%	200	£7,661	£1.53
	One Stop (Tesco), Ferry Road	199	95%	189	£11,080	£2.09
	Other convenience shops, Hullbridge	30	100%	30	£5,000	£0.15
	Co-op, Hawkwell	140	95%	133	£7,661	£1.02
	Co-op, Great Wakering	173	95%	164	£7,661	£1.26
	Other local convenience shops	130	100%	130	£5,000	£0.65
	Sub-Total	**1,318**		**1,238**		**£9.45**
Rochford Total		**10,352**		**9,429**		**£83.21**

Source: NLP Survey March 2014, IGD, Goad, VOA and Verdict

Table 11: Summary of Convenience Goods Expenditure 2014 to 2034 - Baseline Population

Centre	2014	2019	2024	2029	2034
Available Expenditure in Rochford District (£m)					
Rayleigh	53.62	55.78	58.64	61.82	65.49
Rochford	25.48	26.69	28.24	29.95	31.92
Hockley	9.49	9.94	10.52	11.17	11.90
Other local shops Rochford District	6.88	7.33	7.87	8.47	9.15
Total	**95.48**	**99.74**	**105.28**	**111.40**	**118.45**
Turnover of Existing Facilities (£m)					
Rayleigh	52.48	52.48	52.48	52.48	52.48
Rochford	14.95	14.95	14.95	14.95	14.95
Hockley	6.34	6.34	6.34	6.34	6.34
Other local shops Rochford District	9.45	9.45	9.45	9.45	9.45
Total	**83.21**	**83.21**	**83.21**	**83.21**	**83.21**
Surplus/Defecit Expenditure (£m)					
Rayleigh	1.15	3.30	6.16	9.34	13.01
Rochford	10.53	11.74	13.29	15.00	16.97
Hockley	3.15	3.61	4.19	4.83	5.56
Other local shops Rochford District	-2.56	-2.12	-1.58	-0.98	-0.30
Total	**12.27**	**16.53**	**22.06**	**28.19**	**35.24**

Table 12: Convenience Goods Floorspace Expenditure Capacity 2014 to 2034 - Baseline Population

Centre	2014	2019	2024	2029	2034
Turnover Density New Floorspace (£ per sq.m)	£13,000	£13,000	£13,000	£13,000	£13,000
Floorspace Requirement (sq.m net)					
Rayleigh	88	254	474	718	1,001
Rochford	810	903	1,022	1,154	1,305
Hockley	243	277	322	371	428
Other local shops Rochford District	-197	-163	-121	-75	-23
Total	**944**	**1,271**	**1,697**	**2,169**	**2,711**
Floorspace Requirement (sq.m gross)					
Rayleigh	126	363	677	1,026	1,429
Rochford	1,157	1,290	1,460	1,649	1,865
Hockley	347	396	460	531	611
Other local shops Rochford District	-282	-233	-173	-107	-33
Total	**1,348**	**1,816**	**2,425**	**3,098**	**3,873**

Table A: Study Area Population - High Population Projections

Zone	2011	2014	2019	2024	2029	2034
Zone 1 - Wickford East/Hullbridge	16,115	16,500	17,165	17,841	18,505	19,169
Zone 2 - Rayleigh	32,020	32,865	34,285	35,743	37,175	38,607
Zone 3 - Hockley	27,248	27,873	28,972	30,100	31,196	32,293
Zone 4 - Rochford/Ashingdon/Canewdon	40,009	40,926	42,540	44,196	45,807	47,417
Zone 5 - Gt. Wakering/Shoeburyness	40,369	41,170	42,655	44,177	45,641	47,106
Total	**155,761**	**159,334**	**165,617**	**172,057**	**178,324**	**184,592**

Source: Experian 2011 Census of Population, ONS 2010 Interim Projections 2011 to 2021 extrapolated to 2034

Table B: Summary of Convenience Goods Expenditure 2014 to 2034 - High Population Projections

Centre	2014	2019	2024	2029	2034
Available Expenditure in Rochford District (£m)					
Rayleigh	54.31	57.70	61.94	66.55	71.77
Rochford	25.64	27.17	29.09	31.17	33.54
Hockley	9.55	10.12	10.84	11.62	12.50
Other local shops Rochford District	6.85	7.25	7.76	8.30	8.93
Total	**96.35**	**102.24**	**109.63**	**117.64**	**126.73**
Turnover of Existing Facilities (£m)					
Rayleigh	52.48	52.48	52.48	52.48	52.48
Rochford	14.95	14.95	14.95	14.95	14.95
Hockley	6.34	6.34	6.34	6.34	6.34
Other local shops Rochford District	9.45	9.45	9.45	9.45	9.45
Total	**83.21**	**83.21**	**83.21**	**83.21**	**83.21**
Surplus/Defecit Expenditure (£m)					
Rayleigh	1.83	5.23	9.47	14.07	19.29
Rochford	10.69	12.22	14.14	16.22	18.59
Hockley	3.21	3.78	4.50	5.28	6.16
Other local shops Rochford District	-2.60	-2.20	-1.69	-1.14	-0.52
Total	**13.14**	**19.03**	**26.42**	**34.43**	**43.52**

Table C: Convenience Goods Floorspace Expenditure Capacity 2014 to 2034 - High Population Projections

Centre	2014	2019	2024	2029	2034
Turnover Density New Floorspace (£ per sq.m)	£13,000	£13,000	£13,000	£13,000	£13,000
Floorspace Requirement (sq.m net)					
Rayleigh	141	402	728	1,082	1,484
Rochford	822	940	1,088	1,248	1,430
Hockley	247	291	346	406	474
Other local shops Rochford District	-200	-169	-130	-88	-40
Total	**1,011**	**1,464**	**2,032**	**2,648**	**3,348**
Floorspace Requirement (sq.m gross)					
Rayleigh	202	574	1,040	1,546	2,120
Rochford	1,175	1,343	1,554	1,783	2,043
Hockley	353	416	495	580	677
Other local shops Rochford District	-286	-241	-186	-126	-57
Total	**1,444**	**2,091**	**2,903**	**3,783**	**4,783**

Appendix 3 Comparison Goods Capacity

Table 1: Study Area Population - Baseline Projections

Zone	2011	2014	2019	2024	2029	2034
Zone 1 - Wickford East/Hullbridge	16,115	16,387	16,841	17,295	17,749	18,203
Zone 2 - Rayleigh	32,020	32,332	32,852	33,373	33,893	34,413
Zone 3 - Hockley	27,248	27,706	28,470	29,234	29,998	30,762
Zone 4 - Rochford/Ashingdon/Canewdon	40,009	40,577	41,525	42,472	43,419	44,366
Zone 5 - Gt. Wakering/Shoeburyness	40,369	42,151	45,121	48,090	51,060	54,030
Total	**155,761**	**159,154**	**164,809**	**170,465**	**176,120**	**181,775**

Sources:

Experian 2011 Census of Population - Edge Analytics Approved RSS projections and Thames Gateway/South Essex SHMA

Population growth assumes 250 dwellings p.a. in Rochford, 630 dwellings p.a. in Basildon and 690 dwellings p.a. in Southend

Table 2: Comparison Goods Expenditure per person (£)

Zone	2014	2019	2024	2029	2034
Zone 1 - Wickford East/Hullbridge	3,082	3,411	3,898	4,492	5,182
Zone 2 - Rayleigh	3,082	3,411	3,898	4,492	5,182
Zone 3 - Hockley	3,161	3,499	3,999	4,607	5,315
Zone 4 - Rochford/Ashingdon/Canewdon	2,576	2,851	3,258	3,754	4,331
Zone 5 - Gt. Wakering/Shoeburyness	2,503	2,771	3,166	3,648	4,209

Sources:
Experian Local Expenditure 2012 (2012 prices)
Growth Rates: 3.2% 2012-2013, 2.3% 2013-2014, 2.8% 2014-2015 and 2.9% p.a. from 2015
Excludes Special Forms of Trading

Table 3: Total Comparison Goods Expenditure (£m) – Baseline Population

Zone	2014	2019	2024	2029	2034
Zone 1 - Wickford East/Hullbridge	50.50	57.45	67.42	79.73	94.33
Zone 2 - Rayleigh	99.64	112.06	130.09	152.24	178.33
Zone 3 - Hockley	87.58	99.62	116.89	138.21	163.51
Zone 4 - Rochford/Ashingdon/Canewdon	104.52	118.39	138.39	163.02	192.17
Zone 5 - Gt. Wakering/Shoeburyness	105.50	125.01	152.26	186.29	227.41
Total	**447.74**	**512.53**	**605.06**	**719.49**	**855.75**

Source: Tables 1 and 2

Table 4: Base Year 2014 Comparison Goods Market Shares (%)

