Southend on Sea Retail Study

SOUTHEND ON SEA BOROUGH COUNCIL

REPORT

September 2003

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Contact

Debee Skinner,
Strategic Planning, Technical and Environmental Services,
Southend on Sea Borough Council,
PO Box 5557, Civic Centre, Victoria Avenue,
Southend on Sea, Essex SS2 6ZF
Telephone: 01702 215408
E-Mail: debeeskinner@southend.gov.uk

CB Richard Ellis
Kingsley House
Wimpole Street W1G 0RE

Tel: 020 7182 2000
Fax: 020 7182 2001
e-mail: elizabeth.mason@cbre.com

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SOUTHEND ON SEA RETAIL STUDY

Disclaimer

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APPENDICES

PLANS

1. INTRODUCTION

1.1 CB Richard Ellis was instructed in March 2002 by Southend on Sea Borough Council to provide advice on retail and town centre issues in the Borough. The advice is to be used to inform the preparation of the Replacement Southend on Sea Local Plan.

1.2 The study follows on from the work carried out by CB Richard Ellis for the Joint Structure Plan Authorities of Essex County Council and Southend on Sea Borough Council. CB Richard Ellis prepared the Replacement Structure Plan Town Centres and Retail Potential (TCRP) Study (January 2002) to inform and guide the strategic planning of the key centres in the Structure Plan area.

1.3 The objective of this Local Plan study is to determine the level of different shopping needs in the Borough, and how these needs can be met most appropriately. The study provides the Borough Council with recommendations for the Replacement Local Plan policies.

1.4 The methodology for the study incorporates the following elements:

- a qualitative assessment of existing shopping provision in the Borough, building on the performance assessment undertaken in the Structure Plan TCRP Study. This part of the study focuses on the range, mix and quality of uses in Southend on Sea, the key district centres and out of centre, and examines their role and function in meeting local shopping needs.
- a quantitative analysis of the same shopping destinations, extending the capacity assessment carried out as part of the Structure Plan TCRP study. The analysis outlines the pattern of usage at the local level, and identifies the relative capacity for further town centre versus bulky goods floorspace.
- a consideration of the scope, if any, for new retail development in the Borough. This includes assessing the suitability, viability and availability of sites for new development.
- recommendations on the relevant policies in the Replacement Local Plan for Southend on Sea.

STRUCTURE OF THE REPORT

1.5 Section 2 of the report sets out the qualitative analysis of the existing retail provision in the Borough. We have updated our assessment of the vitality and viability of Southend on Sea, drawing on the indicators of performance set out in Planning Policy Guidance Note (PPG) 6, on Town Centres and Retail Developments. We also assess out of centre shopping provision, reviewing the existing distribution, range and quality of both foodstores and retail warehouses. In Section 3, we assess the role and function of the key District Centres of Leigh on Sea, Westcliff on Sea, Eastwood and North Shoebury. This assessment draws on the PPG6 indicators, where data is available, and the results of our on site survey work.

1.6 Section 4 outlines the results of our quantitative analysis of the performance and capacity of Southend on Sea. We examine existing shopping patterns in the Borough for food and non-food goods, drawing on a new household telephone interview survey undertaken in April 2002. Applying up to date population and expenditure forecasts, we assess the quantitative capacity for further food and non-food floorspace. In Section 5, we outline the results of our analysis of the District Centres drawing on our new household interview survey.

1.7 Section 6 deals with the scope for new retail development in the Borough. It takes the findings of our quantitative analysis and combines it with the results of our qualitative assessment to assess the most appropriate locations for different types of new development. Section 7 summarises the findings of the research and presents a series of recommendations for policies in the Replacement Local Plan.

BACKGROUND

1.8 The Replacement Structure Plan Town Centres and Retail Potential (TCRP) Study was carried out on behalf of Essex County Council and Southend on Sea Borough Council Joint Structure Plan Authorities in 2001, in order to inform and guide the strategic retail planning of the key centres in the Structure Plan area, as an input to an early review of the Plan.

1.9 The study confirms Southend on Sea's role as one of five sub-regional centres at the top of the retail hierarchy in the Structure Plan area. Based on total comparison goods sales (including both high street stores and retail warehouses) the study indicates Southend on Sea has the third highest comparison goods turnover of the sub-regional centres in the Structure Plan area (£407m) and the highest sales density of any centre (£5,400 per sq m net). However, this should be set against other indicators. The Experian Goad data (January 2001) showed that Southend on Sea had the second highest vacancy rate of all the sub-regional centres. Prime rental values were lower than in the sub-regional centres of Colchester and Chelmsford and in contrast to other sub-regional centres, Southend on Sea experienced a decline in values in May 2000. Prime retail yields have also consistently remained higher than both Colchester and Chelmsford.

1.10 Overall, balancing these and other indicators, the study concludes that Southend on Sea is a healthy centre. The town centre provides modern shopping facilities. It has two purpose built shopping centres, The Royals and Victoria Plaza. Investment in the redevelopment of new shop units in part of the former Keddies department store on the High Street and the new multiplex cinema and commercial development on London Road are important attractions. Therefore while the centre is unlikely to be achieving the high sales levels indicated by the capacity exercise, the centre appears to be vital and viable.

1.11 Southend on Sea has two retail warehouse parks, Greyhound Way and Airport, some retail warehouses at London Road, and a few solus retail warehouses. Whilst the Airport Retail Park provides a range of modern facilities, Greyhound Way is an older retail park with a more discount offer. Overall, the study concludes that Southend on Sea has the lowest amount of retail warehousing floorspace of all the sub-regional centres. The range, quality and amount of retail warehousing provision in Southend is inferior to the other principle sub-regional centres, and even taking account of recent developments, we concluded that there may be a qualitative case for future development.

1.12 The TCRP Study concludes that Southend on Sea has a comprehensive provision of convenience goods shopping facilities. In addition to facilities at Leigh and Westcliff, it has a town centre convenience superstore (Sainsburys, London Road), three out/district centre superstores (Waitrose, Eastern Avenue; Tesco, Prince Avenue; and Asda, North Shoebury) and one large supermarket (Safeway, Eastwood). Southend also has a range of other smaller stores and discount convenience goods operators. The study noted that two of the food superstores in Southend are relatively modern, having opened in the mid 1990s (Waitrose and Tesco).

1.13 The study estimates that Southend has the highest convenience goods turnover of any of the sub-regional centres at £234m, equating to a sales density of £13,500 per sq m net. This is considerably above estimated company average sales densities, indicating that the convenience stores are performing very well, although our site survey work did not suggest any significant congestion or overcrowding in the existing food stores.

1.14 The TCRP Study concludes that surplus comparison goods expenditure would be created by 2016. Whilst this will be reduced by recent developments and those still in the pipeline, the study estimates that the surplus expenditure capacity (£154m) created in Southend on Sea could be sufficient to support approximately 24,000 sq m net of additional comparison goods floorspace by 2016, taking account of existing commitments. At a strategic level, we anticipated some scope for additional retail warehouse provision in Southend on Sea, and concluded that some of the surplus expenditure capacity could be directed towards bulky goods facilities. We recommended that the precise amount of town centre versus bulky type floorspace and the potential development opportunities to accommodate such provision should be considered through the Local Plan process.

1.15 We estimated that there would be significant surplus convenience goods expenditure (£95m) in Southend on Sea over the Structure Plan period, as a result of the very high levels of sales in existing stores indicated by our quantitative analysis. We identified no existing commitments to reduce the surplus, and as such we estimated that theoretically there could be capacity for nearly 10,000 sq m net of additional convenience goods floorspace by 2016. We recommended that there is likely to be a need for further convenience stores, but it should be a matter for the Local Plan to assess relatively local deficiencies in food shopping provision, the availability of sequentially preferable sites for further provision and issues of impact and accessibility.

1.16 The TCRP Study also assessed the performance of Leigh on Sea and Westcliff on Sea. The study confirmed the more limited role of Westcliff on Sea for comparison goods shopping and the more specialist role of Leigh on Sea, providing high quality independent retailers, with few multiples. We concluded that the centre was performing this role well, with a low number of vacancies. Overall we considered that because of the nature of the survey our capacity modelling might have under estimated the comparison goods performance of Leigh on Sea and Westcliff on Sea.

1.17 We concluded that Leigh on Sea has an adequate range of local and independent convenience goods retailers, complementing the more specialist comparison retail offer and Westcliff on Sea only has a very localised shopping function. The survey data identified limited usage of both centres which we considered was more likely to be a function of the survey data than a deficiency in Leigh on Sea itself.

1.18 Table 1.1 summarises the findings of our quantitative assessment in the TCRP Study.

TABLE 1.1: FINDINGS OF TCRP STUDY

Location	Turnover (£m)		Sales Density (£ per sq m net)		Capacity (sq m net)	
	2001	2016	2001	2016	2001	2016
Convenience						
Southend	234	248	13,500	8,800	0	9,500
Westcliff	3	3.5	1,000	1,200	0	0
Leigh	17	18	5,800	5,700	0	155
Comparison						
Southend	407	663	5,400	6,800	0	24,00
Westcliff	2	3	100	200	0	0
Leigh	10	17	800	1,300	0	0

Source: CBHP 'Town Centres and Retail Potential Study', January 2001

1.19 The study recognised that there are opportunities for further retail development in Southend on Sea. It was considered particularly important to extend the town centre east-west as far as possible, rather than a further extension of the linear north-south retail area. The TCRP indicated that if opportunities at Tylers Avenue/York Road and Warrior Square were realised this should be possible. Southend on Sea Borough Council has estimated that these sites offer the scope to accommodate approximately 12,000 sq m of additional retail floorspace. The TCRP Study concluded that the redevelopment of the Victoria Plaza Centre may represent a longer term development opportunity over the Structure Plan period.

2. QUALITATIVE ASSESSMENT OF SOUTHEND ON SEA

2.1 In this section, we have updated the qualitative assessment of Southend on Sea town centre prepared as part of our Structure Plan TCRP Study. We have also assessed the range and quality of existing out of centre foodstore and retail warehouse provision. We have drawn on the performance indicators set out in Figure 1 of PPG6 including:

- Diversity of uses;
- Retailer representation and intention to change representation;
- Shopping rents;
- Proportion of vacant street level property;
- Commercial yields on non-domestic property;
- Pedestrian flows;
- Accessibility;
- Customer views and behaviour;
- Perception of safety and occurrence of crime;
- State of the town centre environmental quality.

2.2 We have assessed published data, including that produced by Experian Goad, the CB Richard Ellis Investment Property Research Department, PMRS (Pedestrian Market Research Services Ltd) and the results of our Household Telephone Interview Survey, complemented by our own on-site inspections and research.

SOUTHEND ON SEA TOWN CENTRE

2.3 Southend on Sea lies on the south-east coast of Essex at the end of the A127. The main shopping provision is located on a traditional linear High Street which runs north-south. This is supplemented by two purpose built shopping centres, Victoria Plaza, located at the northern end of the High Street and The Royals located at the southern end.

I) DIVERSITY OF USES

2.4 The most recent Experian Goad data for Southend (January 2002) shows a total of 422 retail and service units in the centre, which provide just over 100,000 sq m of ground floor floorspace (Appendix 1). Experian Goad estimate that approximately 7,000 sq m is in convenience goods uses, 65,000 sq m in comparison goods uses, and the remainder in service uses (18,000 sq m) or vacant (10,000 sq m) or in miscellaneous uses (2,000 sq m). We consider that the Experian Goad floorspace figures under represent the amount of comparison floorspace in Southend as they do not account for upper floors, for example in Debenhams, Woolworths, BHS, W H Smith, and Marks and Spencer.

TABLE 2.1 SETS OUT THE USES IN SOUTHEND ON SEA TOWN CENTRE BY THE NUMBER OF UNITS AND THE AMOUNT OF FLOORSPACE.TABLE 2.1: DIVERSITY OF USES

	Retail Composition			Floorspace (000's)		
Retail Trade Group	Outlets Number	% of all outlets	GB Average %	Sq m	% of all floorspace	GB Average %
Convenience	20	4.74	9.31	7.71	7.56	15.05
Comparison	227	53.79	48.83	64.66	63.39	54.55
Service	119	28.20	29.54	17.74	17.40	20.47
Vacant	48	11.37	10.38	10.13	9.93	8.43
Miscellaneous	8	1.90	1.49	1.77	1.73	1.50
TOTAL	422			102.01		

Source: Experian Goad Centre Report, January 2002

Note: GB average % is based upon all towns surveyed by Experian Goad

2.5 The number of convenience outlets and the amount of convenience floorspace in Southend on Sea is below average. According to Experian Goad, the centre has 20 outlets selling convenience goods. There is below average representation in each retail category with no greengrocers/fishmongers or off licences. This below average representation largely reflects Southend's sub-regional shopping centre role and its function as more of a comparison shopping destination.

2.6 In terms of comparison goods, Southend on Sea town centre has an above average number of outlets and amount of floorspace. It has above average representation in variety, department and catalogue store uses; jewellers, clocks and repairs; and sports, toys, cycles and hobbies. It has below average representation in furniture, carpets and textiles; DIY, hardware and household goods; cars, motorcycles and accessories; and florists and gardens. These are the more bulky goods categories.

2.7 The number of units and the amount of floorspace in service uses is slightly below average, which is somewhat surprising given Southend's tourist function. For example, Southend has below average representation in the restaurants, cafes and fast food category. Similarly, Southend has a below average number of gifts, china, glass and leather goods outlets which again is something of a deficiency in the town's facilities for tourists.

II) RETAILER REPRESENTATION

2.8 Southend on Sea town centre contains a range of multiple retailers. The main multiples are located on the High Street and within The Royals and Victoria Plaza Shopping Centres. Experian Goad highlight a number of key attractors in the centres that they survey. As set out in Table 2.2, Southend on Sea has all of these, with the exception of Our Price and Principles. It also has a range of mixed goods retailers including BHS, Boots the Chemist, Debenhams, Marks & Spencer, WH Smith and Woolworths.

2.9 The majority of the mixed goods retailers are located on the High Street, in conjunction with other fashion clothing retailers such as H&M, Topman/Topshop, Miss Selfridge, Burton, Dorothy Perkins, Bon Marche, Next, River Island, Gap, New Look, Etam and Primark. In general the offer is mainly mid-market, with fewer operators at the upper end of the market, such as French Connection, Zara, Mango, Karen Millen and Kookai.

TABLE 2.2: KEY ATTRACTORS

Adams	1	Dorothy Perkins	1	Our Price	0
Burger King	1	Evans	1	Principles	0
Burton	1	McDonalds	2	River Island Clothing Co.	1
Clarks	2	Mothercare	1	Superdrug	2
Clintons	2	New Look	1	Top Man	1
Dixons	1	Next	1	Top Shop	1
Allders	0	Debenhams	1	Marks & Spencer	1
BHS	1	House of Fraser	0	WH Smith	1
Boots the Chemist	2	John Lewis	0	Woolworths	1

Source: Experian Goad Centre Report, January 2002

2.10 The Royals Shopping Centre is a covered scheme. It opened in 1988. It is anchored by a Debenhams department store and a Littlewoods store. The centre also includes TK Maxx and Boots the Chemist. In total there are 35 units in the centre. It has a dedicated multi-storey car park, with approximately 480 spaces. The other purpose built shopping centre, Victoria Plaza, is an open scheme providing 96 retail units over three floors. The centre is now quite dated as it opened in January 1967. It is anchored by Virgin Megastore, Wilkinsons, Argos and Peacocks. The configuration of the centre is such that it has a number of very small units, many of which are now vacant. Overall, the offer in the Victoria Plaza is more at the lower end of the market when compared with The Royals.

2.11 London Road, Southchurch Road and Queens Road add to the range of retailing within the town centre. There is also a covered and open air market on York Road which offers comparison and convenience goods.

2.12 According to the Promis Report for Southend (March 2001) the prime pitch is quite diluted because of the length of the High Street. The northern part of the pedestrianised High Street; north of the railway bridge, to the junction with London Road and Southchurch Road is regarded as slightly more prime than the southern part.

2.13 The main convenience provision within Southend is provided by the Sainsbury's store on London Road. This store opened in March1989 and provides just over 3,000 sq m net of sales floorspace. The store has a large two-storey car park adjacent to its trading area. Access to this is via lifts and ramps. Whilst the store provides modern food shopping facilities, it is relatively constrained, particularly in terms of its layout. During the course of our survey work, we observed that the lobby and kiosk areas were congested. The store has a comprehensive food offer, including fish and meat counters, a delicatessen and a bakery. The non-food goods offer is more limited, the store does not have a café and customer service facilities are somewhat constrained. However, a pharmacy has recently been installed, and permission has been granted to extend the convenience goods retail sales floorspace by 985 sq m with improved customer facilities; construction commenced in early 2003.

2.14 Other convenience goods shopping in Southend town centre is provided by an Iceland store on York Road, Marks and Spencer Foodhall and a few smaller, more local and independent operators which are scattered throughout the centre, including in the Victoria Plaza Shopping Centre.

2.15 In terms of service uses, restaurants and bars in Southend on Sea are mainly located off the High Street. There are several units on London Road associated with the new Odeon Cinema. These include Mamma Amalfi, ASK, Yates Wine Lodge and Pizza Express. On Southchurch Road, there is also a Hogshead and Frankie and Benny's. Other operators in the town centre include McDonalds, Burger King and KFC. The centre is somewhat lacking in coffee shops and quality restaurants. Other uses within Southend include solicitors, estate agents, employment agencies and other office uses which are primarily located on Clarence Road, Clarence Street and Clifftown Road. The centre also contains a number of national High Street banks, the new Odeon cinema and premises of South East Essex College.

2.16 Overall, representation in Southend has changed very little since our Structure Plan TCRP study. The main large space users all remain the same; largely focused on mid market retailers.

III) RETAILER DEMAND

2.17 According to the Property Focus Database, the number of retailer requirements for Southend has increased quite significantly since our Structure Plan Study. In April 2001, we identified 39 requirements for space in Southend. This has now increased to 57 requirements (June 2002).

2.18 Table 2.3 details the breakdown in requirements for different uses. The convenience goods requirements are limited and include only Aldi, Spar and Julian Graves (health foods). The comparison goods requirements are more extensive and include Allders, Ann Harvey, Base Menswear, Carphone Warehouse, The Discovery Store, Edinburgh Woollen Mill, Millets, Poundland, Richer Sounds, Shoe Fayre, TJ Hughes and Warner Brother Studio stores. The majority of service requirements are for public houses/restaurants including Brewers Fayre, Chicago Rock Café, Edwards, Harvester, Vintage Inns, Walkabout and Whitbread. There are two night club requirements, one hotel requirement and one gym requirement.

TABLE 2.3: RETAILER DEMAND PROFILE

	Comparison	Convenience	Service	TOTAL (June 2002)
Number of units	27	3	27	57
Floorspace sq m minimum	13,707	873	17,953	32,533
Floorspace sq m maximum	39,292	1,347	26,885	67,524

Source: Focus Database, June 2002

2.19 We have carried out a targeted postal survey of retailers and service operators in order to investigate whether there are any further requirements for Southend on Sea. Whilst the response has been relatively limited, the survey has confirmed a department store requirement and requirements from several unit shop retailers. The survey also indicates a requirement for a convenience superstore. The operator has indicated that they would like between 3,250-6,750 sq m of floorspace, approximately 480 car parking spaces and a 3 hectare site. The requirements for further health and fitness clubs have also been confirmed. The operators would require between 2,000-2,500 sq m, 150 car parking spaces and good access by car.

IV) SHOPPING RENTS

2.20 The level of rent which retailers are prepared to pay for retail space within the centre is an indication of the perceived strength of that centre (although other factors such as the availability of floorspace have an impact on rental value). Whilst rental values can also provide a measure of the primacy of streets and locations in the town centre, we have drawn on the CB Richard Ellis Investment Research Database which focuses on prime zone A rental values. As such we cannot compare rental values in different parts of Southend, but comparisons are drawn with regional and national averages.

2.21 Table 2.4 shows the prime rental values achieved in Southend over the period since May 1996. Since our Structure Plan Study prime zone A rental values have fallen slightly, they are currently £1,157 per sq m. Overall, rental levels have fluctuated in the last few years and this is likely to reflect different transactions and lettings within Southend on Sea centre rather than any deficiency.

TABLE 2.4: PRIME ZONE A RETAIL RENTAL VALUES

	May-96	May-97	May-98	May-99	May-00	May-01	May-02
Prime Zone A Shop Rents							
£ per sq ft	77	80	87.5	110	105	110	107.5
£ per sq m	828.5	861	941.5	1,184	1,130	1,184	1,157
Southend Indexed to May 96	100	104	114	143	136	143	140
All Shops Indexed to May 96	100	105	114	124	133	136	139
Eastern Indexed to May 96	100	106	109	117	132	135	138

Source: CB Richard Ellis, Investment Research Database

2.22 We have compared prime retail rental values in Southend with CB Richard Ellis national and regional averages. The rental values have been converted to an index with May 1996 as the base position. The prime retail rental index for Southend has increased over the period 1996 – 2002 with the greatest increase occurring between May 1998 and 1999. National and regional prime retail rental indices have also increased over the last six years, but rental values in Southend have grown at a slightly greater pace than regional and national values.

V) COMMERICAL YIELDS

2.23 The commercial yield on non-domestic property is an indication of the confidence of investors in the long term profitability of the town centre. However, both Government and the RICS have warned that this requires careful analysis and its limitations must be understood. The yield on property investment represents the return (in the form of rent) on capital to an investor. As property investments do not usually produce a fixed income (i.e. rents are reviewed according to market conditions, and the terms of the property's lease), the greater the prospect of future rental growth, the lower the initial yield which an investor would be prepared to accept. Conversely, a higher yield reflects the lower expectation of future rental growth prospects. Yields are therefore an indicator of expectations of the general economic prospects for a town centre.

2.24 Table 2.5 compares yields in Southend with regional and national averages. Since our Structure Plan Study, prime retail yields in Southend have improved slightly, in May 2001, they were 8% and they have now fallen to 7.75%. Overall, however, yields remain higher than they have over much of the period since May 1996. As we previously indicated, however, this is more likely to reflect wider economic trends rather than a decline in investor confidence in Southend.

TABLE 2.5: PRIME RETAIL YIELDS

	May-96	May-97	May-98	May-99	May-00	May-01	May-02
Southend-on-Sea	6.75	6.50	6.25	6.25	6.50	8.0	7.75
All Shops	6.33	6.09	5.67	5.79	5.98	7.02	6.98
Eastern	6.53	6.25	5.81	5.97	6.25	7.36	7.28

Source: CB Richard Ellis, Investment Research Database

2.25 It is evident that prime retail yields in Southend have followed a similar pattern to national and regional averages, increasing slightly over the period to May 2000 with a more significant increase in May 2001 and a slight reduction more recently. Whilst prime retail yields in Southend are above national averages, they are more on a par with regional averages.

VI) VACANT PROPERTIES

2.26 The proportion of vacant street level property is one of the relevant factors which can be used when assessing the vitality and viability of a town centre. It should be used with caution, as vacancy can arise even in the strongest town centres, particularly where properties are under alteration.

2.27 Table 2.6 indicates that according to the Experian Goad Survey (January 2002) there were 48 vacant units in Southend, equating to a floorspace of approximately 10,130 sq m. The number of vacant outlets equates to a vacancy rate of 11.4%. This is slightly above the Experian Goad national average of 10.8% although it is evident that vacancies have fallen slightly since our Structure Plan Study.

TABLE 2.6: VACANT PROPERTIES

	Outlet Number	% of total outlets	GBAverage %	Floorspace (Sq m)	% of total outlets	GB Average %
2000	58	13.62	11.19	10.65	10.63	8.59
2001	53	12.44	11.04	10.85	10.72	8.42
2002	48	11.37	10.83	10.13	9.93	8.43

Source: Experian Goad Centre Report, January 2002

Note: GB average % is based upon all towns surveyed by Experian Goad

2.28 In our Structure Plan work we indicated that a significant proportion of the vacant units were located in the Victoria Plaza Shopping Centre (24 units) and suggested that this reflected the poor configuration of units, pedestrian accessibility and environmental quality of the precinct. The number of vacant outlets in the Victoria Plaza has now fallen to 17 but there are still significant numbers of vacant units particularly at first floor level. There are very few vacancies on the High Street (only two units). One of these units has been vacant since our previous work. The other vacancy has arisen as a result of the relocation of JD Sports into the former Spoils Kitchenware Shop. Other vacancies are largely scattered throughout the secondary parts of the town centre, although there are two vacant units in the Royals Shopping Centre.

VII) PEDESTRIAN FLOWS

2.29 Pedestrian flows are a useful indicator of overall vitality and the relative strengths of different parts of the town centre. PMRS (Pedestrian Market Research Services) last undertook pedestrian flowcounts in Southend in July 2000 (Appendix 2). We have used these to assess pedestrian movements in the centre.

2.30 The July 2000 surveys show that the busiest location in Southend was outside Boots on the northern part of the High Street. The next busiest location was outside Marks & Spencer on the southern part of the High Street. Outside Miss Selfridge on the north part of the High Street was the third busiest location, followed by outside Dixons on the southern part. The next busiest locations were all within the northern part of the High Street including outside Burton, Top Shop and Jessops. Overall, all the locations on the northern part of the High Street had above average pedestrian flow counts. The majority of count points on the southern part of the High Street were also above average, with the exception of the most southerly point, outside Adams.

2.31 The least busy points in the centre were on Southchurch Road at Warrior House and on Queens Road. Both of these count points are very much on the periphery of the centre and in more secondary locations. The next lowest count points were outside the car park entrance in The Royals Shopping Centre, on Alexandra Street, on Southchurch Road, and in Victoria Plaza. All of the count points in the Victoria Plaza recorded below average pedestrian footfalls, consistent with the higher level of vacancies in the centre. Most of the other below average count points were in more peripheral and secondary locations.

VIII) ACCESSIBILITY

2.32 Southend is linked to the strategic road network via the A127 and the A13. These both provide important connections to the west and link via Basildon to the M25. According to the Southend on Sea Retail Promis Report, the town suffers from its coastal location, being located at the ‘end of the line’; there are no major through roads and investment in infrastructure has been limited over recent years.

2.33 Southend town centre is accessible by car. However the pedestrianisation of most of the High Street restricts car access and movement around the centre. Shoppers car parking is currently available in a mix of multi-storey and surface car parks. These provide a considerable number of spaces (3,700), as follows:

- Victoria Plaza (600 spaces);
- Essex Street (210 spaces);
- Warrior Square (400 spaces);
- Elmer Avenue (1,000 spaces);
- Sainsbury's London Road (500 spaces);
- Southend Central Station (151 spaces);
- Chichester Road (260 spaces);
- Clarence Road (100 spaces);
- Alexandra Street (54 spaces);and
- The Royals (500 spaces).

2.34 Southend is highly accessible by public transport. Victoria Station which is located on the junction of the A127 and A13, links Southend with London Liverpool Street and Southend Central Station links Southend with London Fenchurch Street. This service connects through with Westcliff, Leigh, Benfleet, Pitsea and Basildon. The central bus station in Southend is located to the rear of the Royals Shopping Centre on Chichester Road. Buses do not run along the pedestrianised High Street, rather they run north-south along parallel Chichester Road.

IX) CUSTOMER VIEWS AND BEHAVIOUR

2.35 We have used our Household Telephone Interview Survey (Appendix 3) to examine customers' views and usage of Southend. The key results are summarised below:

- The majority of shoppers indicated that they liked Southend on Sea town centre because of proximity reasons, in that it was close to home (24% of all survey respondents) or that they like nothing or very little about the town centre (22% of all survey respondents).

- The most frequently mentioned things that shoppers specifically like about Southend on Sea is the range of non-food shops (13%), followed by the nice environment (4%), the shopping centres (3%), easy accessibility by car (2.5%) and traffic free shopping area (2.5%).
- Shops that were particularly highlighted as being favoured include Debenhams, Hennes, Marks and Spencer and Sainsbury's.
- The majority of shoppers also highlighted very little that they disliked about Southend on Sea town centre (30%). Mirroring shoppers likes, most frequently mentioned dislikes included the poor range of non-food shops (17%), the unattractive environment (13%), the difficulty of parking near the shops (5%), poor security (3.5%), the large size of the centre (3%), car parking (3%) and the centre is too busy (3%).
- In terms of actions which could be taken to improve Southend on Sea town centre, respondents had a range of suggestions. The most frequently mentioned action was more large stores e.g. department stores (11%), followed by more higher quality shops (8%), more/ better/cheaper car parking (12%), cleaner/better maintained streets (9.5%), more covered shopping malls (5%) and more shops (5%).
- Specific shops that respondents ideally would like to see in Southend included more department stores (26%), Keddies (6%), John Lewis (5%) and more fashion, clothes and shoes stores (12%).

X) CRIME

2.36 We have not undertaken any specific survey work on safety and security in Southend on Sea town centre. Our Household Interview Survey indicates limited concerns from shoppers about safety and security.

XI) STATE OF THE TOWN CENTRE ENVIRONMENT

2.37 Most of the High Street in Southend is pedestrianised and is currently undergoing significant regeneration. The SSHAPE project (Southend Seafront High Street and Pier Enhancement) is focused on improving the physical aspects of the central areas of Southend. The project has a combined value of over £17m with £5m being funded from the European Union via Objective 2 money. In the town centre, the programme involves the installation of co-ordinated seating, bins, lamp posts, landscaped areas and public art. New kiosks will be introduced into the High Street, along with electronic information points and video screens. Sections of paving are also being replaced as is current landscaping. This will be a significant improvement to the town centre.

SOUTHEND ON SEA OUT OF CENTRE

I) FOOD STORES

2.38 Southend on Sea has two main out of centre food superstores; Waitrose, Eastern Avenue and Tesco, Prince Avenue (Plan 2). Both these stores were identified through the Local Plan process. Waitrose is located to the north-east of the town centre, off the A1159, on the edge of the urban area. Tesco is located to the north-west of the town centre, off the A127, on the edge of the urban area.

2.39 The Waitrose Eastern Avenue opened in October 1994. It is the Waitrose 'Food and Home' format, with approximately 40% of the store dedicated to non-food items, including garden furniture, kitchenwares, CDs, books, household textiles, curtains, small electrical items and toys. The remainder of the store is a foodhall which has a fish counter, a butchers, patisserie and a meals in minutes counter. The store has a café, kiosk, photo processing, dry cleaning and a post office.

2.40 The Waitrose store has extensive surface car parking and there is a petrol filling station located adjacent to the store. Externally the store appears modern with attractive glazing and landscaping. At the time of our visit, the store appeared fairly busy. However, there were no queues for the check outs and the aisles were not congested or over crowded.

2.41 The Tesco store opened in February 1995. Whilst it is slightly smaller than the Waitrose store, it is still a large, fully conforming food superstore. The store is open 24 hours and has an associated petrol filling station and extensive surface car parking. The store has a range of facilities in-store including photo processing, a kiosk and a pharmacy. The range of food counters include a delicatessen, butcher, fishmonger and bakery. The store also sells an extensive range of non-food items including, childrens and adults clothing, electrical items, CDs, toys, cards and books. It also has a customer coffee shop. During our site inspections the store was busy, the car park was relatively full and all the check-outs were in use.

2.42 In addition to these two out of centre main food superstores, Southend on Sea has several discount food retailers including Aldi, Eastern Avenue; Lidl, Woodgrange Drive; and Lidl, Greyhound Retail Park (Table 2.7). The Tesco Express petrol filling station on Southchurch Road also appears very popular from our Household Telephone Interview Survey results. Other convenience provision in Southend includes a range of District and Local Centres. As detailed in Section 3, we have considered the Asda superstore at North Shoebury, the Safeway store at Eastwood and the Safeway store on London Road, Leigh on Sea. Southend also has a range of other smaller Co-op, Iceland and Somerfield stores although these serve mainly local shopping needs.

2.43 In order to understand the geographical distribution of main foodstore provision in the Borough of Southend, we have examined the 5 minute drive times of the main foodstores including Waitrose, Eastern Avenue; Tesco, Prince Avenue; Safeway, Eastwood; Safeway, Leigh on Sea; Asda, North Shoebury; and Sainsburys, Southend on Sea town centre. These drive times are set out on Plan 3.

2.44 It is evident that much of the Borough is within 5 minutes of a main foodstore, particularly in the western part of the Borough, where there appears to be a degree of overlap between the 5 minute drive times of Sainsburys, Tesco, Safeway and Waitrose. An area with more of a deficiency is to the east of Southend town centre. Whilst this area is partly served by Waitrose and Asda, some parts, particularly around Southchurch and Thorpe Bay, are not within a 5 minute drive of a main foodstore. Although there is local provision in these areas, including a small Honeycombe store at Thorpe Bay and a Lidl store on Woodgrange Drive, the popularity for example of the Tesco filling station on Southchurch Road reinforces our view on the deficiency in existing provision.

TABLE 2.7: OUT OF CENTRE MAIN FOOD SUPERSTORES

	Opened	Gross	Net	Car Parking Spaces	Check Outs
Waitrose, Eastern Avenue	Oct 1994	7,690	4,800	796	25
Tesco, Prince Avenue	Feb 1995	6,500	4,180	636	31
Aldi, Eastern Avenue	Nov 1995	N/A	1,200	100	5
Lidl, Woodgrange Drive	Nov 1995	N/A	800	N/A	N/A
Lidl, Greyhound Retail Park	Jul 2000	1,400	800	N/A	N/A
Tesco Express, Southchurch Road	Jun 2001	300	200	N/A	4

Source: IGD (2002), Southend on Sea Borough Council (2001)

II) RETAIL WAREHOUSES

2.45 Southend on Sea now has three retail warehouse parks: Airport; Greyhound; and London Road. All three are located relatively centrally (Plan 4). The Airport Retail Park is just outside the Borough boundary in Rochford District. The Greyhound Retail Park is located to the north-east of the town centre, on Sutton Road. The London Road Retail Park is located just to the north-west of the town centre (Table 2.8).

2.46 The Airport Retail Park opened in March 1997. It provides approximately 8,500 sq m of floorspace in seven units. All of the units are occupied and the current occupiers include Staples, PC World, Allied Carpets, Harveys, Youngs, Carpet Right and Pets at Home. There is also a McDonalds Drive-Thru. Whilst the retail park provides modern facilities with ample surface level car parking, the range of goods on offer is relatively limited. This combined with its somewhat inaccessible location may account for the fact that it was not particularly busy at the time of our on-site surveys.

2.47 The London Road Retail Park originally comprised only a Homebase store of approximately 5,000 sq m which opened in January 1986. The Retail Park was developed in December 2000, with the addition of two units, which are currently occupied by Currys and Tiles R Us. The new units provide modern retail warehousing facilities with some adjacent surface level car parking. Subsequent to our survey, the Homebase store, a first generation Texas store, has been refurbished to include kitchen, bathroom, lounge, dining room, bedroom display areas, and a garden centre. The inter relationship between the two new units and the original Homebase is limited and shoppers are likely to drive between the two.

2.48 The Greyhound Retail Park is a first generation retail warehousing scheme and the overall appearance of the retail park is dated. The current occupiers are also no longer bulky goods retailers and instead are focused on a more discount offer. Occupiers include Poundstretcher, Farmfoods, Lidl, What Everyone Wants and Matalan. The Matalan store is a freestanding unit, whereas the remaining occupiers are all in a single shed which appears to have been sub-divided. The retail park also has a Bottoms Up off licence fronting onto Sutton Road and to the rear of the retail park there is a relatively large Travis Perkins store located amongst industrial units. This sells a range of DIY materials, timber, patio slabs and fencing.

2.49 In addition to these stores, there are a few other solus retail warehouses within the Borough. These include Jewsons and Halfords on London Road and Jewsons on Stock Road. There is also a B&Q store on Short Street to the north of the town centre. This store is adjacent to the railway station. It is B&Q Supercentre format, selling a range of DIY goods. It also has a garden centre, a kitchen and bathroom display area and sells a range of gardening accessories and furniture. The store is dated but does appear popular and has a relatively extensive and well used surface car park to the front and side of the store.

2.50 We have examined the drive times from the three retail warehouse parks in the Borough. On the basis of a 10 minute drive it is evident that much, but not all, of the Borough is within the vicinity of some retail warehouse facilities (Plan 5). However, the range and choice of bulky goods stores within the Borough is limited and those stores that are available are somewhat dated, largely being first generation retail warehouse facilities.

TABLE 2.8: OUT OF CENTRE RETAIL WAREHOUSE PARKS

Airport Retail Park	
Harveys	Furnishings
Pets at Home	Pets goods
Allied Carpets	Carpets
PC World	Computers
Staples	Office wares
Carpet Right	Carpets
Youngs	Sofas
Greyhound Retail Park	
Poundstretcher	Household goods
Farmfoods	Frozen food
Lidl	Discount food
What Everyone Wants	Clothing
Matalan	Clothing
Bottoms Up	Off-licence
London Road Retail Park	
Homebase	DIY
Currys	Electrical
Tiles R Us	Tiles

Source: Southend on Sea Borough Council (2001), CB Richard Ellis (2002)

SUMMARY

2.51 In our work on the Structure Plan TCRP Study, we concluded that Southend on Sea town centre was vital and viable, and we see no reason to alter our conclusion. The diversity of uses in Southend on Sea town centre reflects its function as a sub-regional shopping destination, focusing on comparison goods provision. Whilst retailer representation is mainly mid market, Southend has a range of key attractors including Debenhams, Marks & Spencer, BHS, Woolworths and Littlewoods. The majority of high street fashion retailers are also represented, including a new Gap store in part of the former Keddies department store building.

2.52 Prime retail rental values in Southend have fluctuated slightly over the last few years, however, they are slightly above regional and national averages. Prime retail yields for Southend have also improved slightly more recently, as has the vacancy rate for Southend. Southend is highly accessibly by public transport including bus and train and the town centre has a range of car parking provision including multi-storey and surface car parks. The main issue with regard to car parking appears to be accessibility, rather than a lack of facilities.

2.53 Shoppers like Southend on Sea because of its proximity to home, range of non-food shops and the attractive environment. However, the issues most frequently mentioned include the lack of non-food shops and the environment. Most frequently mentioned actions to improve the town centre include the provision of more department/larger stores and more fashion/clothing/footwear stores and more/better/cheaper car parking and cleaner/better maintained streets.

2.54 The refurbishment and regeneration of the town centre environment via the SSHAPE project is likely to significantly enhance Southend on Sea town centre. We envisage that this will have positive spin-off benefits for existing retailers and is likely to encourage new users into the town centre.

2.55 The range of foodstores in Southend includes all of the main operators (Tesco, J Sainsbury, Asda, Safeway and Waitrose), with the exception of Morrisons, in conjunction with a range of discounts and smaller stores including Somerfield, Co-op and Iceland. Two of the main out of centre foodstores are relatively new having come forward through the now adopted Local Plan process. Other provision, including that in the District Centres of Eastwood, North Shoebury and Leigh on Sea and the town centre itself, is slightly more dated. Overall, whilst the six main foodstores in the Borough provide relatively comprehensive provision, there is a deficiency in the east of the Borough, in the vicinity of Southchurch and Thorpe Bay.

2.56 Southend has three retail warehouse parks and a few solus warehouses. Overall the range and choice of bulky goods facilities is quite limited. A number of the stores are dated and first generation facilities. The offer at the Greyhound Retail Park is largely discount and non-bulky goods. The offer at the Airport Retail Park is mainly carpets, furnishings and computers/office wares. The location of this park, just inside Rochford District, is also somewhat inaccessible. Both the Homebase and B&Q stores are small and dated, particularly in comparison with modern state of the art warehouse provision. There is therefore a qualitative deficiency in existing retail warehouse provision in the Borough.

3. QUALITATIVE ASSESSMENT OF DISTRICT CENTRES

3.1 In this section we present our qualitative assessment of the District Centres in the Borough. We have updated our assessment of the larger centres of Westcliff on Sea and Leigh on Sea that was carried out as part of the Structure Plan TCRP Study. We have also assessed the other two District Centres identified in the Local Plan: North Shoebury and Eastwood. Our assessment focuses on the economic health of these centres, to complement our capacity assessment, rather than a detailed health check or audit of each centre.

WESTCLIFF ON SEA

3.2 Westcliff on Sea (hereinafter referred to as Westcliff) lies within the urban area of Southend on Sea, approximately 3km west of Southend on Sea town centre. The centre is based on traditional 'high streets' which cover a relatively extensive area. The main shopping provision is on Hamlet Court Road and London Road and the adopted Local Plan reflects this defining the centre relatively narrowly, covering an area on Hamlet Court Road from Canewdon Road to the junction with London Road and a small area on London Road from Ceylon Road to Richmond Avenue.

3.3 Experian Goad have not updated their survey information of Westcliff since our Structure Plan work. Therefore we have used their survey data from March 2001. Experian Goad indicate that Westcliff has 333 retail and service units, which provide approximately 52,500 sq m of ground floor floorspace. Approximately 4,400 sq m is in convenience goods uses, 23,800 sq m in comparison goods uses, and the remainder in service uses (14,500 sq m) or vacant (9,400 sq m) or in miscellaneous uses (400 sq m). Table 3.1 sets out the uses in Westcliff by the number of units and the amount of floorspace.

3.4 The number of convenience outlets and the amount of convenience floorspace in Westcliff is below average. According to Experian Goad the centre has 22 outlets selling convenience goods. Although this is less than the number of convenience outlets in Leigh on Sea, all the convenience categories are represented including several off licences, supermarkets/general convenience stores, newsagents, greengrocers, fishmongers, butchers and bakers.

TABLE 3.1: DIVERSITY OF USES

	Retail Composition			Floorspace (000's)		
Retail Trade Group	Outlets Number	% of all outlets	GB Average %	Sq m	% of all floorspace	GB Average %
Convenience	22	6.61	9.28	4,357	8.30	15.06
Comparison	141	42.34	48.76	23,857	45.44	54.69
Service	108	32.43	29.54	14,548	27.71	20.31
Vacant	59	17.72	10.93	9,374	17.86	8.46
Miscellaneous	3	0.90	1.49	3,62	0.69	1.48
TOTAL	333			102.01		

Source: Experian Goad Centre Report, March 2001

Note: GB average % is based upon all towns surveyed by Experian Goad

3.5 In terms of comparison goods, Westcliff has a below average number of outlets and proportion of floorspace. This reflects its more local shopping function. Conversely, the number of units and amount of floorspace in service uses is above average. The main comparison goods categories represented are furniture, carpets and textiles; DIY, hardware and household goods; electrical, home entertainment, telephones and videos; and mens and boyswear. The centre also has an above average representation of restaurants, cafes, fast-food and take-away outlets; hairdressing, beauty and health salons; laundrettes and dry cleaners; and estate agents.

3.6 The main convenience offer in Westcliff is a small Budgens store, a small Co-op store and a small Somerfield store. Budgens and Co-op are on Hamlet Court Road and therefore within the Defined Shopping Centre. Somerfield is located on London Road, within the Secondary Shopping Frontage. None of the convenience stores are likely to cater for main food shopping, rather they will be used more for everyday top-up food and convenience goods shopping.

3.7 In terms of national multiple comparison operators, Westcliff has a small Boots the Chemist and a Lloyds Pharmacy. The majority of other operators are independent. Westcliff has some quality outlets including independent household goods and china store R Havens, and B&R Barnes a fitted kitchen and bathroom shop. Outside the Defined Shopping Centre, particularly on London Road there are a number of specialist outlets such as Danceland (dancewear), Young Brides (bridal wear), Classic Brass Company (brassware) and Allegro Music (musical instruments).