Centre/Facility	Zone 1 Wickford East/Hullbridge	Zone 2 Rayleigh	Zone 3 Hockley	Zone 4 Rochford/ Ashingdon/ Canewdon	Zone 5 Gt. Wakering/ Shoeburyness	% Inflow
Rayleigh	5.7%	23.5%	15.1%	3.5%	1.1%	10.0%
Rochford	0.1%	0.4%	2.6%	5.9%	1.9%	5.0%
Hockley	0.1%	0.0%	6.1%	0.5%	0.0%	5.0%
Southend Airport Retail Park	0.5%	2.5%	4.9%	6.3%	3.0%	40.0%
Other Rochford District	0.3%	0.0%	0.6%	0.5%	0.7%	5.0%
Rochford District Total	**6.7%**	**26.4%**	**29.3%**	**16.7%**	**6.7%**	
Chelmsford	3.7%	3.9%	2.3%	1.3%	0.3%	n/a
Southend on Sea/Leigh on Sea/Shoeburyness	10.5%	19.6%	42.0%	64.7%	77.6%	n/a
intu Lakeside	14.4%	13.5%	13.5%	8.3%	7.7%	n/a
Hadleigh/South Benfleet/Canvey Island/Rayleigh Weir	2.4%	13.8%	4.7%	1.4%	0.9%	n/a
Basildon/Pitsea/Wickford	57.4%	17.2%	4.5%	3.6%	2.8%	n/a
Other	4.9%	5.6%	3.7%	4.0%	4.0%	n/a
Other Sub-Total	**93.3%**	**73.6%**	**70.7%**	**83.3%**	**93.3%**	
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	

Source: NEMS Household Survey April 2014

Table 5: Base Year 2014 Comparison Goods Expenditure (£m)

Centre/Facility	Zone 1 Wickford East/Hullbridge	Zone 2 Rayleigh	Zone 3 Hockley	Zone 4 Rochford/ Ashingdon/ Canewdon	Zone 5 Gt. Wakering/ Shoeburyness	Inflow	Total
Expenditure 2014	**50.50**	**99.64**	**87.58**	**104.52**	**105.50**		
Rayleigh	2.88	23.41	13.22	3.66	1.16	4.93	49.26
Rochford	0.05	0.40	2.28	6.17	2.00	0.57	11.47
Hockley	0.05	0.00	5.34	0.52	0.00	0.31	6.23
Southend Airport Retail Park	0.25	2.49	4.29	6.58	3.17	11.19	27.97
Other Rochford District	0.15	0.00	0.53	0.52	0.74	0.10	2.04
Rochford District Total	**3.38**	**26.30**	**25.66**	**17.45**	**7.07**	**17.10**	**96.98**
Chelmsford	1.87	3.89	2.01	1.36	0.32	n/a	9.44
Southend on Sea/Leigh on Sea/Shoeburyness	5.30	19.53	36.78	67.62	81.87	n/a	211.11
intu Lakeside	7.27	13.45	11.82	8.68	8.12	n/a	49.35
Hadleigh/South Benfleet/Canvey Island/Rayleigh Weir	1.21	13.75	4.12	1.46	0.95	n/a	21.49
Basildon/Pitsea/Wickford	28.99	17.14	3.94	3.76	2.95	n/a	56.78
Other	2.47	5.58	3.24	4.18	4.22	n/a	19.70
Other Sub-Total	**47.12**	**73.33**	**61.92**	**87.07**	**98.44**		**367.87**
TOTAL	**50.50**	**99.64**	**87.58**	**104.52**	**105.50**		**464.84**

Source: Table 3 and 4

Table 6: Comparison Goods Expenditure 2019 (£m)

Centre/Facility	Zone 1 Wickford East/Hullbridge	Zone 2 Rayleigh	Zone 3 Hockley	Zone 4 Rochford/ Ashingdon/ Canewdon	Zone 5 Gt. Wakering/ Shoeburyness	Inflow	Total
Expenditure 2019	**57.45**	**112.06**	**99.62**	**118.39**	**125.01**		
Rayleigh	3.27	26.33	15.04	4.14	1.38	5.57	55.74
Rochford	0.06	0.45	2.59	6.99	2.38	0.66	13.11
Hockley	0.06	0.00	6.08	0.59	0.00	0.35	7.08
Southend Airport Retail Park	0.29	2.80	4.88	7.46	3.75	12.79	31.97
Other Rochford District	0.17	0.00	0.60	0.59	0.88	0.12	2.35
Rochford District Total	**3.85**	**29.58**	**29.19**	**19.77**	**8.38**	**19.49**	**110.26**
Chelmsford	2.13	4.37	2.29	1.54	0.38	n/a	10.70
Southend on Sea/Leigh on Sea/Shoeburyness	6.03	21.96	41.84	76.60	97.01	n/a	243.45
intu Lakeside	8.27	15.13	13.45	9.83	9.63	n/a	56.30
Hadleigh/South Benfleet/Canvey Island/Rayleigh Weir	1.38	15.46	4.68	1.66	1.13	n/a	24.31
Basildon/Pitsea/Wickford	32.97	19.27	4.48	4.26	3.50	n/a	64.50
Other	2.81	6.28	3.69	4.74	5.00	n/a	22.51
Other Sub-Total	**53.60**	**82.48**	**70.43**	**98.62**	**116.64**		**421.76**
TOTAL	**57.45**	**112.06**	**99.62**	**118.39**	**125.01**		**532.02**

Source: Table 3 and 4

Table 7: Comparison Goods Expenditure 2024 (£m)

Centre/Facility	Zone 1 Wickford East/Hullbridge	Zone 2 Rayleigh	Zone 3 Hockley	Zone 4 Rochford/ Ashingdon/ Canewdon	Zone 5 Gt. Wakering/ Shoeburyness	Inflow	Total
Expenditure 2024	**67.42**	**130.09**	**116.89**	**138.39**	**152.26**		
Rayleigh	3.84	30.57	17.65	4.84	1.67	6.51	65.09
Rochford	0.07	0.52	3.04	8.16	2.89	0.77	15.46
Hockley	0.07	0.00	7.13	0.69	0.00	0.42	8.31
Southend Airport Retail Park	0.34	3.25	5.73	8.72	4.57	15.07	37.67
Other Rochford District	0.20	0.00	0.70	0.69	1.07	0.14	2.80
Rochford District Total	**4.52**	**34.34**	**34.25**	**23.11**	**10.20**	**22.91**	**129.33**
Chelmsford	2.49	5.07	2.69	1.80	0.46	n/a	12.51
Southend on Sea/Leigh on Sea/Shoeburyness	7.08	25.50	49.10	89.54	118.16	n/a	289.37
intu Lakeside	9.71	17.56	15.78	11.49	11.72	n/a	66.26
Hadleigh/South Benfleet/Canvey Island/Rayleigh Weir	1.62	17.95	5.49	1.94	1.37	n/a	28.37
Basildon/Pitsea/Wickford	38.70	22.38	5.26	4.98	4.26	n/a	75.58
Other	3.30	7.29	4.33	5.54	6.09	n/a	26.54
Other Sub-Total	**62.90**	**95.75**	**82.64**	**115.28**	**142.06**		**498.63**
TOTAL	**67.42**	**130.09**	**116.89**	**138.39**	**152.26**		**627.96**

Source: Table 3 and 4

Table 8: Comparison Goods Expenditure 2029 (£m)

Centre/Facility	Zone 1 Wickford East/Hullbridge	Zone 2 Rayleigh	Zone 3 Hockley	Zone 4 Rochford/ Ashingdon/ Canewdon	Zone 5 Gt. Wakering/ Shoeburyness	Inflow	Total
Expenditure 2029	**79.73**	**152.24**	**138.21**	**163.02**	**186.29**		
Rayleigh	4.54	35.78	20.87	5.71	2.05	7.66	76.61
Rochford	0.08	0.61	3.59	9.62	3.54	0.92	18.36
Hockley	0.08	0.00	8.43	0.82	0.00	0.49	9.82
Southend Airport Retail Park	0.40	3.81	6.77	10.27	5.59	17.89	44.73
Other Rochford District	0.24	0.00	0.83	0.82	1.30	0.17	3.36
Rochford District Total	**5.34**	**40.19**	**40.50**	**27.22**	**12.48**	**27.13**	**152.86**
Chelmsford	2.95	5.94	3.18	2.12	0.56	n/a	14.74
Southend on Sea/Leigh on Sea/Shoeburyness	8.37	29.84	58.05	105.47	144.56	n/a	346.29
intu Lakeside	11.48	20.55	18.66	13.53	14.34	n/a	78.57
Hadleigh/South Benfleet/Canvey Island/Rayleigh Weir	1.91	21.01	6.50	2.28	1.68	n/a	33.38
Basildon/Pitsea/Wickford	45.76	26.19	6.22	5.87	5.22	n/a	89.25
Other	3.91	8.53	5.11	6.52	7.45	n/a	31.52
Other Sub-Total	**74.38**	**112.05**	**97.72**	**135.79**	**173.81**		**593.75**
TOTAL	**79.73**	**152.24**	**138.21**	**163.02**	**186.29**		**746.61**

Source: Table 3 and 4

Table 9: Comparison Goods Expenditure 2034 (£m)

Centre/Facility	Zone 1 Wickford East/Hullbridge	Zone 2 Rayleigh	Zone 3 Hockley	Zone 4 Rochford/ Ashingdon/ Canewdon	Zone 5 Gt. Wakering/ Shoeburyness	Inflow	Total
Expenditure 2014	**94.33**	**178.33**	**163.51**	**192.17**	**227.41**		
Rayleigh	5.38	41.91	24.69	6.73	2.50	9.02	90.22
Rochford	0.09	0.71	4.25	11.34	4.32	1.09	21.81
Hockley	0.09	0.00	9.97	0.96	0.00	0.58	11.61
Southend Airport Retail Park	0.47	4.46	8.01	12.11	6.82	21.25	53.12
Other Rochford District	0.28	0.00	0.98	0.96	1.59	0.20	4.02
Rochford District Total	**6.32**	**47.08**	**47.91**	**32.09**	**15.24**	**32.14**	**180.78**
Chelmsford	3.49	6.95	3.76	2.50	0.68	n/a	17.39
Southend on Sea/Leigh on Sea/Shoeburyness	9.90	34.95	68.68	124.33	176.47	n/a	414.34
intu Lakeside	13.58	24.07	22.07	15.95	17.51	n/a	93.19
Hadleigh/South Benfleet/Canvey Island/Rayleigh Weir	2.26	24.61	7.69	2.69	2.05	n/a	39.30
Basildon/Pitsea/Wickford	54.15	30.67	7.36	6.92	6.37	n/a	105.46
Other	4.62	9.99	6.05	7.69	9.10	n/a	37.44
Other Sub-Total	**88.01**	**131.25**	**115.60**	**160.08**	**212.17**		**707.12**
TOTAL	**94.33**	**178.33**	**163.51**	**192.17**	**227.41**		**887.90**