3.8 Westcliff has several national multiple restaurants including KFC, Pizza Hut, Wimpy and Perfect Pizza. There are also a range of independent public houses and restaurants, including several more modern/ quality Indian and Chinese restaurants. Westcliff appears to be fulfilling its district centre service with representation by most of the 'high street' banks and building societies (Barclays, HSBC, Halifax, Natwest, Nationwide, Lloyds). Other services include video hire (Blockbuster Video), estate agents, opticians, betting offices (Corals and Ladbrooks), travel agents (Thomas Cook), drycleaners, hairdressers and beauty salons.

3.9 Westcliff had a particularly high vacancy rate at the time of the last Experian Goad survey. In our Structure Plan work, we noted that it had the highest vacancy rate of all centres in the Structure Plan area at 17.7% (59 vacant units). This was above the Experian Goad national average vacancy rate of 11%. The vacant units in Westcliff are relatively scattered. At the time of the last Experian Goad survey just over one-third of the units within the defined centre were vacant. There were significant numbers of vacancies to the south of the defined centre, both on Hamlet Court Road and on Station Road.

3.10 We have spoken to several local agents regarding the commercial property market in Westcliff. They are overwhelmingly of the opinion that the centre is improving and currently enjoying something of a renaissance, since its deterioration in the early 1990s. We have noted that there has been a take up of units since our Structure Plan work, for example two vacant units adjacent to the Budgens store have been converted into the China Garden restaurant. Local agents consider that Westcliff is improving because of a combination of factors, including general improvements in the property market and because of an overspill from Leigh on Sea where properties are now very difficult to obtain.

3.11 Local agents have indicated that the take up of units is now extending from the prime pitch on Hamlet Court Road into more secondary areas such as London Road. However, the relative deficiency of the southern part of the centre was highlighted. The long-term vacancy of the former Queens Hotel site to the south of the centre, abutting the railway line was considered to detract from the vibrancy of Westcliff. We understand that this has now been bought by McCarthy & Stone and is being developed for retirement units which could enhance the southern part of the centre.

3.12 Westcliff is easily accessible by car, public transport and foot. Due to the traditional linear format of the centre, off street car parking is limited. There is a small car park to the south of the centre off Station Road at the railway station. There are two car parks to the north of the centre, to rear of Boots the Chemist and at the junction of Hamlet Court Road and London Road. In addition to these, there are some limited on-street parking facilities.

3.13 Bus stops are located intermittently and conveniently along Hamlet Court Road and London Road and Westcliff railway station, connecting through to Southend Central and London Fenchurch Street, is located at the southern end of Hamlet Court Road. The bus services and facilities on London Road and at the junction of London Road and Hamlet Court Road are subject to significant improvement (including bus priority measures at junctions, new high quality bus shelters and bus lay-bys, and real time passenger information telematics) as part of Phase 1 of the A13 Passenger Transport Corridor Improvement Scheme (LTP funded), which is expected to be completed in mid 2003. The Hamlet Court Road Enhancement Scheme is currently being finalised between the Council and various partners, and is expected to be implemented from January 2004 onwards. This will bring a range of environmental, highway, and parking improvements to reinforce the renaissance of the centre. Due to the traditional layout of the centre and proximity of surrounding residential areas, pedestrian accessibility is relatively good. It is, however, diluted by the extent of the centre which reduces its attractiveness for walking.

LEIGH ON SEA

3.14 Leigh on Sea (hereinafter referred to as Leigh) is situated to the south of the A13, west of Westcliff, although still within the suburbs of Southend on Sea. It is approximately 5km west of Southend on Sea town centre. Leigh is a very pleasant and attractive historic centre, based on several traditional streets. The main shopping provision is provided on The Broadway and Elm Road. The Local Plan reflects this defining the shopping centre as the area on The Broadway between the junction with Radcliff Drive and Elm Road and the area on Elm Road as far north as Rectory Grove and North Street.

3.15 As in Westcliff, Experian Goad have not updated their survey information since our Structure Plan work. We have therefore used the survey data from March 2001. Experian Goad indicate that at that time Leigh had 280 units in retail and services uses. They provided approximately 38,200 sq m of ground floor floorspace. Approximately 4,500 sq m is in convenience goods uses, 21,900 sq m in comparison goods uses and the remainder in service uses (9,100 sq m), vacant (1,800 sq m) or in miscellaneous uses (800 sq m). Overall Leigh has less floorspace than Westcliff. Whilst the amount of convenience and comparison floorspace is broadly similar to Westcliff, overall amount is lower because Leigh has considerably less floorspace in service uses and vacant. Table 3.2 sets out the uses in Leigh on Sea by the number of units and the amount of floorspace.

TABLE 3.2: DIVERSITY OF USES

	Retail Composition			Floorspace (000's)		
Retail Trade Group	Outlets Number	% of all outlets	GB Average %	Sq m	% of all floorspace	GB Average %
Convenience	28	10.0	9.28	4,543	11.9	15.06
Comparison	159	56.8	48.76	21,906	57.3	54.69
Service	76	27.1	29.54	9,151	23.9	20.31
Vacant	16	5.7	10.93	1,830	4.8	8.46
Miscellaneous	1	0.4	1.49	790	2.1	1.48
TOTAL	280			38,220		

Source: Experian Goad Centre Report, March 2001

Note: GB average % is based upon all towns surveyed by Experian Goad

3.16 The number of convenience outlets in Leigh is very slightly above average, but the amount of convenience floorspace is below average. According to Experian Goad, the centre has 28 outlets selling convenience goods, these include a mix of convenience goods categories such as delicatessens, greengrocers, butchers, fishmongers, bakers, newsagents and off licences. Leigh also has an above average number of units and proportion of comparison goods floorspace. Most comparison goods categories are represented in Leigh, including uses such as clothing and footwear and gifts and jewellery, which are more usually located in larger, higher order comparison shopping destinations such as Southend on Sea town centre. The number of service outlets in Leigh is slightly below average, although the amount of floorspace is slightly above average. Overall, the centre has good representation particularly in the restaurant and bar category and in the banks and estate agents category.

3.17 Retailer representation in Leigh is mainly independent operators rather than national multiple operators. This is similar to Westcliff, although the quality of retailers in Leigh is generally higher. For example Leigh has a range of quality/designer ladies, mens and childrens wear boutiques, art galleries, antique shops and interior design/homewares stores. In terms of national multiple comparison retailers, Leigh has a Woolworths store and Chemys Chemist.

3.18 The main convenience goods store in Leigh is a small Co-op supermarket located at 14-22 The Broadway. The store provides approximately 300 sq m gross of retail floorspace and 200 sq m net sales. There is also a Costcutter store on The Broadway. Neither of these convenience stores are likely to cater for main food shopping. Other retailers which add to the quality representation in Leigh include independent delicatessens such as Sages and Leigh Deli and independent fishmongers, butchers, bakers and greengrocers.

3.19 In our quantitative assessment, we have reviewed the performance of Safeway, London Road. This store is about half a mile from The Broadway in Leigh. Whilst it is not a fully conforming convenience superstore with a range of facilities in addition to groceries, it is likely to meet the main bulky food shopping needs of some of the residents of Leigh. The store opened in 1981 and provides 2,400 sq m gross and 1,480 sq m net of retail floorspace. It has 10 check-outs and a delicatessen, bakers and kiosk. The car parking facilities at the store are not ideal. There is a small car park raised up over the store which is accessed from the store via lifts and by car via side-streets.

3.20 Leigh has a range of quality restaurants and bars which are run by independent operators such as Ugo's, Bombay Spice and Café Rococo. There is a Wimpy fast food take away restaurant on The Broadway and several public houses scattered throughout the centre. Like Westcliff, Leigh provides a range of independent services including hairdressers/beauty salons and dry cleaners. It also has representation of the high street banks (Natwest, HSBC, Halifax, Barclays, Nationwide, Woolwich, Lloyds TSB and Abbey National), travel agents (Lunn Polly and Travel Choice), and local and independent estate agents and opticians.

3.21 We are only aware of limited retailer requirements for Leigh on the Focus Property Database. In August 2002 there were three requirements including Aldi stores, Banardos Charity Shop and Pizza Express. In general, however, the Focus Database is unlikely to be representative of the demand for a centre such as Leigh as much of the demand is likely to be from local independent operators whose requirements would not be published. We have spoken to local agents operating in the commercial property market in Leigh. They have indicated that units, particularly in The Broadway are very popular, with considerable interest and demand for units, although very few become available. Local agents have indicated that difficulty with obtaining units on The Broadway has resulted in take up on Leigh Road.

3.22 According to the Experian Goad survey, Leigh had a low vacancy rate in March 2001. At this time there were sixteen vacant units, equating to a vacancy rate of 5.7%. This is below the Experian Goad national average vacancy rate of 11%. Similarly the proportion of vacant floorspace is also below average. This is an indication that the centre is performing particularly well. In March 2001, approximately half of the vacancies were in the Defined Shopping Centre. A number of these have now been taken up including for example a large new hairdressers on Elm Road and a pizzeria (Irma's) adjacent to this. There are now very few opportunities for further provision in Leigh. We are not aware of any development opportunities in the centre.

3.23 In terms of accessibility Leigh, like Westcliff is accessible by car, public transport and foot. The popularity of the centre generates significant volumes of traffic, particularly along Elm Road and The Broadway. Whilst on-street car parking is available on The Broadway and Broadway West, this is very popular. There is very limited off-street parking, with only one car park to the north of the centre on Elm Road and as such traffic generation within the centre is compounded by traffic circulating in order to identify car parking spaces. As such conflict between vehicles and pedestrians could be a deterrent to pedestrian accessibility. Traffic calming works which are currently underway should go someway towards addressing this.

NORTH SHOEBURY

3.24 North Shoebury District Centre is located in the eastern part of the Borough of Southend on Sea. It is just off North Shoebury Road (A13). The District Centre is based upon a large Asda superstore, with a number of small unit shops adjacent to it. Table 3.3 indicates the range of uses at North Shoebury District Centre. It is evident that the majority of unit shops are in service uses, including video hire, hairdressers, travel agents, take away, dry cleaner and opticians.

TABLE 3.3: NORTH SHOEBURY DISTRICT CENTRE

Fascia	Use	Category
Asda	Foodstore	Convenience
Cue and Rest	Social club	Service
Ace of Cards	Card shop	Comparison
Templeman	Opticians	Service
Choices Videos	Video hire	Service
Hair Care Shop	Hairdressers	Service
ABC Travel	Travel agent	Service
Fish n Chicken	Take away	Service
Dry Cleaning Plus	Dry cleaning	Service
Vacant	-	-
Parsons Barn	Public house	Service

Source: CB Richard Ellis, July 2002

3.25 The Asda store opened in December 1981 and is therefore now relatively dated. It provides approximately 6,900 sq m gross and 3,900 sq m net of retail floorspace. The store has an extensive range of non-food goods, including George Clothing, CDs, videos, stationery, gardenwares, beachwares and kitchenwares. The store also sells a comprehensive range of groceries. In-store counters include Hot Chicken, Curry Pot, pizza, fish, bakery and delicatessen. The store also has a pharmacy, kiosk and café. It is therefore likely to meet most of shoppers needs in a single destination. The store has an extensive (600 spaces) surface level car park which appears very popular. The store is also served by local bus routes and there are cycle parking and pedestrian walkways.

EASTWOOD DISTRICT CENTRE

3.26 Eastwood District Centre is located in the north west of the Borough. The centre is relatively inaccessible and is located on Western Approaches which is within a largely residential area. The District Centre is based upon a Safeway food store. There are three other small units adjacent to this store, one of which is vacant, and the other two are occupied by service uses as a hairdressers and dry cleaners.

TABLE 3.4: EASTWOOD DISTRICT CENTRE

Fascia	Use	Category
Safeway	Foodstore	Convenience
Smart Scissors	Hairdressers	Service
Aaron	Dry cleaners	Service
Vacant	-	-
Loyal Toast	Public House	Service

Source: CB Richard Ellis, July 2002

3.27 The Safeway store opened in June 1980. It is a purpose built store with adjacent surface level car parking (250 spaces). The store provides approximately 2,400 sq m gross and 1,700 sq m net of retail floorspace. It has a limited non-food provision, although it does provide a pharmacy. There is also a kiosk, but no café. The store appears relatively popular, although it only serves a localised catchment area.

SUMMARY

3.28 Southend on Sea has four quite varied District Centres. Westcliff on Sea is the largest of these centres, whilst it has for a number of years been overshadowed by Southend on Sea town centre, it is now enjoying something of a renaissance and is functioning more strongly, serving the local shopping needs of the surrounding area. However the centre lacks a quality main foodstore.

3.29 Leigh on Sea is clearly the most vibrant of the District Centres in the Borough. It has the most upmarket and quality offer serving convenience, comparison and service needs of the neighbouring community. Like Westcliff, it does not have a main food store. It does however benefit from supermarket facilities on London Road. The main concern in the future will be to ensure that Leigh on Sea does not overheat. In particular, there is very limited car parking and this does create vehicular and pedestrian conflict as car drivers circulate to identify car parking spaces.

3.30 North Shoebury and Eastwood District Centres are based upon convenience stores with only several small adjacent unit shops. They both appear to serve an important local shopping function, providing for both bulky main and top-up food and convenience shopping. They also have some service facilities sufficient to meet local needs.

4. QUANTITATIVE ASSESSMENT OF SOUTHEND ON SEA

4.1 In this section we examine the current performance of shopping destinations in the Borough of Southend on Sea in quantitative terms. We have assessed the convenience and comparison goods performance of Southend on Sea town centre and out of centre. This quantitative assessment forms a key input into our consideration of the need for further retail floorspace in the Borough.

4.2 In order to carry out our quantitative assessment we have used a conventional and widely accepted step-by-step methodology. This draws upon the results of a household telephone interview survey of existing shopping patterns, which enables us to model the existing flows of available expenditure to each centre. To summarise, we have:

- calculated a total amount of convenience and comparison goods expenditure which is available within the postcode areas comprising the Southend survey area;
- allocated the available expenditure to the convenience and comparison goods shops in each centre, drawing on the results of the household interview survey of shopping patterns, so as to provide estimates of current sales and forecasts of future sales;
- compared the total expenditure attracted to each centre with existing retail floorspace, to assess sales densities in each shopping destination and the degree of under or over trading.

4.3 Once we have established this baseline position we then explore the capacity for further retail floorspace. The results of all the modelling are set out in Tables 1-25, Appendix 4.

DATA INPUTS

I) SURVEY AREA AND HOUSEHOLD INTERVIEW SURVEY

4.4 In order to provide detailed information on the current shopping patterns in Southend on Sea Borough, we commissioned a new household interview survey covering 1,000 households. The survey questionnaire was designed by CB Richard Ellis, in consultation with council officers, and interviewing and data processing was undertaken by Research & Marketing Ltd. The survey questionnaire and results are included in Appendix 3.

4.5 The survey sought to determine shopping habits of households for both convenience and comparison goods. Where necessary, the survey results have been re-based to remove inappropriate responses, such as catalogue/internet/mail order shopping, shopping abroad and 'don't shop' for particular goods. In some cases the survey results have also been adjusted to account for anomalies that we have identified based on other collaborative evidence.

4.6 For food and convenience goods, the household interview survey included questions on main and top-up food and convenience goods shopping. The modelling uses weighted averages of the responses to these questions; weighting the responses to each category according to our estimate of the relative expenditures in each. The survey also included seven questions on specific comparison goods types which coincide with the Unit for Retail Planning Information (URPI) definitions of comparison goods expenditure. Accordingly the modelling uses the weighted averages of the household survey responses for each goods type based on the proportion of per capita expenditure on that goods type.

4.7 The Southend survey area is illustrated on Plan 1. It covers a relatively wide area, extending slightly beyond the original Drivers Jonas survey area, to include the eastern fringes of Basildon and parts of Wickford. The survey area has been subdivided into 10 zones, based on postcode sectors.

II) ESTIMATES OF POPULATION IN THE SURVEY AREA

4.8 Population estimates and forecasts for each of the survey zones were prepared from the MapInfo system. Overall the population of the whole survey area is currently 417,538. It is forecast to rise to 422,907 by 2006, an increase of 1.3%. Subsequently, population is forecast to increase by a further 1.4%, reaching 429,002 by 2011, and then by 1.3% to 434,775 in 2016 (Table 1).

III) AVAILABLE EXPENDITURE IN THE SURVEY AREA

4.9 MapInfo estimates of per capita expenditure on convenience and comparison goods have been prepared. These are in 1997 prices and an individual estimate has been prepared for each survey zone, to reflect any variations in affluence across the catchment area. It is evident that the outer parts of the catchment including the fringes of Basildon and Foulness Island are the least affluent, whereas areas including Leigh on Sea, Hadleigh, Rayleigh and Wickford are more affluent.

4.10 We have updated the expenditure forecasts to 1998 prices and made a deduction for special forms of trading. We have then multiplied expenditure per capita by the (growing) population in the survey area to generate available expenditure data for 2002, 2006, 2011 and 2016. As suggested in the URPI Brief 99/2, we have assumed growth in available expenditure at 0.1% per annum for convenience goods. Our figure of 3% per annum for comparison goods has been revised downwards from the URPI suggestion of 3.6% to make an allowance for special forms of trading, in particular internet shopping. The available expenditure figures therefore reflect growth in population and expenditure.

4.11 The available convenience goods expenditure in the Southend survey area is currently £570m. It is forecast to increase by approximately 6% to reach £602m by 2016. The available expenditure on comparison goods in the same area is currently £901m. It is forecast to increase by about 57% to reach £1,420m by 2016 (Table 2b).

IV) FLOORSPACE DATA

4.12 The comparison and convenience goods floorspace data used in our modelling has been drawn from a variety of different sources, including Experian Goad, the Institute of Grocery Distribution (IGD) Report and Southend on Sea Borough Council. The use of a number of different data sources could have affected the accuracy of the data and subject to resources, we would recommend that the Borough Council undertakes a shop floorspace survey to update this data. This would enable a more accurate basis for any future modelling and monitoring work that the Council undertakes.

V) ESTIMATED COMPANY AVERAGE SALES DENSITIES

4.13 Estimated average company sales density figures for the main food stores have been drawn from retail research by Verdict Research Ltd 2001. These are at 1998 prices and include VAT.

SOUTHEND ON SEA TOWN CENTRE CONVENIENCE GOODS ASSESSMENT

4.14 We have estimated the draw of Southend town centre for convenience goods (Table 3). It is evident that Southend on Sea's catchment for convenience goods shopping focuses on those areas immediately covering the town centre. The highest trade draw for convenience goods is in Zone 7, where the town centre draws 42% of total convenience spending. Zone 8 is the next most significant catchment zone, with 34% of convenience expenditure going to Southend town centre, followed by Zone 6 with 11%. Beyond this, the market shares fall off to less than 4% in the remainder of the survey zones. The main draw in Zone 7 is to Sainsbury's which draws 31% of convenience expenditure.

4.15 Based on these shopping patterns, we have calculated the current total convenience goods turnover of Southend town centre as approximately £66m (Table 4). With this level of turnover and a net sales floorspace of approximately 7,000 sq m, Southend currently has a convenience goods sales density of approximately £9,600 per sq m net (Table 5). We consider that this sales density is above estimated company average sales densities for the principal and local food stores in the town centre (estimated at £8,400 per sq m net).

4.16 The above average level of trading is largely as a result of the performance of Sainsbury's in Southend town centre. We estimate that the store currently has a convenience goods turnover of approximately £46m, whereas if it were trading at company average levels we would expect the turnover to be closer to £37m. From our observations in the store it appeared busy. The entrance/kiosk area in particular was congested, and the majority of check outs in use.

4.17 Overall, we consider that there may be some scope to enhance convenience goods provision in Southend on Sea town centre. The existing above average performance of the town centre convenience goods stores results in capacity for approximately 900 sq m net of additional floorspace by 2006. This increases slightly to approximately 1,000 sq m by 2011 and to approximately 1,100 sq m by 2016 (Table 5). We are not aware of any commitments in the pipeline which would absorb this capacity.

SOUTHEND ON SEA OUT OF CENTRE CONVENIENCE GOODS ASSESSMENT

4.18 Table 6 illustrates the draw to out-of-centre convenience stores in Southend on Sea. It is evident that the main foodstores, Waitrose, Eastern Avenue and Tesco, Prince Avenue have the largest catchments. The main trade draw to Waitrose is from zone 8 (20%) where it is located. The main draw to Tesco is from zone 10 (37%) to the north, where there are no competing main food superstores and zones 5, 6 and 7, covering Southend and parts of Hockley. We have adjusted the trade drawn to the Tesco superstore on Prince Avenue and that drawn to the Tesco Express (petrol filling station) on Southchurch Road as we consider that some respondents have over-estimated their use of the Tesco Express for main food shopping. Aldi, Eastern Avenue and Lidl, Woodgrange Drive draw comparatively small proportions of trade from the ten zones. This reflects the more limited extent of discount main food shopping.

4.19 In terms of sales, we estimate that the out of centre foodstores in Southend on Sea have a combined turnover of approximately £86m, equating to a sales density of approximately £13,100 per sq m net. This is above the combined sales densities for the out of centre food stores, based upon estimated company averages (£10,500 per sq m net).

4.20 The majority of sales currently take place at Tesco, Prince Avenue. According to our estimates, Tesco has a turnover of around £45m. This is higher than the turnover based on estimated company averages (£34m). From our observations the store appeared busy, the car park was relatively full and whilst not overcrowded the store was being well used. The turnover of the Tesco Express is also above average.

4.21 Conversely, we estimate that Waitrose has a turnover of £23m which is below the company average sales for a store of such size (£27m). The Waitrose store was the least busy of the main food stores in Southend. We consider this is in part likely to reflect the nature of the retail offer which results in fewer, but higher expenditure trips to Waitrose. This is a phenomenon that we have identified in other studies. Aldi and Lidl both appear to be trading adequately relative to company averages.

4.22 Overall, the level of above average trading by Tesco balances the slightly below average trading of Waitrose and results in surplus expenditure capacity to support new floorspace. We estimate that by 2006 sufficient expenditure capacity would be generated to support approximately 1,700 sq m net of new floorspace, increasing to 1,800 sq m net by 2011 and 2,000 sq m net by 2016.

4.23 This capacity in itself would not be sufficient to support a new convenience superstore (over 2,500 sq m net). However, the combined surplus expenditure generated from the town centre and out of centre is between 2,600 sq m net in 2006 and 3,100 sq m net in 2016. This would be sufficient to support a new convenience superstore over the Local Plan period.

SOUTHEND ON SEA TOWN CENTRE COMPARISON GOODS ASSESSMENT

4.24 The comparison catchment for Southend town centre is more extensive than that for convenience shopping. This reflects the sub-regional role of the town centre. It is evident that the core catchment of Southend is focused in Survey Zones 7, 8, 9 and 10 (in each of which Southend town centre accounts for approximately 65-70% of comparison goods shopping). Southend also draws significant amounts of comparison goods trade from Zones 3, 5 and 6. Zones 1 and 4 are the only two zones with less than 10% of their catchment going to Southend, the figures being 1% and 2% respectively (Table 3). This is largely due to their relative proximity to the competing sub-regional centres of Basildon, Chelmsford, and the Lakeside Shopping Centre.

4.25 Southend town centre draws a large proportion of the trade for clothing and footwear. The next highest draw is for 'books, jewellery, watches and recreational goods' (Table 3b). This illustrates that Southend town centre is performing the role that is to be expected of a centre of this size, in catering for the more recreational types of comparison shopping. We have adjusted the shopping patterns in relation to bulky goods, including furniture and carpets, household textiles and electrical appliances, to more adequately reflect the more limited offer of these goods in Southend town centre, relative to off-centre at retail warehouses.

4.26 We estimate that in 2002, Southend-on-Sea has a town centre comparison goods turnover of about £371m (Table 4). This includes an allowance for some tourist expenditure. With a town centre comparison goods sales area of approximately 60,000 sq m net, this level of turnover equates to a sales density of approximately £6,200 per sq m net (Tables 4 and 5). Drawing on comparisons with other centres that we have studied elsewhere in the country, this sales density suggests that Southend is trading well for a centre of its size, function and catchment area characteristics.

4.27 We have not examined scenarios for Southend on Sea to further enhance its market share. The town centre currently has a significant trade retention from the core and secondary catchment areas and trade falls off notably beyond this in the face of competition from alternative shopping destinations, including Basildon, Chelmsford and Lakeside Shopping Centre. As such we consider it would be very challenging to seek to uplift market share. Rather we have considered the effect of Southend on Sea maintaining its existing market share, using growth in population and available expenditure to support the development of some new floorspace in the town centre, in conjunction with the renewal of existing space.

4.28 In assessing the future comparison capacity, we have assumed that the efficiency with which existing floorspace is being used will gradually increase over the analysis period: we have assumed an annual growth rate in existing sales per square metre of 1.5%. We have also assumed that new floorspace will achieve sales of approximately £6,000 per sq m, i.e. a broadly similar level of trading to existing floorspace.

4.29 We have not identified any commitments in the pipeline which will reduce surplus capacity. The proposals for the redevelopment of the Odeon cinema site, which were considered as a commitment in the Structure Plan work, no longer involve the provision of any retail floorspace. Overall, therefore we forecast that by 2006 there could be capacity for about 4,900 sq m (net) of additional comparison goods floorspace. This will increase to about 12,200 sq m (net) by 2011 and 21,200 sq m (net) by 2016 on the basis of existing market shares.

SOUTHEND ON SEA OUT OF CENTRE COMPARISON GOODS ASSESSMENT

4.30 Table 6 presents the trade draw to comparison stores in out-of-centre locations in Southend on Sea. It is evident that the existing Retail Parks and solus retail warehouses draw relatively limited trade, particularly when compared with the town centre. The largest proportions of trade are drawn from Zones 6, 7, 8, 9 and 10 although the trade draw is no greater than 8% in any zone. Bulky goods expenditure is therefore leaking from the Southend catchment, particularly from those areas which are not immediately adjacent to the town centre.

4.31 Overall we estimate that the out of centre stores have a combined turnover of £48m, equating to a sales density of £1,750 per sq m net. This compares with an estimated company average sales density of approximately £1,970 per sq m net and indicates that the existing stores are not performing particularly well. This is, in part, likely to reflect the deficiencies in the existing retail warehouse provision in comparison with competing destinations.

4.32 Despite the below average performance of retail warehouses in Southend, expenditure growth is such that even after allowing for existing commitments in the longer term there is capacity to support further floorspace. In the short-term, if market shares remain the same and Southend is unable to clawback expenditure currently leaking elsewhere, the existing commitments including proposals at Fossetts Way and adjacent to Waitrose, will result in an over supply of floorspace. However, expenditure growth is such that capacity will be created for approximately 1,700 sq m net of retail warehouse floorspace by 2011 and 5,200 sq m net by 2016.

4.33 We have examined the scope to increase Southend's bulky goods market share, by virtue of new development (Scenario Two). We have only anticipated a very limited increase in market shares given the level of competition from surrounding shopping destinations; we have enhanced market shares by 5% in the core catchment zones (7, 8, 9, 10) and 3% in the secondary catchment zones (5 and 6). We have not enhanced market share in zone 3 because of the existing competing bulky goods stores in this area at Thundersley and South Benfleet.

4.34 Based upon these assumptions, we forecast that further retail warehouse provision in Southend could increase the combined bulky goods stores turnover to approximately £78m by 2006, compared with £54m under the baseline position. At this level, and allowing for existing retailers to improve their turnover by 1.5% per annum, we estimate that there would be sufficient capacity to support significant further bulky goods floorspace. We have examined the scope for existing commitments and the current proposed B&Q Warehouse, and even with only a modest increase in market share this could be supported and still create residual capacity to support further floorspace of up to 11,200 sq m net by 2016.

SUMMARY

4.35 We consider that convenience stores in Southend are currently performing well and will continue to do so. The Sainsbury's store in the town centre and the Tesco, Prince Avenue in particular are trading very successfully. Whilst the performance of the Waitrose, Eastern Avenue is below that based upon estimated company averages we consider that this is most likely to be a reflection of the trading characteristics of Waitrose; the nature of the offer is such that the store often attracts fewer trips, but they are higher spending.

4.36 Overall, we consider that there is capacity to enhance the provision of convenience goods retailing in Southend on Sea, with the addition of a new convenience superstore over the Replacement Local Plan period. We have forecast capacity for between 2,600 sq m net and 3,100 sq m net of additional convenience goods floorspace between 2006 and 2016.

4.37 Southend town centre is also performing successfully as a comparison shopping destination, drawing a significant amount of trade from the surrounding zones, as well as some from further away to the east, where competition is very limited. We consider that there is scope for additional comparison floorspace in Southend town centre, based upon forecast growth in population and expenditure over the Replacement Local Plan period. We are not aware of any commitments in the pipeline to absorb expenditure growth and as such we forecast capacity for up to about 21,200 sq m net of additional comparison goods floorspace by 2016.

4.38 Whilst out-of-centre stores in Southend are not trading particularly well, expenditure capacity to support new floorspace will be generated over the Replacement Local Plan period of up to 5,200 sq m net. There is scope for this capacity to be enhanced by virtue of clawback of expenditure that is currently leaking from the Southend on Sea catchment area to competing destinations. With only a modest increase in market share capacity could be created to support existing commitments, the current proposed B&Q Warehouse and a further 11,200 sq m net of bulky goods floorspace by 2016.

5. QUANTITATIVE ASSESSMENT OF DISTRICT CENTRES

5.1 In this Section we set out the results of our quantitative assessment of the District Centres in the Borough. We have assessed the convenience and comparison goods performance of the larger centres of Westcliff on Sea and Leigh on Sea. For the smaller centres of North Shoebury and Eastwood we have only assessed convenience shopping patterns and performance. The assessment draws on the data inputs set out in Section 4 and the modelling tables set out in Appendix 4.

WESTCLIFF ON SEA CONVENIENCE GOODS ASSESSMENT

5.2 Table 9 shows the trade drawn to Westcliff for convenience goods. It is a limited draw, reflecting the offer in Westcliff. We have examined the trade drawn to Somerfield, London Road, and to other local stores. Both Somerfield and the 'other local stores' have the greatest draw from Zone 7, which is the core zone (7% and 6% respectively). Zones 7 and 8 are the only zones from which the Somerfield store draws trade. Local stores in Westcliff draw a small amount of trade from a slightly wider catchment.

5.3 Total convenience sales in Westcliff are in the region of £12m which, based upon an existing floorspace of 3,000 sq m net, equates to a sales density of approximately £4,100 sq m net (Table 11). This is broadly comparable with sales densities based upon company averages (£4,200 sq m net) and indicates that overall, the centre is performing adequately. At a more detailed level, it appears that the Somerfield store is trading particularly well in relation to estimated company averages.

5.4 Based upon the overall performance of Westcliff, we consider that there is little quantitative need for additional convenience floorspace provision over the Replacement Local Plan period. We consider any limited growth in expenditure should be directed towards enhancing the turnover of existing retailers.

LEIGH ON SEA CONVENIENCE GOODS ASSESSMENT

5.5 Table 12 shows the trade drawn to Leigh for convenience goods, and in particular the trade drawn to Safeway, London Road and other local stores. For both Safeway and the local stores, this trade draw is focused almost entirely on Zone 6.

5.6 We estimate that overall, Leigh has a convenience goods turnover of approximately £36m. Based upon this current town centre turnover within the existing shop floorspace of 4,600 sq m net, we estimate that Leigh has a convenience sales density of approximately £7,900 per sq m net (Table 14). This is above estimated company average sales densities for the convenience goods stores currently present in Leigh (£5,500 per sq m net), and indicates that the centre is performing well as a convenience shopping destination.

5.7 Based upon the existing level of trading of the convenience goods stores in Leigh, we consider that there is some theoretical surplus capacity. By 2006 there could theoretically be surplus capacity to support a further 1,000 sq m net of additional convenience goods floorspace. Whilst this could increase to approximately 1,200 sq m net over the Replacement Local Plan period, this would not be sufficient to support a new convenience superstore.

NORTH SHOEBURY CONVENIENCE GOODS ASSESSMENT

5.8 We have examined the trade diversion to the Asda store at North Shoebury. Some 72% of the convenience expenditure in Zone 9 is drawn to this store, with about 27% from Zone 8 (Table 15). Based upon these shopping patterns, we estimate that the Asda store has a turnover of £45m in 2002 which equates to a sales density of £17,800 per sq m net. This is considerably above the sales density based upon estimated company averages (£11,400 per sq m net) and the Asda store therefore appears to be trading very successfully (Table 17).

5.9 This level of above average trading generates surplus expenditure capacity. We estimate that there will be capacity to support approximately 1,500 sq m net of new floorspace by 2006, 1,600 sq m net by 2011 and 1,700 sq m net by 2016. This level of capacity, in itself, would not be sufficient to support a new convenience superstore. However, in conjunction with the surplus capacity generated from the above average trading of Sainsbury's, London Road and Tesco, Prince Avenue, this reiterates our view that there is scope for a new food superstore in Southend over the Replacement Local Plan period.

EASTWOOD CONVENIENCE GOODS ASSESSMENT

5.10 We have also examined the trade drawn to the Safeway store at Eastwood. This is mainly from zone 6 (11%), the zone in which the store is located (Table 15). We estimate that the Safeway store currently has a turnover of £14m (Table 17). This equates to a sales density of £10,600 per sq m net which is slightly above estimated company average sales densities (£9,100 per sq m net). Therefore whilst the Safeway store at Eastwood is performing adequately, we do not consider that further capacity to support new floorspace will be created over the Replacement Local Plan period.

WESTCLIFF ON SEA COMPARISON GOODS ASSESSMENT

5.11 Table 9 indicates the trade drawn to Westcliff for comparison goods shopping. As with convenience goods, the core draw is from survey Zone 7. The amount of comparison goods trade drawn to Westcliff is very limited, which largely reflects the more limited retail offer. In addition, the survey results reflect shoppers preferences for 'most' of their comparison goods shopping and Westcliff may be used on a more infrequent basis.

5.12 We estimate that Westcliff has a total comparison goods turnover of approximately £9m (Table 11). Based upon an existing floorspace of approximately 14,200 sq m net, this equates to a sales density of only £700 per sq m net, which is a very low level. This suggests there is unlikely to be any capacity for further comparison shopping floorspace at current market shares. Any surplus expenditure generated as a result of growth should be absorbed by existing retailers.

LEIGH ON SEA COMPARISON GOODS ASSESSMENT

5.13 Leigh draws much of its comparison goods trade from Zone 6 (15%) (Table 12). It draws more comparison goods trade than Westcliff, and overall has a turnover of approximately £23m. We estimate that Leigh has a comparison goods floorspace of 13,100 sq m net which results in a sales density of approximately £1,700 per sq m net. This is higher than the sales density of Westcliff, and reflects the more specialist/quality nature of the retail offer. Overall, the centre is trading reasonably successfully. However, any growth in available comparison goods expenditure should be absorbed by existing retailers, and as such we do not consider there is likely to be any capacity for new comparison floorspace in Leigh over the Replacement Local Plan period.

SUMMARY

5.14 We estimate that the convenience stores in the District Centres in the Borough are generally performing adequately or well. The Asda store at North Shoebury in particular is trading at levels in excess of estimated company averages, as are stores in Leigh on Sea, including the Safeway store, London Road and local stores on The Broadway and Elm Road.

5.15 We have identified some surplus convenience goods capacity at North Shoebury and Leigh on Sea. Whilst the capacity likely to arise over the Replacement Local Plan period would in neither case be sufficient to support a new convenience superstore, in conjunction with surplus capacity generated by virtue of the above average levels of trading of the Sainsburys, London Road and Tesco, Prince Avenue it reiterates our view that there is scope for a new food superstore in Southend over the Replacement Local Plan period.

5.16 North Shoebury and Eastwood do not have a significant comparison goods shopping function. We consider that Westcliff on Sea is not trading particularly strongly as a comparison shopping destination and we have not identified any capacity for new comparison floorspace. Leigh on Sea is trading reasonably successfully as a comparison shopping destination, but given its size relative to Southend on Sea and the more localised catchment, we consider that any surplus expenditure generated over the Local Plan period should be used to support existing retailers, rather than new comparison goods floorspace.

6. SCOPE FOR NEW DEVELOPMENT

6.1 In this Section, we have assessed the scope for accommodating new development in the Borough of Southend-on-Sea. This has involved reviewing the suitability of potential development opportunities for different types and forms of retail development. The assessment has taken account of our qualitative and quantitative analysis, set out in the proceeding Sections of this Report.

6.2 In carrying out our assessment, we have had regard to the adopted Southend-on-Sea Local Plan (1994). The plan allocated six sites for shopping and retail services proposals. These sites are as follows:-

- Former Municipal College site, London Road;
- Warrior Square (south side) and Whitegate Road (north side);
- Tylers Avenue and York Road;
- Alexandra Street, High Street and Market Place;
- Land north of Eastern Avenue;
- Land north of Prince Avenue.

6.3 Three of these proposal sites were completed during the Local Plan period. The former Municipal College site, London Road, has been redeveloped into an Odeon Cinema and a number of commercial/restaurant uses. Land north of Eastern Avenue has been developed to provide a Waitrose store and land north of Prince Avenue developed to provide a Tesco store.

6.4 In conjunction with recent appeals and planning applications the Borough Council has identified four additional potential development opportunities, as follows:-

- Seaway Car Park, Queensway;

- The Odeon Cinema, High Street;
- Former Keddies department store, Chichester Road; and
- Vacant properties, Victoria Avenue.

6.5 As part of our assessment of development opportunities in Southend we have examined the three Local Plan proposal sites in the town centre which have not yet been completed and the further sites identified through planning applications/appeals. We examined each opportunity in turn.

WARRIOR SQUARE (SOUTH SIDE) & WHITEGATE ROAD (NORTH SIDE)

6.6 The Warrior Square site is located immediately outside Southend on Sea Defined Shopping Centre, to the rear of the north eastern part of the pedestrianised High Street. The site is located between Warrior Square and Whitegate Road, to the east of Chichester Road. Warrior Square is an open garden with residential properties to the north and east. Whitegate Road is also a residential street.

6.7 The Warrior Square site was formerly a larger area including the adjacent Warrior Sports Centre. This has, however, been refurbished and has therefore been excluded from the proposal site. The site now includes surface level pay and display car parks, 14 Victorian terraced houses fronting onto Whitegate Road, and an office building. The site is approximately 1 hectare.

6.8 The site is identified in the adopted Local Plan for retail development and additional public car parking. The Local Plan indicates that up to 5,000 sq m of retail space could be accommodated, with multi-level parking. The Drivers Jonas' Study into Economic Opportunities in Southend Town Centre' (October 1996) considered the Warrior Square site. They concluded that because of its location and reduced size it was unlikely to have potential for retail development. In addition, they identified a number of constraints to development, as follows:-

- The site abuts the Warrior Square Conservation Area, and the Borough Council would seek a suitably sympathetic design along the Warrior Square frontage.
- The site is used as a car park and is a valuable asset to the town centre. Any development on the site would therefore necessitate multi-storey car parking provision which could pose planning problems in this sensitive location.

6.9 We also consider that the surrounding Conservation Area and residential uses mitigate against redevelopment for retail uses. Drivers Jonas suggested that the site was better suited for flagship office development and we concur with this conclusion. In these circumstances, we do not consider it appropriate to allocate this site for retail development in the Replacement Local Plan. It could be considered for some small-scale retail development as part of a mixed use scheme.

TYLERS AVENUE & YORK ROAD

6.10 This site is located to the rear of the south eastern part of the pedestrianised High Street, on Chichester Road/Grover Street, within the Defined Shopping Centre. The site is bound to the north by Tylers Avenue and to the south by Heygate Avenue. It is dissected by York Road. The surrounding uses include Tylers House (County Court) and Dencora Court (office) to the north, residential to the east, The Royals Shopping Centre to the south and the rear of commercial properties including Marks and Spencer, fronting onto the High Street to the west. The site is approximately 1.7 hectares.

6.11 The existing uses on the site include; a surface-level pay and display public car park to the south of Tylers Avenue; an indoor and outdoor market fronting onto the northern side of York Road; commercial properties with residential above, fronting onto the southern side of York Road; and Southend-on-Sea central bus station, to the north of Heygate Avenue.

6.12 The site is allocated in the adopted Local Plan for additional town centre car parking, a replacement bus station and 7,000 sq m of retail floorspace. The Local Plan also indicates that the site could include office floorspace and a covered market. To the east of the proposal site, a further site has been identified (land west of Baltic Avenue) for residential buffer development. The Local Plan proposes that this area including part of the covered market and public car park should be developed for residential to act as a buffer between existing housing and commercial redevelopment on the wider Tylers Avenue site. The size of the buffer site is approximately 0.32 hectares.

6.13 We consider that there are a number of constraints that would need to be overcome to develop the site. These include the following:

- The site assembly would be fairly extensive as the site is currently in a number of ownerships. The principal landowner is, however, the Borough Council.
- The realignment of Chichester Road to create a site contiguous with properties fronting the High Street would be advantageous, but this is likely to be a costly exercise and could increase site assembly requirements.
- The relocation/replacement of the Bus Station, either to an alternative site or on the existing site.
- The replication of the level of car parking currently on the site and additional requirements of any new development.

6.14 Drivers Jonas identified a number of these constraints, but concluded that the site could provide a major development opportunity for the town. They suggested that the site provides potential for a mixed use scheme, led by retail development. They also indicated that the quality and extent of retail development would be dependent on forging links to the High Street; if direct links were made there may be an opportunity for a quality retail development. Alternatively, the site could accommodate free-standing retail units, such as discount food and non-food units.

6.15 We also consider that this site is suitable for new retail development. It is in close proximity to the main High Street shopping area within the town centre and could potentially, depending on the re-alignment of Chichester Road, be fully integrated with the High Street and/or The Royals Shopping Centre. We have had discussions with the owners of The Royals and their agents and they would be happy to engage with the Borough Council to consider this development opportunity further. The redevelopment of the site could significantly enhance the southern part of the High Street, promoting increased pedestrian footfall and strengthening this area relative to the northern part of the High Street. Development in this location would also extend the town centre on an east-west axis which we consider would be preferable to a further linear north-south extension.

6.16 The Tylers Avenue site provides the key development opportunity in Southend on Sea town centre. Subject to a number of provisos, not least securing an appropriate quality anchor store and ensuring effective integration with the High Street, it could accommodate a new retail development. Alternative options either within any new development or elsewhere would also have to be identified for the range of existing uses on the site, in particular the bus station, the market and existing car parking. We therefore consider that in formulating the Replacement Local Plan the site should remain allocated for retail development and the Borough Council should also consider undertaking a Feasibility Study to explore the potential of the site and the scope for relocating existing uses.

ALEXANDRA STREET, HIGH STREET AND MARKET PLACE

6.17 This site is located in the south west corner of the town centre, between the High Street and Royal Mews. It is largely within the Defined Shopping Centre. The uses surrounding the site are largely commercial on the High Street and Alexandra Street. The site is located opposite The Royals Shopping Centre on the High Street and opposite Woolworths and Abbey National Bank on Alexandra Street. To the south of the site there are dwellings on Royal Terrace/Royal Mews.

6.18 The existing uses on the site include a mix of retail/commercial units fronting onto Alexandra Street and High Street and small shops along Market Place. The site also includes a surface car park to the rear of properties on Market Place and the High Street. The site is approximately 0.5 hectares.

6.19 The site is allocated for retail development in the adopted Local Plan. The Local Plan indicates that it has the potential to be redeveloped to provide more modern retail facilities, with office floorspace over. The Local Plan estimated that the site could accommodate up to 3,000 sq m of retail floorspace with basement or roof top car parking. The Council also indicated that they would encourage the refurbishment of premises adjoining in Royal Mews.