Source: Table 3 and 4

Table 10: Comparison Goods Floorspace, 2014

Centre	Gross Floorspace (sq.m)	Sales Floorspace (sq.m net)
Rayleigh town centre	11,530	7,490
Asda, Rawreth Lane	n/a	305
Rochford town centre *	n/a	4,350
Hockley town centre	n/a	1,290
Southend Airport Retail Park	8,277	7,035
Other Local Shops	n/a	1,000
Rochford Total		**21,470**

Source: NLP Survey March 2014, IGD, Goad, VOA and Verdict

** includes Homebase, Purdeys Way*

Table 11: Summary of Comparison Goods Expenditure 2014 to 2034 - Baseline Population

Centre	2014	2019	2024	2029	2034
Available Expenditure in Rochford District (£m)					
Rayleigh	49.26	55.74	65.09	76.61	90.22
Rochford	11.47	13.11	15.46	18.36	21.81
Hockley	6.23	7.08	8.31	9.82	11.61
Southend Airport Retail Park	27.97	31.97	37.67	44.73	53.12
Other Rochford District	2.04	2.35	2.80	3.36	4.02
Total	**96.98**	**110.26**	**129.33**	**152.86**	**180.78**
Turnover of Existing Facilities (£m)					
Rayleigh	49.26	54.39	60.05	66.30	73.20
Rochford	11.47	12.66	13.98	15.44	17.05
Hockley	6.23	6.87	7.59	8.38	9.25
Southend Airport Retail Park	27.97	30.89	34.10	37.65	41.57
Other Rochford District	2.04	2.25	2.49	2.75	3.03
Total	**96.98**	**107.07**	**118.21**	**130.52**	**144.10**
Surplus Expenditure (£m)					
Rayleigh	0.00	1.35	5.04	10.31	17.02
Rochford	0.00	0.45	1.47	2.92	4.76
Hockley	0.00	0.21	0.71	1.44	2.36
Southend Airport Retail Park	0.00	1.08	3.57	7.08	11.55
Other Rochford District	0.00	0.10	0.31	0.61	0.99
Total	**0.00**	**3.19**	**11.12**	**22.35**	**36.68**

Table 12: Comparison Goods Floorspace Expenditure Capacity 2014 to 2034 - Baseline Population

Centre	2014	2019	2024	2029	2034
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,520	£6,095	£6,729	£7,430
Floorspace Requirement (sq.m net)					
Rayleigh	0	245	827	1,531	2,291
Rochford	0	81	242	434	641
Hockley	0	37	117	213	317
Southend Airport Retail Park	0	195	586	1,052	1,555
Other Rochford District	0	19	52	91	133
Total	**0**	**578**	**1,824**	**3,321**	**4,937**
Floorspace Requirement (sq.m gross)					
Rayleigh	0	327	1,103	2,042	3,055
Rochford	0	108	323	578	855
Hockley	0	50	156	285	423
Southend Airport Retail Park	0	261	781	1,402	2,073
Other Rochford District	0	25	69	121	177
Total	**0**	**770**	**2,432**	**4,428**	**6,582**

Table A: Study Area Population - High Population Projections

Zone	2011	2014	2019	2024	2029	2034
Zone 1 - Wickford East/Hullbridge	16,115	16,500	17,165	17,841	18,505	19,169
Zone 2 - Rayleigh	32,020	32,865	34,285	35,743	37,175	38,607
Zone 3 - Hockley	27,248	27,873	28,972	30,100	31,196	32,293
Zone 4 - Rochford/Ashingdon/Canewdon	40,009	40,926	42,540	44,196	45,807	47,417
Zone 5 - Gt. Wakering/Shoeburyness	40,369	41,170	42,655	44,177	45,641	47,106
Total	**155,761**	**159,334**	**165,617**	**172,057**	**178,324**	**184,592**

Source: Experian 2011 Census of Population, ONS 2010 Interim Projections 2011 to 2021 extrapolated to 2034

Table B: Summary of Comparison Goods Expenditure 2014 to 2034 - High Population Projections

Centre	2014	2019	2024	2029	2034
Available Expenditure in Rochford District (£m)					
Rayleigh	49.81	57.41	68.29	81.70	97.74
Rochford	11.50	13.22	15.69	18.74	22.37
Hockley	6.27	7.21	8.56	10.22	12.21
Southend Airport Retail Park	28.06	32.28	38.33	45.77	54.66
Other Rochford District	2.03	2.33	2.77	3.30	3.94
Total	**97.66**	**112.47**	**133.64**	**159.74**	**190.91**
Turnover of Existing Facilities (£m)					
Rayleigh	49.81	54.99	60.71	67.03	74.01
Rochford	11.50	12.70	14.02	15.48	17.09
Hockley	6.27	6.92	7.64	8.43	9.31
Southend Airport Retail Park	28.06	30.98	34.21	37.77	41.70
Other Rochford District	2.03	2.24	2.48	2.73	3.02
Total	**97.66**	**107.83**	**119.05**	**131.44**	**145.12**
Surplus Expenditure (£m)					
Rayleigh	0.00	2.42	7.57	14.67	23.73
Rochford	0.00	0.53	1.68	3.26	5.28
Hockley	0.00	0.29	0.92	1.79	2.90
Southend Airport Retail Park	0.00	1.30	4.12	8.01	12.96
Other Rochford District	0.00	0.09	0.29	0.57	0.92
Total	**0.00**	**4.64**	**14.59**	**28.30**	**45.79**

Table C: Comparison Goods Floorspace Expenditure Capacity 2014 to 2034 - High Population Projections

Centre	2014	2019	2024	2029	2034
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,520	£6,095	£6,729	£7,430
Floorspace Requirement (sq.m net)					
Rayleigh	0	439	1,243	2,180	3,194
Rochford	0	96	275	484	710
Hockley	0	53	151	266	390
Southend Airport Retail Park	0	236	676	1,190	1,745
Other Rochford District	0	17	48	85	124
Total	**0**	**840**	**2,393**	**4,205**	**6,163**
Floorspace Requirement (sq.m gross)					
Rayleigh	0	585	1,657	2,907	4,258
Rochford	0	128	367	646	947
Hockley	0	70	202	355	520
Southend Airport Retail Park	0	315	902	1,586	2,327
Other Rochford District	0	22	64	113	165
Total	**0**	**1,120**	**3,191**	**5,606**	**8,217**

Appendix 4 Audit of Centres

A. Rayleigh

Rayleigh is the main shopping and commercial centre within Rochford District, and is located in the south west of the District and to the north west of Southend-on-Sea. Rayleigh has a traditional and relatively attractive high street will a mix of multiple and independent outlets. The key roles of Rayleigh include:

- **Convenience shopping:** main and top up food and grocery shopping facilities. The centre has a number of small and medium sized supermarkets including Co-op, Iceland and Morrisons, there is also an out of centre Asda store. These food stores are supported by a reasonable selection of small specialist food shops including bakers, newsagents, butcher and health food store.
- **Comparison shopping:** there is a mix of national multiple retailers and small independent traders. Boots and M&Co are the largest stores. Most national multiples are located along the High Street.
- **Services**: provides a good range and choice of services including high street banks, estate agents, hairdressers, cafés, restaurants and takeaways.
- **Leisure:** health and fitness clubs.
- **Community facilities:** Library and health centres.

Mix of Uses and Retailer Occupation

Rayleigh has a total of 200 retail/service units (excluding separate indoor market stalls and upper floor only uses). The diversity of uses present in Rayleigh in terms of the number of ground floor units is set out in Table A.1, compared against the national average.

Table A.1 Rayleigh Use Class Mix by Unit

Type of Unit	Units* 2008	Units * 2013	% of Total Number of Units	
			Rayleigh	UK Average (1)
Comparison Retail	75	68	34.0	36.0
Convenience Retail	14	16	8.0	8.1
A1 Services (2)	35	33	16.5	14.1
A2 Services	27	37	18.5	12.1
A3/A5	33	33	16.5	14.7
A4 pubs/bars	4	4	2.0	2.9
Vacant	12	9	4.5	12.1
Total	**200**	**200**	**100.0**	**100.0**

Source: WYG 2008 RRLS, RDC Land Use Survey 2013. * units exclude indoor market stalls
(1) UK average for all town centres surveyed by Goad Plans (March 2014)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

Despite having a much lower vacancy rate than the national average, Rayleigh has an average proportion of comparison and convenience shops. The centre has a good provision of non-retail services. This mix reflects Raleigh's position within the shopping hierarchy, with a focus on lower order comparison shopping and servicing day to day needs.

Retailer Representation

Rayleigh has a reasonable selection of comparison shops (68) reflecting its size and role in the shopping hierarchy in the District. Provision is much more limited in the other centres within the District. Table A.2 provides a breakdown of comparison shop units by category compared with the national average. In addition to these comparison shop units the indoor market on the High Street includes 17 stalls selling a range of non-food goods.

Table A.2 Rayleigh Breakdown of Comparison Units

Type of Unit	Rayleigh		% UK Average*
	Units	%	
Clothing and footwear	14	20.6	25.0
Furniture, carpets and textiles	3	4.4	7.4
Booksellers, arts, crafts and stationers	2	2.9	10.6
Electrical, gas, music and photography	4	5.9	9.4
DIY, hardware and homewares	5	7.4	6.4
China, glass, gifts and fancy goods	4	5.9	4.6
Cars, motorcycles and motor access	0	0.0	1.3
Chemists, drug stores and opticians	12	17.6	10.0
Variety, department and catalogue	0	0.0	1.6
Florists, nurserymen and seedsmen	2	2.9	2.3
Toys, hobby, cycle and sport	1	1.5	5.2
Jewellers	5	7.4	5.0
Charity/second hand shops	6	8.8	8.4
Other comparison retailers	10	14.7	2.9
Total	**68**	**100.0**	**100.0**

Source: Goad Plan and RDC Land Use Survey 2013
*UK average for all town centres surveyed by Goad Plans (March 2014)

The centre provides most of the Goad comparison shop categories apart from cars, motorcycles and motor access goods and variety stores. The town centre has a good provision of pharmacies and opticians. However the choice of shops in most other categories is limited.

Service Uses

Rayleigh has a good range of non-retail service uses, with all categories well represented (see Table A.3). The mix of service uses is similar to the national average, although the centre has a higher proportion of estate agents. The wide range of services in Rayleigh reflects its day to day shopping and service role.

There is a mix of food and drink establishments including coffee shops, cafés, takeaways, public houses and restaurants.

Table A.3 Rayleigh Analysis of Selected Service Uses

Type of Unit	Rayleigh		% UK Average*
	Units	%	
Restaurants/cafés	20	20.6	23.3
Fast food/takeaways	13	13.4	15.2
Pubs/bars	4	4.1	7.6
Banks/other financial services	13	13.4	12.9
Betting shops/casinos	4	4.1	4.0
Estate agents/valuers	15	15.5	9.5
Travel agents	2	2.1	2.5
Hairdressers/beauty parlours	25	25.8	22.9
Laundries/dry cleaners	1	1.0	2.2
Sub-Total	**97**	**100.0**	**100.0**
Other A1 Retail Services	5		
Total	**102**		

Source: Goad Plan and RDC Land Use Survey 2013
*UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

There were nine vacant retail units within Rayleigh at the time of the Council 2013 survey, giving a vacancy rate of 4.5%, around a third of the national average of 12.1%. This suggests the demand for shop premises is relatively healthy. The number of vacant units has decreased slightly since 2008 despite the effects of the recession.

Summary of Rayleigh's Strengths and Weaknesses

Strengths

- The centre provides a reasonable range and mix of both national multiple and independent comparison retailers selling lower order goods i.e. good purchased on a day to day basis.
- The Co-op acts as an anchor store attracting customers to the town centre.
- The centre has an excellent good range and choice of non-retail services. There is a good mix and choice of food and drink establishments.
- The centre's vacancy level is much lower than the national average, which suggests demand for premises is strong.

- The indoor market provides a range of comparison goods.
- The centre has a large surface car park conveniently located a short walking distance to the heart of the town centre.
- Overall the attractive historic shopping environment is well maintained and pleasant.

Weaknesses

- The centre has a limited provision of comparison shops selling higher order comparison goods i.e. goods bought on an occasional basis where customers will window shop/shop around.
- The leisure and entertainment sectors are under-represented.
- The centre has a limited supply of large modern retail premises suitable to meet the requirements of multiple retailers.
- The High Street experiences some traffic congestion.

B. Rochford

Rochford is the second largest shopping and commercial centre within Rochford District and is located in the centre of the District.

The key roles of Rochford include:

- **Convenience shopping:** Co-op, Sainsbury's Local and Spar supermarkets supported by a small selection of independent specialists including a butcher, bakers, greengrocer and newsagents.
- **Comparison shopping:** predominantly small independent retailers and a number of charity shops.
- **Services:** provides a reasonable range and choice of services;
- **Entertainments:** a number of public houses and restaurants;
- **Community facilities:** medical surgeries, citizen's advice, library and council offices.

Mix of Uses and Occupier Representation

Rochford has a total of 87 retail/service uses. The diversity of uses in Rochford town centre in terms of the number of units is set out in Table B.1, compared against the national average.

Table B.1 Rochford Use Class Mix by Unit

Type of Unit	Units 2008	Units 2014	% of Total Number of Units	
			Rochford	UK Average (1)
Comparison Retail	26	28	32.2	36.0
Convenience Retail	12	10	11.5	8.1
A1 Services (2)	14	14	16.1	14.1
A2 Services	7	8	9.2	12.1
A3/A5	12	15	17.2	14.7
A4 pubs/bars	6	6	6.9	2.9
Vacant	10	6	6.9	12.1
Total	**87**	**87**	**100.0**	**100.0**

Source: WYG 2008 RRLS, NLP survey March 2014
(1) UK average for all town centres surveyed by Goad Plans (March 2014)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

The mix of uses has not changed significantly since 2008. Rochford continues to have a lower proportion of comparison shops when compared with the national average, and higher proportions of convenience shops and Class A1 services (e.g. hairdressers). This mix of uses is characteristic of small town centres that serve local shopping/service needs.

A key change since 2008 is the drop in the number of vacant units from 10 to six. In 2008 there was a cluster of vacant units in the new development at Roche Close. Most of these units have been occupied. The vacancy rate is now much lower than the national average, which reflects a vital and viable centre.

Retailer Representation

Rochford has a small selection of comparison shops (28) when compared with Rayleigh, reflecting its local role in the retail hierarchy in the District. Table B.2 provides a breakdown of comparison shop units by category. The number of comparison shops has increased marginally since 2008, but this sector continues to be dominated by small independent traders and second hand/ charity shops.

Table B.2 Rochford Breakdown of Comparison Units

Type of Unit	Rochford		% UK Average*
	Units	%	
Clothing and footwear	4	14.3	25.0
Furniture, carpets and textiles	3	10.7	7.4
Booksellers, arts, crafts and stationers	1	3.6	10.6
Electrical, gas, music and photography	0	0.0	9.4
DIY, hardware and homewares	1	3.6	6.4
China, glass, gifts and fancy goods	4	14.3	4.6
Cars, motorcycles and motor access	1	3.6	1.3
Chemists, drug stores and opticians	3	11.1	10.0
Variety, department and catalogue	0	0.0	1.6
Florists, nurserymen and seedsmen	2	7.1	2.3
Toys, hobby, cycle and sport	0	0.0	5.2
Jewellers	1	3.6	5.0
Charity/second hand shops	6	21.4	8.4
Other comparison retailers	2	7.1	2.9
Total	**28**	**100.0**	**100.0**

Source: NLP survey March 2014
*UK average for all town centres surveyed by Goad Plans (March 2014)

The centre does not provide outlets within all of the Goad Plan comparison categories, with three of the 13 categories not represented. The choice of shop units within the other categories is limited.

Rochford has some key comparison shops serving day to day needs e.g. chemists, opticians, hardware and card shops. The provision of clothing shops and electrical goods is poor compared to the national average.

Service Uses

Rochford has a good range of non-retail service uses, with all categories represented (see Table B.3) reflecting the size of Rochford and its service role in the shopping hierarchy. The provision of hairdressers/beauty parlours is particularly good, but banks/other financial services are under-provided. The centre has a strong evening economy with a good selection of restaurants and public houses for a centre of its size.

Table B.3 Rochford Analysis of Selected Service Uses

Type of Unit	Rochford		% UK Average*
	Units	%	
Restaurants/cafés	11	29.0	23.3
Fast food/takeaways	4	10.5	15.2
Pubs/bars	6	15.8	7.6
Banks/other financial services	2	5.3	12.9
Betting shops/casinos	1	2.6	4.0
Estate agents/valuers	1	2.6	9.5
Travel agents	1	2.6	2.5
Hairdressers/beauty parlours	11	29.0	22.9
Laundries/dry cleaners	1	2.6	2.2
Sub-Total	**38**	**100.0**	**100.0**
Other A1 Retail Services	1		
Total	**39**		

Source: NLP survey March 2014
*UK average for all town centres surveyed by Goad Plans (March 2014)

Summary of Rochford's Strengths and Weaknesses

Strengths

- There is a good provision of convenience retailing within the centre, Co-op, Sainsbury's and Spar stores. These stores cater for both main and top up food shopping.
- The centre has a good range of independent comparison shops and services that meet the day to day needs of residents.
- The vacancy rate is lower than the national average.
- The historic character of the centre creates an attractive environment.

Weaknesses

- The centre has a limited choice of national multiple comparison shops.
- The proportion of clothing and footwear stores is significantly below the national average. Rochford's comparison offer is primarily lower order comparison goods. Residents generally look to Southend for higher order comparison goods.

C. Hockley

Hockley is the third largest centre within Rochford District and is located to the west of the District, between Rayleigh and Rochford.