6.20 Drivers Jonas considered this site in their Study into Economic Opportunities in Southend Town Centre and concluded that it should not be promoted for redevelopment. Whilst they recognise the opportunities of this site in terms of its proximity to The Royals Shopping Centre and the substantial pedestrian flows, they identified a number of constraints. These included:

- The small retail units on Market Place provide valuable accommodation for niche retailers close to the High Street.
- Development of the site would involve the loss of valuable car parking spaces.
- The limited size and irregular shape of the site restricts the development potential.

6.21 We concur with Drivers Jonas as to the constraints on this site and consider that it should be retained for small-scale niche retailing which would broaden the retail offer in Southend on Sea town centre.

ODEON CINEMA, HIGH STREET

6.22 This site has been identified by the Borough Council in relation to planning applications/appeals. It is not identified in the Local Plan; the former cinema itself is, however, within the Defined Shopping Centre and located on and to the rear of the northern part of the pedestrianised High Street, to the south of Elmer Approach.

6.23 The site includes the now vacant Odeon Cinema, which closed following the development of a new Odeon Cinema on London Road. The front of the cinema has been occupied by unit shopping, including an Everything's £1. The site is dissected by Luker Road and includes to the rear an area used as a temporary car park. This was formerly to be developed for office uses and was cleared and excavated, although the scheme did not come forward. The site is approximately 0.88 hectares.

6.24 Planning permission has more recently been granted for development by South East Essex College on this site (3rd September 2002). The application involves a two stage development including as Phase 1 the development of the former car park area for a college/university campus and as Phase 2 development of the cinema site, and the link with the High Street, also for college and related facilities. Phase 1 construction has commenced. As we understand it, no retail facilities are proposed as part of this scheme.

SEAWAY CAR PARK

6.25 This site is located on the south east edge of Southend town centre. It is outside the Defined Shopping Centre boundary and beyond the Central Business District boundary. The site is bounded by Herbert Grove to the west, Queensway to the north, the rear of Hartington Road to the east and Lucy Road to the south. The uses surrounding the site on Herbert Road, Queensway and Hartington Road are largely housing and guest houses. Lucy Road includes the rear of commercial premises fronting onto Marine Parade, the uses include night clubs and public houses.

6.26 The existing car park on the Seaway site is a surface-level pay and display facility with an adjacent coach and lorry park. The site currently provides approximately 600 parking spaces. There is a considerable change in topography across the site as it falls away quite considerably to the east. Drivers Jonas considered the Seaway car park site and concluded that because of its importance as a car park for seafront users development of the site should be discouraged.

6.27 The Seaway site is not allocated within the Local Plan for retail development, rather it is identified for enhanced parking provision. The plan does, however, note that it could accommodate a well-designed retail store, subject to the provision of appropriate replacement public car parking facilities in a decked or multi-storey format and some residential buffer development on the Herbert Grove frontage. The visual prominence of the site also requires a design, layout and scale of development that respects the surrounding buildings and enhances the townscape. The site is approximately 1.7 hectares.

6.28 The Seaway Car Park is not a town centre site, nor is it integrated with the town centre. It is also potentially too small for replacement car parking and a retail development. We consider that the site may be suitable for a convenience superstore, although this would be subject to design, layout, residential amenity and car parking considerations. The location of the site on the eastern edge of the town centre would serve the relative deficiency in food store provision that we have identified in the eastern part of the borough, whilst still providing a more central facility.

VACANT PROPERTIES ON VICTORIA AVENUE

6.29 Victoria Avenue is the main office and civic facilities location in Southend-on-Sea. Whilst some of the 1960s office blocks may become redundant over the life of the Replacement Local Plan, we do not consider this is an appropriate location to allocate sites for further retail development. Southend-on-Sea already has a somewhat over extended linear High Street and in our work for the Structure Plan Review we indicated that any further retail development should occur on the east-west axis rather than further expansion north-south. Whilst some small-scale commercial uses may be appropriate as part of any redevelopment or refurbishment of existing office premises, we do not consider that at this stage, sites should be allocated for retail development. Any proposals that come forward over the Replacement Local Plan period should be considered on the basis of a criteria-based policy.

OTHER OPPORTUNITIES

6.30 We are not aware of any other opportunities for further retail development in Southend-on-Sea in addition to those sites referred to above. The town centre on the whole is very tightly constrained by surrounding residential areas particularly to the east and west and the seafront to the south. Given these constraints we consider that there are a number of potential premises within the existing town centre that could be redeveloped to provide enhanced retail and service facilities.

6.31 In particular we consider that any opportunities to redevelop and enhance the Victoria Plaza shopping scheme would be very appropriate. Whilst the scheme has benefited from a refurbishment/modernisation in design and layout terms it is now very dated. The format of the scheme is such that it does not provide suitable accommodation to meet modern retailers' requirements. In addition, many of the stores are towards the mid to lower end of the market. We note that much of the unit formerly occupied by C&A

remains vacant and its dead frontage further detracts from the overall appearance of the scheme. According to Experian Goad, there are also significant numbers of vacant units in the Victoria Plaza scheme, particularly on the first floor.

6.32 As such we consider that the redevelopment of this scheme would be of significant benefit to Southend on Sea town centre. If significant redevelopment is not forthcoming we consider that the Council should explore alternative options to maximise occupancy. For example, smaller units could be re-occupied by niche or themed retailers, markets or discount factory outlet type shopping.

6.33 Another existing building which could be brought back into use over the Replacement Local Plan period is the rear of the former Keddies department store on Chichester Road. Whilst the front of the department store has now been redeveloped into High Street units, the rear remains vacant. It is unlikely that this could be redeveloped, given existing office premises above. It is currently advertised as available, providing accommodation for offices, restaurant and leisure uses. We consider that these uses would be ideal in this location, further adding to the vitality and viability of the town centre. However, permission has been granted, subject to a S106 Agreement, for the erection of a 10 storey extension over the existing four storey building, and 2 floors over the existing 11 storey building, for mixed use development including residential, hotel, office, nightclub, Class A3, and casino use. If the legal agreement is signed, and the permission is implemented, then this site would not be available and on this basis should not be included within the Replacement Local Plan.

6.34 A further consideration for the Borough Council could be the redevelopment/enhancement of certain existing blocks of retail premises on the High Street. The Borough Council may wish to identify particularly poor zones of the High Street which will be targeted for refurbishment over the Replacement Local Plan period.

SUMMARY

6.35 We consider that it will no longer be necessary to allocate the developed sites at London Road, Prince Avenue and Eastern Avenue in the Replacement Local Plan. In addition, the South East Essex College campus development is now under construction on the former Odeon Cinema and adjacent car park site, and this should not, therefore, be included in the Replacement Local Plan. We also consider that the Warrior Square/Whitegate Road site should be included as a mixed use development opportunity and the scope for any significant retail development on the Alexandra Street/Market Place site is limited.

6.36 As such the only potential retail development opportunity remaining from the adopted Local Plan is at Tylers Avenue/York Road. We consider that it should be identified in the Replacement Local Plan and the Borough Council should actively seek to take the development of this site forward. A Feasibility Study should be considered to test the scope of the site, the potential for expanding The Royals Shopping Centre onto the site and the alternative options for relocating/reincorporating existing uses on the site.

6.37 Whilst Seaway car park site could offer the potential for retail development, such as a convenience store, it will be a matter for the Borough Council to decide priorities in terms of car parking facilities. We do not envisage that this site could accommodate sufficient replacement car parking facilities in addition to a retail development.

6.38 We also consider that Victoria Avenue is not the appropriate location to allocate sites for retail development. Whilst some commercial uses may be appropriate in conjunction with any redevelopment of office facilities on Victoria Avenue, we consider that over the Replacement Local Plan period the focus should be on encouraging further retail development in Southend on Sea town centre.

6.39 We consider that opportunities may arise over the Replacement Local Plan period to further enhance the existing provision in Southend on Sea town centre through the renewal or redevelopment of existing space. In particular, we consider that the Victoria Plaza centre would benefit from further modernisation/ redevelopment. There are also existing blocks on the High Street which would benefit from the renewal or refurbishment of façades and shop fronts. In addition, the reoccupation of the rear of the former Keddies department store, possibly with restaurant or bar use, would enhance the vitality and viability of this part of the town centre.

7. LOCAL PLAN POLICY RECOMMENDATIONS

7.1 In this Section, we highlight our recommendations for the shopping policies in the Southend on Sea Replacement Local Plan. We have taken each of the shopping policies in the adopted Local Plan in turn, and commented on their continuing appropriateness or otherwise. Where we consider new policies are necessary we have highlighted them.

CONVENIENCE GOODS SHOPPING & LARGE NEW STORES

7.2 The adopted Local Plan considered the need for further convenience goods stores within the Borough over the period to 2001. The Plan indicated that despite limited population and expenditure growth over the Plan period there was quantitative scope for additional convenience goods floorspace of 3,000 sq m net in the Borough. This took no account of any increased expenditure from workers or other visitors, nor did it take account of further changes to existing facilities, particularly in terms of the renewal of outmoded floorspace, the Plan therefore made provision for a higher level of new floorspace and proposed at least two new large modern food stores in the Borough during the Plan period.

7.3 The Plan indicated that the need for such additional floorspace was reinforced by indications that the existing food stores in the Borough were trading at very high levels (Sainsbury's, London Road and Asda, North Shoebury). In qualitative terms it was indicated that there was a need for additional high quality food stores to serve both the northern and western parts of the Borough. The Plan recognised the guidance emerging from central government on the need to locate new convenience goods floorspace in town centres. It was considered, however, that there was no scope for providing further 'first order' facilities within the centres of the Borough. Proposals were therefore made at Eastern Avenue and Prince Avenue.

7.4 We consider that it will be necessary to update the text of the Local Plan, drawing on the findings of this Retail Study. In terms of the quantitative need for further convenience floorspace in the Borough, the adopted Local Plan considerations of population and expenditure remain valid. We have, however, identified capacity for approximately 3,100 sq m net of convenience goods floorspace based upon over-trading of the existing stores in Southend town centre and out-of-centre (Sainsbury's, London Road and Tesco, Prince Avenue). This capacity increases to approximately 6,200 sq m net when the level of trading of stores in the existing District Centres is also considered (Asda, North Shoebury and stores in Leigh on Sea). Whilst we consider that there may be some scope for the Waitrose store, Eastern Avenue to further enhance its turnover, the quantitative assessment indicates the need for further convenience superstore provision in the Borough. The two new stores developed over the adopted Local Plan period have not fully addressed the expenditure capacity.

7.5 In qualitative terms, our on-site work indicates that the town centre Sainsbury's store at London Road, Tesco at Prince Avenue and Asda at North Shoebury are all trading extremely well. Although the Borough has a range and choice of food retailers, including representation by most of the main operators and a range of discount and smaller stores, we have identified an area of deficiency in terms of main food shopping in the south/eastern part of the Borough. The existing provision in this area is also more dated; the town centre Sainsbury's and the Asda store were built in the 1980s and the Asda store is over 20 years old.

7.6 We have not identified any new development sites in Southend on Sea town centre, other than those in the adopted Local Plan. We therefore consider that the Borough Council may wish to review the appropriateness of the Seaway car park site for the provision of a convenience superstore. Whilst competing priorities for the redevelopment of this site will have to be decided upon in formulating the Replacement Local Plan, we believe the site may be suitable for a convenience superstore, subject to design, layout, residential amenity and car parking considerations. The Borough Council should also consider undertaking a Development Feasibility Study to review alternative opportunities within the Borough to accommodate a new convenience superstore.

RETAIL WAREHOUSING

7.7 The adopted Local Plan indicates rapid growth in the number of retail warehouse facilities in and around Southend. The advantage of retail warehousing from the point of view of retailers is detailed. However, the Plan balances this against concerns that such developments could attract shoppers and retailers away from established centres. The Plan also raises concerns over the use of valuable land/resources for retail warehouse development. Overall the adopted Local Plan concludes that in view of the substantial provision already made, the limited land availability in the town, and the competing needs for this land, the approach should continue to be focused on securing retail warehouse developments in edge of centre locations, which complement rather than compete with established shopping facilities and which do not occupy land which is valuable to industrial and business needs.

7.8 We suggest that the Replacement Local Plan should reflect the findings of this retail study with regards to retail warehousing. We have identified capacity for a further 5,200 sq m net of bulky goods floorspace over the Local Plan period. This could be significantly greater if a scheme of sufficient size and quality was introduced such that it could claw back expenditure currently leaking from the Southend catchment area. With only a modest increase in market share, capacity could be created to support existing commitments, the current proposed B&Q Warehouse and a further 11,200 sq m net of bulky goods floorspace by 2016.

7.9 In qualitative terms we also consider that the existing retail warehouse provision has limitations. There is scope to widen both the range and choice of retail warehouse facilities in the Borough, as the existing breadth of bulky goods offer is limited. A number of the existing stores are small, dated and first generation and do not provide 'modern' state of the art facilities. In addition, the Airport Park is located in Rochford District and is somewhat inaccessible to Southend residents. Overall, existing facilities currently have a limited trade draw.

7.10 Whilst we have not identified any sites suitable for retail warehousing development over the Replacement Local Plan period, we suggest that in considering any future applications on the basis of 'criteria-based' policies our assessment should be borne in mind.

NEW SHOPPING DEVELOPMENTS

7.11 Policy S1 of the adopted Local Plan deals with new shopping developments. This policy was drafted based upon the guidance in the previous version of PPG6 and as such we consider it should be updated to reflect the revised PPG6 published in June 1996 and subsequent Ministerial Clarifications. Ideally if a further revision of PPG6 is published prior to the formulation of the Replacement Local Plan the advice within this should also be reflected.

7.12 In order to reflect more current central government guidance we consider that Policy S1 should reflect the requirement to consider *inter alia* both need and sequential approach, in addition to impact. As currently, a criteria-based policy is likely to be the most appropriate format to facilitate assessment of proposals that come forward over the Replacement Local Plan period.

7.13 In terms of need, the Replacement Local Plan should require that the need for any proposed development has been adequately demonstrated. Whilst the criteria for demonstrating a need will be a matter for the Borough Council as decision maker, the Council may wish to define certain components of need. These could be set out in the accompanying text, rather than in the policy. We suggest that they could include a range of qualitative factors such as the range and choice of existing provision, the level of provision relative to the size and scale of the catchment area of the Borough, the extent to which proposals provide modern, competitive and innovative retail facilities, the need to meet customers' aspirations and the need to meet retailers' requirements. In addition, quantitative factors will also be of relevance such as surplus expenditure capacity to support new floorspace, because of over-trading of existing facilities or leakage of expenditure to other competing shopping destinations.

7.14 In terms of the sequential approach, the Replacement Local Plan should require that a sequential approach to site selection has been adopted by those promoting proposals for retail and other town centre developments which attract large numbers of people. Only if development cannot be accommodated within, or on the edge of, the town centre and there is a demonstrable need for it, should out of centre sites elsewhere within the urban area be considered, provided they are accessible by a choice of means of transport. Criteria of particular relevance will be to ensure that flexibility has been applied in terms of the format, design and scale of development proposed and the amount of car parking, tailoring it to fit local circumstances.

SOUTHEND TOWN CENTRE

7.15 The adopted Local Plan recognised the significant comparison goods development that had taken place in Southend on Sea with the development of the Royals Shopping Centre, the Greyhound Shopping Park in Sutton Road and other retail warehouse developments on the edge of the town centre. Whilst it concluded that these new developments had met the need for new floorspace in the short term, expenditure growth over the Plan period was such that during the 1990s a need could arise for between 20,000-30,000 sq m net of retail floorspace in the centre. Whilst these estimates were dependant upon a number of assumptions, the plan recognised that if the town centre was to improve as a shopping destination and to remain competitive with other sub-regional centres, new shopping facilities had to be provided.

7.16 We consider that the Replacement Local Plan should be updated to draw on the findings of this Retail Study. Whilst we have assumed slightly lower levels of growth in expenditure over the Replacement Local Plan period, our current capacity assessment indicates the potential for approximately 21,000 sq m net of comparison goods floorspace in the town centre over the period to 2016. Drawing on our analysis, including our assessment of the current performance of the centre and existing levels of retailer requirements, we are not convinced that this capacity is sufficient to support a 'major' new shopping centre in the town over the Replacement Plan Period. Rather we consider the Plan should focus on some new development such as an expansion of high street shopping or The Royals and renewal of existing space, as appropriate.

7.17 We consider that Policy S2 should continue to allocate the Tylers Avenue/York Road site as a prime retail development opportunity within the town centre. We suggest that the potential of the site needs to be explored further. The Borough Council should undertake a feasibility study to explore the scope of the site, the potential for expanding The Royals Shopping Centre onto the site and the alternative options for relocating/reincorporating existing uses on the site.

7.18 In addition to allocating these sites for proposed retail development we consider that the Borough Council may wish to identify certain blocks or parts of the High Street which could be targeted for renewal. This would be particularly appropriate given the current environmental improvements and other enhancements as part of the SSHAPE Project.

7.19 The Replacement Local Plan could include certain criteria which any proposals for new development in Southend on Sea town centre would be subject to. These could include:-

- Consideration of the impact on the remainder of the town centre;
- Accessibility by a choice of means of transport;
- Integration with existing shopping facilities; and
- Impact on local and historic environment.

LARGE SHOPPING DEVELOPMENTS

7.20 We have not specifically reviewed the requirements of Policy S3, restricting the use of large shopping developments to non-convenience goods. Whilst we note that the Borough Council may have particular sensitivities with regard to changes of use to convenience goods, given our conclusion that there is a need for further convenience goods floorspace in the Borough, and the limited opportunities to address this need, it may be appropriate to exclude Policy S3 and rather consider each application on its individual merits.

RETAIL MARKETS

7.21 We consider that it will be necessary to include Policy S4 in the Replacement Local Plan. The relocation of the covered market facility from York Road should clearly be a priority for Southend-on-Sea town centre in order to facilitate the development of the wider Tylers Avenue/York Road site.

NON-RETAIL USES AND OTHER LOCAL PLAN SHOPPING POLICIES

7.22 We have not been instructed to consider the frontage or other policies on fringe commercial areas or car showrooms in the adopted Local Plan. We consider, however, that the frontage policies will warrant further consideration during the formulation of the Replacement Local Plan. It will be particularly appropriate in Southend on Sea town centre to ensure that a focus of retailing activity is maintained on the High Street. Conversely in Westcliff on Sea District Centre it will be necessary to review the scope for widening the range of activities in the centre to encourage greater vitality.

8. CONCLUSIONS

8.1 This report has assessed retailing and town centres in the Borough of Southend on Sea, in order to inform the preparation of the Replacement Southend on Sea Local Plan. We have drawn the following key conclusions:

- Southend on Sea is a vital and viable town centre. The diversity of uses reflects the centres sub-regional shopping function and although retailer representation is mainly mid market, Southend has a range of key attractions and high street fashion retailers. The performance of financial indicators reflects national trends, with retail yields performing better than retail rental values. Vacancies have fallen slightly more recently. The centre is accessible by a range of modes and the refurbishment of the town centre environment via the SSHAPE project is likely to be a significant enhancement and should have positive spin-off benefits.

- Southend town centre is performing successfully as a comparison shopping destination and we consider that there is scope for additional comparison floorspace in the town centre, based upon forecast growth in population and expenditure over the Local Plan period. We are not aware of any commitments in the pipeline to absorb surplus expenditure and as such we forecast capacity for up to about 21,200 sq m net of additional comparison goods floorspace by 2016.

- Southend on Sea has a choice of convenience stores, including nearly all the main operators in conjunction with discount and smaller stores. Although two of the main out of centre food stores are relatively new having come forward through the now adopted Local Plan process, other provision including that in the District Centres of Eastwood, North Shoebury and Leigh on Sea and the town centre itself is slightly more dated. Overall, whilst the six main foodstores in the Borough provide relatively comprehensive provision, there is a geographical deficiency in the east of the Borough, in the vicinity of Southchurch and Thorpe Bay.

- The convenience stores in the Borough are currently performing well. The Sainsbury's store in the town centre and the Tesco, Prince Avenue in particular are trading very successfully. We consider that there is capacity to enhance the provision of convenience goods retailing in Southend on Sea, with the addition of a new convenience superstore over the Replacement Local Plan period. We have forecast capacity for between 2,600 sq m net and 3,100 sq m net of additional convenience goods floorspace between 2006 and 2016.

- Overall the range and choice of bulky goods facilities in Southend on Sea is limited. A number of the stores are dated and first generation facilities. The DIY stores are small and do not provide modern state of the art warehouse facilities. The offer is also limited in terms of bulky goods categories or is focused on discount and non-bulky goods. Overall, whilst the geographical distribution of facilities is relatively central, the Airport Retail Park in Rochford District Council is somewhat inaccessible. We consider therefore that there is a qualitative deficiency in existing retail warehouse provision in the Borough.

- Whilst out-of-centre retail warehouses in Southend are not trading particularly well, expenditure capacity to support new floorspace will be generated over the Replacement Local Plan period of up to 5,200 sq m net. There is scope for this capacity to be enhanced by virtue of clawback of expenditure that is currently leaking from the Southend on Sea catchment area to competing destinations. With only a modest increase in market share capacity could be created to support existing commitments, the current proposed B&Q Warehouse and a further 11,200 sq m net of bulky goods floorspace by 2016.

- Southend on Sea has four quite varied District Centres. Westcliff on Sea is the largest of these centres. Whilst it has for a number of years been overshadowed by Southend on Sea town centre, it is now enjoying something of a renaissance and is functioning more strongly, serving the local shopping needs of the surrounding area. However the centre lacks a quality main food store.

- Leigh on Sea is clearly the most vibrant of the District Centres in the Borough. It has the most upmarket and quality offer serving convenience, comparison and service needs of the neighbouring community. Like Westcliff, it does not have a main food store. It does, however, benefit from supermarket facilities on London Road. The main concern in the future will be to ensure that Leigh on Sea does not overheat. In particular, there is very limited car parking and this does create vehicular and pedestrian conflict as car drivers circulate to identify car parking spaces.

- North Shoebury and Eastwood District Centres are based upon convenience stores with only several small adjacent unit shops. They both appear to serve an important local shopping function, providing for both bulky main and top-up food and convenience shopping. They also have some service facilities sufficient to meet local needs.

- We estimate that the convenience stores in the District Centres in the Borough are generally performing adequately or well. The Asda store at North Shoebury in particular is trading at levels in excess of estimated company averages, as are stores in Leigh on Sea, including the Safeway store, London Road and local stores on The Broadway and Elm Road.

- We have identified some surplus convenience goods capacity at North Shoebury and Leigh on Sea. Whilst the capacity likely to arise over the Replacement Local Plan period would in neither case be sufficient to support a new convenience superstore, in conjunction with surplus capacity generated by virtue of the above average levels of trading of the Sainsburys, London Road and Tesco, Prince Avenue it reiterates our view that there is scope for a new food superstore in Southend over the Replacement Local Plan period.

- North Shoebury and Eastwood do not have a significant comparison goods shopping function. We consider that Westcliff on Sea is not trading particularly strongly as a comparison shopping destination and we have not identified any capacity for new comparison floorspace. Leigh on Sea is trading reasonably successfully as a comparison shopping destination, but given its size relative to Southend on Sea and the more localised catchment we consider that any surplus expenditure generated over the Local Plan period should be used to support existing retailers, rather than new comparison goods floorspace.

- We have examined a range of opportunities to accommodate the development we have identified scope for in our assessment. However, the number of sites that are suitable, viable and available is limited. Several sites in the adopted Local Plan including London Road, Prince Avenue and Eastern Avenue have now been developed. In addition, the South East Essex College campus development is now under construction on the former Odeon Cinema and adjacent car park site, and this should not, therefore, be included in the Replacement Local Plan. We also consider that the Warrior Square/Whitegate Road site has limited potential other than for small-scale retailing as part of a mixed use development. There is also little scope for any significant retail development on the Alexandra Street/Market Place site and we do not consider Victoria Avenue an appropriate location to allocate sites for retail development.

- As such the only potential retail development opportunity remaining from the adopted Local Plan is at Tylers Avenue/York Road. We consider that it should be identified in the Replacement Local Plan and the Borough Council should actively seek to take the development of this site forward. A Feasibility Study should be considered to test the scope of the site, the potential for expanding The Royals Shopping Centre onto the site and the alternative options for relocating/reincorporating existing uses on the site.

- Whilst Seaway car park site could offer the potential for retail development, such as a convenience store, it will be a matter for the Borough Council to decide priorities in terms of car parking facilities. We do not envisage that this site could accommodate sufficient replacement car parking facilities in addition to a retail development.

- We consider that opportunities may arise over the Replacement Local Plan period to further enhance the existing provision in Southend-on-Sea town centre through the renewal or redevelopment of existing space. In particular, we consider that the Victoria Plaza centre would benefit from further modernisation/redevelopment. There are also existing blocks on the High Street which would benefit from the renewal or refurbishment of façades and shop fronts and the reoccupation of the rear of the former Keddies department store would enhance the vitality and viability of this part of the town centre. However, this site has recently been granted permission subject to the completion of a legal agreement. If this is signed, and permission is issued and implemented, then this site will not be available. On that basis, it should not be included within the Replacement Local Plan

Appendix 1

Experian Goad Centre Report (January 2002)

goad
Centre Report

Southend-on-Sea

Prepared for:
CB Hillier Parker

experian

GETTING THE MOST FROM YOUR GOAD CENTRE REPORT

Each shopping centre has its own unique mix of multiple outlets, independent shops, convenience and comparison stores, food outlets and vacant premises.

Understanding the retail composition of a centre and its effect on local consumers is crucial to the success of any business. By studying the information in the report, you will be able to examine site quality, evaluate threats and opportunities, and assess the vitality and viability of the centre. However, you will only achieve this if you are aware of the various implications of the data that you see. This guide is designed to help you interpret the information you see on the Goad Centre Report.

1. The Local Area
The map in the top left-hand corner of your report locates other local Goad centres. When evaluating the quality of a site, it is often beneficial to compare it with other local shopping centres. Goad Centre Reports are available for any of the highlighted centres.

2. The Indexing System
A simple indexing system appears throughout the report. This illustrates the difference between a percentage figure for the centre and the GB average. An index of 100 represents an exact match, anything less than 100 indicates a below average count for the centre, and a figure over 100 represents an above average count.

For example, if restaurants accounted for 10% of a centre's outlets and the GB average was also 10%, the index would be 100. If however, the GB average was 8%, the index would be 125.

The index is an effective gap analysis tool and can be used to identify areas that are under and over represented within a centre. A retail category that is heavily under represented could indicate poor local demand. On the other hand, it could show that there is an untapped market waiting to be serviced. Either way, it provides a strong indication that the site will need to be examined further.

3. Floor Space
The floor space figures shown on the report are derived from the relevant Goad Paper Plan, but only show the footprint floorspace, and the site area without the building lines. They should not therefore be read as a definitive report of floor space, but do provide a useful means of comparison between centres, as all outlets are measured in a consistent manner.

4. Vacant Outlets
Comparing the number of vacant outlets with the GB average provides a useful insight into the current economic status of a centre. For example, a high index generally represents under-development or decay, while a low index shows a strong retail presence.

5. Multiple Outlets/Key Attractors
A multiple retailer is defined as being part of a network of nine or more outlets. The presence of multiple outlets can greatly enhance the appeal of a centre to local consumers. The strong branding and comprehensive product mix of retailers such as Marks & Spencer, Boots and Dixons is often sufficient in itself to attract consumers to a centre. Approximately 27 national multiples have been identified as key attractors, (i.e. those retailers most likely to improve the consumer appeal of a centre).

The presence of multiple outlets and key attractors can have a significant impact on neighbouring outlets. While other retailers will undoubtedly benefit from increased pedestrian traffic, (and therefore increased sales opportunities), multiples provide fierce competition for rivals in their retail categories.

6. Retail Centre Ranking
Every year, Experian produces a National Retail Centre Ranking. This measures the quality of a site in a regional and a national context, taking into account a variety of factors, including size, number of outlets, presence of primary retailers and vacant premises.

The four additional centres listed under Retail Centre Ranking are those centres with the most similar attributes to the selected centre, according to the framework laid out by the National Retail Centre Ranking.

Shows the number of units in individual categories

Displays the number as a percentage of the total units in the centre

Shows the % of the GB base for individual categories

Retail Trade Group	Number	% of Centre	% in GB	Index v GB
Convenience	43	8.7	9.8	88
Comparison	274	55.9	49.3	118
Service	159	25.0	26.1	96
Miscellaneous	68	8.9	14.4	61

Also available from Experian:

The Goad Catchment Profile
This measures the extent of the local consumer base, in relation to a shopping centre. It also helps you to recognise the individual groups that make-up a local population, using MOSAIC, the world's leading geo-demographic classification system.

MOSAIC classifies individuals using census, financial, housing and retail data. Combining this with the profile's information on local household composition and age structure enables you to understand the varied lifestyles and behaviours of individual customers. You can then tailor your products, services and communications to suit local markets, build one-to-one customer relations and generate greater brand loyalty.

Goad Paper Plans
These provide a bird's eye view of over 1,200 UK retail centres. The name, retail category, floor space and exact location of all outlets and vacant premises is recorded and mapped. Key location factors such as pedestrian zones, road crossings, bus stops and car parks are also featured.

Tailored Plans and Extracts
We are able to provide tailored plans and extracts which highlight the information most relevant to your enquiry.

The Retail Address Database
An extensive database covering the addresses of 340,000 retail outlets across the UK, this is a highly effective tool for site evaluation and competitor analysis.

For further details on these products or if you have any queries regarding your Goad Centre Report, please contact Experian on:
Tel: 0845 601 6011
Fax: 0115 968 5003
E-mail: goad.sales@uk.experian.com

Southend-on-Sea

goad
Centre Report

Key Retail Indicators

	Count	%	% GB	Index
Total Outlets	422			
Total Floorspace (000 sq ft)	1096			
Vacant Outlets	48	11.37	10.83	105
Vacant Floorspace (000 sq ft)	109	9.93	8.43	118
Multiple Outlets	189	44.79	34.37	130
Comparison Outlets	227	53.79	48.83	110

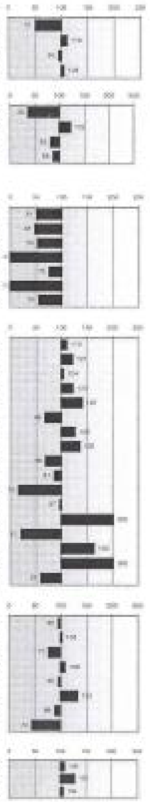
Key Attractors

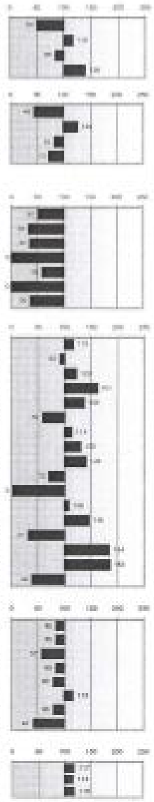
Adams	1	Top Man	1
Burger King	1	Top Shop	1
Burton	1		
Clarks	2		
Clintons	2		
Dixons	1		
Dorothy Perkins	1	**Mixed Goods Retailers**	
Evans	1	Aldiss	0
McDonalds	2	BHS	1
Mothercare	1	Boots The Chemist	2
New Look	1	Debenhams	1
Next	1	House of Fraser	0
Our Price	0	John Lewis	0
Principles	0	Marks & Spencer	1
River Island Clothing Co	1	W H Smith	1
Superdrug	2	Woolworths	1

Retail Centre Ranking	Closest Centres	Distance (mi)
Basildon	Westcliff-on-Sea	1.1
Romford	Leigh-on-Sea	3.7
Southend-on-Sea	Hadleigh	7.2
Salisbury	Canvey Island	8.3

Retail Composition

	Outlets Number	%	%GB	Index	Floorspace (000's) sq.ft	sq.m	%	%GB	Index
Retail Trade Group									
Convenience	20	4.74	9.31	51	83	7.71	7.56	15.85	50
Comparison	227	53.79	45.63	118	696	64.66	63.39	54.55	116
Service	119	28.20	29.54	95	191	17.74	17.40	20.47	85
Vacant	48	11.37	10.83	105	109	10.13	11.66	8.43	138
Multiple Retailers by Trade Group									
Convenience	8	4.23	11.67	36	71	6.60	9.65	21.65	45
Comparison	132	69.84	57.11	122	548	51.00	74.50	59.23	126
Service	45	23.81	28.81	83	106	9.85	14.40	17.25	83
Miscellaneous	4	2.12	2.41	88	10	0.93	1.36	1.86	73
Retail Category									
Convenience	20	4.74	9.31	51	83	7.71	7.56	15.85	50
Bakers	4	0.95	1.98	48	4	0.37	0.36	1.11	33
Butchers	2	0.47	0.88	53	2	0.19	0.18	0.52	35
Greengrocers & fishmongers	0	0.00	0.78	0	0	0.00	0.00	0.36	0
Grocers & frozen foods	9	2.13	2.79	76	72	6.69	6.56	11.25	58
Off licences & homebrew	0	0.00	0.79	0	0	0.00	0.00	0.55	0
CTN & convenience	5	1.18	2.14	55	5	0.46	0.45	1.25	36
Comparison	227	53.79	45.63	118	696	64.66	63.39	54.55	116
Footwear & repairs	12	2.84	2.36	121	17	1.58	1.55	1.67	92
Mens, boys wear	7	1.66	1.24	134	16	1.49	1.46	1.20	122
Womens, girls & childrens	28	6.64	5.43	122	77	7.15	7.01	4.35	161
Mixed & general clothing	18	4.27	3.04	140	65	6.04	5.92	4.35	136
Furniture, carpets, textiles	14	3.32	4.87	68	35	3.25	3.19	5.43	59
Books, arts/crafts, stationers/copy	24	5.69	4.51	126	45	4.18	4.10	3.61	114
Elec, home ent, 'phones & video	32	7.58	5.58	136	63	5.85	5.74	4.42	130
DIY, hardware & household goods	9	2.13	3.08	69	73	6.78	6.65	4.75	140
Gifts, china, glass & leather goods	7	1.66	1.91	87	8	0.74	0.73	1.01	72
Cars, motor cycles & accessories	1	0.24	1.51	16	1	0.09	0.09	2.70	3
Chemists, toiletries & opticians	15	3.55	3.66	97	47	4.37	4.28	3.97	108
Variety, department & catalogue	11	2.61	1.29	202	164	15.24	14.94	10.29	145
Florists & gardens	1	0.24	1.13	21	2	0.19	0.18	0.57	32
Sports, toys, cycles & hobbies	19	4.50	2.73	165	51	4.74	4.64	2.53	184
Jewellers, clocks & repairs	19	4.50	2.23	202	21	1.95	1.91	1.03	185
Charity, pets & other comparison	10	2.37	3.91	61	11	1.02	1.00	2.57	39
Service	119	28.20	29.54	95	191	17.74	17.40	20.47	85
Restaurants, cafes, fast food	52	12.32	12.04	102	74	6.87	6.74	7.95	85
Hairdressing, beauty & health	18	4.27	5.55	77	16	1.49	1.46	2.56	57
Launderettes & dry cleaners	5	1.18	1.09	109	5	0.46	0.46	0.54	85
Travel agents	8	1.90	1.98	96	11	1.02	1.00	1.26	80
Banks & financial services	27	6.40	4.82	133	70	6.50	6.38	5.51	116
Building societies	3	0.71	0.78	91	6	0.56	0.55	0.68	80
Estate agents & auctioneers	6	1.42	3.25	44	9	0.84	0.82	1.98	41
Miscellaneous	56	13.27	12.32	108	128	11.89	11.66	9.93	117
Employment, careers, POs & info	8	1.90	1.48	128	19	1.77	1.73	1.50	115
Vacant	48	11.37	10.83	105	109	10.13	9.93	8.43	118





For a Goad Paper Plan, a Goad Catchment Report or if you have any queries please contact Experian on tel: 0845 601 6011 or fax: 0115 968 5003 or E-mail: goad.sales@uk.experian.com

Survey Date: 28/01/02

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TERMS AND CONDITIONS

1. DEFINITIONS
"this agreement" means the terms and conditions hereunder and the correspondence between the parties attached hereto.
"Experian" means Experian Group Limited.
"the Client" means the person, firm or limited company to whom the Services are to be provided.
"the Information" means any information (in whatsoever form) provided to the Client by Experian in connection with the Services.
"the Media" means the records, tapes or other materials and documents by which the information is communicated to the Client.
"the Services" means the services to be provided by Experian to the Client more particularly described in the correspondence between the parties attached hereto.

2. CONTRACT TERMS
Subject to Clause 14 hereunder this Agreement shall be on the terms and conditions set out below to the exclusion of any other terms and conditions whether or not the same are endorsed upon, delivered with or referred to in any document delivered or sent by the client to Experian.

3. PAYMENT OF CHARGES
3.1 The charges for the Services ("the Charges") shall be specified by Experian to the Client.
3.2 The Client shall pay the Charges within 28 days of the date of Experian's invoice thereof.
3.3 Interest at an annual rate of 5% above Barclays Bank plc's base rate from time to time shall accrue daily and be calculated on a daily basis on any sum overdue from the date of invoice until payment in full of the Charges.
3.4 Unless expressly stated otherwise the Charges shall be exclusive of VAT (or any other duty chargeable in respect thereof) (which for the avoidance of doubt shall be payable by the Client in accordance with the terms and conditions hereof).

4. PROVISION OF THE SERVICES
4.1 Experian shall use all reasonable endeavours to ensure that the information is accurate in all material respects.
4.2 Save as provided in sub-clause 4.1 above or otherwise expressly provided in this Agreement or to the extent that it is unlawful for any said representations and warranties to be excluded Experian makes no representations or warranties whether express or implied (by statute or otherwise) in connection with the Services or use thereof by the Client or otherwise in connection with this Agreement.
4.3 The parties hereto agree that the time for the performance of Experian's obligations in connection with the Services shall not be of the essence in this Agreement.

5. LIMITATION OF LIABILITY
Notwithstanding anything to the contrary contained in this Agreement:
5.1 Experian shall not be liable (whether in contract or in negligence (other than the liability in respect of death or personal injury arising out of the negligence of Experian its servants or agents) or other tort or otherwise) for any indirect or consequential loss of any kind whatsoever (including without limitation loss of profit or loss of business) suffered by the Client in connection with the Services.
5.2 Without prejudice to the provisions of sub-clause 4.1 above Experian's maximum aggregate liability hereunder (other than liability in respect of death or personal injury arising out of the negligence of Experian its servants or agents) whether for breach of this Agreement or otherwise and whether or not arising from the negligence of Experian or any other person involved directly or indirectly in the provision of the Services shall not exceed an amount equal to the Charges (exclusive of VAT) payable to Experian hereunder.

6. COPYRIGHT
Property and the copyright (and all other intellectual property rights) in the Media and the Information (other than any information which has passed to Experian by the Client in connection with the Services or which has been obtained from any third party by Experian which copyright and all other intellectual property rights as appropriate shall remain vested in such third party) shall at all times remain vested in Experian.

7. CONFIDENTIALITY
7.1 The Client undertakes that it shall use the Information solely for the purpose of its own business and shall not (without the prior written consent of Experian) copy reproduce publish or transmit any part of the Information in any manner whatsoever and the media shall be returned to Experian upon demand.
7.2 The Client undertakes with Experian that the Client shall permit access to the Information only to those of its authorised officers or employees who need to know or use the Information and that the Client shall procure that its offices and employees shall maintain in strictest confidence and not divulge communicate or permit access to any third party any confidential information relating to Experian.
7.3 For the purpose of sub-clause 7.2 hereof the expression "confidential information" shall mean (as the context may require)
7.3.1 the Information; and/or
7.3.2 any information concerning Experian's trade secrets or business dealings transactions or affairs which may come to the notice of the client; and/or
7.3.3 any information and/or know how relating to the methods or techniques used by Experian in devising and developing the Services and any tapes documents or other materials comprising any part of such information and/or know how made available by Experian hereunder.
7.4 The provisions of sub-clause 7.2 hereof shall not apply to any confidential information to the extent that:
7.4.1 the Client is required to divulge the same by a Court tribunal or government authority with competent jurisdiction
7.4.2 it has already come within the public domain
7.4.3 it was already known to the Client prior to the date of disclosure by Experian (as evidenced by written records)

8. INDEMNITY
The Client shall indemnify and keep indemnified Experian from and against any and all liability loss claims demands costs or expenses of any kind whatsoever which shall at any time suffer or incur and which arise out of or in connection with the services provided that this indemnity shall not apply to the extent that any such liability arises of the default of Experian.

9. DATA PROTECTION ACT 1984
The Client undertakes that at all times they shall comply fully with the provisions of the Data Protection Act 1984 and any subsequent amendments thereto or re-enactments thereof.

10. TERMINATION
10.1 Experian shall be entitled to terminate this Agreement immediately by written notice to the Client if:
10.1.1 The Client is guilty of any material breach of the provisions of this Agreement and such breach if capable of remedy is not remedied within twenty one working days of written notice having been given to remedy such breach.

10.1.2 The Client has had a bankruptcy order made against it or has made an arrangement or composition with its creditors or (being a body corporate) has had convened a meeting of creditors (whether formal or informal) or has entered into liquidation (whether voluntary or compulsory) except a solvent voluntary liquidation for the purpose only of reconstruction or amalgamation or has a receiver manager administrator or administrative receiver appointed of its undertaking or any part thereof or a resolution has been passed or a petition presented to any Court for the winding-up of the Client or for the granting of an administration order in respect of the Client or any proceedings have been commenced relating to the insolvency of the Client.

10.2 The termination of this Agreement shall be without prejudice to the rights of Experian accrued prior to such termination.

11. FORCE MAJEURE
Notwithstanding anything herein contained neither party shall be under any liability to the other in respect of any failure to perform or delay in performing any of the obligations hereunder which is due to any cause of whatsoever nature beyond its reasonable control and no such failure or delay shall be deemed for any purpose to be a breach of this Agreement.

12. ASSIGNMENT
The rights granted to the Client hereunder are personal to it and the Client shall not assign or grant any rights in respect of or otherwise deal in the same.

13. WAIVER
Failure by either party to enforce any of the provisions of this Agreement shall not operate as a waiver of any of its rights hereunder or operate so as to bar the exercise or enforcement thereof at any time or times.

14. VARIATIONS
This Agreement constitutes the whole of the terms agreed between the parties hereto in respect of the subject matter hereof and supersedes all previous negotiations, understandings or representations and shall be capable of being varied only by an instrument in writing signed by a duly authorised representative of each of the parties hereto.

15. NOTICE
Any notice to be given hereunder by either party to the other may be given by first class mail addressed to the party at the address herein specified or such other address as such party may from time to time nominate for the purpose hereof or by telex or telefax and shall be deemed to have been served:
15.1 if given by mail seventy-two hours after the same shall have been despatched and
15.2 if given by telex or telefax one hour after transmission (if transmitted during normal business hours) and twelve hours after transmission (if transmitted outside normal business hours).

16. SEVERANCE
This Agreement is severable in that if any provision hereof is determined to be illegal or unenforceable by any Court or competent jurisdiction such provision shall be deemed to have been deleted without affecting the remaining provisions of this Agreement.

17. LAW
This Agreement shall be governed by and construed in accordance with English Law and the parties hereto agree that the English Courts shall have exclusive jurisdiction.

Appendix 2

PMRS Pedestrian Flow Counts (July 2000)

PEDESTRIAN MARKET RESEARCH SERVICES

SOUTHEND ON SEA
2000
PEDESTRIAN FLOWCOUNT

PMRS
PEDESTRIAN MARKET RESEARCH SERVICES

REPORT

Survey Date : 21 & 22 July 2000

Weather: Friday : Warm & Sunny
Saturday : Overcast with Sunny Spells

PMRS Sopwell Mill, 61 Cottonmill Lane, St Albans, Herts AL1 2ES Tel: 01727 867 100

SOUTHEND ON SEA - 2000

1	**W H SMITH**	2-12 London Road		8.94	113	14.16	120	54.35	117
2	**H M V**	8-14 Queens Road		2.94	37	5.97	51	20.97	45
3	**ULTIMATE WHOLESALERS**	15-17 Queens Road		1.56	20	2.52	21	9.60	21
4	BOOTS	**195-197 High Street**		**13.53**	**172**	**23.13**	**196**	**86.26**	**186**
5	**TOP SHOP**	147-149 High Street		12.72	161	20.37	173	77.86	168
6	**JESSOPS**	119 High Street		13.47	171	19.32	164	77.15	167
7	**NEW LOOK**	107 High Street		11.40	145	18.57	158	70.52	152
8	**WALLIS**	63 High Street		8.67	110	16.41	139	59.01	128
9	**WOOLWORTHS**	29-35 High Street		11.79	150	17.64	150	69.25	150
10	**THE FLOWER MARKET**	12 Alexandra Street		2.46	31	2.49	21	11.65	25
11	**ADAMS**	17 High Street		5.79	73	8.79	75	34.31	74
12	**DEBENHAMS**	The Royals Shopping Centre	T	8.52	108	15.54	132	56.61	122
13	**CAR PARK ENTRANCE**	The Royals Shopping Centre	T	1.80	23	2.88	24	11.01	24
14	**BOOTS**	The Royals Shopping Centre	T	7.38	94	11.70	99	44.90	97
15	**B H S**	36-44 High Street		12.30	156	17.58	149	70.31	152
16	**ICELAND**	4-18 York Road		2.91	37	3.24	27	14.47	31
17	**MARKS & SPENCER**	54-64 High Street		13.80	175	21.48	182	83.01	179
18	**DIXONS**	90 High Street		14.16	180	19.56	166	79.34	171
19	**NEXT**	104-106 High Street		13.65	173	17.82	151	74.05	160
20	**BURTON**	130 High Street		14.46	183	18.87	160	78.43	169
21	**MISS SELFRIDGE**	170 High Street		14.01	178	20.37	173	80.90	175
22	**WALMSLEYS SUITE SUPERSTORE**	4 Southchurch Road		4.02	51	4.83	41	20.82	45
23	**VIRGIN MEGASTORE**	1-7 Southchurch Road		7.50	95	10.26	87	41.79	90
24	**VACANT**	232-233 Victoria Plaza	T	6.48	82	8.49	72	35.22	76
25	**VACANT**	201-205 Victoria Plaza	T	9.09	115	9.93	84	44.75	97
26	**VACANT**	349 Victoria Plaza		2.28	29	4.92	42	16.94	37
27	**CURIO CITY**	309-315 Victoria Plaza	T	3.87	49	6.84	58	25.20	54
28	**THE CORK & CHEESE PH**	10-11 Victoria Plaza		1.83	23	4.62	39	15.18	33
29	**QUEENSWAY PHARMACY**	63 Southchurch Road		2.97	38	3.27	28	14.68	32
30	**DAWN**	3 Warrior Hse-Southchurch Road		2.22	28	1.95	17	9.81	21

Note T - total street/mall width counted
Note A - enumerated on adjacent street
Note C - count affected by construction work

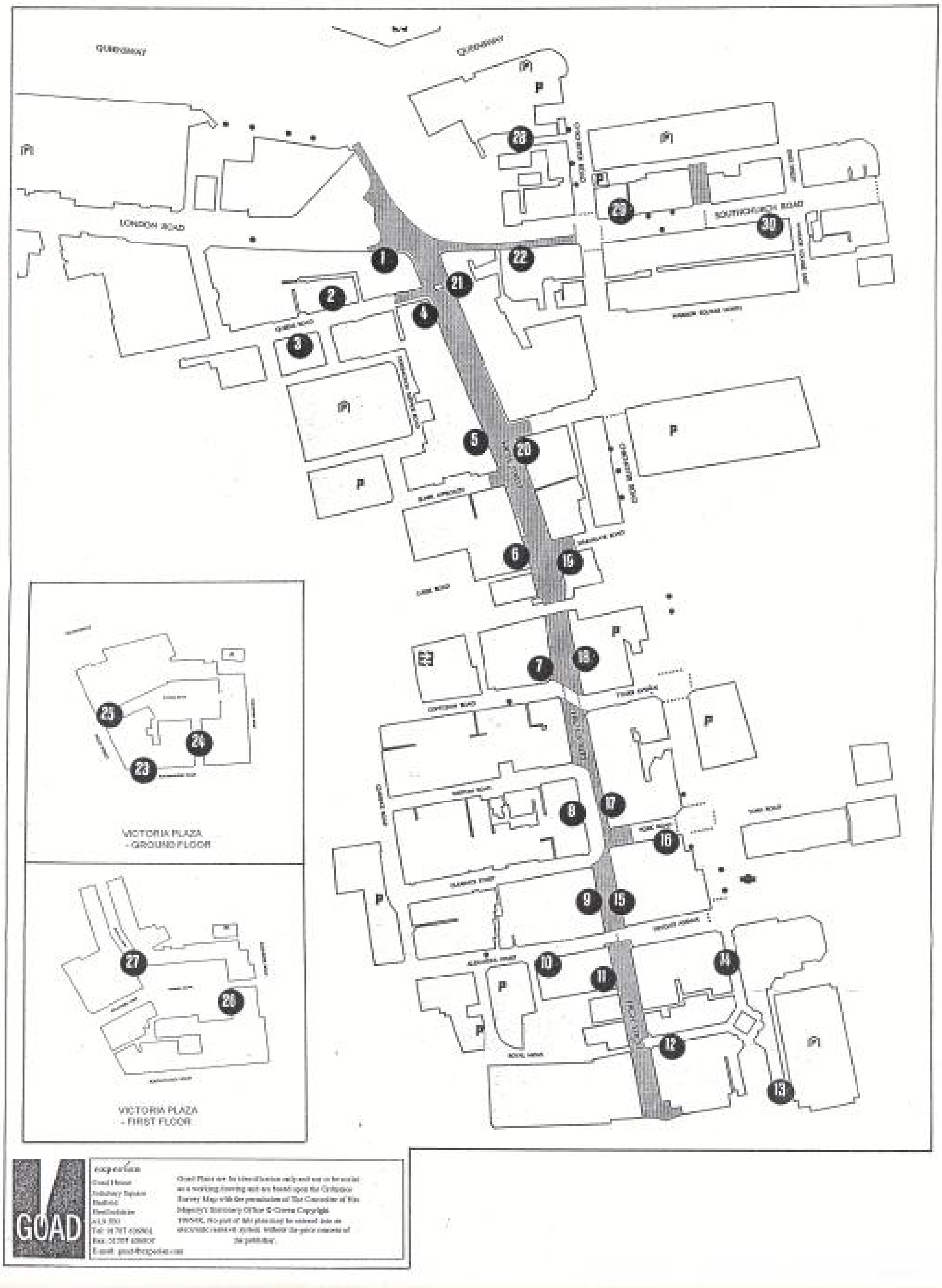
RED - busiest recorded footfall
COUNT - results shown in thousands
INDEX - percentage of average flow (benchmarked at 100)

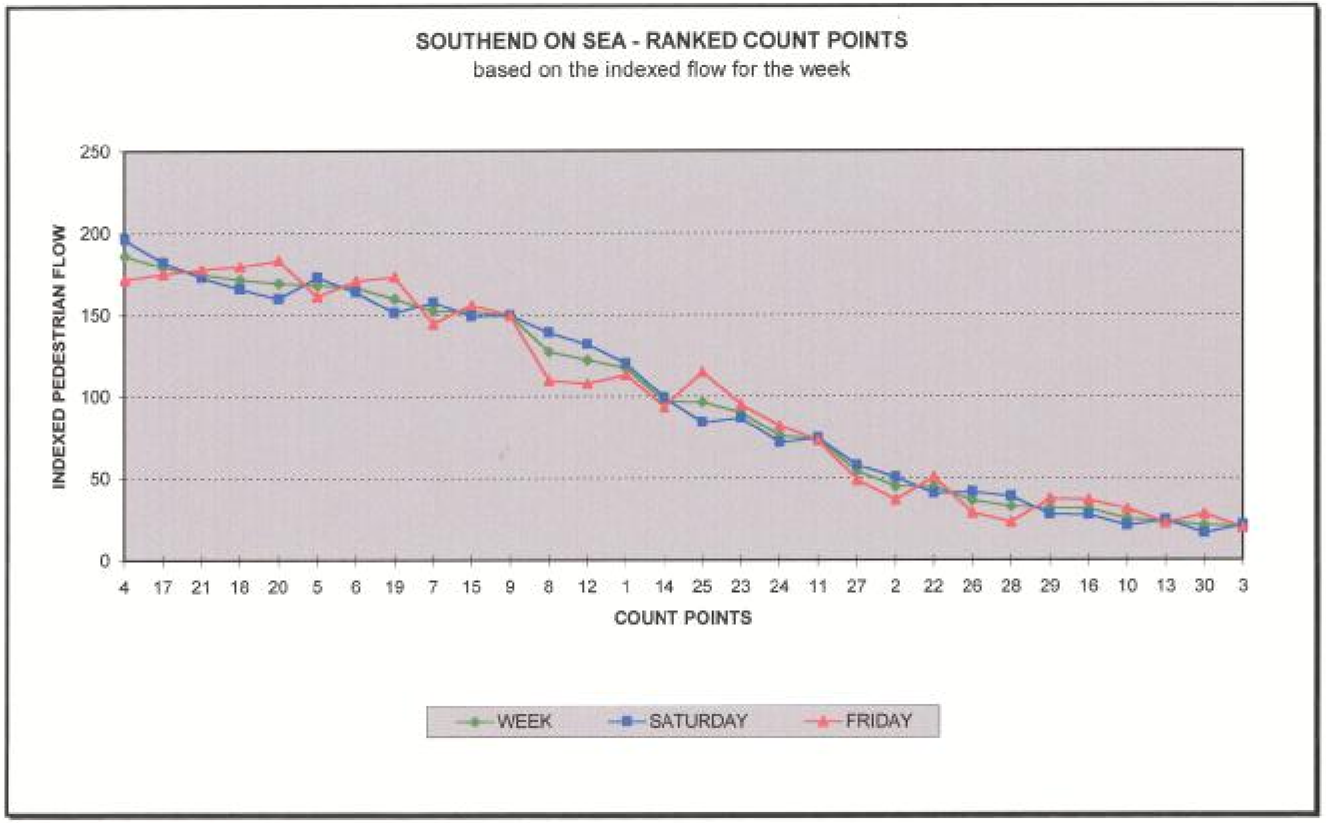
CENTRE - SOUTHEND ON SEA

COUNT POINT LOCATION

NO	OCCUPIER	STREET & ADDRESS	PRECISE COUNT POINT LOCATION
1	W H SMITH	2-12 London Road	A distance of 30ft was counted out on to London Road
2	H M V	8-14 Queens Road	Pavement width counted on Queens Road
3	ULTIMATE WHOLESALERS	15-17 Queens Road	Pavement width counted on Queens Road
4	BOOTS	195-197 High Street	Half width of pedestrian walkway counted on High Street
5	TOP SHOP	147-149 High Street	Half width of pedestrian walkway counted on High Street
6	JESSOPS	119 High Street	Half width of pedestrian walkway counted on High Street
7	NEW LOOK	107 High Street	Half width of pedestrian walkway counted on High Street
8	WALLIS	63 High Street	Pavement width counted on High Street
9	WOOLWORTHS	29-35 High Street	Half width of pedestrian walkway counted on High Street
10	THE FLOWER MARKET	12 Alexandra Street	Pavement width counted on Alexandra Street
11	ADAMS	17 High Street	Half width of pedestrian walkway counted on High Street
12	DEBENHAMS	The Royals Shopping Centre	Full width of pedestrian mall counted in The Royals Shopping Centre
13	CAR PARK ENTRANCE	The Royals Shopping Centre	Full width counted across entrance to car park in The Royal Shopping Centre
14	BOOTS	The Royals Shopping Centre	Full width of pedestrian mall counted in The Royals Shopping Centre
15	B H S	36-44 High Street	Half width of pedestrian walkway counted on High Street
16	ICELAND	4-18 York Road	Pavement width counted on York Road
17	MARKS & SPENCER	54-64 High Street	Pavement width counted on High Street
18	DIXONS	90 High Street	Half width of pedestrian walkway counted on High Street
19	NEXT	104-106 High Street	Half width of pedestrian walkway counted on High Street
20	BURTON	130 High Street	Half width of pedestrian walkway counted on High Street
21	MISS SELFRIDGE	170 High Street	Half width of pedestrian walkway counted on High Street
22	WALMSLEYS SUITE SUPERSTORE	4 Southchurch Road	Full pavement width counted to balustrade
23	VIRGIN MEGASTORE	1-7 Southchurch Road	Half width of pedestrian walkway counted on Southchurch Road
24	VACANT	232-233 Victoria Plaza	Ground floor, full width of pedestrian mall counted in Victoria Plaza
25	VACANT	201-205 Victoria Plaza	Ground floor, full width of pedestrian mall counted in Victoria Plaza
26	VACANT	349 Victoria Plaza	First floor, full width of pedestrian mall counted to balustrade in Victoria Plaza
27	CURIO CITY	309-315 Victoria Plaza	First floor, full width of pedestrian mall counted in Victoria Plaza
28	THE CORK & CHEESE PH	10-11 Victoria Plaza	Lower ground floor, half width of pedestrian mall counted in Victoria Plaza
29	QUEENSWAY PHARMACY	63 Southchurch Road	Pavement width counted on Southchurch Road
30	DAWN	3 Warrior Hse-Southchurch Road	Pavement width counted on Southchurch Road

SOUTHEND-ON-SEA





The 100 index is the benchmark, and refers to the average flow for the centre.
Count points with indices greater than 100 have pedestrian flow above the centre's average.

EXPLANATORY NOTES

1 The 30 count points are selected from the Goad plan and cover the contiguous retail area. The sites at which the enumeration was undertaken are identified by the fascia and address of the occupier with the exact enumeration point noted in each case. The names of occupiers and their trades are given for identification purposes only : the names cited are not necessarily their full trading names, nor do the trades cited necessarily represent the full extent of their business. Similarly, the streets and street numbers are given solely for the purpose of identifying the sites at which the enumeration was undertaken and they do not necessarily represent the postal addresses of the occupiers.

2 The numbers given represent estimates of the total number of pedestrians passing each site over a six hour period between the hours of 10.00am - 5.00pm on Friday and Saturday, and during the whole week (Mon-Sat). The totals given for Friday and Saturday represent samples which are grossed up by a factor of 30, the reciprocal of the sampling fraction, to allow for the fact that on either day pedestrian movements were counted for a total of 12 minutes out of a possible 6 hours.

3 The numbers given for the whole week are the sums of those given for Friday and Saturday grossed up by a second factor of 2.353 to allow for the days Monday - Thursday which were not enumerated. This latter factor is an average based upon a series of previous counts conducted throughout the week (Mon-Sat).

4 Unless otherwise indicated, the enumerators are instructed to count pedestrians passing the count point in both directions, with the exception of children under the age of eight, vagrants, post-persons, traffic wardens, police, and delivery men. In the case of vehicular streets, the full pavement width outside the unit indicated is enumerated, and in the case of pedestrianised streets and shopping malls, half pavement width is enumerated.

5 The indices given in the table for Friday, Saturday, and the whole week are percentages based upon the average recorded flow of all 30 count points, which is benchmarked at 100 percent. The chart shows the indexed count points relative to the average pedestrian flow, and indicates the locational hierarchy throughout the centre.

Appendix 3

Household Telephone Interview Survey Results (April 2002)

Q1. Where do you do most of your household's main food shopping?

Excludes those who use the Internet	Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Weighted Base	996	100.0%	82	100.0%	90	100.0%	117	100.0%	117	100.0%	124	100.0%	121	100.0%	141	100.0%
Tesco Extra, Pitsea, Basildon	103	10.4%	48	58.2%	14	15.4%	21	18.3%	3	2.6%	11	8.9%	4	3.4%	2	1.5%
Sainsbury's, London Road, Southend-on-sea	96	9.6%					5	4.3%			1	.8%	11	9.3%	52	37.2%
Asda, North Shoebury Road, Shoeburyness	94	9.4%							1	.9%	2	1.6%	2	1.7%	5	3.6%
Tesco, Southend, Prince Avenue	75	7.5%			1	1.1%	1	.9%			13	10.6%	21	16.9%	20	13.9%
Sainsbury's, Stadium Way, Rayleigh/Benfleet/Thundersley	62	6.3%			2	2.2%	30	25.2%	2	1.7%	23	18.7%	3	2.5%	1	.7%
Safeway, Northwick Road, Canvey Island	49	4.9%	1	1.3%	34	37.4%	10	8.7%					1	.8%	2	1.5%
Waitrose, Fossetts Way, Eastern Avenue, Southend-on-sea	42	4.2%					1	.9%	1	.9%	1	.8%	4	3.4%	7	5.1%
Safeway, London Road, Leigh-on-sea	36	3.6%			3	3.3%	1	.9%					26	21.2%	6	4.4%
Asda, South Woodham Ferrers	36	3.6%			1	1.1%	1	.9%	27	23.5%	5	4.1%				
Safeway, London Road, Hadleigh	30	3.0%					25	21.7%					4	3.4%		
Somerfield, Wickford	30	3.0%	1	1.3%			1	.9%	27	23.5%						
Sainsbury's, Cricketer's Way, Nevendon, Basildon	27	2.8%	7	8.9%			3	2.6%	9	7.8%	1	.8%	2	1.7%	1	.7%
Somerfield, Canvey Island Town Centre	26	2.6%			26	28.6%										
Somerfield, Rayleigh Town Centre	25	2.5%									23	18.7%	2	1.7%		

(cont.)

Q1. Where do you do most of your household's main food shopping?

Excludes those who use the Internet	Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Safeway, Western Approach, Eastwood, Southend-on-sea	24	2.4%			1	1.1%					2	1.6%	12	10.2%	6	4.4%
Local stores, Southend-on-sea	21	2.1%									1	.8%	3	2.5%	8	5.8%
Local stores, Leigh-on-sea	18	1.8%									4	3.3%	11	9.3%	2	1.5%
Tesco, Mayflower Retail Park, Basildon	17	1.7%	1	1.3%			1	.9%	8	7.0%	6	4.9%				
SavaCentre, Eastgate, Basildon Town Centre	12	1.2%	5	6.3%	1	1.1%	1	.9%	4	3.5%	1	.8%				
Asda (Dales), Pipps Hill, Basildon	10	1.0%	3	3.8%	1	1.1%			5	4.3%						
Somerfield, London Road, Westcliffe	9	.9%													8	5.8%
Somerfield, Rochford Road, Prittlewell, Southend-on-sea	6	.6%													3	2.2%
Local stores, Westcliffe	5	.5%	1	1.3%			1	.9%	1	.9%					2	1.5%
Waitrose, Southend-on-Sea, Eastern Avenue	5	.5%													2	1.5%
Local stores, Canvey Island Town Centre	5	.5%			4	4.4%	1	.9%								
Aldi, Eastern Avenue, Southend-on-sea	4	.4%	1	1.3%									1	.8%	2	1.5%
Local stores, Basildon Town Centre	4	.4%	2	2.5%					2	1.7%						
Tesco, Laindon / Dunton, Basildon	4	.4%					2	1.7%	2	1.7%						
Local stores, Wickford Town Centre	3	.3%							3	2.6%						
Lidl, Woodgrange Drive, Southend-on-sea	3	.3%													1	.7%
Local stores, Pitsea	2	.2%					2	1.7%								

(cont.)

Q1. Where do you do most of your household's main food shopping?

Excludes those who use the Internet	Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Lidl, Pitsea	2	.2%	1	1.3%	1	1.1%										
Sainbury, Southend-on-Sea, London Road	1	.1%							1	.9%						
Safeway, Eastwood, Riverford Road	1	.1%									1	.8%				

(cont.)

Q1. Where do you do most of your household's main food shopping?

Excludes those who use the Internet		Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7	
		#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Other	Tesco Express, Southend-On-Sea, South Church Road	50	5.0%					1	.9%	1	.9%	15	12.2%	11	9.3%	8	5.8%
	Asda, Heron Park, Basildon	6	.6%	5	6.3%	1	1.1%										
	Sainsbury, Basildon, Pitsea	5	.5%	3	3.8%			1	.9%	1	.9%						
	Asda, Village Square, Chelmsford	4	.4%							4	3.5%						
	Local Stores, Wickford	3	.3%							2	1.7%	1	.8%				
	Somerfield, Hockley	3	.3%									3	2.4%				
	Somerfield, Southend-On-Sea, Rochford Road	3	.3%					1	.9%							1	.7%
	Somerfield, Hockley, Spa Road	3	.3%									2	1.6%				
	Asda, Leigh-on-sea	2	.2%											2	1.7%		
	Local stores, Benfleet	2	.2%					2	1.7%								
	Sainsburys, Chelmsford, White Hart Lane	2	.2%							2	1.7%						
	Sommerfield, Benfleet, High Road	2	.2%					2	1.7%								
	Local Stores, Chelmsford	2	.2%							1	.9%	1	.8%				
	Somerfield, Rayleigh, Websters Way	2	.2%									2	1.6%				
	Market, Basildon, Pitsea	1	.1%	1	1.3%												
	Shops Around	1	.1%	1	1.3%												
	Sanders, Southend-on-Sea	1	.1%														
	Sainsburys, Chelmsford, White Heart Lane	1	.1%							1	.9%						
	Co-op, Broadway, Wickford	1	.1%							1	.9%						
	Co-op, Gloucester Avenue, Chelmsford	1	.1%							1	.9%						

(cont.)

Q1. Where do you do most of your household's main food shopping?

Excludes those who use the Internet		Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7	
		#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Other	Co-op, London Road, Benfleet	1	.1%					1	.9%								
	Local Stores, South Woodham Ferrers	1	.1%							1	.9%						
	M&S, Chelmsford, High Street	1	.1%							1	.9%						
	Sainsburys, The Brewery, Waterloo Road, Romford	1	.1%							1	.9%						
	Tesco Whiteheart Lane Chemsford	1	.1%							1	.9%						
	Budgens,Hulbridge	1	.1%									1	.8%				
	Co-op, Main Road, Hockley	1	.1%									1	.8%				
	Local Stores, Hockley	1	.1%									1	.8%				
	Sainsburys, Rayleigh, Stadium Way	1	.1%									1	.8%				
	Asda, Merrielands Crescent, Dagenham	1	.1%			1	1.1%										
	Local Stores, Shoeburyness	1	.1%														
	Local Stores, Rochford, Canewdon	1	.1%														
	Tesco, High Street, Rayleigh	1	.1%														

(cont.)

Q1. Where do you do most of your household's main food shopping?

Excludes those who use the Internet	Area 8		Area 9		Area 10	
	#	%	#	%	#	%
Weighted Base	101	100.0%	58	100.0%	45	100.0%
Tesco Extra, Pitsea, Basildon						
Sainsbury's, London Road, Southend-on-sea	22	21.4%	2	3.3%	2	5.1%
Asda, North Shoebury Road, Shoeburyness	33	32.7%	47	81.7%	3	6.8%
Tesco, Southend, Prince Avenue	4	4.1%	1	1.7%	14	32.2%
Sainsbury's, Stadium Way, Rayleigh/Benfleet/Thundersley					2	3.4%
Safeway, Northwick Road, Canvey Island					1	1.7%
Waitrose, Fossetts Way, Eastern Avenue, Southend-on-sea	23	22.4%	3	5.0%	2	5.1%
Safeway, London Road, Leigh-on-sea						
Asda, South Woodham Ferrers	1	1.0%				
Safeway, London Road, Hadleigh						
Somerfield, Wickford						
Sainsbury's, Cricketer's Way, Nevendon, Basildon	3	3.1%			1	1.7%
Somerfield, Canvey Island Town Centre						
Somerfield, Rayleigh Town Centre						

(cont.)

Q1. Where do you do most of your household's main food shopping?

Excludes those who use the Internet	Area 8		Area 9		Area 10	
	#	%	#	%	#	%
Safeway, Western Approach, Eastwood, Southend-on-sea					2	5.1%
Local stores, Southend-on-sea	8	8.2%				
Local stores, Leigh-on-sea					1	1.7%
Tesco, Mayflower Retail Park, Basildon			1	1.7%		
SavaCentre, Eastgate, Basildon Town Centre						
Asda (Dales), Pipps Hill, Basildon			1	1.7%		
Somerfield, London Road, Westcliffe	1	1.0%				
Somerfield, Rochford Road, Prittlewell, Southend-on-sea					3	6.8%
Local stores, Westcliffe						
Waitrose, Southend-on-Sea, Eastern Avenue	1	1.0%	2	3.3%		
Local stores, Canvey Island Town Centre						
Aldi, Eastern Avenue, Southend-on-sea						
Local stores, Basildon Town Centre						
Tesco, Laindon / Dunton, Basildon						
Local stores, Wickford Town Centre						
Lidl, Woodgrange Drive, Southend-on-sea	1	1.0%			1	1.7%
Local stores, Pitsea						

(cont.)

Q1. Where do you do most of your household's main food shopping?

Excludes those who use the Internet	Area 8		Area 9		Area 10	
	#	%	#	%	#	%
Lidl, Pitsea						
Sainbury, Southend-on-Sea, London Road						
Safeway, Eastwood, Riverford Road						

(cont.)

Q1. Where do you do most of your household's main food shopping?

Excludes those who use the Internet		Area 8 #	Area 8 %	Area 9 #	Area 9 %	Area 10 #	Area 10 %
Other	Tesco Express, Southend-On-Sea, South Church Road	3	3.1%			10	22.0%
	Asda, Heron Park, Basildon						
	Sainsbury, Basildon, Pitsea						
	Asda, Village Square, Chelmsford						
	Local Stores, Wickford						
	Somerfield, Hockley						
	Somerfield, Southend-On-Sea, Rochford Road					1	1.7%
	Somerfield, Hockley, Spa Road					1	1.7%
	Asda, Leigh-on-sea						
	Local stores, Benfleet						
	Sainsburys, Chelmsford, White Hart Lane						
	Sommerfield, Benfleet, High Road						
	Local Stores, Chelmsford						
	Somerfield, Rayleigh, Websters Way						
	Market, Basildon, Pitsea						
	Shops Around						
	Sanders, Southend-on-Sea	1	1.0%				
	Sainsburys, Chelmsford, White Heart Lane						
	Co-op, Broadway, Wickford						
	Co-op, Gloucester Avenue, Chelmsford						

(cont.)

Q1. Where do you do most of your household's main food shopping?

Excludes those who use the Internet		Area 8		Area 9		Area 10	
		#	%	#	%	#	%
Other	Co-op, London Road, Benfleet						
	Local Stores, South Woodham Ferrers						
	M&S, Chelmsford, High Street						
	Sainsburys, The Brewery, Waterloo Road, Romford						
	Tesco Whiteheart Lane Chemsford						
	Budgens,Hulbridge						
	Co-op, Main Road, Hockley						
	Local Stores, Hockley						
	Sainsburys, Rayleigh, Stadium Way						
	Asda, Merrielands Crescent, Dagenham						
	Local Stores, Shoeburyness			1	1.7%		
	Local Stores, Rochford, Canewdon					1	1.7%
	Tesco, High Street, Rayleigh					1	1.7%

Q2. How do you usually travel to do your household's main food shopping?

	Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7		Area 8		Area 9		Area 10	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Weighted Base	1003	100.0%	83	100.0%	91	100.0%	118	100.0%	118	100.0%	124	100.0%	121	100.0%	143	100.0%	102	100.0%	58	100.0%	45	100.0%
Car / Van (as driver)	666	66.4%	49	58.8%	57	63.0%	84	71.6%	80	68.1%	87	69.9%	84	69.5%	86	60.4%	61	59.6%	41	70.0%	37	81.4%
Car/Van (as passenger)	148	14.8%	16	18.8%	18	19.6%	19	16.4%	12	10.3%	20	16.3%	15	12.7%	15	10.8%	18	17.2%	9	15.0%	6	13.6%
Walk	122	12.2%	8	10.0%	9	9.8%	10	8.6%	17	14.7%	12	9.8%	18	15.3%	29	20.1%	14	14.1%	4	6.7%		
Bus	37	3.7%	5	6.3%	4	4.3%	2	1.7%	3	2.6%	5	4.1%	1	.8%	6	4.3%	4	4.0%	5	8.3%	2	3.4%
Taxi	11	1.1%	3	3.8%	2	2.2%			1	.9%			2	1.7%	1	.7%	2	2.0%				
Good delivered	9	.9%	1	1.3%			1	.9%	2	1.7%					3	2.2%	1	1.0%			1	1.7%
Bicycle	5	.5%	1	1.3%	1	1.1%									2	1.4%	1	1.0%				
Motability scooter	2	.2%							1	.9%							1	1.0%				
Train	2	.2%					1	.9%	1	.9%												

Q3a. Do you usually combine doing your household's main food shopping with any non-food shopping on the same journey?

	Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7		Area 8		Area 9		Area 10	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Weighted Base	1003	100.0%	83	100.0%	91	100.0%	118	100.0%	118	100.0%	124	100.0%	121	100.0%	143	100.0%	102	100.0%	58	100.0%	45	100.0%
Yes	310	30.9%	22	26.3%	33	35.9%	36	30.2%	40	33.6%	43	35.0%	33	27.1%	41	28.8%	34	33.3%	16	28.3%	13	28.8%
No	693	69.1%	61	73.8%	58	64.1%	82	69.8%	78	66.4%	81	65.0%	88	72.9%	102	71.2%	68	66.7%	42	71.7%	32	71.2%

Q3b. Where do you usually do this non-food shopping?

	Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Weighted Base	310	100.0%	22	100.0%	33	100.0%	36	100.0%	40	100.0%	43	100.0%	33	100.0%	41	100.0%
Basildon	54	17.3%	17	76.2%	11	33.3%	8	22.9%	12	30.8%	5	11.6%				
Canvey Island	20	6.4%			15	45.5%	4	11.4%							1	2.5%
Chelmsford	5	1.6%							5	12.8%						
Cricketers Retail Park, Basildon	1	.3%	1	4.8%												
Hadleigh	5	1.6%					4	11.4%					1	3.1%		
Lakeside Shopping Centre	9	2.8%	1	4.8%	1	3.0%	2	5.7%	1	2.6%			1	3.1%	1	2.5%
Leigh-on-sea (Broadway)	9	3.0%											7	21.9%	2	5.0%
Pipps Hill (Heron) Retail Park, Basildon	1	.3%									1	2.3%				
Rayleigh	23	7.5%			1	3.0%	2	5.7%			17	39.5%	3	9.4%		
Rayleigh Trading Estate, Stadium Way, Thundersley	8	2.6%					4	11.4%	1	2.6%	3	7.0%				
Retail Warehouses, Stadium Way, Thundersley	2	.7%					1	2.9%	1	2.6%						
Rochford	3	.8%									1	2.3%				
Southend-on-sea	110	35.3%			4	12.1%	6	17.1%			10	23.3%	17	53.1%	31	75.0%
Waitrose (Food & Home), Eastern Avenue, Southend-on-sea	2	.6%														
Westcliff-on-sea (Hamlet Court Road)	8	2.6%											1	3.1%	6	15.0%
Wickford	14	4.6%							14	35.9%						

(cont.)

Q3b. Where do you usually do this non-food shopping?

		Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7	
		#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Other	Benfleet	3	1.0%					3	8.6%								
	Crayford	1	.3%	1	4.8%												
	Hawkwell	1	.3%									1	2.3%				
	Hockley	3	.9%									2	4.7%				
	Holbridge	1	.3%									1	2.3%				
	Internet	1	.3%					1	2.9%								
	North Shoebury	1	.3%														
	Pitsea	3	1.0%	2	9.5%	1	3.0%										
	Romford	2	.7%							2	5.1%						
	Shoeburyness	17	5.4%									2	4.7%	1	3.1%		
	South Woodham Ferrers	3	1.0%							3	7.7%						
	Western Approch,Eastwood	1	.3%											1	3.1%		

(cont.)

Q3b. Where do you usually do this non-food shopping?

	Area 8		Area 9		Area 10	
	#	%	#	%	#	%
Weighted Base	34	100.0%	16	100.0%	13	100.0%
Basildon			1	5.9%		
Canvey Island						
Chelmsford						
Cricketers Retail Park, Basildon						
Hadleigh						
Lakeside Shopping Centre					2	11.8%
Leigh-on-sea (Broadway)						
Pipps Hill (Heron) Retail Park, Basildon						
Rayleigh						
Rayleigh Trading Estate, Stadium Way, Thundersley						
Retail Warehouses, Stadium Way, Thundersley						
Rochford					2	11.8%
Southend-on-sea	28	81.8%	6	35.3%	8	58.8%
Waitrose (Food & Home), Eastern Avenue, Southend-on-sea	1	3.0%			1	5.9%
Westcliff-on-sea (Hamlet Court Road)					1	5.9%
Wickford						

(cont.)

Q3b. Where do you usually do this non-food shopping?

		Area 8		Area 9		Area 10	
		#	%	#	%	#	%
Other	Benfleet						
	Crayford						
	Hawkwell						
	Hockley					1	5.9%
	Holbridge						
	Internet						
	North Shoebury			1	5.9%		
	Pitsea						
	Romford						
	Shoeburyness	5	15.2%	9	52.9%		
	South Woodham Ferrers						
	Western Approch,Eastwood						

Q4. Where do you do most of your household's shopping for small scale top-up food and convenience items?

Excludes those who do not do top up shopping	Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Weighted Base	878	100.0%	70	100.0%	77	100.0%	106	100.0%	105	100.0%	109	100.0%	100	100.0%	130	100.0%
Local stores, Southend-on-sea	97	11.1%			2	2.6%	5	4.8%	1	1.0%	7	6.5%	8	8.2%	31	23.8%
Local stores, Leigh-on-sea	56	6.4%					4	3.8%					42	41.8%	9	7.1%
Local stores, Canvey Island Town Centre	42	4.7%	1	1.5%	38	48.7%	2	1.9%					1	1.0%		
Asda, North Shoebury Road, Shoeburyness	35	4.0%							1	1.0%	1	.9%				
Sainsbury's, London Road, Southend-on-sea	29	3.3%			1	1.3%	1	1.0%					2	2.0%	17	13.5%
Local stores, Rayleigh Town Centre	27	3.1%					4	3.8%			21	19.4%	1	1.0%		
Local stores, Pitsea	27	3.1%	20	28.4%	1	1.3%	5	4.8%			1	.9%				
Tesco Extra, Pitsea, Basildon	27	3.0%	15	20.9%	1	1.3%	4	3.8%			2	1.9%	2	2.0%	1	.8%
Local stores, Westcliffe	26	2.9%	1	1.5%									1	1.0%	24	18.3%
Local stores, Wickford Town Centre	25	2.9%							25	24.3%						
Tesco, Southend, Prince Avenue	25	2.8%									3	2.8%	5	5.1%	12	9.5%
Asda, South Woodham Ferrers	22	2.5%							19	18.4%	3	2.8%				
Sainsbury's, Stadium Way, Rayleigh/Benfleet/Thundersley	22	2.5%			2	2.6%	9	8.7%			9	8.3%	1	1.0%	1	.8%
Somerfield, Rayleigh Town Centre	22	2.5%									22	20.4%				
Safeway, Western Approach, Eastwood, Southend-on-sea	21	2.3%					1	1.0%			1	.9%	12	12.2%	5	4.0%
Safeway, Northwick Road, Canvey Island	20	2.3%			16	20.5%	4	3.8%								

(cont.)

Q4. Where do you do most of your household's shopping for small scale top-up food and convenience items?

Excludes those who do not do top up shopping	Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Safeway, London Road, Hadleigh	19	2.2%					18	17.3%					1	1.0%		
Safeway, London Road, Leigh-on-sea	19	2.2%							1	1.0%			15	15.3%	2	1.6%
Somerfield, Wickford	18	2.1%							18	17.5%						
Waitrose, Fossetts Way, Eastern Avenue, Southend-on-sea	18	2.0%											1	1.0%	4	3.2%
Somerfield, Rochford Road, Prittlewell, Southend-on-sea	16	1.8%									2	1.9%			5	4.0%
Local stores, Basildon Town Centre	14	1.6%	9	13.4%	1	1.3%	2	1.9%	2	1.9%						
Local stores, West Road, Shoeburyness	14	1.5%														
Somerfield, London Road, Westcliffe	13	1.5%													13	10.3%
Somerfield, Canvey Island Town Centre	13	1.5%			12	15.4%			1	1.0%						
Lidl, Pitsea	6	.7%	4	6.0%			2	1.9%								
Local Stores, Thorpe Bay Broadway, Southend-on-sea	6	.7%														
Sainsbury's, Cricketer's Way, Nevendon, Basildon	6	.7%	3	4.5%					3	2.9%						
Asda (Dales), Pipps Hill, Basildon	6	.7%	2	3.0%					3	2.9%						
Lidl, Woodgrange Drive, Southend-on-sea	5	.6%													2	1.6%
Aldi, Eastern Avenue, Southend-on-sea	5	.6%	1	1.5%					3	2.9%					1	.8%
SavaCentre, Eastgate, Basildon Town Centre	4	.5%	2	3.0%	1	1.3%					1	.9%				

(cont.)

Q4. Where do you do most of your household's shopping for small scale top-up food and convenience items?

Excludes those who do not do top up shopping	Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Tesco, Mayflower Retail Park, Basildon	3	.3%									1	.9%	1	1.0%		
Farmfoods, Pitsea	2	.2%	2	3.0%												

(cont.)

Q4. Where do you do most of your household's shopping for small scale top-up food and convenience items?

Excludes those who do not do top up shopping		Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7	
		#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Other	Local Stores, Benfleet	32	3.6%					32	29.8%								
	Local Stores, Hockley, Hullbridge	17	2.0%									17	15.7%				
	Local Stores, Rochford	15	1.8%									1	.9%				
	Tesco, Southend-On-Sea, Southchurch Road	10	1.1%									1	.9%	2	2.0%	1	.8%
	Local Stores, Hockley	6	.7%									6	5.6%				
	Local Stores, Eastwood	5	.6%					1	1.0%					4	4.1%		
	Co-op, Wickford, The Broadway	5	.6%							5	4.9%						
	Local Stores, South Woodham Ferrers	5	.6%							5	4.9%						
	Somerfield, Hockley, Spa Road	5	.6%									5	4.6%				
	Somerfield, Rochford, Golden Parade	5	.5%														
	Aldi, Wickford, The Arcade	4	.5%	2	3.0%					2	1.9%						
	Local Stores, Hadleigh	4	.5%					4	3.8%								
	local Stores, South Church	3	.4%														
	Local Stores, Thundersley	3	.3%					3	2.9%								
	Local Stores, Chelmsford	3	.3%							2	1.9%	1	.9%				
	Local Stores, Great Wakering	3	.3%														
	Local Stores, Vange	2	.2%	2	3.0%												
	Sainsbury, Basildon, Pitsea	2	.2%	2	3.0%												
	Local stores, Thorpe Park	2	.2%														
	Local Stores-South Woodham	2	.2%							2	1.9%						
	Asda, Chelmsford, Queen Elizabeth II Square	2	.2%							2	1.9%						

(cont.)

Q4. Where do you do most of your household's shopping for small scale top-up food and convenience items?

Excludes those who do not do top up shopping		Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7	
		#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Other	Asda, Chelmsford, Village Square	2	.2%							2	1.9%						
	Iceland, Benfleet, Hadleigh, Rectory Road	2	.2%					2	1.9%								
	Spar, South Woodham Ferrers, Clemets Green Lane	2	.2%							2	1.9%						
	Somerfield, Rayleigh, Websters Way	2	.2%					1	1.0%			1	.9%				
	milkman	2	.2%					1	1.0%								
	Market, Rochford	2	.2%														
	Londis, Basildon, Chalvedon Square	1	.1%	1	1.5%												
	Market, Basildon, Pitsea	1	.1%	1	1.5%												
	Tesco, Basildon, Mandeville Way	1	.1%	1	1.5%												
	Local Stores, Thorpe Bay, Liftons Way	1	.1%														
	Local stores, Woodgrange	1	.1%														
	Sanders, Southend-On-Sea, Southchurch Road	1	.1%														
	Co-op, Chelmsford, Gloucester Avenue	1	.1%							1	1.0%						
	Iceland, Wickford, High Street	1	.1%							1	1.0%						
	Marks & Spencer, Basildon, Town Square	1	.1%							1	1.0%						
	Chelmsford Star, Hockley, Hawkswell	1	.1%									1	.9%				
	Marks & Spencer, Chelmsford, High street	1	.1%									1	.9%				

(cont.)

Q4. Where do you do most of your household's shopping for small scale top-up food and convenience items?

Excludes those who do not do top up shopping		Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7	
		#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Other	Alldays, Canvey Island, Linden Way	1	.1%			1	1.3%										
	Iceland, Canvey Island	1	.1%			1	1.3%										
	Local Stores, West Thurrock, Lakeside Shopping Centre	1	.1%			1	1.3%										
	Coop, Great Wakering, High Street	1	.1%														
	Honeycombe (NISA), Southend-On-Sea, The Broadway, Thorpbay	1	.1%														
	Happy Shopper, Briar Road, Rochford	1	.1%														
	Somerfield, Basildon, Laindon Centre	1	.1%														

(cont.)

Q4. Where do you do most of your household's shopping for small scale top-up food and convenience items?

Excludes those who do not do top up shopping	Area 8		Area 9		Area 10	
	#	%	#	%	#	%
Weighted Base	84	100.0%	56	100.0%	41	100.0%
Local stores, Southend-on-sea	34	40.2%	7	12.1%	2	5.6%
Local stores, Leigh-on-sea					1	1.9%
Local stores, Canvey Island Town Centre						
Asda, North Shoebury Road, Shoeburyness	9	11.0%	24	43.1%		
Sainsbury's, London Road, Southend-on-sea	5	6.1%	2	3.4%		
Local stores, Rayleigh Town Centre					1	1.9%
Local stores, Pitsea						
Tesco Extra, Pitsea, Basildon	2	2.4%				
Local stores, Westcliffe						
Local stores, Wickford Town Centre						
Tesco, Southend, Prince Avenue	1	1.2%			3	7.4%
Asda, South Woodham Ferrers						
Sainsbury's, Stadium Way, Rayleigh/Benfleet/Thundersley						
Somerfield, Rayleigh Town Centre						
Safeway, Western Approach, Eastwood, Southend-on-sea	1	1.2%				
Safeway, Northwick Road, Canvey Island						

(cont.)

Q4. Where do you do most of your household's shopping for small scale top-up food and convenience items?