The key roles of Hockley include:

- **Convenience shopping:** including a Co-op, Sainsbury's Local and Costcutter. These provide a top up shopping role.
- **Comparison shopping:** the centre comprises a small range of independent retailers.
- **Services:** provides a range and choice of services estate agents, hairdressers, cafés, restaurants, and takeaways;
- **Entertainments:** one public house is located within the centre;
- **Community facilities:** a library.

Mix of Uses and Occupier Representation

Hockley has a total of 60 retail/service uses. The diversity of uses present in Hockley in terms of the number of units is set out in Table C.1, compared against the national average.

Table C.1 Hockley Use Class Mix by Unit

Type of Unit	Units 2008	Units 2014	% of Total Number of Units	
			Hockley	UK Average (1)
Comparison Retail	24	19	31.7	36.0
Convenience Retail	8	7	11.7	8.1
A1 Services (2)	10	13	21.7	14.1
A2 Services	9	8	13.3	12.1
A3/A5	8	10	16.7	14.7
A4 pubs/bars	1	1	1.7	2.9
Vacant	4	2	3.3	12.1
Total	**64**	**60**	**100.0**	**100.0**

Source: WYG 2008 RRLS, NLP survey March 2014
(1) UK average for all town centres surveyed by Goad Plans (March 2014)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

The centre's mix of units is broadly similar to the national average although it has a higher proportion of convenience and A1, A2, A3 and A5 service units when compared against the national average. This reflects the centre's more local service shopping role. The vacancy rate of this centre is much lower than the national average at 3.3%, which suggests the centre is healthy.

Retailer Representation

Hockley has small selection of comparison shops (19), consistent with its overall size and its service centre role in the retail hierarchy. Table C.2 provides a breakdown of comparison shop units by category.

Table C.2 Hockley Breakdown of Comparison Units

Type of Unit	Hockley		% UK Average*
	Units	%	
Clothing and footwear	2	10.5	25.0
Furniture, carpets and textiles	4	21.1	7.4
Booksellers, arts, crafts and stationers	0	0.0	10.6
Electrical, gas, music and photography	2	10.5	9.4
DIY, hardware and homewares	2	10.5	6.4
China, glass, gifts and fancy goods	2	10.5	4.6
Cars, motorcycles and motor access	0	0.0	1.3
Chemists, drug stores and opticians	3	15.8	10.0
Variety, department and catalogue	0	0.0	1.6
Florists, nurserymen and seedsmen	1	5.3	2.3
Toys, hobby, cycle and sport	0	0.0	5.2
Jewellers	0	0.0	5.0
Charity/second hand shops	2	10.5	8.4
Other comparison retailers	1	5.3	2.9
Total	**19**	**100.0**	**100.0**

Source: NLP survey March 2014
*UK average for all town centres surveyed by Goad Plans (March 2014)

The centre does not provide any booksellers/arts/crafts/stationers, cars/motorcycles/motor access, variety/department/catalogue, toys/hobby/cycle/sport or jewellery stores. There is a high proportion of furniture/carpets/textile, china/glass/gifts/fancy goods, chemists/drug stores/opticians and florists/nurserymen/seedsman when compared to the national average. The proportion of clothing/footwear stores is low. The choice of shops in all categories is limited.

Service Uses

Hockley has a reasonable range of non-retail service uses, with all categories represented (see Table C.3) reflecting the size of Hockley and its service role in the shopping hierarchy.

Table C.3 Hockley Analysis of Selected Service Uses

Type of Unit	Hockley		% UK Average*
	Units	%	
Restaurants/cafés	4	15.4	23.3
Fast food/takeaways	6	23.1	15.2
Pubs/bars	1	3.8	7.6
Banks/other financial services	1	3.8	12.9
Betting shops/casinos	1	3.8	4.0
Estate agents/valuers	4	15.4	9.5
Travel agents	1	3.8	2.5

Type of Unit	Hockley		% UK Average*
	Units	%	
Hairdressers/beauty parlours	7	26.9	22.9
Laundries/dry cleaners	1	3.8	2.2
Sub-Total	**26**	**100.0**	**100.0**
Other A1 Retail Services	4		
Total	**30**		

Source: NLP survey March 2014
*UK average for all town centres surveyed by Goad Plans (March 2014)

Vacant Units

There were only two vacant retail units within Hockley at the time of NLP's survey, giving a vacancy rate of 3.3%, significantly below the national average of 12.1%.

Summary of Hockley's Strengths and Weaknesses

Strengths

- There is a good provision of convenience retail for top up shopping.
- The centre has a good range of non-retail service uses.
- The vacancy rate is significantly lower than the national average.

Weaknesses

- The centre has a small localised catchment area, with most customers coming from the Hockley urban area.
- Food stores are relatively small and do not attract a significant proportion of main and bulk food shopping trips.
- The choice of comparison retail units is limited and many categories of shops are not represented.

D. Local Centres/Parades

Hullbridge

Hullbridge is served by a freestanding Budgens supermarket and a cluster of shops and services (12 units) along the stretch of Ferry Road from Malyons Lane to just beyond Ambleside Gardens, which include a Co-op supermarket, a One Stop convenience store, bakery, opticians, pharmacist, craft shop, two takeaways and a library. There are two vacant shop units. There is some limited off-street and on-street car parking.

Great Wakering

Great Wakering is a reasonably large village centre. The linear high street and a number (around 20) of shops and services interspersed with residential uses. The village centre is anchor by a Co-op convenience store and a Premier store. The centre has a library, community hall, pharmacist, estate agent, takeaways and a small selection of independent comparison shops.

Canewdon

Canewdon is a very small village centre, including a public house, a Costcutter convenience store, village shop and church hall.

Golden Cross Parade, Ashingdon Road

Ashingdon Road is a purpose built 1970s neighbourhood shopping parade with 15 shop units. It is anchored by a Co-op supermarket. Other uses include a baker, newsagent, off-license, pharmacist and takeaways.

Hullbridge Road/Rawreth Lane Parade

Hullbridge Road/Rawreth Lane is a purpose built 1980s neighbourhood shopping parade with nine shop units. It is anchored by a post office store. Other uses include a hairdressers, pharmacist and takeaways.

Hawkwell

Hawkwell has a small parade of shops anchored by a Co-op convenience store. The available facilities include an MOT garage, post office, Chinese takeaway, pharmacist and off-license.

E. Southend Airport Retail Park

The Southend Airport Retail Park is located on the Rochford District/Southend on Sea boundary to the south of Rochford. The retail park has ten units with over 8,500 sq.m gross floorspace. There is surface car parking for over 400 cars. The tenants include Argos, Carpetright, Harveys, Staples, Sports Direct, Pets at Home, B&M Bargains and MacDonalds.

Appendix 5 Household Survey Results

Household Survey Results

Survey Structure

NEMS Market Research carried out a telephone survey of 800 households across the Rochford District study area in April 2014. The study area was split into five zones, based on postcode sectors.

The number of interviews undertaken reflects the population in each zone in order to provide statistically reliable sub-samples. The main aims of the survey were to establish patterns for the following:

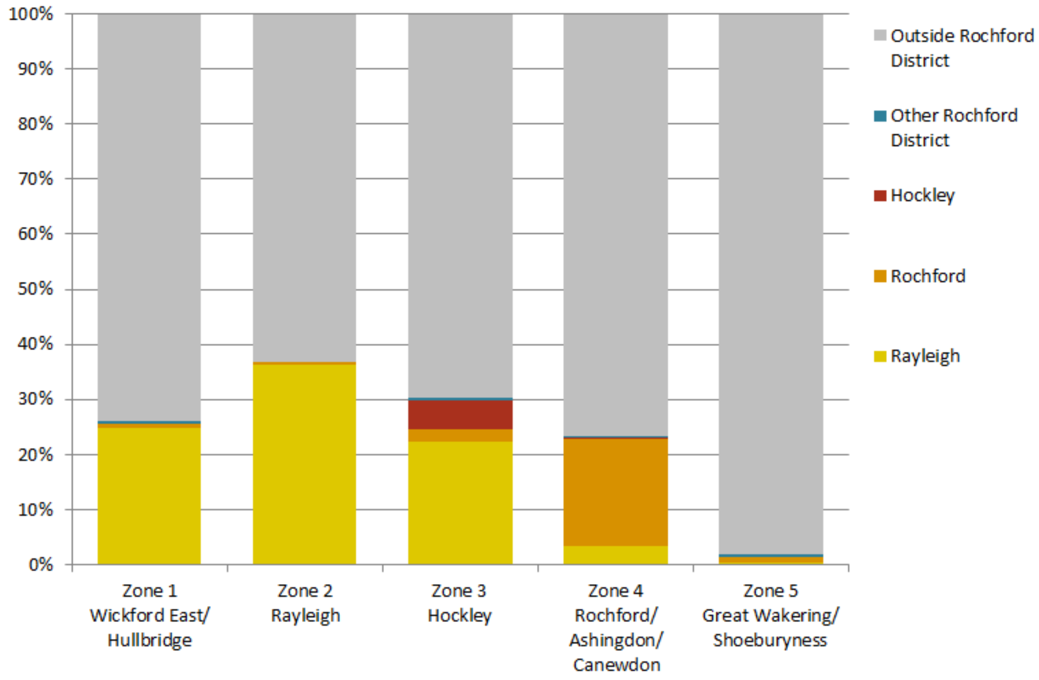
- Main food and top up grocery shopping;
- Non-food shopping, including:
  - clothing and footwear;
  - domestic electrical appliances;
  - other electrical goods (TV, Hi-Fi and computers);
  - furniture, soft furnishing or carpets;
  - DIY/hardware items and garden items;
  - chemist, health and beauty items; and
  - other non-food items (e.g. books, CDs, DVDs, toys and gifts).