Excludes those who do not do top up shopping	Area 8		Area 9		Area 10	
	#	%	#	%	#	%
Safeway, London Road, Hadleigh						
Safeway, London Road, Leigh-on-sea					1	1.9%
Somerfield, Wickford						
Waitrose, Fossetts Way, Eastern Avenue, Southend-on-sea	9	11.0%	1	1.7%	2	5.6%
Somerfield, Rochford Road, Prittlewell, Southend-on-sea					8	20.4%
Local stores, Basildon Town Centre						
Local stores, West Road, Shoeburyness	1	1.2%	13	22.4%		
Somerfield, London Road, Westcliffe						
Somerfield, Canvey Island Town Centre						
Lidl, Pitsea						
Local Stores, Thorpe Bay Broadway, Southend-on-sea	6	7.3%				
Sainsbury's, Cricketer's Way, Nevendon, Basildon						
Asda (Dales), Pipps Hill, Basildon			1	1.7%		
Lidl, Woodgrange Drive, Southend-on-sea	3	3.7%				
Aldi, Eastern Avenue, Southend-on-sea						
SavaCentre, Eastgate, Basildon Town Centre						

(cont.)

Q4. Where do you do most of your household's shopping for small scale top-up food and convenience items?

Excludes those who do not do top up shopping	Area 8		Area 9		Area 10	
	#	%	#	%	#	%
Tesco, Mayflower Retail Park, Basildon			1	1.7%		
Farmfoods, Pitsea						

(cont.)

Q4. Where do you do most of your household's shopping for small scale top-up food and convenience items?

Excludes those who do not do top up shopping		Area 8		Area 9		Area 10	
		#	%	#	%	#	%
Other	Local Stores, Benfleet						
	Local Stores, Hockley, Hullbridge						
	Local Stores, Rochford					14	35.2%
	Tesco, Southend-On-Sea, Southchurch Road	3	3.7%	2	3.4%	1	1.9%
	Local Stores, Hockley						
	Local Stores, Eastwood						
	Co-op, Wickford, The Broadway						
	Local Stores, South Woodham Ferrers						
	Somerfield, Hockley, Spa Road						
	Somerfield, Rochford, Golden Parade					5	11.1%
	Aldi, Wickford, The Arcade						
	Local Stores, Hadleigh						
	local Stores, South Church	3	3.7%				
	Local Stores, Thundersley						
	Local Stores, Chelmsford						
	Local Stores, Great Wakering			3	5.2%		
	Local Stores, Vange						
	Sainsbury, Basildon, Pitsea						
	Local stores, Thorpe Park	2	2.4%				
	Local Stores-South Woodham						
	Asda, Chelmsford, Queen Elizabeth II Square						

(cont.)

Q4. Where do you do most of your household's shopping for small scale top-up food and convenience items?

Excludes those who do not do top up shopping		Area 8		Area 9		Area 10	
		#	%	#	%	#	%
Other	Asda, Chelmsford, Village Square						
	Iceland, Benfleet, Hadleigh, Rectory Road						
	Spar, South Woodham Ferrers, Clemets Green Lane						
	Somerfield, Rayleigh, Websters Way						
	milkman					1	1.9%
	Market, Rochford			1	1.7%	1	1.9%
	Londis, Basildon, Chalvedon Square						
	Market, Basildon, Pitsea						
	Tesco, Basildon, Mandeville Way						
	Local Stores, Thorpe Bay, Liftons Way	1	1.2%				
	Local stores, Woodgrange	1	1.2%				
	Sanders, Southend-On-Sea, Southchurch Road	1	1.2%				
	Co-op, Chelmsford, Gloucester Avenue						
	Iceland, Wickford, High Street						
	Marks & Spencer, Basildon, Town Square						
	Chelmsford Star, Hockley, Hawkswell						
	Marks & Spencer, Chelmsford, High street						

(cont.)

Q4. Where do you do most of your household's shopping for small scale top-up food and convenience items?

Excludes those who do not do top up shopping		Area 8		Area 9		Area 10	
		#	%	#	%	#	%
Other	Alldays, Canvey Island, Linden Way						
	Iceland, Canvey Island						
	Local Stores, West Thurrock, Lakeside Shopping Centre						
	Coop, Great Wakering, High Street			1	1.7%		
	Honeycombe (NISA), Southend-On-Sea, The Broadway, Thorpbay			1	1.7%		
	Happy Shopper, Briar Road, Rochford					1	1.9%
	Somerfield, Basildon, Laindon Centre					1	1.9%

Q5. Where do you do most of your household's shopping for clothes, footwear and other fashion goods?

Excludes catalogue/mail order and do not do responses	Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Weighted Base	955	100.0%	79	100.0%	87	100.0%	111	100.0%	114	100.0%	119	100.0%	114	100.0%	137	100.0%
Southend-on-sea	467	48.9%	1	1.3%	20	22.7%	43	38.5%	3	2.7%	60	50.8%	70	61.3%	110	80.5%
Basildon	206	21.6%	68	86.8%	45	51.1%	32	28.4%	41	35.7%	12	10.2%	5	4.5%	1	.8%
Lakeside Shopping Centre	125	13.1%	4	5.3%	16	18.2%	23	21.1%	22	19.6%	23	19.5%	16	14.4%	7	5.3%
Chelmsford	34	3.6%					3	2.8%	26	23.2%	3	2.5%				
Rayleigh	18	1.9%					2	1.8%	1	.9%	12	10.2%	3	2.7%		
Bluewater Shopping Centre	17	1.8%			1	1.1%	1	.9%	2	1.8%	5	4.2%	3	2.7%	2	1.5%
Central London	13	1.4%	1	1.3%					2	1.8%	1	.8%	1	.9%	2	1.5%
Wickford	11	1.2%							11	9.8%						
Cricketers Retail Park, Basildon	9	.9%											5	4.5%	2	1.5%
Leigh-on-sea (Broadway)	7	.7%			1	1.1%							6	5.4%		
Hadleigh	6	.6%					4	3.7%			1	.8%			1	.8%
Canvey Island	5	.5%			4	4.5%			1	.9%						
Westcliff-on-sea (Hamlet Court Road)	4	.4%	1	1.3%											3	2.3%
Southend Airport Retail Park, Southend-on-sea	3	.3%					1	.9%					1	.9%	1	.8%
Greyhound Retail Park, Greyhound Way, Southend on sea	2	.2%											1	.9%	1	.8%
Brentwood	1	.1%													1	.8%
Rayleigh Trading Estate, Stadium Way, Thundersley	1	.1%											1	.9%		
Pipps Hill (Heron) Retail Park, Basildon	1	.1%														

(cont.)

Q5. Where do you do most of your household's shopping for clothes, footwear and other fashion goods?

Excludes catalogue/mail order and do not do responses		Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7	
		#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Other	London, West End	3	.3%													1	.8%
	Shop Around	3	.3%					1	.9%			1	.8%				
	Basildon, Pitsea	2	.2%	1	1.3%											1	.8%
	Romford Town Centre	2	.2%			1	1.1%			1	.9%						
	Asda, Shoebury	2	.2%														
	Local Stores, Eastgate.	1	.1%	1	1.3%												
	London, Camden Town	1	.1%	1	1.3%												
	Glasgow City Centre	1	.1%														
	London, Wood Green	1	.1%													1	.8%
	Boreham Wood	1	.1%													1	.8%
	Oxford	1	.1%													1	.8%
	Swansea	1	.1%											1	.9%		
	Chelmsford	1	.1%							1	.9%						
	Glouchester, Matson	1	.1%							1	.9%						
	Grays, West Thurrock	1	.1%					1	.9%								
	Norwich	1	.1%							1	.9%						

(cont.)

Q5. Where do you do most of your household's shopping for clothes, footwear and other fashion goods?

Excludes catalogue/mail order and do not do responses	Area 8		Area 9		Area 10	
	#	%	#	%	#	%
Weighted Base	97	100.0%	57	100.0%	41	100.0%
Southend-on-sea	79	81.9%	45	79.7%	35	85.2%
Basildon	2	2.1%			1	1.9%
Lakeside Shopping Centre	6	6.4%	3	5.1%	4	9.3%
Chelmsford			1	1.7%	1	1.9%
Rayleigh						
Bluewater Shopping Centre	3	3.2%				
Central London	3	3.2%	3	5.1%		
Wickford						
Cricketers Retail Park, Basildon			1	1.7%	1	1.9%
Leigh-on-sea (Broadway)						
Hadleigh						
Canvey Island						
Westcliff-on-sea (Hamlet Court Road)						
Southend Airport Retail Park, Southend-on-sea						
Greyhound Retail Park, Greyhound Way, Southend on sea						
Brentwood						
Rayleigh Trading Estate, Stadium Way, Thundersley						
Pipps Hill (Heron) Retail Park, Basildon			1	1.7%		

(cont.)

Q5. Where do you do most of your household's shopping for clothes, footwear and other fashion goods?

Excludes catalogue/mail order and do not do responses		Area 8		Area 9		Area 10	
		#	%	#	%	#	%
Other	London, West End	2	2.1%				
	Shop Around			1	1.7%		
	Basildon, Pitsea						
	Romford Town Centre						
	Asda, Shoebury			2	3.4%		
	Local Stores, Eastgate.						
	London, Camden Town						
	Glasgow City Centre	1	1.1%				
	London, Wood Green						
	Boreham Wood						
	Oxford						
	Swansea						
	Chelmsford						
	Glouchester, Matson						
	Grays, West Thurrock						
	Norwich						

Q6. Where do you do most of your household's shopping for furniture, carpets and other floor coverings?

Excludes catalogue, manufacturer and do not do responses	Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Weighted Base	860	100.0%	71	100.0%	78	100.0%	104	100.0%	106	100.0%	108	100.0%	97	100.0%	118	100.0%
Southend-on-sea	312	36.2%	2	2.9%	11	13.9%	25	24.5%	3	2.9%	41	38.3%	49	50.5%	67	56.5%
Basildon	189	22.0%	51	72.1%	32	40.5%	28	27.5%	34	31.7%	19	17.8%	6	6.3%	11	9.6%
Lakeside Shopping Centre	115	13.4%	8	11.8%	15	19.0%	22	21.6%	15	14.4%	10	9.3%	15	15.8%	16	13.9%
Southend Airport Retail Park, Southend-on-sea	31	3.6%			2	2.5%	2	2.0%			4	3.7%	2	2.1%	6	5.2%
Rayleigh	27	3.2%					3	2.9%	1	1.0%	17	15.9%	3	3.2%	1	.9%
Chelmsford	27	3.1%					1	1.0%	22	21.2%	1	.9%			1	.9%
Leigh-on-sea (Broadway)	16	1.9%					3	2.9%			1	.9%	9	9.5%	1	.9%
Wickford	13	1.5%							13	12.5%						
Mayflower Retail Park, Basildon	13	1.5%	2	2.9%	1	1.3%	3	2.9%	2	1.9%	2	1.9%	1	1.1%		
Westcliff-on-sea (Hamlet Court Road)	11	1.3%			1	1.3%	1	1.0%			1	.9%			6	5.2%
Pipps Hill (Heron) Retail Park, Basildon	11	1.3%	2	2.9%	3	3.8%			4	3.8%			1	1.1%	1	.9%
Canvey Island	10	1.2%			9	11.4%									1	.9%
Rochford	10	1.2%									3	2.8%	1	1.1%	1	.9%
Bluewater Shopping Centre	8	.9%	1	1.5%			1	1.0%	1	1.0%	2	1.9%	1	1.1%	1	.9%
Central London	7	.8%							2	1.9%			2	2.1%		
Rayleigh Trading Estate, Stadium Way, Thundersley	7	.8%					1	1.0%			2	1.9%			1	.9%
Hadleigh	4	.5%					3	2.9%					1	1.1%		
Cricketers Retail Park, Basildon	4	.4%	1	1.5%					1	1.0%			1	1.1%		
Retail Warehouses, London Road, Southend-on-sea	3	.3%					1	1.0%							1	.9%
Greyhound Retail Park, Greyhound Way, Southend on sea	3	.3%														

(cont.)

Q6. Where do you do most of your household's shopping for furniture, carpets and other floor coverings?

Excludes catalogue, manufacturer and do not do responses		Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7	
		#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Retail Warehouses, Purdeys Way, Rochford		1	.1%											1	1.1%		
Retail Warehouses, Stadium Way, Thundersley		1	.1%					1	1.0%								
Other	Shop around	14	1.6%			4	5.1%	1	1.0%	2	1.9%	2	1.9%	2	2.1%	1	.9%
	Benfleet	7	.8%			1	1.3%	4	3.9%	1	1.0%						
	Romford	2	.2%	1	1.5%					1	1.0%						
	Local Stores, Eastgate	1	.1%	1	1.5%												
	Pitsea	1	.1%	1	1.5%												
	Colchester	1	.1%														
	Local Store, Thorpe Bay	1	.1%														
	Chelmsford, Purleigh	1	.1%													1	.9%
	Eastwood	1	.1%											1	1.1%		
	Maldon	1	.1%							1	1.0%						
	South Woodham Ferrers	1	.1%							1	1.0%						
	Through Trade Contacts	1	.1%							1	1.0%						
	Trade Pine, Southend Road, Grays	1	.1%					1	1.0%								
	Local Stores,Upminster	1	.1%									1	.9%				
	Battlesbridge Town Centre, Essex	1	.1%														

(cont.)

Q6. Where do you do most of your household's shopping for furniture, carpets and other floor coverings?

Excludes catalogue, manufacturer and do not do responses	Area 8		Area 9		Area 10	
	#	%	#	%	#	%
Weighted Base	88	100.0%	50	100.0%	40	100.0%
Southend-on-sea	61	69.4%	33	65.4%	19	47.2%
Basildon	3	3.5%	2	3.8%	3	7.5%
Lakeside Shopping Centre	6	7.1%	4	7.7%	2	5.7%
Southend Airport Retail Park, Southend-on-sea	6	7.1%	5	9.6%	4	9.4%
Rayleigh	1	1.2%			1	1.9%
Chelmsford					2	3.8%
Leigh-on-sea (Broadway)	2	2.4%				
Wickford						
Mayflower Retail Park, Basildon			1	1.9%	1	1.9%
Westcliff-on-sea (Hamlet Court Road)	1	1.2%	1	1.9%		
Pipps Hill (Heron) Retail Park, Basildon						
Canvey Island						
Rochford	1	1.2%			4	9.4%
Bluewater Shopping Centre					1	1.9%
Central London	1	1.2%	2	3.8%		
Rayleigh Trading Estate, Stadium Way, Thundersley	1	1.2%	1	1.9%	1	1.9%
Hadleigh						
Cricketers Retail Park, Basildon					1	1.9%
Retail Warehouses, London Road, Southend-on-sea					1	1.9%
Greyhound Retail Park, Greyhound Way, Southend on sea	1	1.2%			2	3.8%

(cont.)

Q6. Where do you do most of your household's shopping for furniture, carpets and other floor coverings?

Excludes catalogue, manufacturer and do not do responses		Area 8		Area 9		Area 10	
		#	%	#	%	#	%
Retail Warehouses, Purdeys Way, Rochford							
Retail Warehouses, Stadium Way, Thundersley							
Other	Shop around			1	1.9%	1	1.9%
	Benfleet	1	1.2%				
	Romford						
	Local Stores, Eastgate						
	Pitsea						
	Colchester	1	1.2%				
	Local Store, Thorpe Bay	1	1.2%				
	Chelmsford, Purleigh						
	Eastwood						
	Maldon						
	South Woodham Ferrers						
	Through Trade Contacts						
	Trade Pine, Southend Road, Grays						
	Local Stores,Upminster						
	Battlesbridge Town Centre, Essex			1	1.9%		

Q7. Where do you do most of your household's shopping for household textiles and soft furnishings, including bedding?

Excludes catalogue/mail order, and do not do responses	Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Weighted Base	887	100.0%	70	100.0%	82	100.0%	104	100.0%	108	100.0%	113	100.0%	109	100.0%	117	100.0%
Southend-on-sea	379	42.7%	2	3.0%	15	18.1%	34	32.4%	4	3.8%	49	43.8%	56	51.9%	81	69.3%
Basildon	202	22.7%	57	82.1%	37	44.6%	30	28.4%	38	34.9%	15	13.4%	9	8.5%	3	2.6%
Lakeside Shopping Centre	118	13.3%	5	7.5%	12	14.5%	20	19.6%	18	17.0%	16	14.3%	16	15.1%	17	14.9%
Chelmsford	28	3.2%			1	1.2%	1	1.0%	21	19.8%	3	2.7%			1	.9%
Rayleigh	27	3.1%			2	2.4%	2	2.0%	2	1.9%	14	12.5%	3	2.8%	3	2.6%
Leigh-on-sea (Broadway)	14	1.6%					1	1.0%			1	.9%	10	9.4%	1	.9%
Canvey Island	14	1.6%			13	15.7%			1	.9%						
Wickford	13	1.5%							13	12.3%						
Bluewater Shopping Centre	11	1.2%					1	1.0%	2	1.9%	3	2.7%	2	1.9%	1	.9%
Southend Airport Retail Park, Southend-on-sea	10	1.1%									1	.9%	2	1.9%	3	2.6%
Central London	9	1.0%	1	1.5%			2	2.0%	1	.9%	1	.9%	1	.9%	1	.9%
Mayflower Retail Park, Basildon	9	1.0%	1	1.5%			1	1.0%	2	1.9%	3	2.7%	1	.9%		
Rayleigh Trading Estate, Stadium Way, Thundersley	8	.9%			1	1.2%	2	2.0%	1	.9%	1	.9%	1	.9%		
Westcliff-on-sea (Hamlet Court Road)	7	.8%	1	1.5%			1	1.0%			1	.9%			3	2.6%
Hadleigh	4	.5%					4	3.9%								
Rochford	4	.4%									2	1.8%				
Waitrose (Food & Home), Eastern Avenue, Southend-on-sea	3	.3%													1	.9%
Pipps Hill (Heron) Retail Park, Basildon	2	.2%					1	1.0%					1	.9%		
Cricketers Retail Park, Basildon	2	.2%											1	.9%		
Retail Warehouses, London Road, Southend-on-sea	1	.1%					1	1.0%								

(cont.)

Q7. Where do you do most of your household's shopping for household textiles and soft furnishings, including bedding?

Excludes catalogue/mail order, and do not do responses		Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7	
		#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Other	Shop around	11	1.2%	1	1.5%	1	1.2%	1	1.0%	1	.9%	2	1.8%	2	1.9%	1	.9%
	Romford	2	.2%			1	1.2%										
	Local stores, Eastgate	1	.1%	1	1.5%												
	Abroad	1	.1%														
	Glasgow	1	.1%														
	have them made	1	.1%											1	.9%		
	Swansea	1	.1%											1	.9%		
	Grays, West Thurrock	1	.1%					1	1.0%								
	Ilford	1	.1%							1	.9%						
	Local Stores South Woodham	1	.1%							1	.9%						
	Market, Pitsea	1	.1%					1	1.0%								
	Through Trade Contacts	1	.1%							1	.9%						

(cont.)

Q7. Where do you do most of your household's shopping for household textiles and soft furnishings, including bedding?

Excludes catalogue/mail order, and do not do responses	Area 8		Area 9		Area 10	
	#	%	#	%	#	%
Weighted Base	97	100.0%	50	100.0%	38	100.0%
Southend-on-sea	74	76.6%	41	80.8%	22	58.0%
Basildon	3	3.2%	6	11.5%	5	12.0%
Lakeside Shopping Centre	6	6.4%	3	5.8%	3	8.0%
Chelmsford					1	2.0%
Rayleigh					1	2.0%
Leigh-on-sea (Broadway)	1	1.1%				
Canvey Island						
Wickford						
Bluewater Shopping Centre	1	1.1%			1	2.0%
Southend Airport Retail Park, Southend-on-sea	2	2.1%			2	4.0%
Central London	1	1.1%	1	1.9%		
Mayflower Retail Park, Basildon					1	2.0%
Rayleigh Trading Estate, Stadium Way, Thundersley	2	2.1%				
Westcliff-on-sea (Hamlet Court Road)	1	1.1%				
Hadleigh						
Rochford					2	4.0%
Waitrose (Food & Home), Eastern Avenue, Southend-on-sea	2	2.1%				
Pipps Hill (Heron) Retail Park, Basildon						
Cricketers Retail Park, Basildon					1	2.0%
Retail Warehouses, London Road, Southend-on-sea						

(cont.)

Q7. Where do you do most of your household's shopping for household textiles and soft furnishings, including bedding?

Excludes catalogue/mail order, and do not do responses		Area 8		Area 9		Area 10	
		#	%	#	%	#	%
Other	Shop around					2	4.0%
	Romford	1	1.1%				
	Local stores, Eastgate						
	Abroad	1	1.1%				
	Glasgow	1	1.1%				
	have them made						
	Swansea						
	Grays, West Thurrock						
	Ilford						
	Local Stores South Woodham						
	Market, Pitsea						
	Through Trade Contacts						

Q8. Where do you do most of your household's shopping for domestic electrical appliances, such as fridges, washing machines, kettles or hairdryers?

Excludes catalogue/mail order, Internet and do not do responses	Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Weighted Base	939	100.0%	75	100.0%	88	100.0%	109	100.0%	111	100.0%	118	100.0%	109	100.0%	132	100.0%
Southend-on-sea	385	41.1%	2	2.8%	14	15.7%	20	18.7%	2	1.8%	44	37.6%	62	56.6%	94	71.1%
Basildon	184	19.7%	51	68.1%	31	34.8%	32	29.0%	49	44.0%	10	8.5%	4	3.8%	3	2.3%
Lakeside Shopping Centre	56	6.0%	5	6.9%	6	6.7%	12	11.2%	7	6.4%	3	2.6%	9	8.5%	8	6.2%
Rayleigh	54	5.7%			3	3.4%	6	5.6%	1	.9%	29	24.8%	8	7.5%	3	2.3%
Rayleigh Trading Estate, Stadium Way, Thundersley	29	3.1%			3	3.4%	11	10.3%			10	8.5%	1	.9%	2	1.6%
Chelmsford	23	2.5%					1	.9%	22	20.2%						
Canvey Island	22	2.3%			21	23.6%					1	.9%				
Leigh-on-sea (Broadway)	19	2.1%											16	15.1%	2	1.6%
Southend Airport Retail Park, Southend-on-sea	17	1.8%							1	.9%	1	.9%	2	1.9%	4	3.1%
Mayflower Retail Park, Basildon	15	1.6%	3	4.2%	2	2.2%	2	1.9%	4	3.7%	1	.9%				
Pipps Hill (Heron) Retail Park, Basildon	13	1.4%	6	8.3%	2	2.2%			3	2.8%	1	.9%	1	.9%		
Wickford	12	1.3%							12	11.0%						
Retail Warehouses, London Road, Southend-on-sea	12	1.3%									3	2.6%	2	1.9%	5	3.9%
Hadleigh	11	1.2%			3	3.4%	5	4.7%					1	.9%		
Westcliff-on-sea (Hamlet Court Road)	9	1.0%	1	1.4%	1	1.1%					1	.9%			6	4.7%
Bluewater Shopping Centre	7	.8%	1	1.4%			1	.9%			3	2.6%			1	.8%
Greyhound Retail Park, Greyhound Way, Southend on sea	6	.6%									1	.9%			1	.8%
Waitrose (Food & Home), Eastern Avenue, Southend-on-sea	4	.4%									1	.9%			1	.8%

(cont.)

Q8. Where do you do most of your household's shopping for domestic electrical appliances, such as fridges, washing machines, kettles or hairdryers?

Excludes catalogue/mail order, Internet and do not do responses		Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7	
		#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Cricketers Retail Park, Basildon		4	.4%	1	1.4%					2	1.8%						
Rochford		4	.4%									1	.9%			1	.8%
Central London		2	.2%							1	.9%						
Retail Warehouses, Stadium Way, Thundersley		1	.1%					1	.9%								
Retail Warehouses, Purdeys Way, Rochford		1	.1%														
Other	Benfleet	16	1.7%					10	9.3%	2	1.8%	3	2.6%	1	.9%		
	shop around	9	.9%	1	1.4%			2	1.9%	2	1.8%	1	.9%				
	Bethnal Green	5	.5%					4	3.7%					1	.9%		
	Pitsea	4	.4%	2	2.8%	2	2.2%										
	Great Wakering	3	.3%														
	Hockley	2	.2%									2	1.7%				
	Gallows Corner, Romford	2	.2%			1	1.1%			1	.9%						
	Shoeburyness	2	.2%														
	Local Stores, Eastgate.	1	.1%	1	1.4%												
	Chelmsford, Chelmer Village Retail Park	1	.1%							1	.9%						
	Local Stores Thundersley	1	.1%					1	.9%								
	Holbridge	1	.1%									1	.9%				

(cont.)

Q8. Where do you do most of your household's shopping for domestic electrical appliances, such as fridges, washing machines, kettles or hairdryers?

Excludes catalogue/mail order, Internet and do not do responses	Area 8		Area 9		Area 10	
	#	%	#	%	#	%
Weighted Base	98	100.0%	58	100.0%	42	100.0%
Southend-on-sea	76	77.9%	45	78.3%	26	61.8%
Basildon	2	2.1%	1	1.7%	2	5.5%
Lakeside Shopping Centre	2	2.1%	1	1.7%	2	5.5%
Rayleigh	1	1.1%			2	5.5%
Rayleigh Trading Estate, Stadium Way, Thundersley					2	3.6%
Chelmsford						
Canvey Island						
Leigh-on-sea (Broadway)	1	1.1%				
Southend Airport Retail Park, Southend-on-sea	5	5.3%	2	3.3%	2	3.6%
Mayflower Retail Park, Basildon			1	1.7%	2	3.6%
Pipps Hill (Heron) Retail Park, Basildon						
Wickford						
Retail Warehouses, London Road, Southend-on-sea			2	3.3%		
Hadleigh	2	2.1%				
Westcliff-on-sea (Hamlet Court Road)						
Bluewater Shopping Centre	1	1.1%				
Greyhound Retail Park, Greyhound Way, Southend on sea	3	3.2%			1	1.8%
Waitrose (Food & Home), Eastern Avenue, Southend-on-sea	2	2.1%				

(cont.)

Q8. Where do you do most of your household's shopping for domestic electrical appliances, such as fridges, washing machines, kettles or hairdryers?

Excludes catalogue/mail order, Internet and do not do responses		Area 8		Area 9		Area 10	
		#	%	#	%	#	%
Cricketers Retail Park, Basildon						1	1.8%
Rochford						2	3.6%
Central London				1	1.7%		
Retail Warehouses, Stadium Way, Thundersley							
Retail Warehouses, Purdeys Way, Rochford						1	1.8%
Other	Benfleet						
	shop around	1	1.1%	1	1.7%	1	1.8%
	Bethnal Green						
	Pitsea						
	Great Wakering			3	5.0%		
	Hockley						
	Gallows Corner, Romford						
	Shoeburyness	1	1.1%	1	1.7%		
	Local Stores, Eastgate.						
	Chelmsford, Chelmer Village Retail Park						
	Local Stores Thundersley						
	Holbridge						

Q9. Where do you do most of your household's shopping for TV, Hi-fi, radio, musical instruments and photographic equipment?

Excludes catalogue/mail order, Internet and do not do responses	Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Weighted Base	927	100.0%	76	100.0%	88	100.0%	109	100.0%	112	100.0%	113	100.0%	107	100.0%	127	100.0%
Southend-on-sea	329	35.5%			6	6.7%	15	14.0%	1	.9%	35	31.2%	52	49.0%	80	63.4%
Basildon	208	22.4%	55	72.6%	37	41.6%	31	28.0%	50	44.5%	20	17.9%	4	3.8%	6	4.9%
Rayleigh	66	7.1%			4	4.5%	9	8.4%			35	31.2%	10	9.6%	2	1.6%
Lakeside Shopping Centre	60	6.5%	6	8.2%	11	12.4%	11	10.3%	10	9.1%			5	4.8%	8	6.5%
Rayleigh Trading Estate, Stadium Way, Thundersley	30	3.2%			3	3.4%	12	11.2%	2	1.8%	8	7.1%			2	1.6%
Chelmsford	26	2.8%					1	.9%	24	21.8%						
Leigh-on-sea (Broadway)	25	2.7%											22	20.2%	2	1.6%
Southend Airport Retail Park, Southend-on-sea	24	2.6%					1	.9%			1	.9%	6	5.8%	5	4.1%
Canvey Island	20	2.1%			20	22.5%										
Mayflower Retail Park, Basildon	17	1.8%	3	4.1%	2	2.2%	3	2.8%	5	4.5%	1	.9%				
Pipps Hill (Heron) Retail Park, Basildon	11	1.2%	6	8.2%	2	2.2%			2	1.8%			1	1.0%		
Retail Warehouses, London Road, Southend-on-sea	11	1.2%									3	2.7%	2	1.9%	6	4.9%
Westcliff-on-sea (Hamlet Court Road)	10	1.1%	1	1.4%							1	.9%			8	6.5%
Hadleigh	10	1.1%			1	1.1%	8	7.5%					1	1.0%		
Wickford	10	1.1%			1	1.1%			9	8.2%						
Waitrose (Food & Home), Eastern Avenue, Southend-on-sea	7	.7%					1	.9%							2	1.6%
Bluewater Shopping Centre	6	.7%					1	.9%			2	1.8%	1	1.0%	1	.8%
Greyhound Retail Park, Greyhound Way, Southend on sea	6	.6%									1	.9%	1	1.0%		
Cricketers Retail Park, Basildon	5	.5%	1	1.4%			1	.9%	2	1.8%						

(cont.)

Q9. Where do you do most of your household's shopping for TV, Hi-fi, radio, musical instruments and photographic equipment?

Excludes catalogue/mail order, Internet and do not do responses		Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7	
		#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Central London		4	.4%	1	1.4%					1	.9%					1	.8%
Rochford		3	.4%									1	.9%				
Brentwood		3	.3%					2	1.9%								
Retail Warehouses, Purdeys Way, Rochford		1	.1%							1	.9%						
Retail Warehouses, Stadium Way, Thundersley		1	.1%					1	.9%								
Other	Benfleet	12	1.3%					10	9.3%			1	.9%	1	1.0%		
	shop around	7	.8%							2	1.8%	2	1.8%			1	.8%
	Shoeburyness	4	.4%					1	.9%								
	Pitsea	3	.3%	1	1.4%	1	1.1%									1	.8%
	Great Wakering	3	.3%														
	Romford Town Centre	2	.2%			1	1.1%			1	.9%						
	Local Stores, Eastgate	1	.1%	1	1.4%												
	South Woodham Ferrers	1	.1%							1	.9%						
	Hockley	1	.1%									1	.9%				

(cont.)

Q9. Where do you do most of your household's shopping for TV, Hi-fi, radio, musical instruments and photographic equipment?

Excludes catalogue/mail order, Internet and do not do responses	Area 8		Area 9		Area 10	
	#	%	#	%	#	%
Weighted Base	97	100.0%	58	100.0%	41	100.0%
Southend-on-sea	72	74.5%	44	76.7%	22	53.7%
Basildon	3	3.2%			2	5.6%
Rayleigh	2	2.1%			3	7.4%
Lakeside Shopping Centre	3	3.2%	2	3.3%	3	7.4%
Rayleigh Trading Estate, Stadium Way, Thundersley			1	1.7%	2	3.7%
Chelmsford					1	1.9%
Leigh-on-sea (Broadway)	1	1.1%				
Southend Airport Retail Park, Southend-on-sea	5	5.3%	3	5.0%	2	5.6%
Canvey Island						
Mayflower Retail Park, Basildon			1	1.7%	2	3.7%
Pipps Hill (Heron) Retail Park, Basildon						
Retail Warehouses, London Road, Southend-on-sea						
Westcliff-on-sea (Hamlet Court Road)						
Hadleigh						
Wickford						
Waitrose (Food & Home), Eastern Avenue, Southend-on-sea	2	2.1%	1	1.7%	1	1.9%
Bluewater Shopping Centre	1	1.1%				
Greyhound Retail Park, Greyhound Way, Southend on sea	2	2.1%	1	1.7%	1	1.9%
Cricketers Retail Park, Basildon					1	1.9%

(cont.)

Q9. Where do you do most of your household's shopping for TV, Hi-fi, radio, musical instruments and photographic equipment?

Excludes catalogue/mail order, Internet and do not do responses		Area 8		Area 9		Area 10	
		#	%	#	%	#	%
Central London				1	1.7%		
Rochford						2	5.6%
Brentwood		1	1.1%				
Retail Warehouses, Purdeys Way, Rochford							
Retail Warehouses, Stadium Way, Thundersley							
Other	Benfleet						
	shop around	2	2.1%				
	Shoeburyness	2	2.1%	1	1.7%		
	Pitsea						
	Great Wakering			3	5.0%		
	Romford Town Centre						
	Local Stores, Eastgate						
	South Woodham Ferrers						
	Hockley						

Q10. Where do you do most of your household's shopping for DIY goods and decorating supplies?

Excludes catalogue/mail order and do not do responses	Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Weighted Base	918	100.0%	80	100.0%	86	100.0%	108	100.0%	107	100.0%	116	100.0%	104	100.0%	130	100.0%
B&Q, adj to Victoria Station	169	18.4%	1	1.3%	3	3.4%	1	.9%	2	1.9%	7	6.1%	23	21.8%	51	39.7%
Southend-on-sea	162	17.7%	1	1.3%	2	2.3%	10	9.4%	1	1.0%	14	12.2%	27	25.7%	47	36.5%
Basildon	151	16.5%	50	62.3%	35	40.2%	11	10.4%	43	40.0%	9	7.8%	1	1.0%	2	1.6%
Rayleigh	97	10.5%			8	9.2%	18	17.0%	1	1.0%	43	37.4%	18	17.8%	3	2.4%
Rayleigh Trading Estate, Stadium Way, Thundersley	67	7.3%			5	5.7%	24	22.6%	2	1.9%	26	22.6%	7	6.9%	1	.8%
Rochford	30	3.2%									6	5.2%	4	4.0%	2	1.6%
Lakeside Shopping Centre	29	3.1%	5	6.5%	1	1.1%	3	2.8%	9	8.6%			6	5.9%	3	2.4%
Chelmsford	21	2.3%					1	.9%	20	19.0%						
Canvey Island	21	2.3%			19	21.8%	1	.9%	1	1.0%						
Mayflower Retail Park, Basildon	17	1.9%	5	6.5%	1	1.1%	1	.9%	8	7.6%	1	.9%				
Pipps Hill (Heron) Retail Park, Basildon	14	1.6%	5	6.5%	2	2.3%			5	4.8%	1	.9%	1	1.0%		
Southend Airport Retail Park, Southend-on-sea	14	1.5%							1	1.0%			3	3.0%	3	2.4%
Retail Warehouses, Purdeys Way, Rochford	10	1.1%													2	1.6%
Leigh-on-sea (Broadway)	10	1.1%											10	9.9%		
Westcliff-on-sea (Hamlet Court Road)	9	1.0%											2	2.0%	7	5.6%
Retail Warehouses, London Road, Southend-on-sea	8	.9%							1	1.0%	3	2.6%			3	2.4%
Retail Warehouses, Stadium Way, Thundersley	6	.7%					5	4.7%								
Cricketers Retail Park, Basildon	4	.4%	1	1.3%					3	2.9%						
Hadleigh	4	.4%					4	3.8%								
Wickford	4	.4%							4	3.8%						
Bluewater Shopping Centre	2	.2%					2	1.9%								

(cont.)

Q10. Where do you do most of your household's shopping for DIY goods and decorating supplies?

Excludes catalogue/mail order and do not do responses		Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7	
		#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Brentwood		2	.2%			1	1.1%	1	.9%								
Central London		2	.2%							1	1.0%						
Greyhound Retail Park, Greyhound Way, Southend on sea		1	.1%													1	.8%
Other	Benfleet	28	3.1%			4	4.6%	24	22.6%								
	Pitsea	14	1.6%	9	11.7%	5	5.7%										
	Hockley	4	.4%									4	3.5%				
	Shop around	3	.3%													1	.8%
	Southend Retail Park	2	.2%													2	1.6%
	Chelmsford, Homelands Retail Park	2	.2%							2	1.9%						
	Maldon	2	.2%							2	1.9%						
	Thurrock Town Centre	2	.2%			1	1.1%							1	1.0%		
	Trade	2	.2%	1	1.3%												
	Rochford Industrial Estate	2	.2%														
	Local Stores, Eastgate.	1	.1%	1	1.3%												
	Ashendown	1	.1%									1	.9%				

(cont.)

Q10. Where do you do most of your household's shopping for DIY goods and decorating supplies?

Excludes catalogue/mail order and do not do responses	Area 8		Area 9		Area 10	
	#	%	#	%	#	%
Weighted Base	92	100.0%	54	100.0%	43	100.0%
B&Q, adj to Victoria Station	54	58.4%	23	42.9%	4	8.9%
Southend-on-sea	29	31.5%	20	37.5%	11	25.0%
Basildon					1	1.8%
Rayleigh					5	10.7%
Rayleigh Trading Estate, Stadium Way, Thundersley					2	3.6%
Rochford	1	1.1%	5	8.9%	11	26.8%
Lakeside Shopping Centre	1	1.1%				
Chelmsford						
Canvey Island						
Mayflower Retail Park, Basildon					1	1.8%
Pipps Hill (Heron) Retail Park, Basildon						
Southend Airport Retail Park, Southend-on-sea	5	5.6%	1	1.8%	1	1.8%
Retail Warehouses, Purdeys Way, Rochford	1	1.1%	2	3.6%	5	12.5%
Leigh-on-sea (Broadway)						
Westcliff-on-sea (Hamlet Court Road)						
Retail Warehouses, London Road, Southend-on-sea					1	1.8%
Retail Warehouses, Stadium Way, Thundersley			1	1.8%		
Cricketers Retail Park, Basildon						
Hadleigh						
Wickford						
Bluewater Shopping Centre						

(cont.)

Q10. Where do you do most of your household's shopping for DIY goods and decorating supplies?

Excludes catalogue/mail order and do not do responses		Area 8		Area 9		Area 10	
		#	%	#	%	#	%
Brentwood							
Central London				1	1.8%		
Greyhound Retail Park, Greyhound Way, Southend on sea							
Other	Benfleet						
	Pitsea						
	Hockley						
	Shop around	1	1.1%			1	1.8%
	Southend Retail Park						
	Chelmsford, Homelands Retail Park						
	Maldon						
	Thurrock Town Centre						
	Trade			1	1.8%		
	Rochford Industrial Estate					2	3.6%
	Local Stores, Eastgate.						
	Ashendown						

Q11. Where do you do most of your household's shopping for books, jewellery, china, glass, watches and recreational and luxury goods?

Excludes catalogue/mail order, Internet and do not do responses	Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Weighted Base	862	100.0%	72	100.0%	79	100.0%	97	100.0%	105	100.0%	105	100.0%	98	100.0%	126	100.0%
Southend-on-sea	398	46.2%			17	21.2%	34	34.7%	2	1.9%	46	44.2%	51	52.1%	98	77.9%
Basildon	160	18.5%	49	68.1%	35	43.7%	25	26.3%	35	33.0%	11	10.6%	2	2.1%	1	.8%
Lakeside Shopping Centre	113	13.1%	7	10.1%	12	15.0%	22	23.2%	19	18.4%	21	20.2%	8	8.3%	9	7.4%
Leigh-on-sea (Broadway)	37	4.3%					4	4.2%			2	1.9%	26	26.0%	4	3.3%
Chelmsford	31	3.6%					1	1.1%	22	21.4%	6	5.8%			1	.8%
Rayleigh	20	2.3%					2	2.1%			14	13.5%	4	4.2%		
Central London	18	2.1%	2	2.9%	1	1.2%			5	4.9%	1	1.0%	3	3.1%	2	1.6%
Wickford	14	1.7%							14	13.6%						
Bluewater Shopping Centre	13	1.5%	2	2.9%			3	3.2%	4	3.9%	1	1.0%	1	1.0%	2	1.6%
Westcliff-on-sea (Hamlet Court Road)	12	1.4%	1	1.4%			1	1.1%					2	2.1%	5	4.1%
Canvey Island	10	1.1%			10	12.5%										
Rochford	4	.4%														
Rayleigh Trading Estate, Stadium Way, Thundersley	3	.4%					2	2.1%					1	1.0%		
Pipps Hill (Heron) Retail Park, Basildon	1	.1%	1	1.4%												
Waitrose (Food & Home), Eastern Avenue, Southend-on-sea	1	.1%														
Southend Airport Retail Park, Southend-on-sea	1	.1%													1	.8%
Retail Warehouses, Stadium Way, Thundersley	1	.1%					1	1.1%								

(cont.)

Q11. Where do you do most of your household's shopping for books, jewellery, china, glass, watches and recreational and luxury goods?

Excludes catalogue/mail order, Internet and do not do responses		Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7	
		#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Other	Shop around	5	.6%	2	2.9%	2	2.5%					1	1.0%				
	Pitsea	4	.5%	4	5.8%												
	Abroad	4	.5%	2	2.9%	1	1.2%			1	1.0%						
	South Woodham Ferrers	2	.2%							2	1.9%						
	Local Stores, Eastgate	1	.1%	1	1.4%												
	Glasgow	1	.1%														
	Shoeburyness	1	.1%														
	Scotland	1	.1%													1	.8%
	Benfleet Town Centre	1	.1%					1	1.1%								
	Hockley	1	.1%									1	1.0%				
	Local Stores, Worcester	1	.1%			1	1.2%										
	Romford Town Centre	1	.1%			1	1.2%										

(cont.)

Q11. Where do you do most of your household's shopping for books, jewellery, china, glass, watches and recreational and luxury goods?

Excludes catalogue/mail order, Internet and do not do responses	Area 8		Area 9		Area 10	
	#	%	#	%	#	%
Weighted Base	88	100.0%	56	100.0%	37	100.0%
Southend-on-sea	74	84.7%	47	84.5%	29	77.6%
Basildon			2	3.4%		
Lakeside Shopping Centre	5	5.9%	6	10.3%	2	6.1%
Leigh-on-sea (Broadway)	1	1.2%				
Chelmsford					1	2.0%
Rayleigh						
Central London	3	3.5%	1	1.7%		
Wickford						
Bluewater Shopping Centre						
Westcliff-on-sea (Hamlet Court Road)	1	1.2%			2	4.1%
Canvey Island						
Rochford					4	10.2%
Rayleigh Trading Estate, Stadium Way, Thundersley						
Pipps Hill (Heron) Retail Park, Basildon						
Waitrose (Food & Home), Eastern Avenue, Southend-on-sea	1	1.2%				
Southend Airport Retail Park, Southend-on-sea						
Retail Warehouses, Stadium Way, Thundersley						

(cont.)

Q11. Where do you do most of your household's shopping for books, jewellery, china, glass, watches and recreational and luxury goods?

Excludes catalogue/mail order, Internet and do not do responses		Area 8		Area 9		Area 10	
		#	%	#	%	#	%
Other	Shop around						
	Pitsea						
	Abroad						
	South Woodham Ferrers						
	Local Stores, Eastgate						
	Glasgow	1	1.2%				
	Shoeburyness	1	1.2%				
	Scotland						
	Benfleet Town Centre						
	Hockley						
	Local Stores, Worcester						
	Romford Town Centre						

Q12. How do you normally travel when you shop for non-food goods?

	Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7		Area 8		Area 9		Area 10	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Weighted Base	1003	100.0%	83	100.0%	91	100.0%	118	100.0%	118	100.0%	124	100.0%	121	100.0%	143	100.0%	102	100.0%	58	100.0%	45	100.0%
Car / Van (as driver)	656	65.4%	52	62.5%	56	62.0%	86	73.3%	81	69.0%	88	70.7%	79	65.3%	84	59.0%	56	54.5%	38	65.0%	36	79.7%
Car/Van (as passenger)	152	15.2%	12	15.0%	20	21.7%	19	16.4%	12	10.3%	20	16.3%	18	15.3%	16	11.5%	15	15.2%	12	20.0%	6	13.6%
Bus	92	9.2%	8	10.0%	9	9.8%	7	6.0%	13	11.2%	12	9.8%	9	7.6%	11	7.9%	11	11.1%	8	13.3%	3	6.8%
Walk	59	5.9%	3	3.8%	2	2.2%	3	2.6%	5	4.3%	3	2.4%	12	10.2%	22	15.1%	9	9.1%				
Train	15	1.5%	2	2.5%	1	1.1%	1	.9%	3	2.6%	1	.8%	1	.8%	3	2.2%	2	2.0%	1	1.7%		
Taxi	14	1.4%	3	3.8%	3	3.3%			1	.9%			1	.8%	3	2.2%	3	3.0%				
Bicycle	10	1.0%	2	2.5%			1	.9%	1	.9%					3	2.2%	3	3.0%				
Mobility scooter	2	.2%							1	.9%							1	1.0%				
Fly	1	.1%															1	1.0%				

Q13a. What do you like most about Southend-on-Sea town centre for shopping and services? (ONE ANSWER ONLY)

	Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7		Area 8		Area 9		Area 10	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Weighted Base	1003	100.0%	83	100.0%	91	100.0%	118	100.0%	118	100.0%	124	100.0%	121	100.0%	143	100.0%	102	100.0%	58	100.0%	45	100.0%
Close to home	242	24.1%			6	6.5%	14	12.1%	2	1.7%	30	24.4%	43	35.6%	69	48.2%	44	43.4%	19	33.3%	14	30.5%
Nothing / very little	226	22.5%	12	15.0%	13	14.1%	28	24.1%	31	25.9%	37	30.1%	29	23.7%	24	16.5%	27	26.3%	13	21.7%	12	27.1%
Don't shop in Southend-on-sea	140	14.0%	39	47.5%	28	30.4%	21	18.1%	41	34.5%	4	3.3%	4	3.4%	1	.7%	1	1.0%			1	1.7%
Good range of non-food shops	133	13.2%	9	11.3%	20	21.7%	15	12.9%	15	12.9%	14	11.4%	17	14.4%	15	10.8%	10	10.1%	11	18.3%	5	11.9%
Attractive/nice environment	43	4.3%	6	7.5%	5	5.4%	4	3.4%	9	7.8%	5	4.1%	3	2.5%	6	4.3%	2	2.0%	2	3.3%		
Shopping centres	31	3.1%	4	5.0%	5	5.4%	4	3.4%	3	2.6%	6	4.9%	2	1.7%	2	1.4%	1	1.0%	2	3.3%	2	3.4%
Easy to get to by car	25	2.5%			1	1.1%	4	3.4%			7	5.7%	1	.8%	4	2.9%			5	8.3%	3	6.8%
Traffic free shopping area	25	2.5%	1	1.3%	2	2.2%	5	4.3%			5	4.1%	2	1.7%	2	1.4%	5	5.1%			2	5.1%
Habit / familiarity	21	2.1%	1	1.3%	1	1.1%	3	2.6%			1	.8%	2	1.7%	6	4.3%	2	2.0%	4	6.7%	1	1.7%
Good day out	19	1.9%	2	2.5%	1	1.1%	3	2.6%	7	6.0%	1	.8%	3	2.5%	1	.7%					1	1.7%
Particular non-food shops	13	1.3%	3	3.8%	2	2.2%	4	3.4%	1	.9%	1	.8%	1	.8%	1	.7%						
Easy to park near shops	12	1.2%	1	1.3%			2	1.7%	2	1.7%	2	1.6%	2	1.7%	1	.7%	1	1.0%			1	1.7%
Compact shopping area	12	1.2%	1	1.3%	1	1.1%	2	1.7%			2	1.6%			2	1.4%	2	2.0%	1	1.7%	1	1.7%
Close to work	11	1.1%			2	2.2%	1	.9%	1	.9%			2	1.7%	2	1.4%	2	2.0%	1	1.7%		
Other	9	.9%							3	2.6%	1	.8%	1	.8%	3	2.2%	1	1.0%				
Feels safe	7	.7%			2	2.2%	1	.9%			1	.8%	1	.8%	1	.7%			1	1.7%		
Easy to get to by bus	7	.7%	1	1.3%					1	.9%	2	1.6%					1	1.0%			2	3.4%
Convenience	7	.7%			1	1.1%					1	.8%	2	1.7%	1	.7%					2	3.4%
Good pubs, cafes or restaurants	6	.6%	1	1.3%			2	1.7%			1	.8%	2	1.7%								
Close to friends and relatives	3	.3%					1	.9%	1	.9%					1	.7%						
Easy to get to by train	3	.3%			2	2.2%			1	.9%												
Good food stores	2	.2%											2	1.7%								
Good tourist attractions	2	.2%									2	1.6%										
Particular food store	1	.1%															1	1.0%				

(cont.)

Q13a. What do you like most about Southend-on-Sea town centre for shopping and services? (ONE ANSWER ONLY)

	Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7		Area 8		Area 9		Area 10	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Good financial services (banks, building societes, etc.)	1	.1%															1	1.0%				
Large area	1	.1%											1	.8%								
Nice and open	1	.1%					1	.9%														
Good disabled facilities	1	.1%					1	.9%														

Q13a. What do you like most about Southend-on-Sea town centre for shopping and services? (TOTAL ANSWERS)

		Weighted Base	Area 1	Area 2	Area 3	Area 4	Area 5	Area 6	Area 7	Area 8	Area 9	Area 10
Weighted Base	#	1003	83	91	118	118	124	121	143	102	58	45
Close to home	#	294	1	10	17	6	37	54	79	46	26	16
	%	29.3%	1.3%	10.9%	14.7%	5.2%	30.1%	44.9%	55.4%	45.5%	45.0%	35.6%
Nothing / very little	#	226	12	13	28	31	37	29	24	27	13	12
	%	22.5%	15.0%	14.1%	24.1%	25.9%	30.1%	23.7%	16.5%	26.3%	21.7%	27.1%
Good range of non-food shops	#	194	11	26	21	18	21	27	27	14	19	9
	%	19.4%	13.8%	28.3%	18.1%	15.5%	17.1%	22.0%	18.7%	14.1%	33.3%	20.3%
Don't shop in Southend-on-sea	#	140	39	28	21	41	4	4	1	1		1
	%	14.0%	47.5%	30.4%	18.1%	34.5%	3.3%	3.4%	.7%	1.0%		1.7%
Attractive/nice environment	#	110	10	11	8	13	17	12	19	9	10	1
	%	11.0%	12.5%	12.0%	6.9%	11.2%	13.8%	10.2%	12.9%	9.1%	16.7%	1.7%
Easy to get to by car	#	62	1	4	7		12	4	14	3	12	5
	%	6.2%	1.3%	4.3%	6.0%		9.8%	3.4%	10.1%	3.0%	20.0%	10.2%
Shopping centres	#	54	7	6	7	7	9	5	3	3	2	4
	%	5.3%	8.8%	6.5%	6.0%	6.0%	7.3%	4.2%	2.2%	3.0%	3.3%	8.5%

(cont.)

Q13a. What do you like most about Southend-on-Sea town centre for shopping and services? (TOTAL ANSWERS)

		Weighted Base	Area 1	Area 2	Area 3	Area 4	Area 5	Area 6	Area 7	Area 8	Area 9	Area 10
Traffic free shopping area	#	42	1	4	9		6	6	3	8	1	3
	%	4.2%	1.3%	4.3%	7.8%		4.9%	5.1%	2.2%	8.1%	1.7%	6.8%
Easy to park near shops	#	40	1	2	8	2	7	5	5	3	3	4
	%	4.0%	1.3%	2.2%	6.9%	1.7%	5.7%	4.2%	3.6%	3.0%	5.0%	8.5%
Good day out	#	38	2	4	3	10	7	6	3	1	1	1
	%	3.8%	2.5%	4.3%	2.6%	8.6%	5.7%	5.1%	2.2%	1.0%	1.7%	1.7%
Habit / familiarity	#	30	1	1	4		2	2	9	3	5	2
	%	3.0%	1.3%	1.1%	3.4%		1.6%	1.7%	6.5%	3.0%	8.3%	5.1%
Particular non-food shops	#	28	4	3	7	3	1	3	4	2		1
	%	2.8%	5.0%	3.3%	6.0%	2.6%	.8%	2.5%	2.9%	2.0%		1.7%
Good pubs, cafes or restaurants	#	27	5		5		4	6	4	2		
	%	2.7%	6.3%		4.3%		3.3%	5.1%	2.9%	2.0%		
Good food stores	#	22	1	3	1	2	2	4	4	3	2	
	%	2.2%	1.3%	3.3%	.9%	1.7%	1.6%	3.4%	2.9%	3.0%	3.3%	
Compact shopping area	#	21	1	2	2		4	2	4	2	1	2
	%	2.1%	1.3%	2.2%	1.7%		3.3%	1.7%	2.9%	2.0%	1.7%	5.1%
Easy to get to by bus	#	18	2	1	1	3	3		2	2	1	2
	%	1.7%	2.5%	1.1%	.9%	2.6%	2.4%		1.4%	2.0%	1.7%	5.1%
Other	#	17		1	1	3	2	2	6	2		
	%	1.7%		1.1%	.9%	2.6%	1.6%	1.7%	4.3%	2.0%		
Good tourist attractions	#	16	2	1	2	3	4		2	1	1	
	%	1.6%	2.5%	1.1%	1.7%	2.6%	3.3%		1.4%	1.0%	1.7%	
Close to work	#	16		2	1	1		2	3	3	3	1
	%	1.6%		2.2%	.9%	.9%		1.7%	2.2%	3.0%	5.0%	1.7%
Convenience	#	15		1	2	1	2	3	3		1	2
	%	1.5%		1.1%	1.7%	.9%	1.6%	2.5%	2.2%		1.7%	5.1%
Feels safe	#	14		2	1		2	1	5		2	1
	%	1.4%		2.2%	.9%		1.6%	.8%	3.6%		3.3%	1.7%
Close to friends and relatives	#	10	1		1	2		1	1	2	1	1
	%	1.0%	1.3%		.9%	1.7%		.8%	.7%	2.0%	1.7%	1.7%

(cont.)

Q13a. What do you like most about Southend-on-Sea town centre for shopping and services? (TOTAL ANSWERS)

		Weighted Base	Area 1	Area 2	Area 3	Area 4	Area 5	Area 6	Area 7	Area 8	Area 9	Area 10
Particular food store	#	7			2			2	1	1	1	
	%	.7%			1.7%			1.7%	.7%	1.0%	1.7%	
Good financial services (banks, building	#	6			1		1		1	1	2	
	%	.6%			.9%		.8%		.7%	1.0%	3.3%	
Good entertainment facilities	#	5					2		1		2	
	%	.5%					1.6%		.7%		3.3%	
Easy to get to by train	#	3		2		1						
	%	.3%		2.2%		.9%						
Large area	#	1						1				
	%	.1%						.8%				
Not too busy	#	1						1				
	%	.1%						.8%				
Nice and open	#	1			1							
	%	.1%			.9%							
Good disabled facilities	#	1			1							
	%	.1%			.9%							
Cheap parking	#	1			1							
	%	.1%			.9%							

Q13d. Which non-food shop do you particularly like ?

	Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7		Area 8		Area 10	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Weighted Base	28	100.0%	4	100.0%	3	100.0%	7	100.0%	3	100.0%	1	100.0%	3	100.0%	4	100.0%	2	100.0%	1	100.0%
Not specified	5	18.0%					3	42.9%	1	33.3%					1	25.0%				
Clothes/Shoe Shops	1	3.6%											1	33.3%						
Debenhams	9	31.6%	3	75.0%	1	33.3%	1	14.3%	1	33.3%					1	25.0%	1	50.0%	1	100.0%
Hennes (H&M)	2	7.2%					2	28.6%												
Littlewoods	1	3.6%									1	100.0%								
M&S	6	21.7%					1	14.3%	1	33.3%			1	33.3%	2	50.0%	1	50.0%		
Music Shops	1	3.7%	1	25.0%																
Primark	1	3.6%											1	33.3%						
Wilkinsons	1	3.5%			1	33.3%														
Woolworths	1	3.5%			1	33.3%														

Q13e. Which food shop do you particularly like ?

	Weighted Base		Area 3		Area 6		Area 7		Area 8		Area 9	
	#	%	#	%	#	%	#	%	#	%	#	%
Weighted Base	7	100.0%	2	100.0%	2	100.0%	1	100.0%	1	100.0%	1	100.0%
Not specified	1	14.4%			1	50.0%						
Iceland	2	28.6%	2	100.0%								
Sainsbury`s	3	42.5%			1	50.0%	1	100.0%			1	100.0%
Waitrose	1	14.5%							1	100.0%		

Q14a. What do you dislike most about Southend-on-Sea town centre for shopping and services? [ONE ANSWER ONLY]

	Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7		Area 8		Area 9	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Weighted Base	1003	100.0%	83	100.0%	91	100.0%	118	100.0%	118	100.0%	124	100.0%	121	100.0%	143	100.0%	102	100.0%	58	100.0%
Nothing / very little	304	30.4%	24	28.8%	29	31.5%	38	31.9%	34	28.4%	39	31.7%	34	28.0%	39	27.3%	35	34.3%	17	30.0%
Poor range of non-food shops	168	16.8%	4	5.0%	10	10.9%	13	11.2%	11	9.5%	25	20.3%	24	19.5%	32	22.3%	24	23.2%	16	28.3%
Unattractive/not nice environment	129	12.9%	7	8.8%	5	5.4%	14	12.1%	10	8.6%	21	17.1%	22	17.8%	25	17.3%	14	14.1%	4	6.7%
Don't shop in Southend-on-sea	76	7.6%	23	27.5%	13	14.1%	8	6.9%	25	21.6%	2	1.6%	4	3.4%	1	.7%				
Difficult to park near shops	49	4.9%	2	2.5%	6	6.5%	8	6.9%	6	5.2%	7	5.7%	4	3.4%	5	3.6%	3	3.0%	2	3.3%
Feels unsafe / poor security	35	3.5%	2	2.5%	5	5.4%	4	3.4%	2	1.7%	3	2.4%	3	2.5%	7	5.0%	5	5.1%	2	3.3%
Town centre is too big	34	3.4%	3	3.8%	2	2.2%	9	7.8%	6	5.2%	3	2.4%	4	3.4%	4	2.9%	2	2.0%		
Car parking too expensive	31	3.1%	2	2.5%	3	3.3%	3	2.6%	3	2.6%	2	1.6%	6	5.1%	4	2.9%	2	2.0%	3	5.0%
Too busy	28	2.8%	2	2.5%	5	5.4%	4	3.4%					7	5.9%	6	4.3%	2	2.0%	1	1.7%
Too far from home	26	2.6%	6	7.5%	4	4.3%	5	4.3%	9	7.8%	1	.8%					1	1.0%		
Particular non-food shops not available	21	2.1%			1	1.1%	3	2.6%	1	.9%	1	.8%	3	2.5%	3	2.2%	5	5.1%	3	5.0%
Not undercover	15	1.5%					2	1.7%	2	1.7%	5	4.1%	2	1.7%	1	.7%	1	1.0%	1	1.7%
Poor food stores	11	1.1%	1	1.3%			1	.9%	1	.9%	1	.8%	2	1.7%	2	1.4%	1	1.0%	2	3.3%
Generally rundown	11	1.1%			1	1.1%			1	.9%	3	2.4%	2	1.7%	2	1.4%			2	3.3%
Not enough shops	11	1.1%					1	.9%	1	.9%	2	1.6%	1	.8%	2	1.4%	1	1.0%	2	3.3%
Difficult to get to by car	10	1.0%	2	2.5%	3	3.3%	1	.9%	2	1.7%	1	.8%			1	.7%				
Too far to walk to shops	8	.8%	1	1.3%	2	2.2%	2	1.7%									3	3.0%		
Particular non-food shops disliked	6	.6%			1	1.1%					2	1.6%	1	.8%	1	.7%			1	1.7%
Not enough cafes or restaurants	5	.5%			1	1.1%			1	.9%	1	.8%			2	1.4%				
Difficult to get to by bus	5	.5%			1	1.1%					1	.8%					2	2.0%	1	1.7%
Miscellaneous other	3	.3%	2	2.5%					1	.9%										
Poor / rundown sea front	3	.3%									1	.8%			2	1.4%				

(cont.)

Q14a. What do you dislike most about Southend-on-Sea town centre for shopping and services? [ONE ANSWER ONLY]

	Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7		Area 8		Area 9	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Poor financial services (banks, building societes, etc.)	3	.3%									1	.8%	1	.8%					1	1.7%
Particular food store not available	2	.2%							1	.9%					1	.7%				
Poorly maintained streets / street furniture	2	.2%									1	.8%			1	.7%				
Too far from work	1	.1%	1	1.3%																
Not enough cultural appeal	1	.1%													1	.7%				
Music in shops	1	.1%											1	.8%						
Poor facilities	1	.1%					1	.9%												

(cont.)

Q14a. What do you dislike most about Southend-on-Sea town centre for shopping and services? [ONE ANSWER ONLY]

	Area 10	
	#	%
Weighted Base	45	100.0%
Nothing / very little	16	35.6%
Poor range of non-food shops	9	20.3%
Unattractive/not nice environment	7	15.3%
Don't shop in Southend-on-sea		
Difficult to park near shops	5	11.9%
Feels unsafe / poor security	2	3.4%
Town centre is too big	1	1.7%
Car parking too expensive	2	5.1%
Too busy	1	1.7%
Too far from home		
Particular non-food shops not available	1	1.7%
Not undercover	1	1.7%
Poor food stores		
Generally rundown		
Not enough shops	1	1.7%
Difficult to get to by car		
Too far to walk to shops		
Particular non-food shops disliked		
Not enough cafes or restaurants		
Difficult to get to by bus		
Miscellaneous other		
Poor / rundown sea front		

(cont.)

Q14a. What do you dislike most about Southend-on-Sea town centre for shopping and services? [ONE ANSWER ONLY]

	Area 10 #	Area 10 %
Poor financial services (banks, building societies, etc.)		
Particular food store not available		
Poorly maintained streets / street furniture		
Too far from work		
Not enough cultural appeal		
Music in shops		
Poor facilities		

Q14a. What do you dislike most about Southend-on-Sea town centre for shopping and services? (TOTAL ANSWERS)

		Weighted Base	Area 1	Area 2	Area 3	Area 4	Area 5	Area 6	Area 7	Area 8	Area 9	Area 10
Weighted Base	#	1003	83	91	118	118	124	121	143	102	58	45
Nothing / very little	#	304	24	29	38	34	39	34	39	35	17	16
	%	30.4%	28.8%	31.5%	31.9%	28.4%	31.7%	28.0%	27.3%	34.3%	30.0%	35.6%
Poor range of non-food shops	#	282	7	17	25	19	46	39	48	36	27	16
	%	28.1%	8.8%	18.5%	21.6%	16.4%	37.4%	32.2%	33.8%	35.4%	46.7%	35.6%
Unattractive/not nice environment	#	189	11	9	21	16	33	31	34	19	5	10
	%	18.9%	13.8%	9.8%	18.1%	13.8%	26.8%	25.4%	23.7%	18.2%	8.3%	22.0%
Feels unsafe / poor security	#	89	3	9	12	4	10	15	19	10	3	3
	%	8.8%	3.8%	9.8%	10.3%	3.4%	8.1%	12.7%	12.9%	10.1%	5.0%	6.8%
Difficult to park near shops	#	86	6	8	13	11	13	11	8	5	4	6
	%	8.6%	7.5%	8.7%	11.2%	9.5%	10.6%	9.3%	5.8%	5.1%	6.7%	13.6%

(cont.)

Q14a. What do you dislike most about Southend-on-Sea town centre for shopping and services? (TOTAL ANSWERS)

		Weighted Base	Area 1	Area 2	Area 3	Area 4	Area 5	Area 6	Area 7	Area 8	Area 9	Area 10
Don't shop in Southend-on-sea	#	76	23	13	8	25	2	4	1			
	%	7.6%	27.5%	14.1%	6.9%	21.6%	1.6%	3.4%	.7%			
Car parking too expensive	#	53	3	3	9	5	3	10	7	3	6	3
	%	5.3%	3.8%	3.3%	7.8%	4.3%	2.4%	8.5%	5.0%	3.0%	10.0%	6.8%
Too busy	#	44	5	7	6			10	7	5	3	1
	%	4.4%	6.3%	7.6%	5.2%			8.5%	5.0%	5.1%	5.0%	1.7%
Town centre is too big	#	43	4	3	13	6	4	4	4	2		2
	%	4.3%	5.0%	3.3%	11.2%	5.2%	3.3%	3.4%	2.9%	2.0%		5.1%
Particular non-food shops not available	#	42		2	4	3	2	7	5	9	8	2
	%	4.2%		2.2%	3.4%	2.6%	1.6%	5.9%	3.6%	9.1%	13.3%	3.4%
Poor food stores	#	41	2	1	4	3	3	6	11	3	5	2
	%	4.1%	2.5%	1.1%	3.4%	2.6%	2.4%	5.1%	7.9%	3.0%	8.3%	5.1%
Too far from home	#	32	7	5	5	10	2		1	1		
	%	3.1%	8.8%	5.4%	4.3%	8.6%	1.6%		.7%	1.0%		
Not undercover	#	26	1	2	3	2	6	5	2	1	2	2
	%	2.6%	1.3%	2.2%	2.6%	1.7%	4.9%	4.2%	1.4%	1.0%	3.3%	3.4%
Miscellaneous other	#	25	2	2	1	2	2	3	4	3	3	2
	%	2.5%	2.5%	2.2%	.9%	1.7%	1.6%	2.5%	2.9%	3.0%	5.0%	5.1%
Not enough cafes or restaurants	#	22		2	2	3	2	1	6	2	4	
	%	2.2%		2.2%	1.7%	2.6%	1.6%	.8%	4.3%	2.0%	6.7%	
Difficult to get to by car	#	21	4	6	3	4	1	1	2			
	%	2.1%	5.0%	6.5%	2.6%	3.4%	.8%	.8%	1.4%			
Particular non-food shops disliked	#	13		2		2	4	1	1	2	1	
	%	1.3%		2.2%		1.7%	3.3%	.8%	.7%	2.0%	1.7%	
Generally rundown	#	13		1	2	1	3	2	2		2	
	%	1.3%		1.1%	1.7%	.9%	2.4%	1.7%	1.4%		3.3%	
Too far to walk to shops	#	12	1	2	2	2				3		2
	%	1.2%	1.3%	2.2%	1.7%	1.7%				3.0%		5.1%
Not enough shops	#	11			1	1	2	1	2	1	2	1
	%	1.1%			.9%	.9%	1.6%	.8%	1.4%	1.0%	3.3%	1.7%
Difficult to get to by bus	#	9		1	1		1	1	1	3	1	
	%	.9%		1.1%	.9%		.8%	.8%	.7%	3.0%	1.7%	

(cont.)

Q14a. What do you dislike most about Southend-on-Sea town centre for shopping and services? (TOTAL ANSWERS)

		Weighted Base	Area 1	Area 2	Area 3	Area 4	Area 5	Area 6	Area 7	Area 8	Area 9	Area 10
Particular food store not available	#	6	1			1			2		2	
	%	.6%	1.3%			.9%			1.4%		3.3%	
Poor facilities	#	5			1				1		1	2
	%	.5%			.9%				.7%		1.7%	5.1%
Poorly maintained streets / street furniture	#	5					1		3	1		
	%	.5%					.8%		2.2%	1.0%		
Poor facilities for disabled	#	4						1	1	1	1	
	%	.4%						.8%	.7%	1.0%	1.7%	
Poor financial services (banks, building societes,	#	4					1	2			1	
	%	.4%					.8%	1.7%			1.7%	
Particular food store disliked	#	3				1		2				
	%	.3%				.9%		1.7%				
Poor / rundown sea front	#	3					1		2			
	%	.3%					.8%		1.4%			
Too far from work	#	2	1				1					
	%	.2%	1.3%				.8%					
Pedestrian area	#	2		1						1		
	%	.2%		1.1%						1.0%		
Too many financial services	#	1								1		
	%	.1%								1.0%		
Not enough cultural appeal	#	1							1			
	%	.1%							.7%			
Too many cafes / restaurants	#	1							1			
	%	.1%							.7%			
Music in shops	#	1						1				
	%	.1%						.8%				

Q14d. Which non-food shop do you particularly dislike ?

	Weighted Base		Area 2		Area 4		Area 5		Area 6		Area 7		Area 8		Area 9	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Weighted Base	13	100.0%	2	100.0%	2	100.0%	4	100.0%	1	100.0%	1	100.0%	2	100.0%	1	100.0%
Unspecified	5	38.4%	2	100.0%			1	25.0%	1	100.0%			1	50.0%		
Asda	1	7.7%			1	50.0%										
Fast Food Resturants	2	15.6%			1	50.0%							1	50.0%		
McDonalds	1	7.4%													1	100.0%
Discount shops	2	15.4%					2	50.0%								
Shoe shops	1	7.8%									1	100.0%				
Sports shops	1	7.7%					1	25.0%								

Q14e. Which non-food shop is not available ?

	Weighted Base		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7		Area 8		Area 9		Area 10	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Weighted Base	42	100.0%	2	100.0%	4	100.0%	3	100.0%	2	100.0%	7	100.0%	5	100.0%	9	100.0%	8	100.0%	2	100.0%
Unspecified	3	7.3%			1	25.0%							1	20.0%	1	11.1%				
Alders	2	4.9%			1	25.0%					1	14.3%								
Childrens clothes shops	4	9.5%	1	50.0%					1	50.0%	1	14.3%					1	12.5%		
Clothes shop for petite sizes	1	2.4%									1	14.3%								
Department stores	10	24.1%					3	100.0%	1	50.0%	1	14.3%			3	33.3%	2	25.0%		
Evans	1	2.3%															1	12.5%		
Furnishings	1	2.4%									1	14.3%								
Habitat	1	2.3%															1	12.5%		
Ikea	2	4.8%													1	11.1%	1	12.5%		
Keddie's	12	27.8%			1	25.0%					2	28.6%	2	40.0%	3	33.3%	2	25.0%	2	100.0%
Laura Ashley	1	2.5%											1	20.0%						
M&S	1	2.5%													1	11.1%				
Mature persons fashion shop	1	2.5%											1	20.0%						
TESCO	1	2.4%	1	50.0%																
Waterstones	1	2.4%			1	25.0%														

Q14f. Which food shop do you dislike?

	Weighted Base		Area 4		Area 6	
	#	%	#	%	#	%
Weighted Base	3	100.0%	1	100.0%	2	100.0%
Unspecified	3	100.0%	1	100.0%	2	100.0%

Q14g. Which food shop is not available ?

	Weighted Base		Area 1		Area 4		Area 7		Area 9	
	#	%	#	%	#	%	#	%	#	%
Weighted Base	6	100.0%	1	100.0%	1	100.0%	2	100.0%	2	100.0%
Unspecified	2	33.2%	1	100.0%					1	50.0%
Butchers	1	16.0%							1	50.0%
Safeway	2	33.8%			1	100.0%	1	50.0%		
Sainsburys	1	17.0%					1	50.0%		

Q15a. What is the first action that should be taken to further improve Southend-on-Sea town centre? [FIRST ANSWER]

	Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7		Area 8		Area 9	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Weighted Base	1003	100.0%	83	100.0%	91	100.0%	118	100.0%	118	100.0%	124	100.0%	121	100.0%	143	100.0%	102	100.0%	58	100.0%
Nothing / very little	188	20.4%	23	34.4%	17	20.2%	20	18.3%	37	36.0%	20	17.1%	19	17.4%	16	12.3%	16	16.8%	12	20.7%
More large stores e.g. Department stores	103	11.1%	3	4.7%	6	7.1%	11	10.1%	2	2.0%	16	13.7%	11	10.1%	15	11.5%	20	20.0%	14	24.1%
More higher quality shops	77	8.4%	1	1.6%	9	10.7%	10	9.2%	3	3.0%	10	8.5%	13	11.9%	15	11.5%	9	9.5%	2	3.4%
More / better car parking	75	8.2%	7	10.9%	9	10.7%	10	9.2%	8	8.0%	9	7.7%	10	9.2%	10	7.7%	6	6.3%	3	5.2%
Don't know / no answer	58	6.3%	10	15.6%	13	15.5%	9	8.3%	13	13.0%	4	3.4%	2	1.8%	2	1.5%	4	4.2%		
Cleaner streets	51	5.5%	3	4.7%	4	4.8%	2	1.8%	8	8.0%	6	5.1%	8	7.3%	11	8.5%	4	4.2%	1	1.7%
More covered shopping malls	49	5.3%	1	1.6%	4	4.8%	11	10.1%	4	4.0%	6	5.1%	6	5.5%	9	6.9%	2	2.1%		
More shops	49	5.3%	2	3.1%	2	2.4%	4	3.7%	4	4.0%	14	12.0%	5	4.6%	5	3.8%	4	4.2%	5	8.6%
Better security on the streets	40	4.4%			2	2.4%	11	10.1%	2	2.0%	4	3.4%	7	6.4%	8	6.2%	4	4.2%		
Better maintained streets / street furniture	37	4.0%	2	3.1%	2	2.4%	4	3.7%	6	6.0%	3	2.6%	6	5.5%	7	5.4%	3	3.2%	1	1.7%
Cheaper car parking	35	3.8%	3	4.7%	3	3.6%	5	4.6%	2	2.0%	5	4.3%	5	4.6%	3	2.3%	3	3.2%	3	5.2%
Other - miscellaneous	23	2.5%			2	2.4%	1	.9%			4	3.4%	2	1.8%	3	2.3%	4	4.2%	5	8.6%
More investment	22	2.4%	2	3.1%					3	3.0%	1	.9%	3	2.8%	2	1.5%	3	3.2%	6	10.3%
Increase pedestrian only areas	21	2.3%	3	4.7%	1	1.2%	1	.9%	1	1.0%	4	3.4%	3	2.8%	4	3.1%	4	4.2%		
More seating / litter bins / public art / landscaping	20	2.2%	1	1.6%	1	1.2%	1	.9%			6	5.1%	1	.9%	7	5.4%	3	3.2%		
More usual shops	18	2.0%	1	1.6%			4	3.7%	2	2.0%	1	.9%	2	1.8%	5	3.8%	1	1.1%	1	1.7%
Better bus service	10	1.1%	1	1.6%			1	.9%	1	1.0%	3	2.6%			2	1.5%	1	1.1%	1	1.7%
better traffic management	8	.9%	1	1.6%	2	2.4%			2	2.0%			1	.9%	2	1.5%				
More public toilets	7	.7%					2	1.8%	1	1.0%	1	.9%			1	.8%	1	1.1%		
More services / eating and drinking places	6	.7%	1	1.6%	3	3.6%			1	1.0%					1	.8%				
better disabled access	5	.5%			1	1.2%							1	.9%			2	2.1%	1	1.7%
Better security in the car parks	4	.4%			1	1.2%	2	1.8%	1	1.0%										

(cont.)

Q15a. What is the first action that should be taken to further improve Southend-on-Sea town centre? [FIRST ANSWER]

	Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7		Area 8		Area 9	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
More Mother / Baby facilities	4	.4%			1	1.2%							1	.9%			1	1.1%	1	1.7%
More food shops	4	.4%			1	1.2%							1	.9%					1	1.7%
Reduce pedestrian only areas	2	.2%											1	.9%	1	.8%				
Less financial services	2	.2%											1	.9%	1	.8%				
More retail parks	1	.1%															1	1.1%		
Better cycle route	1	.1%																	1	1.7%
Better town layout	1	.1%																		

(cont.)

Q15a. What is the first action that should be taken to further improve Southend-on-Sea town centre? [FIRST ANSWER]

	Area 10	
	#	%
Weighted Base	45	100.0%
Nothing / very little	8	17.9%
More large stores e.g. Department stores	5	10.7%
More higher quality shops	4	8.9%
More / better car parking	2	5.4%
Don't know / no answer		
Cleaner streets	3	7.1%
More covered shopping malls	5	12.5%
More shops	3	7.1%
Better security on the streets	2	3.6%
Better maintained streets / street furniture	2	5.4%
Cheaper car parking	2	5.4%
Other - miscellaneous	2	5.4%
More investment	2	3.6%
Increase pedestrian only areas		
More seating / litter bins / public art / landscaping		
More usual shops	1	1.8%
Better bus service		
better traffic management		
More public toilets	1	1.8%
More services / eating and drinking places		
better disabled access		
Better security in the car parks		

(cont.)

Q15a. What is the first action that should be taken to further improve Southend-on-Sea town centre? [FIRST ANSWER]

	Area 10	
	#	%
More Mother / Baby facilities		
More food shops	1	1.8%
Reduce pedestrian only areas		
Less financial services		
More retail parks		
Better cycle route		
Better town layout	1	1.8%

Q15a. What are the actions that should be taken to further improve Southend-on-Sea town centre? [TOTAL ANSWER]

		Weighted Base	Area 1	Area 2	Area 3	Area 4	Area 5	Area 6	Area 7	Area 8	Area 9	Area 10
Weighted Base	#	1003	83	91	118	118	124	121	143	102	58	45
Nothing / very little	#	188	23	17	20	37	20	19	16	16	12	8
	%	20.4%	33.8%	20.2%	18.3%	36.0%	17.1%	17.4%	12.3%	16.7%	20.7%	17.9%
More large stores e.g. Department stores	#	160	4	10	17	13	22	15	29	26	15	8
	%	17.3%	6.2%	11.9%	15.6%	13.0%	18.8%	13.8%	21.5%	26.0%	27.6%	17.9%
More higher quality shops	#	158	5	13	21	5	23	25	29	16	13	8
	%	17.1%	7.7%	15.5%	19.3%	5.0%	19.7%	22.0%	21.5%	16.7%	22.4%	17.9%
More / better car parking	#	119	9	14	14	15	11	18	19	7	7	5
	%	12.9%	13.8%	16.7%	12.8%	15.0%	9.4%	16.5%	13.8%	7.3%	12.1%	10.7%
Cleaner streets	#	92	5	6	11	10	10	15	16	10	1	6
	%	9.9%	7.7%	7.1%	10.1%	10.0%	8.5%	13.8%	12.3%	10.4%	1.7%	14.3%
More shops	#	88	4	4	8	8	18	9	9	11	10	6
	%	9.5%	6.2%	4.8%	7.3%	8.0%	15.4%	8.3%	6.9%	11.5%	17.2%	14.3%

(cont.)

Q15a. What are the actions that should be taken to further improve Southend-on-Sea town centre? [TOTAL ANSWER]

		Weighted Base	Area 1	Area 2	Area 3	Area 4	Area 5	Area 6	Area 7	Area 8	Area 9	Area 10
Better security on the streets	#	83	3	7	16	5	8	15	16	9	1	2
	%	9.0%	4.6%	8.3%	14.7%	5.0%	6.8%	13.8%	12.3%	9.4%	1.7%	3.6%
More covered shopping malls	#	81	2	5	15	5	9	9	16	8	5	6
	%	8.8%	3.1%	6.0%	13.8%	5.0%	7.7%	8.3%	12.3%	8.3%	8.6%	14.3%
Cheaper car parking	#	72	5	4	12	6	10	9	11	6	5	3
	%	7.8%	7.7%	4.8%	11.0%	6.0%	8.5%	8.3%	8.5%	6.3%	8.6%	7.1%
Better maintained streets / street furniture	#	71	6	2	9	8	13	9	11	5	2	5
	%	7.7%	9.2%	2.4%	8.3%	8.0%	11.1%	8.3%	8.5%	5.2%	3.4%	10.7%
Don't know / no answer	#	58	10	13	9	13	4	2	2	4		
	%	6.3%	15.4%	15.5%	8.3%	13.0%	3.4%	1.8%	1.5%	4.2%		
More seating / litter bins / public art / landscaping	#	56	2	4	5	2	11	5	14	9	1	2
	%	6.0%	3.1%	4.8%	4.6%	2.0%	9.4%	4.6%	10.8%	9.4%	1.7%	3.6%
More usual shops	#	49	2	2	6	4	2	6	10	6	8	2
	%	5.3%	3.1%	2.4%	5.5%	4.0%	1.7%	5.5%	7.7%	6.3%	13.8%	5.4%
Other - miscellaneous	#	42		3	4		4	3	8	7	7	5
	%	4.5%		3.6%	3.7%		3.4%	2.8%	6.2%	7.3%	12.1%	12.5%
More investment	#	38	2		2	5	4	4	5	5	8	2
	%	4.1%	3.1%		1.8%	5.0%	3.4%	3.7%	3.8%	5.2%	13.8%	5.4%
Increase pedestrian only areas	#	35	4	2	1	2	5	8	5	5	2	
	%	3.7%	6.2%	2.4%	.9%	2.0%	4.3%	7.3%	3.8%	5.2%	3.4%	
More services / eating and drinking places	#	28	1	5	2	2	2	3	4	6	2	1
	%	3.0%	1.5%	6.0%	1.8%	2.0%	1.7%	2.8%	3.1%	6.3%	3.4%	1.8%
Better security in the car parks	#	25		4	11	1	3	3	1	1		1
	%	2.7%		4.8%	10.1%	1.0%	2.6%	2.8%	.8%	1.0%		1.8%
Better bus service	#	19	1		2	2	5	2	4	2	1	
	%	2.1%	1.5%		1.8%	2.0%	4.3%	1.8%	3.1%	2.1%	1.7%	
better traffic management	#	18	1	4		3		3	3		2	2
	%	2.0%	1.5%	4.8%		3.0%		2.8%	2.3%		3.4%	5.4%
More public toilets	#	17		1	2	2	3	1	4	2	1	1
	%	1.8%		1.2%	1.8%	2.0%	2.6%	.9%	3.1%	2.1%	1.7%	1.8%

(cont.)

Q15a. What are the actions that should be taken to further improve Southend-on-Sea town centre? [TOTAL ANSWER]

		Weighted Base	Area 1	Area 2	Area 3	Area 4	Area 5	Area 6	Area 7	Area 8	Area 9	Area 10
Better town layout	#	9	2	1	1	1	1	1	1			1
	%	1.0%	3.1%	1.2%	.9%	1.0%	.9%	.9%	.8%			1.8%
More Mother / Baby facilities	#	8	1	1	1			2	1	1	1	
	%	.9%	1.5%	1.2%	.9%			1.8%	.8%	1.0%	1.7%	
Reduce pedestrian only areas	#	7	1	2				2	1	1		
	%	.8%	1.5%	2.4%				1.8%	.8%	1.0%		
better disabled access	#	7		1				2		3	1	
	%	.8%		1.2%				1.8%		3.1%	1.7%	
More food shops	#	5		1	1			1			1	1
	%	.5%		1.2%	.9%			.9%			1.7%	1.8%
Less financial services	#	3					1	1	1			
	%	.3%					.9%	.9%	.8%			
More retail parks	#	1								1		
	%	.1%								1.0%		
Nothing / very little	#	1							1			
	%	.1%							.8%			
Better cycle route	#	1									1	
	%	.1%									1.7%	

Q15d. Which shops do you want to see?

	Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7		Area 8		Area 9		Area 10	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Weighted Base	88	100.0%	4	100.0%	4	100.0%	8	100.0%	8	100.0%	18	100.0%	9	100.0%	9	100.0%	11	100.0%	10	100.0%	6	100.0%
Unspecified	26	29.2%	1	25.0%	2	50.0%	2	25.0%	2	25.0%	2	11.1%	2	22.2%	3	33.3%	5	45.5%	5	50.0%	2	25.0%
Aldi's	1	1.2%											1	11.1%								
Clothes/Shoe Stores	8	8.7%									2	11.1%	2	22.2%	2	22.2%					2	25.0%
Debenhams	2	2.3%					1	12.5%			1	5.6%										
Department Stores	23	26.1%			1	25.0%	4	50.0%	4	50.0%	7	38.9%	1	11.1%	1	11.1%	2	18.2%	2	20.0%	1	12.5%
Electrical Stores	1	1.2%															1	9.1%				
Fashion Stores	3	3.5%	1	25.0%							2	11.1%										
Furniture Stores	1	1.1%									1	5.6%										
Habitat	1	1.1%																	1	10.0%		
High Street Stores	1	1.2%	1	25.0%																		
John Lewis	4	4.6%			1	25.0%					1	5.6%					2	18.2%				
Keddies	6	6.5%							1	12.5%					2	22.2%			2	20.0%	1	12.5%
Lakeland Plastics	1	.9%																			1	12.5%
More Food/Non Food Stores	10	11.3%					1	12.5%	1	12.5%	2	11.1%	3	33.3%	1	11.1%	1	9.1%			1	12.5%
More Music Stores & Independant Retailers	1	1.2%	1	25.0%																		

Social Grade?

	Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7		Area 8		Area 9		Area 10	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Weighted Base	1003	100.0%	83	100.0%	91	100.0%	118	100.0%	118	100.0%	124	100.0%	121	100.0%	143	100.0%	102	100.0%	58	100.0%	45	100.0%
AB	218	21.8%	10	12.5%	19	20.7%	24	20.7%	33	27.6%	25	20.3%	30	24.6%	36	25.2%	27	26.3%	8	13.3%	7	15.3%
C1	316	31.5%	29	35.0%	21	22.8%	44	37.1%	32	26.7%	45	36.6%	45	37.3%	41	28.8%	26	25.3%	20	35.0%	13	28.8%
C2	292	29.1%	20	23.8%	33	35.9%	34	28.4%	38	31.9%	38	30.9%	30	24.6%	38	26.6%	28	27.3%	19	33.3%	15	33.9%
DE	147	14.6%	23	27.5%	17	18.5%	13	11.2%	13	11.2%	11	8.9%	10	8.5%	24	16.5%	21	20.2%	7	11.7%	8	18.6%
Refused	30	3.0%	1	1.3%	2	2.2%	3	2.6%	3	2.6%	4	3.3%	6	5.1%	4	2.9%	1	1.0%	4	6.7%	2	3.4%

AGE COMPOSITION OF HOUSEHOLD

		Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7		Area 8		Area 9	
		#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Weighted Base		1003	100.0%	83	100.0%	91	100.0%	118	100.0%	118	100.0%	124	100.0%	121	100.0%	143	100.0%	102	100.0%	58	100.0%
No. in household aged 0 -4 years	None	833	89.2%	71	89.5%	82	93.3%	100	89.1%	97	87.2%	99	86.0%	106	92.0%	112	87.9%	84	88.2%	46	94.1%
	One	75	8.0%	8	10.5%	6	6.7%	8	7.3%	12	11.0%	10	8.8%	6	5.4%	12	9.7%	5	5.4%	3	5.9%
	Two	17	1.8%					2	1.8%	1	.9%	3	2.6%	2	1.8%	2	1.6%	5	5.4%		
	Three	1	.1%							1	.9%										
	Four	1	.1%					1	.9%												
	Refused	7	.8%					1	.9%			3	2.6%	1	.9%	1	.8%	1	1.1%		
No in household aged 5 -15 years	None	725	77.2%	57	72.4%	66	76.1%	89	79.1%	94	82.1%	86	74.6%	92	80.4%	93	70.9%	80	84.8%	39	76.9%
	One	106	11.3%	15	18.4%	10	11.4%	10	9.1%	12	10.7%	14	12.3%	5	4.5%	20	15.0%	7	7.6%	8	15.4%
	Two	74	7.9%	5	6.6%	6	6.8%	10	9.1%	7	6.2%	9	7.9%	13	11.6%	11	8.7%	3	3.3%	3	5.8%
	Three	20	2.1%	1	1.3%	5	5.7%	2	1.8%			3	2.6%	1	.9%	5	3.9%	1	1.1%	1	1.9%
	Four	4	.4%							1	.9%			1	.9%	1	.8%	1	1.1%		
	Five	2	.2%	1	1.3%									1	.9%						
	Six	1	.1%															1	1.1%		
	Refused	7	.8%					1	.9%			3	2.6%	1	.9%	1	.8%	1	1.1%		
No in household aged 16 - 24 years	None	754	80.4%	64	80.5%	63	72.7%	92	82.6%	91	81.7%	94	80.9%	94	82.1%	106	81.1%	77	81.5%	37	71.7%
	One	111	11.9%	9	11.7%	16	18.2%	8	7.3%	12	11.0%	12	10.4%	14	12.5%	14	11.0%	11	12.0%	10	18.9%
	Two	52	5.6%	6	7.8%	6	6.8%	10	9.2%	5	4.6%	4	3.5%	4	3.6%	8	6.3%	3	3.3%	4	7.5%
	Three	11	1.2%			1	1.1%			2	1.8%	3	2.6%	1	.9%	1	.8%	2	2.2%	1	1.9%
	Four	2	.2%			1	1.1%			1	.9%										
	Refused	7	.8%					1	.9%			3	2.6%	1	.9%	1	.8%	1	1.1%		
No in household aged 25 -44 years	None	566	59.7%	47	57.7%	45	52.3%	68	60.4%	69	60.7%	74	62.4%	78	67.3%	69	53.6%	61	62.1%	32	63.5%
	One	157	16.5%	18	21.8%	19	21.6%	17	15.3%	20	17.9%	14	12.0%	15	13.3%	20	15.2%	16	16.8%	10	19.2%
	Two	212	22.3%	15	17.9%	21	23.9%	26	23.4%	24	21.4%	27	23.1%	21	17.7%	39	30.4%	19	18.9%	9	17.3%
	Three	5	.5%	2	2.6%	2	2.3%											1	1.1%		
	Four	1	.1%											1	.9%						
	Refused	7	.8%					1	.9%			3	2.6%	1	.9%	1	.8%	1	1.1%		

(cont.)