Main Food Shopping

Large food stores are the primary destination for main food shopping trips across the study area. Overall, the Tesco Extra, Westcliff-on-Sea was the most popular shopping destination for the study area as a whole (15.4%), followed by the Asda in Shoeburyness (15.1%). The Asda at Rawreth Lane, Rayleigh was the most popular destination within Rochford District (9.3%). The internet was used by 3.4% of respondents. The market share of main food shopping for each town centre is shown in the graph below.

Rayleigh has the highest market shares (36%) of main food shopping within its local zone (Zone 2). Rayleigh also achieves a reasonable share in the Wickford East/Hullbridge zone (25%) and Hockley zone (22%). Rochford attracts 20% of main food shopping trips within its zone. The influence of larger stores and centres outside of Rochford District is evident in Figure A below.

Figure A Main Food Shopping



Source: NEMS Household Survey April 2014

Mode of Travel for Main Food Shopping

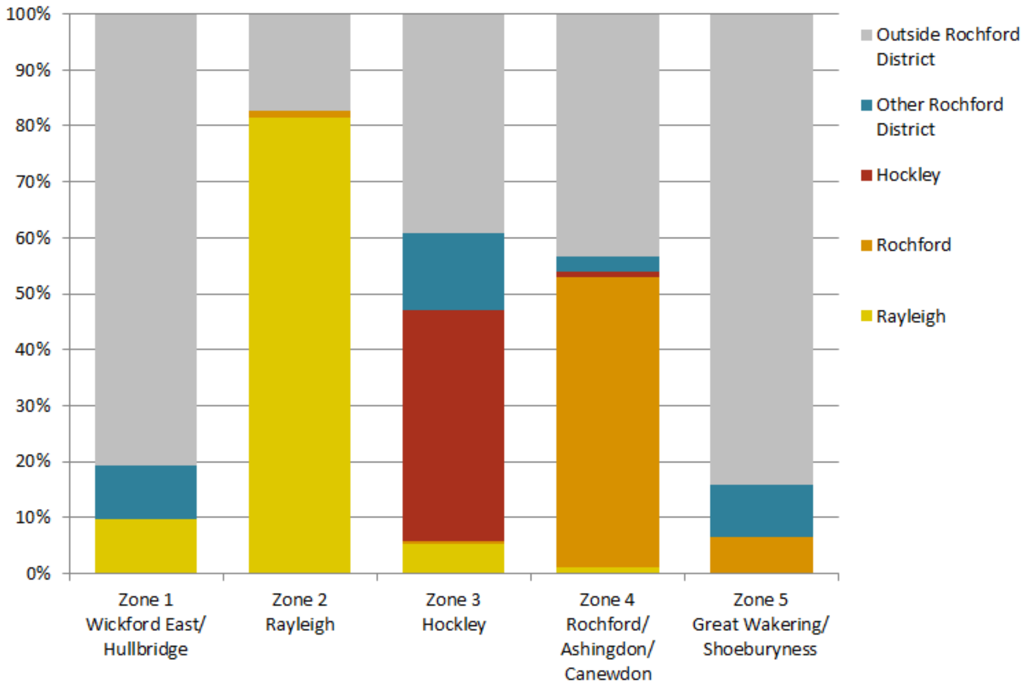
In the whole study area, 86.8% of respondents indicated that they travel to do their main food shopping by car (both driver and passenger) which is higher than the NLP average derived from similar surveys across the country (74.6%). This is typical for a rural district. A lower proportion walk to their main food shopping destination (6.5%) compared to the NLP average of 11.7%, and a lower proportion of households travel by bus (4.8%) compared to the NLP averages derived from other surveys of 8.6%.

Top-Up Food Shopping

Top-up food shopping trips are normally made to supplement main food shopping trips and are undertaken on a more frequent basis for staples such as bread and milk. Around 76% of households across the catchment area indicated that they undertake small-scale or top-up shopping trips in addition to their main food shopping trips. The market share of top-up food shopping for each town is shown in the graph below.

Zones 2 to 3 all retain fairly high top up shopping trips within their main centres. Rayleigh attracts 81.4% of trips (Zone 2), Rochford 51.9% (Zone 4) and Hockley 41.3% (Zone 3).

Figure B Top Up Food Shopping



Source: NEMS Household Survey April 2014

Non-Food Shopping

Respondents were asked in which location they buy most of their household's non-food shopping. For the study area as a whole, Southend town centre was the most popular destination with 41.6% of all respondents shopping there, followed by Rayleigh (10.2%). 8.1% do most of their non-food shopping at intu Lakeside and 6.3% in Basildon. This demonstrates that the majority of non-food shopping is carried out outside the District.

Overall 6.9% of respondents buy most of their non-food shopping on the internet or have it delivered. The Rochford/Ashingdon/Canewdon zone has the highest proportion of respondents who buy most of their non-food shopping on the internet/by mail order (9.9%), followed by the Wickford East/Hullbridge zone (8.8%) and the Hockley zone (7.6%).

Mode of Travel for Non-Food Shopping

The predominant mode of travel for non-food shopping was the car (both driver and passenger) with 74.0% of respondents indicating that they use this form of travel. The second most popular mode of transport for travelling to non-food shopping destinations was by bus/coach (10.0%) followed by walking (6.4%).

Non-Food Shopping Destinations

The household survey asked specific questions to probe which destinations respondents last visited to undertake particular types of non-food shopping. The market share for each non-food goods category within each town in

Rochford District is shown in the graphs below and overleaf. The influence of Southend-on-Sea and other centres outside the District is clearly evident.

Figure C Clothing and Shoes

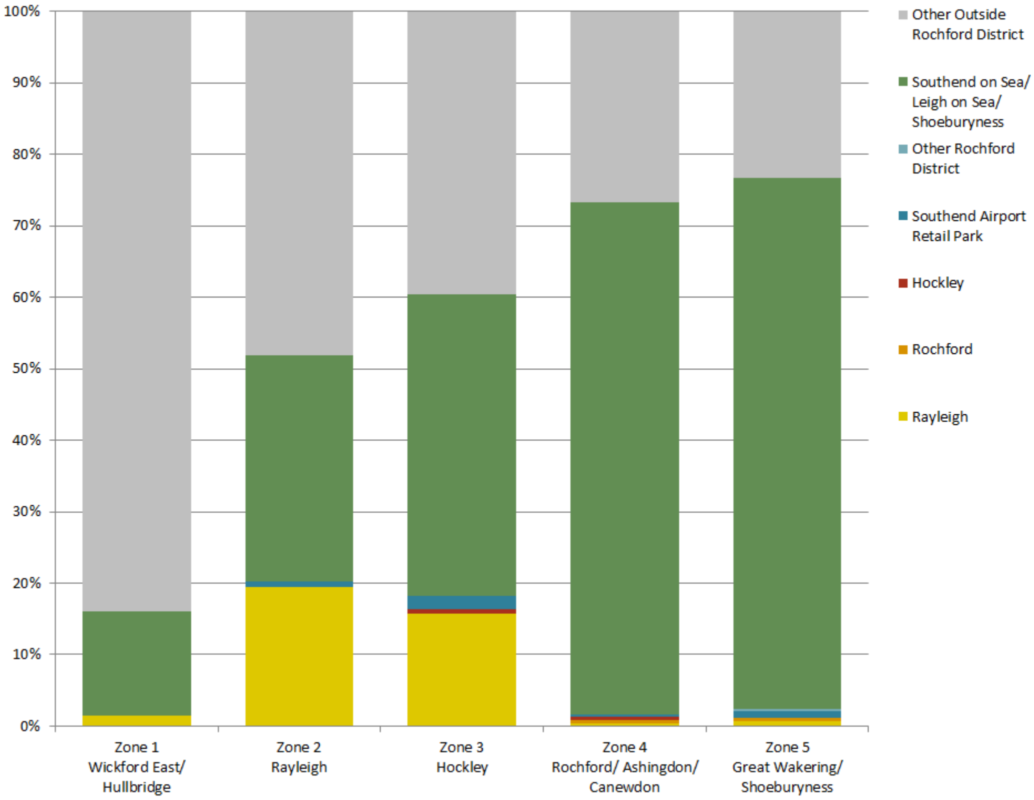
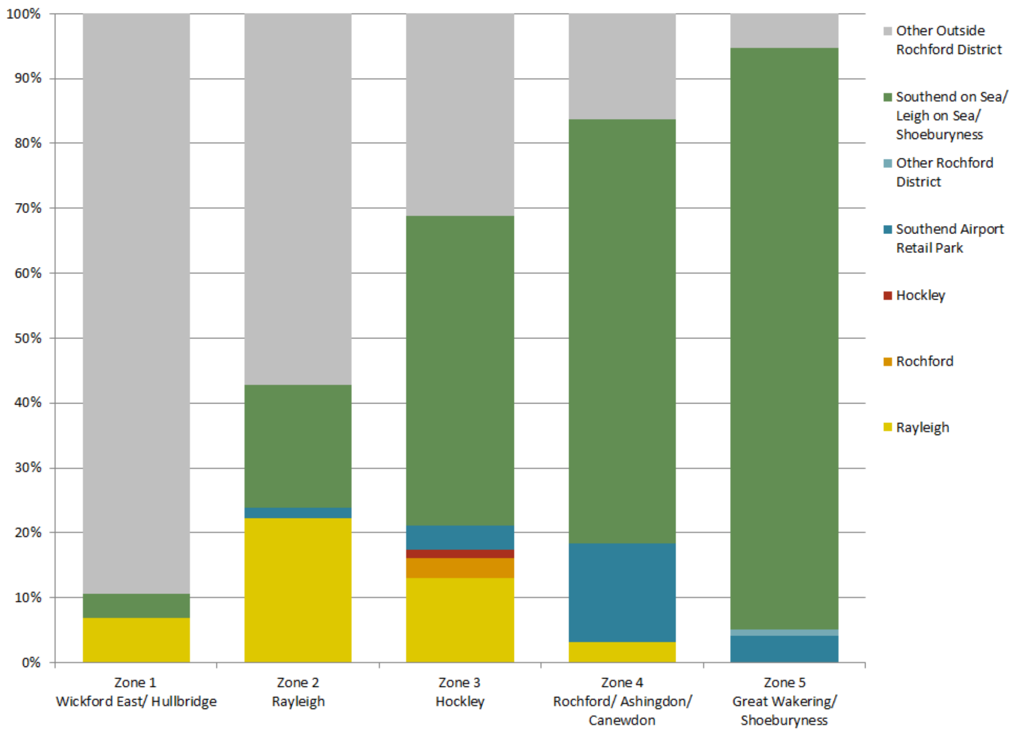