AGE COMPOSITION OF HOUSEHOLD

		Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7		Area 8		Area 9	
		#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
No in household aged 45 and pensionable age ?	None	500	52.7%	42	52.6%	42	47.2%	63	57.4%	50	45.4%	58	49.6%	68	56.9%	76	56.9%	54	56.5%	24	45.5%
	One	164	17.3%	8	10.5%	17	19.1%	13	12.0%	19	17.6%	19	16.2%	23	19.0%	25	18.5%	20	20.7%	13	23.6%
	Two	274	28.9%	29	36.8%	30	33.7%	33	29.6%	40	36.1%	37	31.6%	28	23.3%	30	22.3%	21	21.7%	16	30.9%
	Three	3	.3%							1	.9%					2	1.5%				
	Refused	7	.8%					1	.9%			3	2.6%	1	.9%	1	.8%	1	1.1%		
No in household of pensionable age ?	None	592	63.1%	56	70.1%	66	75.3%	64	58.3%	72	65.7%	71	60.9%	68	57.9%	83	65.3%	49	52.2%	34	63.6%
	One	171	18.2%	15	18.2%	11	12.4%	15	13.9%	20	18.5%	20	17.4%	30	25.4%	22	16.9%	24	25.0%	9	16.4%
	Two	165	17.6%	9	11.7%	11	12.4%	30	26.9%	16	14.8%	22	19.1%	18	15.8%	21	16.1%	21	21.7%	11	20.0%
	Three	2	.2%							1	.9%					1	.8%				
	Refused	7	.8%					1	.9%			3	2.6%	1	.9%	1	.8%	1	1.1%		

(cont.)

AGE COMPOSITION OF HOUSEHOLD

		Area 10	
		#	%
Weighted Base		45	100.0%
No. in household aged 0 -4 years	None	37	87.3%
	One	4	9.1%
	Two	2	3.6%
	Three		
	Four		
	Refused		
No in household aged 5 -15 years	None	30	70.9%
	One	5	12.7%
	Two	6	14.5%
	Three	1	1.8%
	Four		
	Five		
	Six		
	Refused		
No in household aged 16 - 24 years	None	37	87.3%
	One	4	9.1%
	Two	2	3.6%
	Three		
	Four		
	Refused		
No in household aged 25 -44 years	None	24	55.4%
	One	8	17.9%
	Two	11	26.8%
	Three		
	Four		
	Refused		

(cont.)

AGE COMPOSITION OF HOUSEHOLD

		Area 10	
		#	%
No in household aged 45 and pensionable age ?	None	24	56.1%
	One	8	17.5%
	Two	11	26.3%
	Three		
	Refused		
No in household of pensionable age ?	None	28	68.5%
	One	6	14.8%
	Two	7	16.7%
	Three		
	Refused		

WORKING STATUS OF MALES IN HOUSEHOLD

		Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7		Area 8	
		#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Weighted Base		1003	100.0%	83	100.0%	91	100.0%	118	100.0%	118	100.0%	124	100.0%	121	100.0%	143	100.0%	102	100.0%
Q18a Men aged 16 - 64 in part time employment (up to 29 hours per week)	None	854	92.6%	71	93.2%	81	93.2%	103	92.7%	104	92.7%	100	89.2%	107	92.9%	118	93.5%	83	92.0%
	One	56	6.0%	4	5.5%	4	4.5%	7	6.4%	8	7.3%	8	7.2%	6	5.4%	7	5.7%	5	5.7%
	Two	6	.7%	1	1.4%	2	2.3%					1	.9%	1	.9%			1	1.1%
	Refused	7	.8%					1	.9%			3	2.7%	1	.9%	1	.8%	1	1.1%
Q18b Men aged 16 - 64 in full-time employment (30 hours or more per week)	None	454	47.5%	34	42.9%	34	38.2%	56	49.5%	50	43.4%	54	47.0%	72	61.4%	60	44.3%	52	54.3%
	One	419	43.9%	36	45.5%	41	46.1%	52	45.9%	52	45.1%	52	45.2%	37	31.6%	66	48.9%	35	37.0%
	Two	64	6.7%	9	11.7%	12	13.5%	3	2.7%	10	8.8%	6	5.2%	4	3.5%	7	5.3%	6	6.5%
	Three	11	1.2%			2	2.2%	1	.9%	3	2.7%			3	2.6%	1	.8%	1	1.1%
	Refused	7	.7%					1	.9%			3	2.6%	1	.9%	1	.8%	1	1.1%
Q18c Men aged 16 - 64 unemployed	None	877	94.8%	73	94.6%	85	97.7%	107	97.2%	107	95.5%	100	89.2%	112	96.5%	123	96.8%	84	91.1%
	One	41	4.5%	4	5.4%	2	2.3%	2	1.9%	5	4.5%	9	8.1%	3	2.7%	3	2.4%	7	7.8%
	Refused	7	.8%					1	.9%			3	2.7%	1	.9%	1	.8%	1	1.1%

(cont.)

WORKING STATUS OF MALES IN HOUSEHOLD

		Area 9		Area 10	
		#	%	#	%
Weighted Base		58	100.0%	45	100.0%
Q18a Men aged 16 - 64 in part time employment (up to 29 hours per week)	None	46	90.6%	41	98.2%
	One	5	9.4%	1	1.8%
	Two				
	Refused				
Q18b Men aged 16 - 64 in full-time employment (30 hours or more per week)	None	22	41.8%	21	47.4%
	One	26	49.1%	22	50.9%
	Two	5	9.1%	1	1.8%
	Three				
	Refused				
Q18c Men aged 16 - 64 unemployed	None	49	96.2%	37	90.7%
	One	2	3.8%	4	9.3%
	Refused				

WORKING STATUS OF FEMALES IN HOUSEHOLD

		Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7		Area 8	
		#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Weighted Base		1003	100.0%	83	100.0%	91	100.0%	118	100.0%	118	100.0%	124	100.0%	121	100.0%	143	100.0%	102	100.0%
Q19a Women aged 16 - 64 in part-time employment (up to 29 hour per week)	None	692	74.0%	55	69.7%	64	73.0%	87	81.1%	77	68.5%	85	74.3%	88	76.8%	87	66.4%	77	83.3%
	One	233	25.0%	24	30.3%	24	27.0%	19	17.9%	36	31.5%	25	22.1%	26	22.3%	42	32.0%	14	15.6%
	Two	1	.1%									1	.9%						
	Four	1	.1%													1	.8%		
	Refused	7	.8%					1	.9%			3	2.7%	1	.9%	1	.8%	1	1.1%
Q19b Women aged 16 - 64 in full-time employment (30 hours per week or more)	None	715	76.1%	63	79.2%	68	77.5%	91	80.9%	87	77.5%	86	75.9%	85	74.1%	85	65.4%	73	78.0%
	One	187	19.9%	12	15.6%	16	18.0%	18	16.4%	20	18.0%	23	20.5%	26	22.3%	40	30.7%	15	16.5%
	Two	26	2.8%	3	3.9%	4	4.5%	2	1.8%	4	3.6%	1	.9%	3	2.7%	3	2.4%	3	3.3%
	Three	3	.3%	1	1.3%					1	.9%							1	1.1%
	Five	1	.1%													1	.8%		
	Refused	7	.8%					1	.9%			3	2.7%	1	.9%	1	.8%	1	1.1%
Q19c Women aged 16 - 64 unemployed	None	857	92.1%	73	92.1%	80	92.0%	101	90.8%	102	90.9%	100	88.4%	110	95.5%	121	95.9%	84	90.1%
	One	66	7.1%	6	7.9%	7	8.0%	9	8.3%	10	9.1%	10	8.9%	4	3.6%	4	3.3%	8	8.8%
	Refused	7	.8%					1	.9%			3	2.7%	1	.9%	1	.8%	1	1.1%

(cont.)

WORKING STATUS OF FEMALES IN HOUSEHOLD

		Area 9		Area 10	
		#	%	#	%
Weighted Base		58	100.0%	45	100.0%
Q19a Women aged 16 - 64 in part-time employment (up to 29 hour per week)	None	39	75.5%	31	74.5%
	One	13	24.5%	11	25.5%
	Two				
	Four				
	Refused				
Q19b Women aged 16 - 64 in full-time employment (30 hours per week or more)	None	44	81.8%	33	78.2%
	One	8	14.5%	8	20.0%
	Two	2	3.6%	1	1.8%
	Three				
	Five				
	Refused				
Q19c Women aged 16 - 64 unemployed	None	50	96.3%	36	87.0%
	One	2	3.7%	5	13.0%
	Refused				

How many cars does your household have access to?

	Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7		Area 8		Area 9		Area 10	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Weighted Base	1003	100.0%	83	100.0%	91	100.0%	118	100.0%	118	100.0%	124	100.0%	121	100.0%	143	100.0%	102	100.0%	58	100.0%	45	100.0%
None	136	13.6%	13	16.3%	12	13.0%	12	10.3%	17	14.7%	12	9.8%	23	18.6%	22	15.1%	15	15.2%	9	15.0%	1	1.7%
One	485	48.3%	44	52.5%	44	47.8%	56	47.4%	50	42.2%	59	48.0%	61	50.0%	73	51.1%	54	52.5%	22	38.3%	23	50.8%
Two	285	28.4%	21	25.0%	27	29.3%	37	31.0%	33	27.6%	34	27.6%	31	25.4%	38	26.6%	24	23.2%	22	38.3%	19	42.4%
Three or more	83	8.3%	5	6.3%	9	9.8%	11	9.5%	17	14.7%	15	12.2%	6	5.1%	8	5.8%	7	7.1%	3	5.0%	1	1.7%
Refused	15	1.5%					2	1.7%	1	.9%	3	2.4%	1	.8%	2	1.4%	2	2.0%	2	3.3%	2	3.4%

Q20. Do you personally have regular access to a car?

	Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7		Area 8		Area 9		Area 10	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Weighted Base	1003	100.0%	83	100.0%	91	100.0%	118	100.0%	118	100.0%	124	100.0%	121	100.0%	143	100.0%	102	100.0%	58	100.0%	45	100.0%
Yes	796	79.4%	59	71.3%	70	77.2%	104	87.9%	96	81.0%	99	79.7%	95	78.8%	108	75.5%	78	76.8%	47	81.7%	40	88.1%
No	119	11.9%	16	18.8%	16	17.4%	9	7.8%	14	12.1%	8	6.5%	13	11.0%	24	16.5%	11	11.1%	6	10.0%	2	5.1%
Sometimes	56	5.6%	4	5.0%	3	3.3%	2	1.7%	4	3.4%	11	8.9%	9	7.6%	10	7.2%	9	9.1%	2	3.3%	1	1.7%
Refused	32	3.2%	4	5.0%	2	2.2%	3	2.6%	4	3.4%	6	4.9%	3	2.5%	1	.7%	3	3.0%	3	5.0%	2	5.1%

Gender of respondent

	Weighted Base		Area 1		Area 2		Area 3		Area 4		Area 5		Area 6		Area 7		Area 8		Area 9		Area 10	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%	#	%
Weighted Base	1003	100.0%	83	100.0%	91	100.0%	118	100.0%	118	100.0%	124	100.0%	121	100.0%	143	100.0%	102	100.0%	58	100.0%	45	100.0%
Male	257	25.6%	21	25.0%	25	27.2%	42	35.3%	27	23.3%	23	18.7%	31	25.4%	37	25.9%	31	30.3%	11	18.3%	10	22.0%
Female	746	74.4%	62	75.0%	66	72.8%	76	64.7%	91	76.7%	101	81.3%	90	74.6%	106	74.1%	71	69.7%	47	81.7%	35	78.0%

Appendix 4

Retail Capacity Modelling (2002)

SOUTHEND-ON-SEA

LOCAL PLAN REVIEW RETAIL STUDY, 2002

TABLE 1

SURVEY AREA POPULATION FORECASTS

		POPULATION						
Catchment Zone	Postcode Sector Groupings	1991	1996	2001	2002	2006	2011	2016
1	SS13 1/2/3 SS16 4	35,015	34,218	34,349	34,460	34,903	35,406	35,883
2	SS8 7/8/9/0	36,859	35,442	37,737	37,859	38,345	38,898	39,421
3	SS7 1/2/3/4/5	48,094	45,544	48,728	48,885	49,514	50,228	50,906
4	SS11 7/8 SS12 9/0 CM3 !	44,985	45,832	50,114	50,276	50,923	51,655	52,351
5	SS5 4/5/6 SS6 7/8/9	50,004	50,038	51,341	51,506	52,168	52,921	53,631
6	SS0 1/2/3/4/5	48,067	40,336	50,142	50,304	50,952	51,686	52,382
7	SS1 1 SS0 7/8/9/0 SS2 5	56,521	58,765	59,076	59,267	60,029	60,894	61,714
8	SS1 2/3 SS3 8 SS2 4	39,549	42,582	42,129	42,265	42,808	43,425	44,009
9	SS3 9/0	21,840	24,540	23,974	24,051	24,360	24,711	25,043
10	SS4 1/2/3	17,571	18,340	18,606	18,666	18,905	19,179	19,436
TOTAL		398,495	409,637	416,196	417,538	422,907	429,002	434,776

SOURCE: MapInfo Illumine data for Southend-on-Sea

TABLE 2a

PER CAPITA RETAIL EXPENDITURE FORECASTS (1998 prices)

GROWTH IN PER CAPITA RETAIL EXPENDITURE:				
Convenience Goods:	-1.55	% '97-'98	0.10	%pa '98-'16
Comparison Goods:	2.70	% '97-'98	3.00	%pa '98-'16

PER CAPITA RETAIL EXPENDITURE:

Catchment Zone	CONVENIENCE GOODS 1997 (£)	1998 (£)	2002 (£)	2006 (£)	2011 (£)	2016 (£)
1	1,321	1,300	1,305	1,311	1,317	1,324
2	1,362	1,341	1,347	1,352	1,359	1,366
3	1,402	1,380	1,386	1,391	1,398	1,405
4	1,399	1,377	1,383	1,388	1,395	1,402
5	1,394	1,372	1,378	1,383	1,390	1,397
6	1,400	1,378	1,384	1,389	1,396	1,403
7	1,385	1,363	1,369	1,374	1,381	1,388
8	1,383	1,361	1,367	1,372	1,379	1,386
9	1,340	1,319	1,324	1,330	1,336	1,343
10	1,368	1,347	1,353	1,358	1,365	1,372

Catchment Zone	COMPARISON GOODS 1997 (£)	1998 (£)	2002 (£)	2006 (£)	2011 (£)	2016 (£)
1	1,673	1,718	1,934	2,176	2,523	2,925
2	1,796	1,845	2,076	2,337	2,709	3,140
3	1,925	1,977	2,225	2,505	2,903	3,366
4	1,964	2,017	2,271	2,556	2,963	3,434
5	1,908	1,960	2,206	2,483	2,878	3,336
6	1,945	1,997	2,248	2,530	2,933	3,400
7	1,871	1,921	2,163	2,434	2,822	3,271
8	1,881	1,932	2,174	2,447	2,837	3,289
9	1,721	1,767	1,989	2,238	2,595	3,008
10	1,797	1,846	2,077	2,338	2,710	3,142

SOURCE: Table 1, MapInfo Illumine data for Southend-on-Sea, May 2002, URPI Information Brief 99/2

NOTES: Growth 1997-98 is actual

Growth projections 1998 - 2016 are based on URPI ultra-long term trend. CBHP adjustments for e-commerce (0.6%)

Special Forms of trading removed (Ref. URPI Brief 98/2)

i) Convenience goods 0.9%

ii) Comparison goods 7.5%

TABLE 2b

SURVEY AREA RETAIL EXPENDITURE FORECASTS (1998 prices)

	RETAIL EXPENDITURE							
Catchment Zone	CONVENIENCE GOODS 2002 (£000)	2006 (£000)	2011 (£000)	2016 (£000)	COMPARISON GOODS 2002 (£000)	2006 (£000)	2011 (£000)	2016 (£000)
1	44,980	45,741	46,633	47,498	66,635	75,963	89,331	104,955
2	50,981	51,843	52,854	53,833	78,603	89,605	105,375	123,801
3	67,752	68,898	70,242	71,545	108,781	124,008	145,833	171,339
4	69,527	70,704	72,080	73,417	114,155	130,136	153,032	179,797
5	70,969	72,169	73,577	74,938	113,612	129,514	152,310	178,938
6	69,617	70,796	72,174	73,514	113,078	128,910	151,592	178,107
7	81,124	82,497	84,105	85,665	128,170	146,113	171,825	201,875
8	57,757	58,744	59,888	60,999	91,904	104,768	123,206	144,750
9	31,856	32,393	33,024	33,636	47,832	54,527	64,123	75,334
10	25,249	25,675	26,177	26,661	38,775	44,200	51,983	61,070
TOTAL	569,822	579,461	590,757	601,706	901,547	1,027,746	1,208,610	1,419,965

SOURCE: Table 1 and 2a

SOUTHEND-ON-SEA TOWN CENTRE

LOCAL PLAN REVIEW RETAIL STUDY, 2002

TABLE 3

SOUTHEND-ON-SEA TOWN CENTRE TRADE DRAW

SCENARIO ONE: **Baseline**

	CONVENIENCE GOODS								COMPARISON GOODS			
	SAINSBURYS, LONDON ROAD				OTHER STORES							
Catchment Zone	2002 (%)	2006 (%)	2011 (%)	2016 (%)	2002 (%)	2006 (%)	2011 (%)	2016 (%)	2002 (%)	2006 (%)	2011 (%)	2016 (%)
1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	1.0	1.0	1.0
2	0.3	0.3	0.3	0.3	0.0	0.0	0.0	0.0	18.0	18.0	18.0	18.0
3	3.5	3.5	3.5	3.5	0.0	0.0	0.0	0.0	30.5	30.5	30.5	30.5
4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.2	2.2	2.2	2.2
5	0.6	0.6	0.6	0.6	0.0	0.0	0.0	0.0	39.2	39.2	39.2	39.2
6	7.5	7.5	7.5	7.5	3.9	3.9	3.9	3.9	48.3	48.3	48.3	48.3
7	31.3	31.3	31.3	31.3	10.3	10.3	10.3	10.3	67.4	67.4	67.4	67.4
8	17.6	17.6	17.6	17.6	16.2	16.2	16.2	16.2	72.4	72.4	72.4	72.4
9	3.3	3.3	3.3	3.3	0.0	0.0	0.0	0.0	72.1	72.1	72.1	72.1
10	3.8	3.8	3.8	3.8	0.0	0.0	0.0	0.0	65.3	65.3	65.3	65.3

SOURCE: Southend-on-Sea Household Survey (May 2002)

NOTE: CB Hillier Parker adjustments to survey results.

TABLE 4

FORECAST RETAIL SALES SOUTHEND-ON-SEA TOWN CENTRE (1998 prices)

SCENARIO: - **As Table 3**

	CONVENIENCE GOODS								COMPARISON GOODS			
	SAINSBURYS, LONDON ROAD				OTHER STORES							
Catchment Zone	2002 (£000)	2006 (£000)	2011 (£000)	2016 £(000)	2002 (£000)	2006 (£000)	2011 (£000)	2016 £(000)	2002 (£000)	2006 (£000)	2011 (£000)	2016 £(000)
1	0	0	0	0	0	0	0	0	682	777	914	1,074
2	166	168	172	175	0	0	0	0	14,165	16,148	18,990	22,310
3	2,354	2,394	2,441	2,486	0	0	0	0	33,173	37,816	44,472	52,250
4	0	0	0	0	0	0	0	0	2,460	2,804	3,298	3,874
5	426	433	441	450	0	0	0	0	44,507	50,736	59,666	70,097
6	5,204	5,292	5,395	5,495	2,732	2,779	2,833	2,885	54,640	62,291	73,251	86,063
7	25,372	25,801	26,304	26,792	8,356	8,497	8,663	8,823	86,408	98,504	115,839	136,098
8	10,153	10,324	10,525	10,720	9,358	9,516	9,702	9,882	66,570	75,888	89,243	104,848
9	1,059	1,077	1,098	1,118	0	0	0	0	34,511	39,341	46,264	54,354
10	966	982	1,001	1,020	0	0	0	0	25,323	28,867	33,949	39,884
TOTALS	45,699	46,472	47,378	48,256	20,447	20,792	21,198	21,591	362,439	413,172	485,885	570,851

SOURCE: Tables 2 & 3

TABLE 5

FUTURE SHOP FLOORSPACE CAPACITY IN SOUTHEND-ON-SEA TOWN CENTRE

SCENARIO: **As Table 3**

GROWTH IN SALES PER SQ M — COMPARISON GOODS 1.5 %pa '02-'16

	CONVENIENCE GOODS				COMPARISON GOODS			
	2002	2006	2011	2016	2002	2006	2011	2016
Residents' Spending £000	66,145	67,264	68,576	69,847	362,439	413,172	485,885	570,851
Inflow Spending £000	0	0	0	0	9,061	10,329	12,147	14,271
Total Spending £000	66,145	67,264	68,576	69,847	371,500	423,501	498,032	585,123
Existing shop floorspace (sq m net)	6,837	6,837	6,837	6,837	60,000	60,000	60,000	60,000
Sales per sq m net £	9,675	8,381	8,381	8,381	6,192	6,572	7,079	7,627
Sales from existing flsp flrspce (£000)	66,145	57,303	57,303	57,303	371,500	394,296	424,769	457,597
Residual spending support new shops (£000)	0	9,961	11,272	12,544	0	29,205	73,263	127,526
Sales per sq m net in new shops (£)	11,000	11,000	11,000	11,000	6,000	6,000	6,000	6,000
Capacity for new floorspace (sq m net)	0	906	1,025	1,140	0	4,868	12,211	21,254
Less New Development (sqm net)	0	0	0	0	0	0	0	0
Capacity for New Floorspace (sq m net)	0	906	1,025	1,140	0	4,868	12,211	21,254

SOURCE: Table 4

NOTE: Inflow @2.5% to allow for tourist spend

TABLE 3a
CONVENIENCE GOODS 2002

	SOUTHEND-ON-SEA TOWN CENTRE SAINSBURYS, LONDON ROAD			SOUTHEND-ON-SEA TOWN CENTRE LOCAL STORES		
	Main Food	**Top-up**	**WEIGHTED AVERAGE**	**Main Food**	**Top-up**	**WEIGHTED AVERAGE**
Expenditure Weighting:	75	25	100	75	25	100
Zone	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	0.0	0.0	0.0
2	0.0	1.3	0.3	0.0	2.6	0.7
3	4.3	1.0	3.5	0.0	4.8	1.2
4	0.0	0.0	0.0	0.0	1.0	0.3
5	0.8	0.0	0.6	0.8	6.5	2.2
6	9.3	2.0	7.5	2.5	8.2	3.9
7	37.2	13.5	31.3	5.8	23.8	10.3
8	21.4	6.1	17.6	8.2	40.2	16.2
9	3.3	3.4	3.3	0.0	12.1	3.0
10	5.1	0.0	3.8	0.0	5.6	1.4

SOURCE: Southend-on-Sea Household Survey (May 2002)

TABLE 3aii
CONVENIENCE GOODS 2002 - Local Stores adjusted to remove non-town centre stores

	SOUTHEND-ON-SEA TOWN CENTRE SAINSBURYS, LONDON ROAD			SOUTHEND-ON-SEA TOWN CENTRE LOCAL STORES		
	Main Food	**Top-up**	**WEIGHTED AVERAGE**	**Main Food**	**Top-up**	**WEIGHTED AVERAGE**
Expenditure Weighting:	75	25	100	75	25	100
Zone	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	0.0	0.0	0.0
2	0.0	1.3	0.3	0.0	0.0	0.0
3	4.3	1.0	3.5	0.0	0.0	0.0
4	0.0	0.0	0.0	0.0	0.0	0.0
5	0.8	0.0	0.6	0.0	0.0	0.0
6	9.3	2.0	7.5	2.5	8.2	3.9
7	37.2	13.5	31.3	5.8	23.8	10.3
8	21.4	6.1	17.6	8.2	40.2	16.2
9	3.3	3.4	3.3	0.0	0.0	0.0
10	5.1	0.0	3.8	0.0	0.0	0.0

SOURCE: Southend-on-Sea Household Survey (May 2002)

COMPARISON GOODS 2002

	ALLOCATIONS TO SOUTHEND-ON-SEA TOWN CENTRE							
	Clothing & footwear Q5	Furniture Carpets Q6	Household Textiles Q7	White Elect Aplncs Q8	TV, Video, HiFi & Photography Q9	DIY goods & decrtrs spls Q10	Books, jewlry, watches, recnl goods etc Q11	**WEIGHTED AVERAGE**
Expenditure Weighting:	572	204	67	96	102	186	774	2001
Zone	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	1.3	2.9	3.0	2.8	0.0	1.3	0.0	1.0
2	22.7	13.9	18.1	15.7	6.7	2.3	21.2	18.0
3	38.5	24.5	32.4	18.7	14.0	9.4	34.7	30.5
4	2.7	2.9	3.8	1.8	0.9	1.0	1.9	2.2
5	50.8	28.3	33.8	27.6	21.2	12.2	44.2	39.2
6	61.3	30.5	41.9	36.6	39.0	25.7	52.1	48.3
7	80.5	36.5	59.3	51.1	53.4	36.5	77.9	67.4
8	81.9	49.4	66.6	57.9	64.5	31.5	84.7	72.4
9	79.7	45.4	70.8	58.3	66.7	37.5	84.5	72.1
10	85.2	27.2	48.0	41.8	43.7	25.0	77.6	65.3

SOURCE: Southend-on-Sea Household Survey (May 2002)
ADJUSTED Furniture and carpets, household textiles, white appliances, TVs videos

TABLE 5a
TOWN CENTRE CONVENIENCE GOODS FLOORSPACE

Store	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Estimated Sales (£)
Sainsbury's London Road	4,080	90%	3,672	10,026	36,815,472
Marks & Spencer	1,356	92%	1,248	11,477	14,317,787
Market	500	100%	500	1,000	500,000
Local stores	1,575	90%	1,418	4,000	5,670,000
TOTAL	7,511		6,837		57,303,259
AVERAGE				8,381	

SOURCE: Southend-on-Sea Borough Council

Table 5b
TOWN CENTRE COMPARISON GOODS FLOORSPACE

	Net Flsp (sqm)
Total Comparison Goods	60,000

SOURCE: Experian Goad, EGI, Southend BC

SOUTHEND-ON-SEA OUT OF CENTRE

LOCAL PLAN REVIEW RETAIL STUDY, 2002

TABLE 6

SOUTHEND-ON-SEA OUT-OF-CENTRE TRADE DRAW

SCENARIO ONE: **Baseline**

	CONVENIENCE GOODS																				COMPARISON GOODS							
	WAITROSE, EASTERN AVENUE				TESCO, PRINCE AVENUE				ALDI, EASTERN AVENUE				LIDL, WOODGRANGE DRIVE				TESCO EXP, SOUTHCHURCH RD				RETAIL PARKS				OTHER RETAIL WAREHOUSES			
Catchment	2002	2006	2011	2016	2002	2006	2011	2016	2002	2006	2011	2016	2002	2006	2011	2016	2002	2006	2011	2016	2002	2006	2011	2016	2002	2006	2011	2016
Zone	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.4	1.4	1.4	1.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.3	0.3	0.3	0.1	0.1	0.1	0.1
2	0.0	0.0	0.0	0.0	0.8	0.8	0.8	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3
3	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	0.7	0.7	0.7	0.3	0.3	0.3	0.3	0.1	0.1	0.1	0.1
4	0.7	0.7	0.7	0.7	0.0	0.0	0.0	0.0	0.7	0.7	0.7	0.7	0.0	0.0	0.0	0.0	0.7	0.7	0.7	0.7	0.2	0.2	0.2	0.2	0.3	0.3	0.3	0.3
5	0.6	0.6	0.6	0.6	14.7	14.7	14.7	14.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.4	3.4	3.4	3.4	3.0	3.0	3.0	3.0	1.3	1.3	1.3	1.3
6	2.8	2.8	2.8	2.8	17.0	17.0	17.0	17.0	0.6	0.6	0.6	0.6	0.0	0.0	0.0	0.0	4.5	4.5	4.5	4.5	4.6	4.6	4.6	4.6	3.0	3.0	3.0	3.0
7	5.8	5.8	5.8	5.8	12.8	12.8	12.8	12.8	1.3	1.3	1.3	1.3	0.9	0.9	0.9	0.9	4.6	4.6	4.6	4.6	5.6	5.6	5.6	5.6	5.0	5.0	5.0	5.0
8	20.3	20.3	20.3	20.3	3.4	3.4	3.4	3.4	0.0	0.0	0.0	0.0	0.8	0.8	0.8	0.8	3.3	3.3	3.3	3.3	5.1	5.1	5.1	5.1	7.1	7.1	7.1	7.1
9	6.7	6.7	6.7	6.7	1.3	1.3	1.3	1.3	0.0	0.0	0.0	0.0	0.8	0.8	0.8	0.8	0.9	0.9	0.9	0.9	4.7	4.7	4.7	4.7	5.0	5.0	5.0	5.0
10	5.2	5.2	5.2	5.2	37.3	37.3	37.3	37.3	0.0	0.0	0.0	0.0	1.3	1.3	1.3	1.3	5.7	5.7	5.7	5.7	5.6	5.6	5.6	5.6	2.0	2.0	2.0	2.0

SOURCE: Southend-on-Sea Household Survey (May 2002)

TABLE 7

FORECAST RETAIL SALES SOUTHEND-ON-SEA OUT OF CENTRE (1998 prices)

SCENARIO ONE: **As Table 6**

	CONVENIENCE GOODS																				COMPARISON GOODS							
	WAITROSE, EASTERN AVENUE				TESCO, PRINCE AVENUE				ALDI, EASTERN AVENUE				LIDL, WOODGRANGE DRIVE				TESCO EXP, SOUTHCHURCH RD				RETAIL PARKS				OTHER RETAIL WAREHOUSES			
Catchment	2002	2006	2011	2016	2002	2006	2011	2016	2002	2006	2011	2016	2002	2006	2011	2016	2002	2006	2011	2016	2002	2006	2011	2016	2002	2006	2011	2016
Zone	(£000)	(£000)	(£000)	£(000)	(£000)	(£000)	(£000)	£(000)	(£000)	(£000)	(£000)	£(000)	(£000)	(£000)	(£000)	£(000)	(£000)	(£000)	(£000)	£(000)	(£000)	(£000)	(£000)	£(000)	(£000)	(£000)	(£000)	£(000)
1	0	0	0	0	0	0	0	0	607	618	630	641	0	0	0	0	0	0	0	0	170	194	228	268	81	92	108	127
2	0	0	0	0	421	428	436	444	0	0	0	0	0	0	0	0	0	0	0	0	240	274	322	379	248	283	333	391
3	457	465	474	483	457	465	474	483	0	0	0	0	0	0	0	0	457	465	474	483	366	417	491	577	141	161	189	222
4	469	477	487	496	0	0	0	0	504	513	523	532	0	0	0	0	469	477	487	496	262	298	351	412	308	351	413	485
5	426	433	441	450	10,397	10,573	10,779	10,978	0	0	0	0	0	0	0	0	2,395	2,436	2,483	2,529	3,421	3,900	4,586	5,388	1,448	1,650	1,941	2,280
6	1,949	1,982	2,021	2,058	11,800	12,000	12,234	12,461	418	425	433	441	0	0	0	0	3,115	3,168	3,230	3,290	5,211	5,940	6,985	8,207	3,345	3,814	4,485	5,269
7	4,665	4,744	4,836	4,926	10,384	10,560	10,765	10,965	1,075	1,093	1,114	1,135	750	763	778	792	3,691	3,754	3,827	3,898	7,240	8,253	9,706	11,403	6,403	7,299	8,583	10,085
8	11,727	11,925	12,157	12,383	1,950	1,983	2,021	2,059	0	0	0	0	433	441	449	457	1,877	1,909	1,946	1,982	4,718	5,378	6,324	7,430	6,528	7,441	8,751	10,281
9	2,118	2,154	2,196	2,237	406	413	421	429	0	0	0	0	239	243	248	252	271	275	281	286	2,256	2,571	3,024	3,552	2,395	2,730	3,210	3,772
10	1,319	1,342	1,368	1,393	9,405	9,564	9,751	9,931	0	0	0	0	322	327	334	340	1,445	1,470	1,499	1,526	2,156	2,458	2,890	3,396	785	894	1,052	1,236
TOTALS	23,131	23,522	23,980	24,425	45,220	45,985	46,882	47,750	2,604	2,648	2,700	2,750	1,744	1,774	1,809	1,842	13,722	13,954	14,226	14,490	26,038	29,683	34,907	41,011	21,680	24,715	29,064	34,147

SOURCE: Tables 2 & 6

TABLE 8

FUTURE SHOP FLOORSPACE CAPACITY IN SOUTHEND-ON-SEA OUT OF CENTRE

SCENARIO: **As Table 6**

GROWTH IN SALES PER SQM, COMPARISON GOODS PER ANNUM 1.5 %

	CONVENIENCE GOODS				COMPARISON GOODS			
	2002	2006	2011	2016	2002	2006	2011	2016
Residents' Spending £000	86,421	87,882	89,596	91,256	47,718	54,398	63,971	75,158
Existing shop flsp (sq m net)	6,610	6,610	6,610	6,610	27,257	27,257	27,257	27,257
Sales per sq m net £	13,073	10,503	10,503	10,503	1,751	1,858	2,002	2,156
Sales from extg flrspce (£000)	86,421	69,429	69,429	69,429	47,718	50,647	54,561	58,777
Residual spending support new shops (£000)	0	18,454	20,168	21,827	0	3,751	9,410	16,380
Sales per sq m net in new shops (£)	11,000	11,000	11,000	11,000	2,000	2,000	2,000	2,000
Capacity for new floorspace (sq m net)	0	1,678	1,833	1,984	0	1,876	4,705	8,190
Less New Development (sq m net)	0	0	0	0	0	3,016	3,016	3,016
Capacity for New Florspace (sqm net)	0	1,678	1,833	1,984	0	-1,140	1,689	5,174

SOURCE: Table 7

NOTE : Commitments include Fossets Way and Waitrose Extension Unit

TABLE 6a
CONVENIENCE GOODS 2002

	WAITROSE, EASTERN AVENUE			TESCO, PRINCE AVENUE			ALDI, EASTERN AVENUE			LIDL, WOODGRANGE DRIVE			TESCO EXPRESS, SOUTHCHURCH RD		
	Main Food	Top-up	WEIGHTED AVERAGE	Main Food	Top-up	WEIGHTED AVERAGE	Main Food	Top-up	WEIGHTED AVERAGE	Main Food	Top-up	WEIGHTED AVERAGE	Main Food	Top-up	WEIGHTED AVERAGE
Expenditure Weighting:	75	25	100	75	25	100	75	25	100	75	25	100	75	25	100
Zone	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	0.0	0.0	0.0	1.3	1.5	1.4	0.0	0.0	0.0	0.0	0.0	0.0
2	0.0	0.0	0.0	1.1	0.0	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3	0.9	0.0	0.7	0.9	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.0	0.7
4	0.9	0.0	0.7	0.0	0.0	0.0	0.0	2.9	0.7	0.0	0.0	0.0	0.9	0.0	0.7
5	0.8	0.0	0.6	18.6	2.8	14.7	0.0	0.0	0.0	0.0	0.0	0.0	4.2	0.9	3.4
6	3.4	1.0	2.8	20.9	5.1	17.0	0.8	0.0	0.6	0.0	0.0	0.0	5.3	2.0	4.5
7	6.6	3.2	5.8	13.9	9.5	12.8	1.5	0.8	1.3	0.7	1.6	0.9	5.8	0.8	4.6
8	23.4	11.0	20.3	4.1	1.2	3.4	0.0	0.0	0.0	1.0	0.0	0.8	3.1	3.7	3.3
9	8.3	1.7	6.7	1.7	0.0	1.3	0.0	0.0	0.0	1.0	0.0	0.8	0.0	3.4	0.9
10	5.1	5.6	5.2	47.2	7.4	37.3	0.0	0.0	0.0	1.7	0.0	1.3	7.0	1.9	5.7

SOURCE: Southend-on-Sea Household Survey (May 2002)

TABLE 6b
COMPARISON GOODS 2002

	ALLOCATIONS TO AIRPORT WAY, GREYHOUND AND LONDON ROAD RPs							
	Clothing & footwear Q5	Furniture Carpets Q6	Household Textiles Q7	White Elect Aplncs Q8	V, Video, Hif & Photograph Q9	DIY goods & decrtrs spls Q10	ooks, jewelle watches, recn goods etc Q11	**WEIGHTED AVERAGE**
Expenditure Weighting:	572	204	67	96	102	186	774	**2001**
Zone	(%)	(%)	(%)	(%)	(%)	(%)	(%)	**(%)**
1	0.0	2.5	0.0	0.0	0.0	0.0	0.0	**0.3**
2	0.0	3.0	0.0	0.0	0.0	0.0	0.0	**0.3**
3	0.9	0.0	1.0	0.0	0.9	0.0	0.0	**0.3**
4	0.0	0.0	0.0	0.9	0.0	2.0	0.0	**0.2**
5	0.0	13.7	5.9	14.4	9.5	2.6	0.0	**3.0**
6	1.8	17.1	6.9	23.8	13.7	3.0	0.0	**4.6**
7	1.6	20.2	7.6	27.8	14.0	5.6	0.8	**5.6**
8	0.0	23.3	7.1	28.5	12.4	5.6	0.0	**5.1**
9	0.0	24.6	5.0	26.6	11.7	1.8	0.0	**4.7**
10	0.0	30.1	9.0	25.4	12.5	3.6	0.0	**5.6**

	ALLOCATIONS TO OTHER RETAIL WAREHOUSES*							
	Clothing & footwear Q5	Furniture Carpets Q6	Household Textiles Q7	White Elect Aplncs Q8	V, Video, Hif & Photograph Q9	DIY goods & decrtrs spls Q10	Books, jewlry watches, recn goods etc Q11	**WEIGHTED AVERAGE**
Expenditure Weighting:	572	204	67	96	102	186	774	**2001**
Zone	(%)	(%)	(%)	(%)	(%)	(%)	(%)	**(%)**
1	0.0	0.0	0.0	0.0	0.0	1.3	0.0	**0.1**
2	0.0	0.0	0.0	0.0	0.0	3.4	0.0	**0.3**
3	0.0	0.0	0.0	0.0	0.9	0.9	0.0	**0.1**
4	0.0	0.0	0.0	0.0	0.0	2.9	0.0	**0.3**
5	0.0	0.0	5.0	0.9	5.0	8.7	0.0	**1.3**
6	0.0	5.0	5.0	0.0	5.0	21.8	0.0	**3.0**
7	0.0	5.0	5.9	0.8	6.6	42.1	0.0	**5.0**
8	0.0	5.0	7.1	2.1	7.1	58.4	1.2	**7.1**
9	0.0	5.0	5.0	0.0	6.7	42.9	0.0	**5.0**
10	0.0	5.0	5.0	0.0	6.9	10.7	0.0	**2.0**

SOURCE: Southend-on-Sea Household Survey (May 2002)
ADJUSTED

* B&Q, Short Street and Waitrose Food & Home

OUT OF CENTRE CONVENIENCE GOODS FLOORSPACE

Store	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience Flsp (sqm)	Co Average Sales per sq m net)	Average Turnover (£)
Waitrose, Eastern Avenue	2,880	88%	2,534	10,800	27,371,520
Tesco, Prince Avenue	4,180	67%	2,801	12,100	33,887,260
Aldi, Eastern Avenue	760	79%	600	5,700	3,422,280
Lidl, Woodgrange Drive	642	74%	475	4,900	2,327,892
Tesco, Express, Southech	200	100%	200	12,100	2,420,000
TOTAL	8,662		6,610		69,428,952
AVERAGE				10,503	

SOURCE: Southend-on-Sea Borough Council Retail Monitoring Report April 2001
NOTE: Waitrose flsp 4,800 net food and non-food, food @60%

Table 8b
OUT OF CENTRE COMPARISON GOODS FLOORSPACE

	Net Flsp (sqm)	Co Average Sales £ per sq m ne	Average Turnover (£)
Southend Airport Retail Park			
Harveys Carpet Sense	880	1,500	1,320,000
Pets at Home	1,323	1,600	2,116,800
Allied Carpets	875	1,500	1,312,500
PC World	1,323	8,300	10,980,900
Staples	1,778	1,700	3,022,600
Carpet Right	883	1,200	1,059,600
Young's Sofas	880	1,500	1,320,000
Sub-Total	7,942		21,132,400
Greyhound Retail Park			
Matalan	2,975	3,000	8,925,000
What Everyone Wants	1,751	1,200	2,101,200
Poundstretcher	876	1,200	1,051,200
Sub-Total	5,602		12,077,400
London Road Retail Park			
Homebase	3,784	1,400	5,297,600
Curry's	1,150	5,300	6,095,000
Tiles R Us	1,150	1,200	1,380,000
Sub-Total	6,084		12,772,600
Other Retail Warehouses			
Kenbro Carpets, Sutton Rd	1,800	1,200	2,160,000
Halfords, London Road	750		
Waitrose Food & Home	1,920	6,600	12,672,000
B&Q, Short Street	3,159	1,800	5,686,200
Sub-Total	7,629		20,518,200
TOTAL	27,257		53,728,000
AVERAGE		1,971	