Figure D Domestic Electrical Appliances



Source: NEMS Household Survey April 2014

Figure E Other Electrical Goods

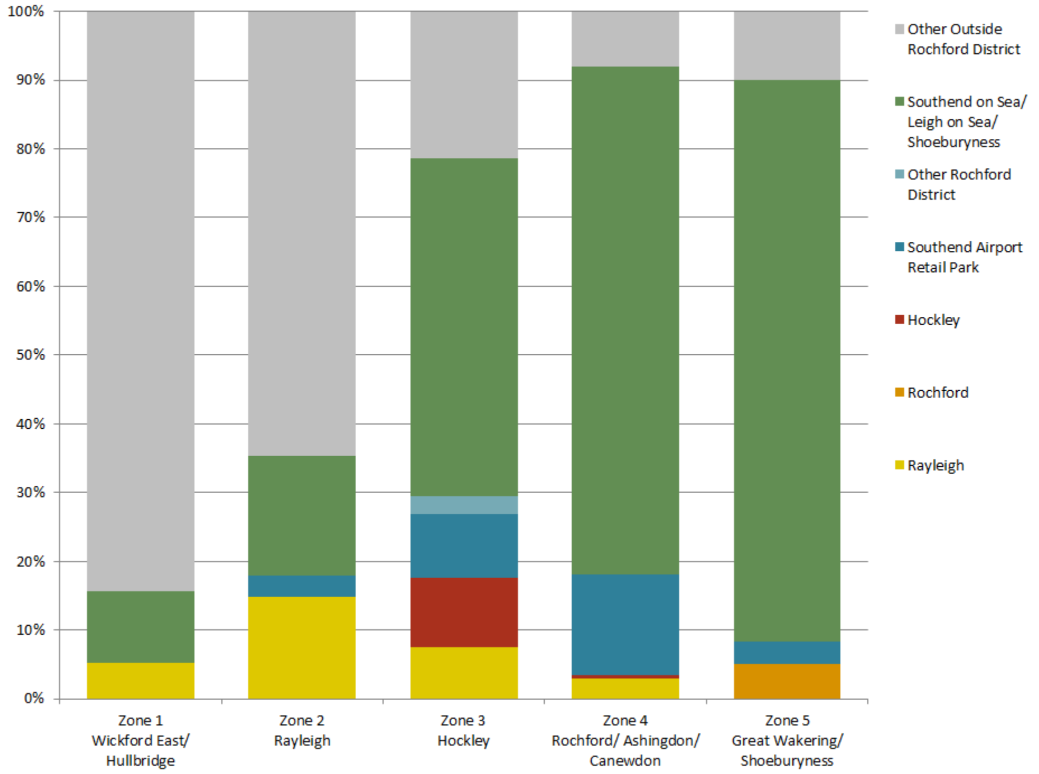
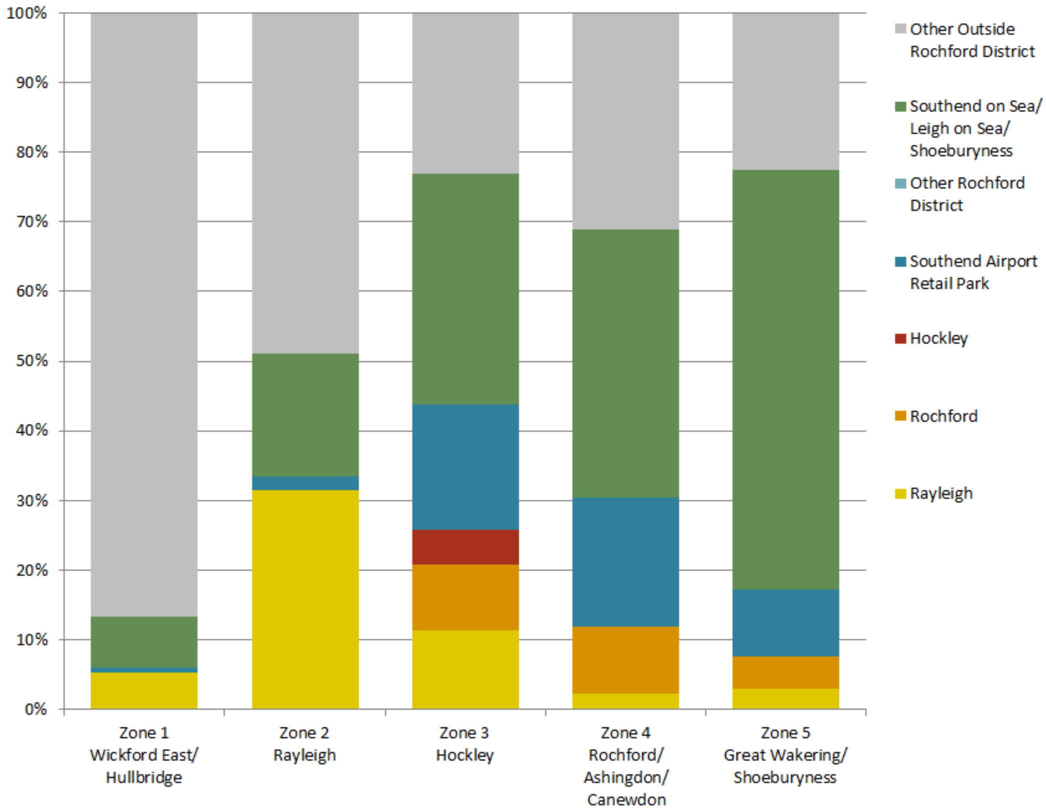


Figure F Furniture, Soft Furnishings and Floor Coverings



Source: NEMS Household Survey April 2014

Figure G DIY, Hardware and Garden Items

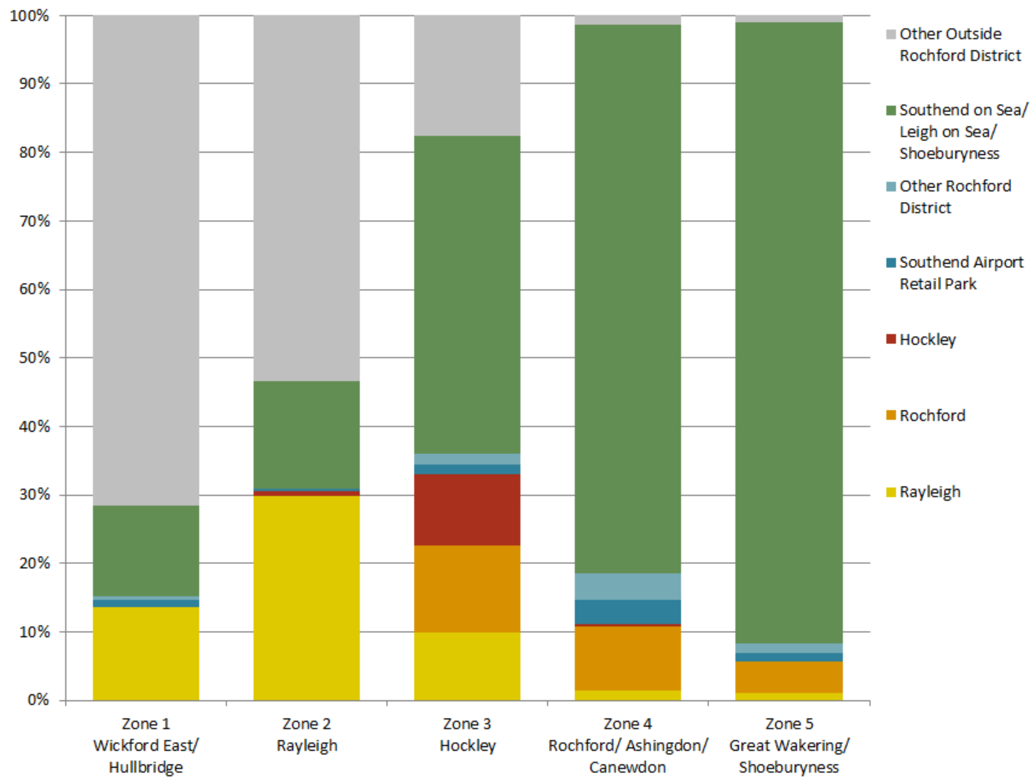
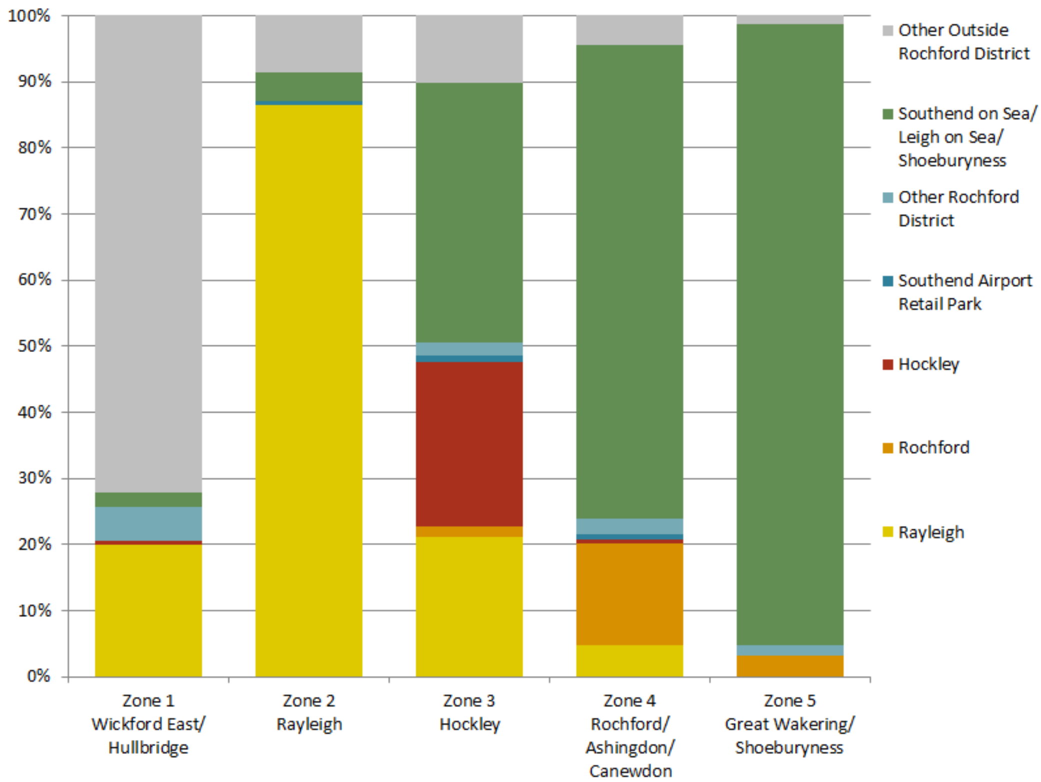
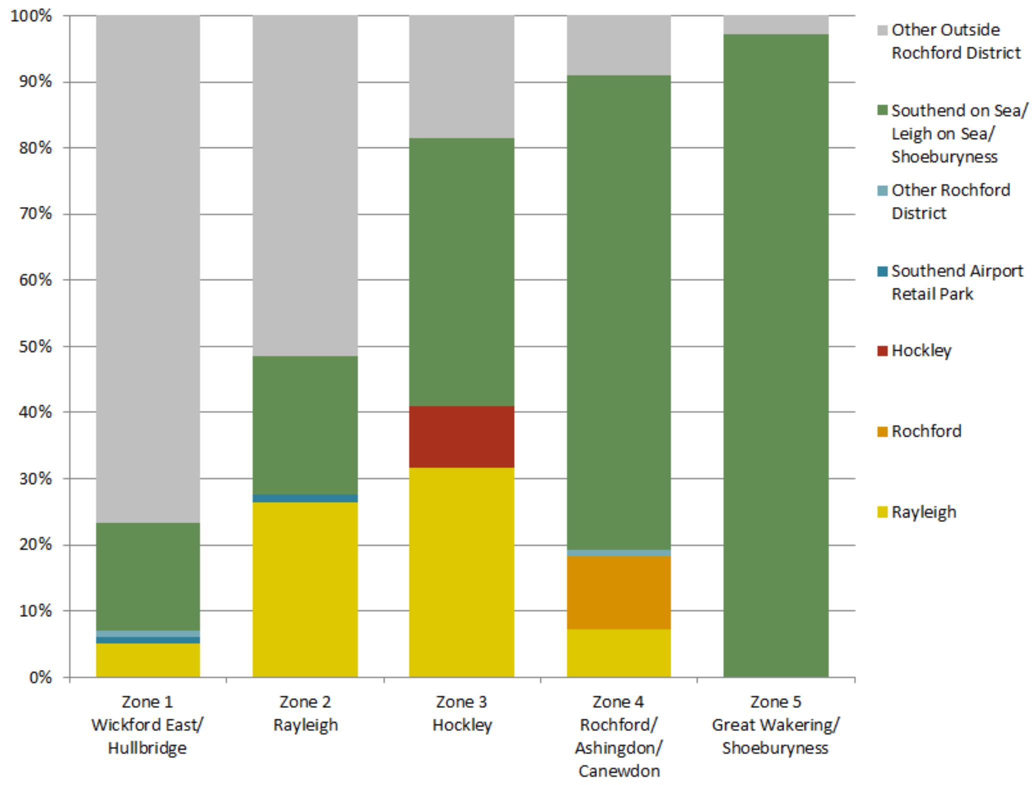


Figure H Health, Beauty and Chemist



Source: NEMS Household Survey April 2014

Figure I Books, CDs, Toys and Gifts



Source: NEMS Household Survey April 2014

Internet Shopping

Respondents were asked what goods they regularly buy on the internet. 33.3% stated that they did not regularly buy items on the internet. The most popular response was books and CDs (51.5%), clothes and shoes (22.1%) and electrical goods (18.7%). 7.5% regularly bought groceries via the internet.

Shoppers' Views

The household survey asked respondents what would make them visit the main centres more often.

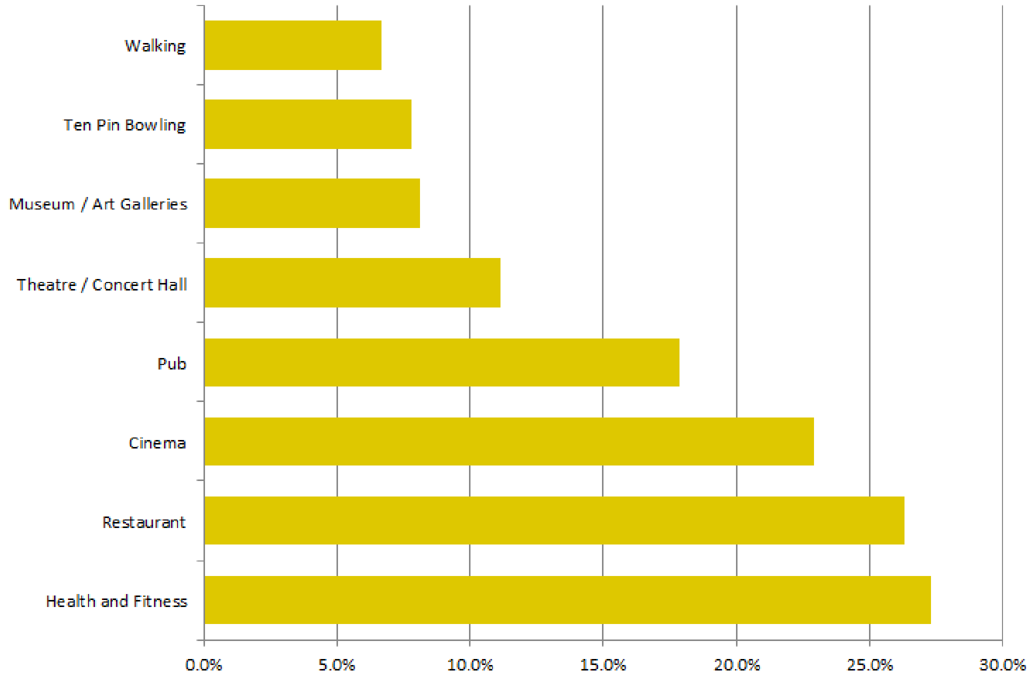
- **Rayleigh Town Centre**: Over half responded that nothing would make them visit Rayleigh town centre more often (50.4%). 14.7% responded a better choice in shops and a further 7.0% specifically responded a better choice of clothing shops. 13.9% said free car parking would make them visit the town more often whilst 7.9% responded more car parking.
- **Rochford Town Centre**: 61.2% said nothing would make them visit Rochford town centre more often. 10.4% replied having a better choice of shops in general would make them visit Rochford more often. More car parking was suggested by 6.3% and free car parking by 3.8%.

- **Hockley Town Centre**: 61.4% responded that nothing would make them visit Hockley town centre more often. Similarly to Rochford, 11.1% replied a better choice in shops in general, 6.7% replied better car parking and 4.4% free car parking.

Leisure Activities

The household survey asked respondents what leisure activities they or their family participate in in their spare time. The graph below shows the most popular responses.

Figure J Leisure Activities



Source: NEMS Household Survey April 2014