SOURCE: CBHP Essex Retail Study
NOTE: Kenbro Carpets estimated @ 70%, not retail shed, several historic units amalgamated
B&Q flsp from RPS Study (2002)
Homebase flsp from RPS Study (2002)
Exlucdes Travis Perkins, rear of Greyhound, Jewsons, London Road, Jewsons, Stoke Road
Currys and Tiles R Us (2,700 gross for both)

SOUTHEND-ON-SEA OUT OF CENTRE

LOCAL PLAN REVIEW RETAIL STUDY, 2002

TABLE 6
SOUTHEND-ON-SEA OUT-OF-CENTRE TRADE DRAW
SCENARIO TWO: **New Bulky Goods Floorspace**

	CONVENIENCE GOODS																				COMPARISON GOODS							
	WAITROSE, EASTERN AVENUE				TESCO, PRINCE AVENUE				ALDI, EASTERN AVENUE				LIDL, WOODGRANGE DRIVE				TESCO EXP, SOUTHCHURCH RD				RETAIL PARKS				OTHER RETAIL WAREHOUSES			
Catchment	2002	2006	2011	2016	2002	2006	2011	2016	2002	2006	2011	2016	2002	2006	2011	2016	2002	2006	2011	2016	2002	2006	2011	2016	2002	2006	2011	2016
Zone	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.4	1.4	1.4	1.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.3	0.3	0.3	0.1	0.1	0.1	0.1
2	0.0	0.0	0.0	0.0	0.8	0.8	0.8	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3
3	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	0.7	0.7	0.7	0.3	0.3	0.3	0.3	0.1	0.1	0.1	0.1
4	0.7	0.7	0.7	0.7	0.0	0.0	0.0	0.0	0.7	0.7	0.7	0.7	0.0	0.0	0.0	0.0	0.7	0.7	0.7	0.7	0.2	0.2	0.2	0.2	0.3	0.3	0.3	0.3
5	0.6	0.6	0.6	0.6	14.7	14.7	14.7	14.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.4	3.4	3.4	3.4	2.9	2.9	2.9	2.9	0.9	3.9	3.9	3.9
6	2.8	2.8	2.8	2.8	17.0	17.0	17.0	17.0	0.6	0.6	0.6	0.6	0.0	0.0	0.0	0.0	4.5	4.5	4.5	4.5	4.7	4.7	4.7	4.7	2.7	5.7	5.7	5.7
7	5.8	5.8	5.8	5.8	12.8	12.8	12.8	12.8	1.3	1.3	1.3	1.3	0.9	0.9	0.9	0.9	4.6	4.6	4.6	4.6	5.7	5.7	5.7	5.7	4.7	9.7	9.7	9.7
8	20.3	20.3	20.3	20.3	3.4	3.4	3.4	3.4	0.0	0.0	0.0	0.0	0.8	0.8	0.8	0.8	3.3	3.3	3.3	3.3	5.2	5.2	5.2	5.2	6.8	11.8	11.8	11.8
9	6.7	6.7	6.7	6.7	1.3	1.3	1.3	1.3	0.0	0.0	0.0	0.0	0.8	0.8	0.8	0.8	0.9	0.9	0.9	0.9	4.8	4.8	4.8	4.8	4.8	9.8	9.8	9.8
10	5.2	5.2	5.2	5.2	37.3	37.3	37.3	37.3	0.0	0.0	0.0	0.0	1.3	1.3	1.3	1.3	5.7	5.7	5.7	5.7	5.6	5.6	5.6	5.6	1.8	6.8	6.8	6.8

SOURCE: Southend-on-Sea Household Survey (May 2002)

TABLE 7
FORECAST RETAIL SALES SOUTHEND-ON-SEA OUT OF CENTRE (1998 prices)
SCENARIO ONE: **As Table 6**

	CONVENIENCE GOODS																				COMPARISON GOODS							
	WAITROSE, EASTERN AVENUE				TESCO, PRINCE AVENUE				ALDI, EASTERN AVENUE				LIDL, WOODGRANGE DRIVE				TESCO EXP, SOUTHCHURCH RD				RETAIL PARKS				OTHER RETAIL WAREHOUSES			
Catchment	2002	2006	2011	2016	2002	2006	2011	2016	2002	2006	2011	2016	2002	2006	2011	2016	2002	2006	2011	2016	2002	2006	2011	2016	2002	2006	2011	2016
Zone	(£000)	(£000)	(£000)	£(000)	(£000)	(£000)	(£000)	£(000)	(£000)	(£000)	(£000)	£(000)	(£000)	(£000)	(£000)	£(000)	(£000)	(£000)	(£000)	£(000)	(£000)	(£000)	(£000)	£(000)	(£000)	(£000)	(£000)	£(000)
1	0	0	0	0	0	0	0	0	607	618	630	641	0	0	0	0	0	0	0	0	170	194	228	268	81	92	108	127
2	0	0	0	0	421	428	436	444	0	0	0	0	0	0	0	0	0	0	0	0	240	274	322	379	248	283	333	391
3	457	465	474	483	457	465	474	483	0	0	0	0	0	0	0	0	457	465	474	483	366	417	491	577	141	161	189	222
4	469	477	487	496	0	0	0	0	504	513	523	532	0	0	0	0	469	477	487	496	262	298	351	412	308	351	413	485
5	426	433	441	450	10,397	10,573	10,779	10,978	0	0	0	0	0	0	0	0	2,395	2,436	2,483	2,529	3,322	3,786	4,453	5,231	968	4,989	5,867	6,892
6	1,949	1,982	2,021	2,058	11,800	12,000	12,234	12,461	418	425	433	441	0	0	0	0	3,115	3,168	3,230	3,290	5,301	6,043	7,106	8,349	3,057	7,352	8,646	10,158
7	4,665	4,744	4,836	4,928	10,384	10,560	10,765	10,965	1,075	1,093	1,114	1,135	750	763	778	792	3,691	3,754	3,827	3,898	7,342	8,370	9,843	11,564	6,076	14,232	16,737	19,664
8	11,727	11,925	12,157	12,383	1,950	1,983	2,021	2,059	0	0	0	0	433	441	449	457	1,877	1,909	1,946	1,982	4,791	5,462	6,423	7,546	6,294	12,413	14,597	17,150
9	2,118	2,154	2,196	2,237	406	413	421	429	0	0	0	0	239	243	248	252	271	275	281	286	2,294	2,615	3,075	3,612	2,273	5,317	6,253	7,346
10	1,319	1,342	1,368	1,393	9,405	9,564	9,751	9,931	0	0	0	0	322	327	334	340	1,445	1,470	1,499	1,526	2,187	2,493	2,932	3,445	686	2,992	3,519	4,134
TOTALS	23,131	23,522	23,960	24,425	45,220	45,965	46,862	47,750	2,604	2,648	2,700	2,750	1,744	1,774	1,809	1,842	13,722	13,954	14,226	14,490	26,274	29,952	35,224	41,383	20,131	48,182	56,661	66,569

SOURCE: Tables 2 & 6

TABLE 8
FUTURE SHOP FLOORSPACE CAPACITY IN SOUTHEND-ON-SEA OUT OF CENTRE
SCENARIO: **As Table 6**

GROWTH IN SALES PER SQM, COMPARISON GOODS PER ANNUM 1.5 %

	CONVENIENCE GOODS				COMPARISON GOODS			
	2002	2006	2011	2016	2002	2006	2011	2016
Residents' Spending £000	86,421	87,882	89,596	91,256	46,405	78,134	91,884	107,952
Existing shop flsp (sq m net)	6,610	6,610	6,610	6,610	27,257	27,257	27,257	27,257
Sales per sq m net £	13,073	10,503	10,503	10,503	1,703	1,807	1,947	2,097
Sales from extg flrspce (£000)	86,421	69,429	69,429	69,429	46,405	49,253	53,059	57,160
Residual spending support new shops (£000)	0	18,454	20,168	21,827	0	28,881	38,825	50,792
Sales per sq m net in new shops (£)	11,000	11,000	11,000	11,000	2,000	2,000	2,000	2,000
Capacity for new floorspace (sq m net)	0	1,678	1,833	1,984	0	14,441	19,413	25,396
Less New Development (sq m net)	0	0	0	0	0	14,162	14,162	14,162
Capacity for New Florspace (sqm net)	0	1,678	1,833	1,984	0	279	5,251	11,234

SOURCE: Table 7
NOTE: Commitments include Fossets Way and Waitrose Extension Unit and B&Q Warehouse

TABLE 9

WESTCLIFF TRADE DRAW

SCENARIO ONE: **Baseline**

	CONVENIENCE GOODS								COMPARISON GOODS			
	SOMERFIELD, LONDON ROAD				LOCAL STORES							
Catchment Zone	2002 (%)	2006 (%)	2011 (%)	2016 (%)	2002 (%)	2006 (%)	2011 (%)	2016 (%)	2002 (%)	2006 (%)	2011 (%)	2016 (%)
1	0.0	0.0	0.0	0.0	1.4	1.4	1.4	1.4	1.3	1.3	1.3	1.3
2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.2	0.2	0.2
3	0.0	0.0	0.0	0.0	0.7	0.7	0.7	0.7	0.6	0.6	0.6	0.6
4	0.0	0.0	0.0	0.0	0.7	0.7	0.7	0.7	0.0	0.0	0.0	0.0
5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.2	0.2	0.2
6	0.0	0.0	0.0	0.0	0.3	0.3	0.3	0.3	0.9	0.9	0.9	0.9
7	6.9	6.9	6.9	6.9	5.7	5.7	5.7	5.7	3.9	3.9	3.9	3.9
8	0.8	0.8	0.8	0.8	0.0	0.0	0.0	0.0	0.7	0.7	0.7	0.7
9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.2	0.2	0.2
10	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.7	1.7	1.7	1.7

SOURCE: Southend-on-Sea Household Survey (May 2002)

TABLE 10

FORECAST RETAIL SALES WESTCLIFF ON SEA (1998 PRICES)

SCENARIO: **As Table 9**

	CONVENIENCE GOODS								COMPARISON GOODS			
	SOMERFIELD, LONDON ROAD				LOCAL STORES							
Catchment Zone	2002 (£000)	2006 (£000)	2011 (£000)	2016 £(000)	2002 (£000)	2006 (£000)	2011 (£000)	2016 £(000)	2002 (£000)	2006 (£000)	2011 (£000)	2016 £(000)
1	0	0	0	0	607	618	630	641	854	974	1,145	1,348
2	0	0	0	0	0	0	0	0	158	180	211	248
3	0	0	0	0	457	465	474	483	663	756	889	1,044
4	0	0	0	0	469	477	487	496	0	0	0	0
5	0	0	0	0	0	0	0	0	251	287	337	396
6	0	0	0	0	174	177	180	184	1,068	1,216	1,430	1,680
7	5,618	5,713	5,824	5,932	4,624	4,702	4,794	4,883	5,058	5,768	6,780	7,258
8	433	441	448	457	0	0	0	0	611	697	819	963
9	0	0	0	0	0	0	0	0	98	111	131	154
10	0	0	0	0	0	0	0	0	670	764	898	1,055
TOTALS	6,051	6,153	6,273	6,390	6,332	6,439	6,565	6,686	9,429	10,749	12,641	14,851

SOURCE: Tables 2 & 9

TABLE 11

FUTURE SHOP FLOORSPACE CAPACITY IN WESTCLIFF

SCENARIO: **As Table 9**

	CONVENIENCE GOODS				COMPARISON GOODS			
	2002	2006	2011	2016	2002	2006	2011	2016
Residents' Spending £000	12,383	12,589	12,838	13,076	9,429	10,749	12,641	14,851
Existing shop floorspace (sq m net)	3,056	3,056	3,056	3,056	14,220	14,220	14,220	14,220
Sales per sq m net £	4,052	4,270	4,270	4,270	663	756	889	1,044
Sales from extg flspce (£000)	12,383	13,051	13,051	13,051	9,429	10,749	12,641	14,851
Residual spending support new shops (£000)	0	-458	-212	25	0	0	0	0
Sales per sq m net in new shops (£)	11,000	11,000	11,000	11,000	5,000	5,000	5,000	5,000
Capacity for new floorspace (sq m net)	0	-42	-19	2	0	0	0	0

SOURCE: Table 10

TABLE 9a

CONVENIENCE GOODS 2002

	WESTCLIFF SOMERFIELD, LONDON ROAD			WESTCLIFF LOCAL STORES		
	Main Food	**Top-up**	**WEIGHTED AVERAGE**	**Main Food**	**Top-up**	**WEIGHTED AVERAGE**
Expenditure Weighting:	75	25	100	75	25	100
Zone	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	1.3	1.5	1.4
2	0.0	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.9	0.0	0.7
4	0.0	0.0	0.0	0.9	0.0	0.7
5	0.0	0.0	0.0	0.0	0.0	0.0
6	0.0	0.0	0.0	0.0	1.0	0.3
7	5.8	10.3	6.9	1.5	16.3	5.7
8	1.0	0.0	0.8	0.0	0.0	0.0
9	0.0	0.0	0.0	0.0	0.0	0.0
10	0.0	0.0	0.0	0.0	0.0	0.0

SOURCE: Southend-on-Sea Household Survey (May 2002)

TABLE 9b

COMPARISON GOODS 2002

	ALLOCATIONS TO WESTCLIFF							
	Clothing & footwear Q5	Furniture Carpets Q6	Household Textiles Q7	White Elect Aplncs Q8	TV, Video, HIFI & Photography Q9	DIY goods & decrtrs spls Q10	Books, jewlry, watches, recnl goods etc Q11	**WEIGHTED AVERAGE**
Expenditure Weighting:	572	204	67	96	102	186	774	2001
Zone	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	1.3	0.0	1.5	1.5	1.4	0.0	1.7	1.2
2	0.0	1.4	0.0	1.2	0.0	0.0	0.0	0.2
3	0.0	1.1	1.0	0.0	0.0	0.0	1.1	0.6
4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
5	0.0	1.0	0.9	0.9	0.9	0.0	0.0	0.2
6	0.0	0.0	0.0	0.0	0.0	1.0	2.1	0.9
7	2.3	5.3	2.7	4.7	6.8	5.6	4.2	4.0
8	0.0	1.2	1.1	0.0	0.0	0.0	1.2	0.6
9	0.0	2.0	0.0	0.0	0.0	0.0	0.0	0.2
10	0.0	0.0	0.0	0.0	0.0	0.0	4.1	1.6

SOURCE: Southend-on-Sea Household Survey (May 2002)

TABLE 11a

WESTCLIFF CONVENIENCE GOODS FLOORSPACE

Store	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience Flsp (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£)
Somerfield, London Road	435	100%	435	5,900	2,566,500
Local Stores	2,621	100%	2,621	4,000	10,484,000
TOTAL	3,056		3,056		13,050,500
AVERAGE				4,270	

Source: Experian Goad Comparison Report (2001), Southend on Sea Monitoring Report (2001)

4366 3056.2

Table 11b

WESTCLIFF COMPARISON GOODS FLOORSPACE

	Net Flsp (sqm)
Total Comparison Goods	14,220

SOURCE: Experian Goad Comparison Report (2001) @ 60%

LEIGH ON SEA

LOCAL PLAN REVIEW RETAIL STUDY, 2002

TABLE 12

LEIGH ON SEA TRADE DRAW

SCENARIO ONE: **Baseline**

Catchment Zone	CONVENIENCE GOODS: SAFEWAY, LONDON ROAD 2002 (%)	2006 (%)	2011 (%)	2016 (%)	CONVENIENCE GOODS: LOCAL STORES 2002 (%)	2006 (%)	2011 (%)	2016 (%)	COMPARISON GOODS 2002 (%)	2006 (%)	2011 (%)	2016 (%)
1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
2	2.5	2.5	2.5	2.5	0.0	0.0	0.0	0.0	0.3	0.3	0.3	0.3
3	0.7	0.7	0.7	0.7	1.0	1.0	1.0	1.0	2.0	2.0	2.0	2.0
4	0.3	0.3	0.3	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
5	0.0	0.0	0.0	0.0	2.5	2.5	2.5	2.5	0.9	0.9	0.9	0.9
6	19.7	19.7	19.7	19.7	17.4	17.4	17.4	17.4	14.7	14.7	14.7	14.7
7	3.7	3.7	3.7	3.7	2.9	2.9	2.9	2.9	1.6	1.6	1.6	1.6
8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.9	0.9	0.9
9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
10	0.5	0.5	0.5	0.5	1.8	1.8	1.8	1.8	0.0	0.0	0.0	0.0

SOURCE: Southend-on-Sea Household Survey (May 2002)

TABLE 13

FORECAST RETAIL SALES LEIGH ON SEA (1998 Prices)

SCENARIO: **As Table 12**

Catchment Zone	CONVENIENCE GOODS: SAFEWAY, LONDON ROAD 2002 (£000)	2006 (£000)	2011 (£000)	2016 £(000)	CONVENIENCE GOODS: LOCAL STORES 2002 (£000)	2006 (£000)	2011 (£000)	2016 £(000)	COMPARISON GOODS 2002 (£000)	2006 (£000)	2011 (£000)	2016 £(000)
1	0	0	0	0	0	0	0	0	0	0	0	0
2	1,352	1,283	1,308	1,332	0	0	0	0	247	282	331	399
3	457	465	474	483	644	655	667	680	2,201	2,509	2,950	3,465
4	174	177	180	184	0	0	0	0	0	0	0	0
5	0	0	0	0	1,756	1,786	1,821	1,855	1,329	1,173	1,379	1,621
6	13,732	13,965	14,236	14,501	12,131	12,336	12,576	12,810	16,630	18,958	22,294	26,193
7	3,002	3,052	3,112	3,170	2,353	2,392	2,439	2,484	2,302	2,202	2,594	3,153
8	0	0	0	0	0	0	0	0	785	895	1,053	1,237
9	0	0	0	0	0	0	0	0	0	0	0	0
10	120	122	124	127	442	449	458	467	0	0	0	0
TOTALS	18,743	19,064	19,435	19,796	17,325	17,619	17,962	18,295	22,894	26,099	30,691	36,059

SOURCE: Tables 2 & 12

TABLE 14

FUTURE SHOP FLOORSPACE CAPACITY IN LEIGH ON SEA

SCENARIO: **As Table 13**

	CONVENIENCE GOODS 2002	2006	2011	2016	COMPARISON GOODS 2002	2006	2011	2016
Residents' Spending £000	36,072	36,682	37,397	38,091	22,894	26,099	30,691	36,059
Existing shop floorspace (sq m net)	4,592	4,592	4,592	4,592	13,140	13,140	13,140	13,140
Sales per sq m net £	7,855	5,489	5,489	5,489	1,742	1,986	2,336	2,744
Sales from exitg flrspce (£000)	36,072	25,207	25,207	25,207	22,894	26,099	30,691	36,059
Residual spending support new shops (£000)	0	11,475	12,190	12,884	0	0	0	0
Sales per sq m net in new shops (£)	11,000	11,000	11,000	11,000	5,000	5,000	5,000	5,000
Capacity for new floorspace (sq m net)	0	1,043	1,108	1,171	0	0	0	0

SOURCE: Table 13

TABLE 12a
CONVENIENCE GOODS 2002

	LEIGH SAFEWAY, LONDON ROAD			LEIGH LOCAL STORES		
	Main Food	**Top-up**	**WEIGHTED AVERAGE**	**Main Food**	**Top-up**	**WEIGHTED AVERAGE**
Expenditure Weighting:	75	25	100	75	25	100
Zone	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	0.0	0.0	0.0
2	3.3	0.0	2.5	0.0	0.0	0.0
3	0.9	0.0	0.7	0.0	3.8	1.0
4	0.0	1.0	0.3	0.0	0.0	0.0
5	0.0	0.0	0.0	3.3	0.0	2.5
6	21.2	15.3	19.7	9.3	41.8	17.4
7	4.4	1.6	3.7	1.5	7.1	2.9
8	0.0	0.0	0.0	0.0	0.0	0.0
9	0.0	0.0	0.0	0.0	0.0	0.0
10	0.0	1.9	0.5	1.7	1.9	1.8

SOURCE: Southend on Sea Household Survey (May 2002)

TABLE 12b
COMPARISON GOODS 2002

	ALLOCATIONS TO LEIGH							
	Clothing & footwear Q5	Furniture Carpets Q6	Household Textiles Q7	White Elect Aplncs Q8	TV, Video, HiFi & Photography Q9	DIY goods & decrtrs spls Q10	Books, jewlry, watches, recnl goods etc Q11	**WEIGHTED AVERAGE**
Expenditure Weighting:	572	204	67	86	102	186	774	2001
Zone	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
2	1.1	0.0	0.0	0.0	0.0	0.0	0.0	0.3
3	0.0	3.2	1.0	0.0	0.0	0.0	4.3	2.0
4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
5	0.0	1.0	0.9	0.0	0.0	0.0	2.0	0.9
6	5.4	9.8	9.8	15.4	20.4	9.0	23.0	14.7
7	0.0	0.9	0.9	1.6	1.7	0.0	3.3	1.6
8	0.0	2.4	1.1	1.1	1.1	0.0	1.2	0.8
9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
10	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

SOURCE: Southend-on-Sea Household Survey (May 2002)

TABLE 14a
LEIGH CONVENIENCE GOODS FLOORSPACE

Store	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience Flsp (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£)
Safeway, London Road	1,490	90%	1,341	9,100	12,203,100
Local Stores	3,251	100%	3,251	4,000	13,004,000
TOTAL	4,741		4,592		25,207,100
AVERAGE				5,489	

Source: Experian Goad Comparison Report (2001), Southend on Sea Borough Council Monitoring Report (2001)

4840 3251.5

Table 14b
OUT OF CENTRE COMPARISON GOODS FLOORSPACE

	Net Flsp (sqm)
Total Comparison Goods	13,140

SOURCE: Experian Goad Comparison Report (2001) @ 50%

TABLE 15
NORTH SHOEBURY AND EASTWOOD TRADE DRAW

SCENARIO ONE: **Baseline**

	CONVENIENCE GOODS							
	ASDA, NORTH SHOEBURY				SAFEWAY, EASTWOOD			
Catchment	2002	2006	2011	2016	2002	2006	2011	2016
Zone	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
2	0.0	0.0	0.0	0.0	0.8	0.8	0.8	0.8
3	0.0	0.0	0.0	0.0	0.3	0.3	0.3	0.3
4	0.9	0.9	0.9	0.9	0.0	0.0	0.0	0.0
5	1.4	1.4	1.4	1.4	2.0	2.0	2.0	2.0
6	1.3	1.3	1.3	1.3	10.7	10.7	10.7	10.7
7	2.7	2.7	2.7	2.7	4.3	4.3	4.3	4.3
8	27.3	27.3	27.3	27.3	0.3	0.3	0.3	0.3
9	72.1	72.1	72.1	72.1	0.0	0.0	0.0	0.0
10	5.1	5.1	5.1	5.1	3.8	3.8	3.8	3.8

SOURCE: Southend-on-Sea Household Survey (May 2002)

TABLE 16
FORECAST RETAIL SALES NORTH SHOEBURY, EASTWOOD

SCENARIO: **As Table 15**

	CONVENIENCE GOODS							
	ASDA, NORTH SHOEBLRY				SAFEWAY, EASTWOOD			
Catchment	2002	2006	2011	2016	2002	2006	2011	2016
Zone	(£000)	(£000)	(£000)	£(000)	(£000)	(£000)	(£000)	£(000)
1	0	0	0	0	0	0	0	0
2	0	0	0	0	421	428	436	444
3	0	0	0	0	169	172	176	179
4	643	654	667	679	0	0	0	0
5	1,011	1,028	1,048	1,068	1,437	1,461	1,490	1,517
6	888	903	920	937	7,449	7,575	7,723	7,866
7	2,190	2,227	2,271	2,313	3,488	3,547	3,617	3,684
8	15,756	16,022	16,335	16,637	173	176	180	183
9	22,851	23,338	23,794	24,234	0	0	0	0
10	1,288	1,309	1,335	1,360	966	982	1,001	1,020
TOTALS	44,727	45,483	46,370	47,229	14,104	14,342	14,622	14,893

SOURCE: Tables 2 & 15

TABLE 16
FUTURE SHOP FLOORSPACE CAPACITY IN NORTH SHOEBURY, EASTWOOD

SCENARIO: **As Table 15**

	ASDA				SAFEWAY			
	2002	2006	2011	2016	2002	2006	2011	2016
Residents' Spending £000	44,727	45,483	46,370	47,229	14,104	14,342	14,622	14,893
Existing shop floorspace (sq m net)	2,508	2,508	2,508	2,508	1,336	1,336	1,336	1,336
Sales per sq m net £	17,834	11,400	11,400	11,400	10,557	9,100	9,100	9,100
Sales from extg flrspce (£000)	44,727	28,591	28,591	28,591	14,104	12,158	12,158	12,158
Residual spending support new shops (£000)	0	16,892	17,779	18,638	0	2,185	2,464	2,736
Sales per sq m net in new shops (£)	11,000	11,000	11,000	11,000	11,000	11,000	10,000	11,000
Capacity for new floorspace (sq m net)	0	1,536	1,616	1,694	0	199	246	249

SOURCE: Table 15

TABLE 15a
CONVENIENCE GOODS 2002

	ASDA, NORTH SHOEBURY			EASTWOOD SAFEWAY, WESTERN APPROACH		
	Main Food	**Top-up**	**WEIGHTED AVERAGE**	**Main Food**	**Top-up**	**WEIGHTED AVERAGE**
Expenditure Weighting:	75	25	100	75	25	100
Zone	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	0.0	0.0	0.0
2	0.0	0.0	0.0	1.1	0.0	0.8
3	0.0	0.0	0.0	0.0	1.0	0.3
4	0.9	1.0	0.9	0.0	0.0	0.0
5	1.6	0.9	1.4	2.4	0.9	2.0
6	1.7	0.0	1.3	10.2	12.2	10.7
7	3.6	0.0	2.7	4.4	4.0	4.3
8	32.7	11.0	27.3	0.0	1.2	0.3
9	81.7	43.1	72.1	0.0	0.0	0.0
10	6.8	0.0	5.1	5.1	0.0	3.8

SOURCE: Southend-on-Sea Household Survey (May 2002)

TABLE 16a
NORTH SHOEBURY AND EASTWOOD CONVENIENCE GOODS FLOORSPACE

Store	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience Flsp (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£)
Asda, North Shoebury	4,180	60%	2,508	11,400	28,591,200
Safeway, Eastwood	1,670	80%	1,336	9,100	12,157,600

Source: Southend-on-Sea Borough Council

Table 23
TOTAL CATCHMENT AREA CONVENIENCE GOODS MARKET SHARES 2002

	SOUTHEND TOWN CENTRE			SOUTHEND OUT-OF-CENTRE						WESTCLIFF			LEIGH			NORTH SHOEBURY EASTWOOD			TOTAL
Catchment Zone	Sainsbury's (%)	Local Stores (%)	Total (%)	Waitrose (%)	Tesco (%)	Aldi (%)	Lidl (%)	Tesco Exp	Total (%)	Somerfield (%)	Local Stores (%)	Total (%)	Safeway (%)	Local Stores (%)	Total (%)	Asda (%)	Safway (%)	Total (%)	(%)
1	0.0	0.0	0.0	0.0	0.0	1.4	0.0	0.0	1.4	0.0	1.4	1.4	0.0	0.0	0.0	0.0	0.0	0.0	**2.7**
2	0.3	0.7	1.0	0.0	0.8	0.0	0.0	0.0	0.8	0.0	0.0	0.0	2.5	0.0	2.5	0.0	0.8	0.8	**5.1**
3	3.5	1.2	4.7	0.7	0.7	0.0	0.0	0.7	2.0	0.0	0.7	0.7	0.7	1.0	1.6	0.0	0.3	0.3	**9.3**
4	0.0	0.3	0.3	0.7	0.0	0.7	0.0	0.7	2.1	0.0	0.7	0.7	0.3	0.0	0.3	0.9	0.0	0.9	**4.2**
5	0.6	2.2	2.8	0.6	8.7	0.0	0.0	9.4	18.6	0.0	0.0	0.0	0.0	2.5	2.5	1.4	2.0	3.5	**27.4**
6	7.5	3.9	11.4	2.8	14.0	0.6	0.0	7.5	24.8	0.0	0.3	0.3	19.7	17.4	37.2	1.3	10.7	12.0	**85.6**
7	31.3	10.3	41.6	5.8	12.8	1.3	0.9	4.6	25.4	6.9	5.7	12.6	3.7	2.9	6.6	2.7	4.3	7.0	**93.2**
8	17.6	16.2	33.8	20.3	3.4	0.0	0.8	3.3	27.7	0.8	0.0	0.8	0.0	0.0	0.0	27.3	0.3	27.6	**89.8**
9	3.3	3.0	6.4	6.7	1.3	0.0	0.8	0.9	9.5	0.0	0.0	0.0	0.0	0.0	0.0	72.1	0.0	72.1	**87.9**
10	3.8	1.4	5.2	5.2	26.0	0.0	1.3	17.0	49.5	0.0	0.0	0.0	0.5	1.8	2.2	5.1	3.8	8.9	**65.9**

Table 24
2002 TOTAL CATCHMENT AREA COMPARISON GOODS MARKET SHARES

	SOUTHEND TC	SOUTHEND OOC			WESTCLIFF	LEIGH	TOTAL
Catchment Zone	Total (%)	Retail Parks (%)	Other RW (%)	Total (%)	Total (%)	Total (%)	(%)
1	1.0	0.3	0.1	0.4	1.3	0.0	**2.7**
2	18.0	0.3	0.3	0.6	0.2	0.0	**18.8**
3	30.5	0.3	0.1	0.5	0.6	1.0	**32.5**
4	2.2	0.2	0.3	0.5	0.0	0.0	**2.7**
5	39.2	3.0	1.3	4.3	0.2	2.5	**46.2**
6	48.3	4.6	3.0	7.6	0.9	17.4	**74.3**
7	67.4	5.6	5.0	10.6	3.9	2.9	**84.9**
8	72.4	5.1	7.1	12.2	0.7	0.0	**85.3**
9	72.1	4.7	5.0	9.7	0.2	0.0	**82.1**
10	65.3	5.6	2.0	7.6	1.7	1.8	**76.4**

Table 24
2006 TOTAL CATCHMENT AREA COMPARISON GOODS MARKET SHARES

	SOUTHEND TC	SOUTHEND OOC			WESTCLIFF	LEIGH	TOTAL
Catchment Zone	Total (%)	Retail Parks (%)	Other RW (%)	Total (%)	Total (%)	Total (%)	(%)
1	1.0	0.3	0.1	0.4	1.3	0.0	**2.7**
2	18.0	0.3	0.3	0.6	0.2	0.3	**19.2**
3	30.5	0.3	0.1	0.5	0.6	2.0	**33.6**
4	2.2	0.2	0.3	0.5	0.0	0.0	**2.7**
5	39.2	2.9	3.9	6.8	0.2	0.9	**47.1**
6	48.3	4.7	5.7	10.4	0.9	14.7	**74.4**
7	67.4	5.7	9.7	15.5	3.9	1.6	**88.4**
8	72.4	5.2	11.8	17.1	0.7	0.9	**91.0**
9	72.1	4.8	9.8	14.5	0.2	0.0	**86.9**
10	65.3	5.6	6.8	12.4	1.7	0.0	**79.4**

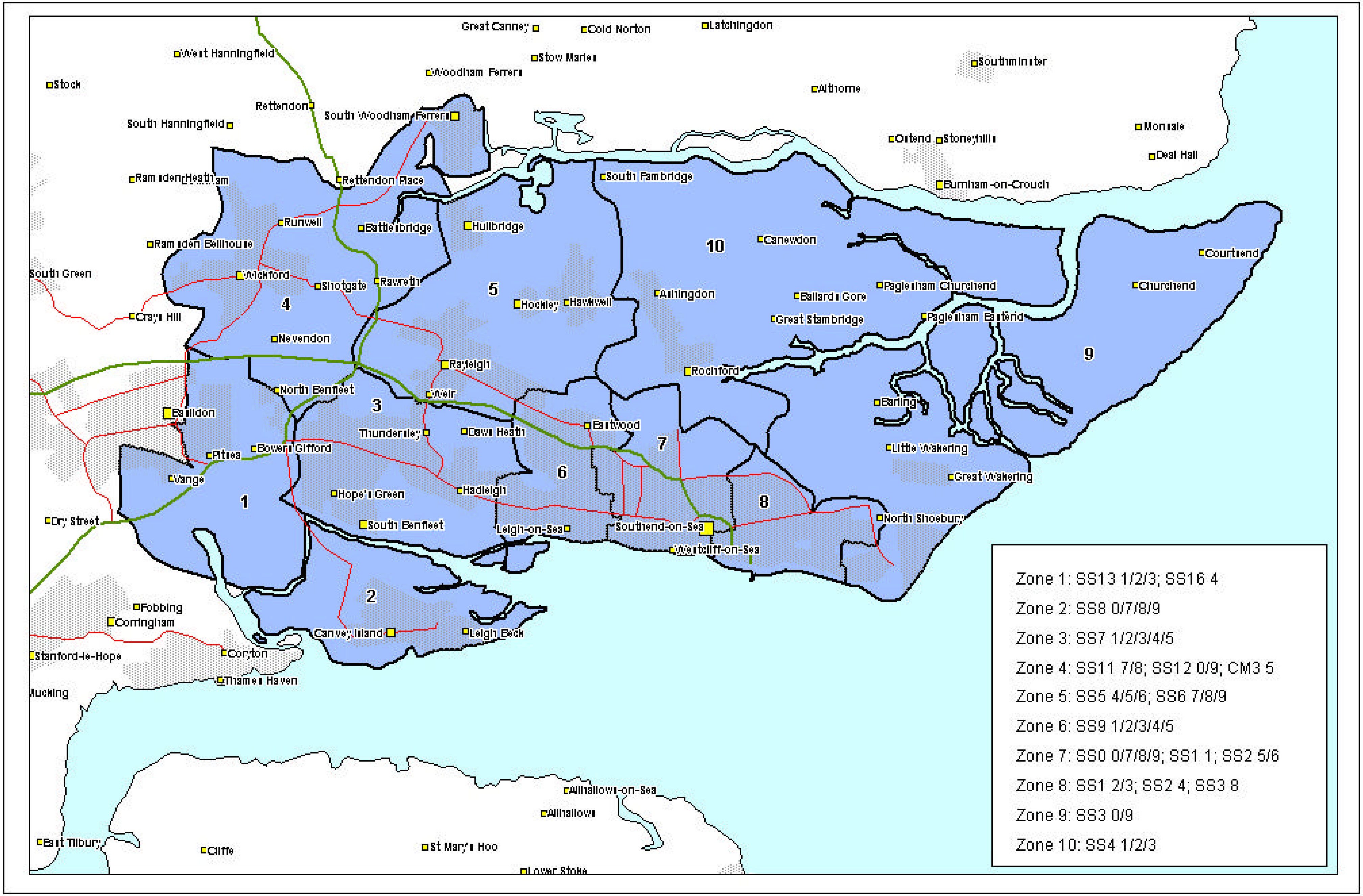
TABLE 25
FORECAST CAPACITY IN SOUTHEND-ON-SEA (GR 3%)

	CONVENIENCE GOODS				COMPARISON GOODS			
	2002	2006	2011	2016	2002	2006	2011	2016
Southend-on-Sea Town Centre	0	906	1,025	1,140	0	4,868	12,211	21,254
Southend-on-Sea Out-of-Centre	0	1,678	1,833	1,984	0	-1,140	1,689	5,174
Westcliff	0	-42	-19	2	0	0	0	0
Leigh	0	1,043	1,108	1,171	0	0	0	0
North Shoebury	0	1,536	1,616	1,694				
Eastwood	0	199	246	249				
TOTAL DISTRICT	0	5,319	5,810	6,241	0	3,727	13,900	26,429

Plan 1

Survey Area

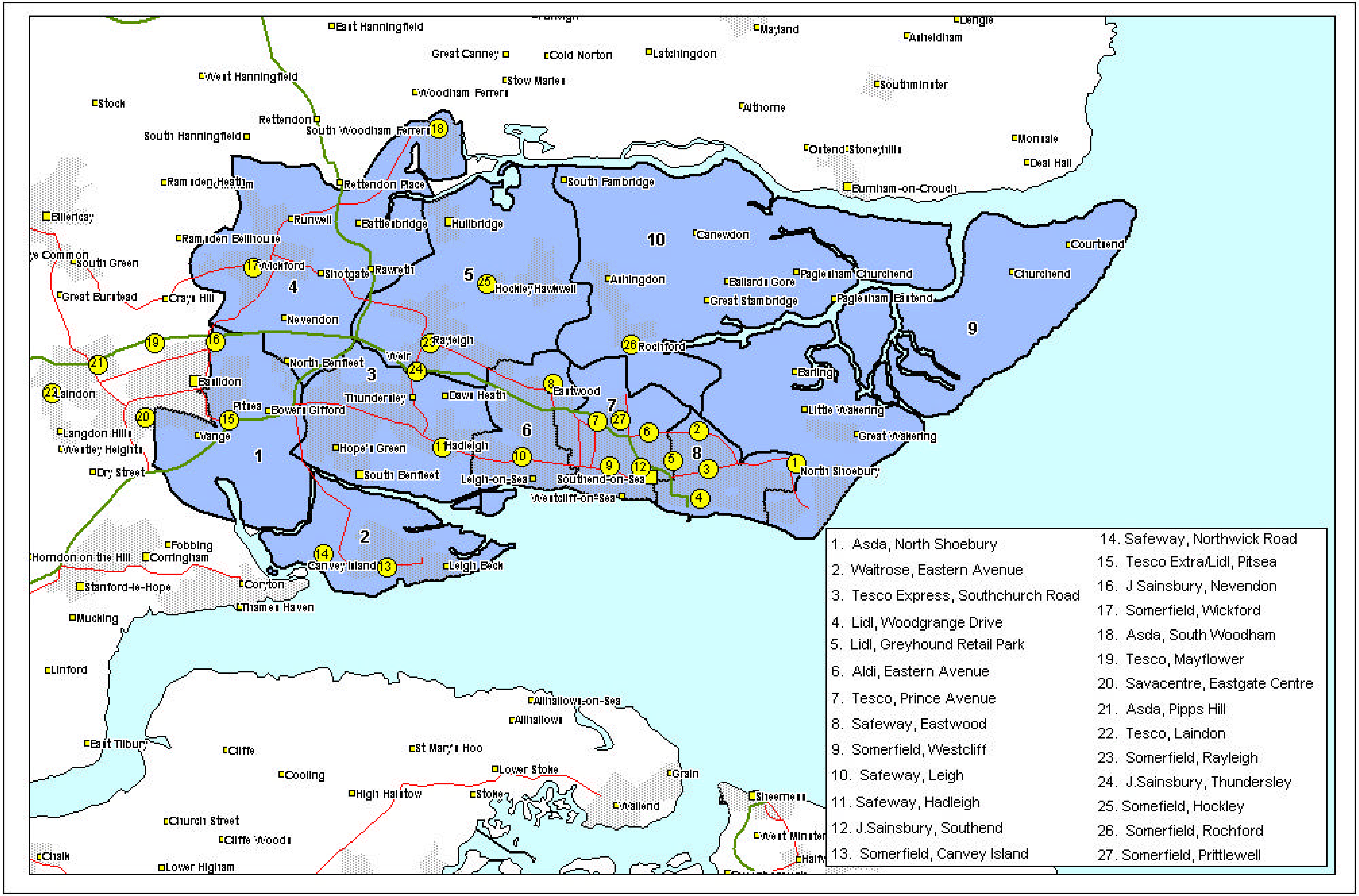
Southend: Survey Area



Plan 2

Foodstores Locations

Southend: Foodstore Locations

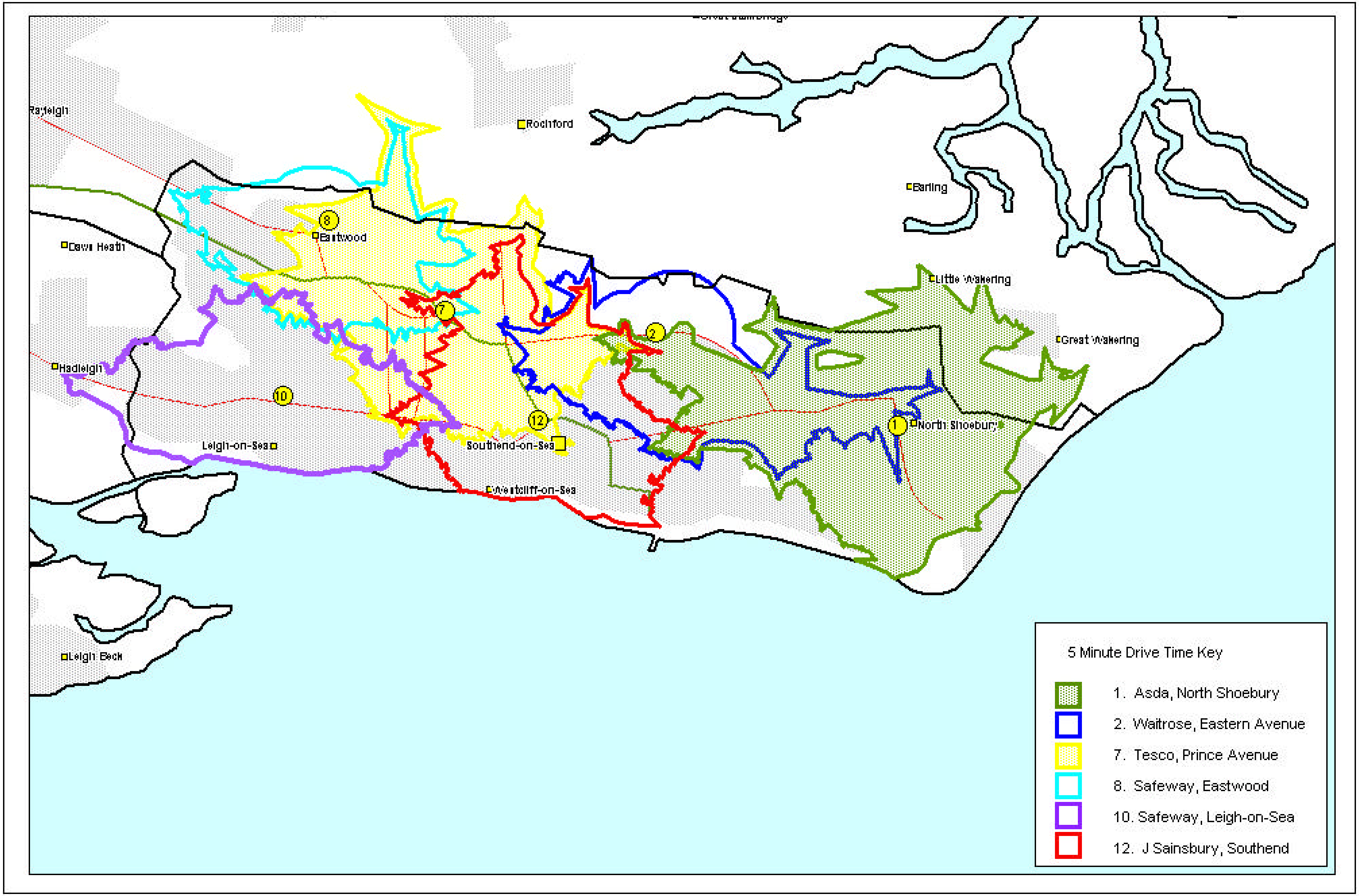


Base map © MapInfo Corporation and © Automobile Association 1999

Plan 3

Foodstore 5 Minute Drive Times

Southend: Main Foodstores 5 Minute Drive Times



Plan 4

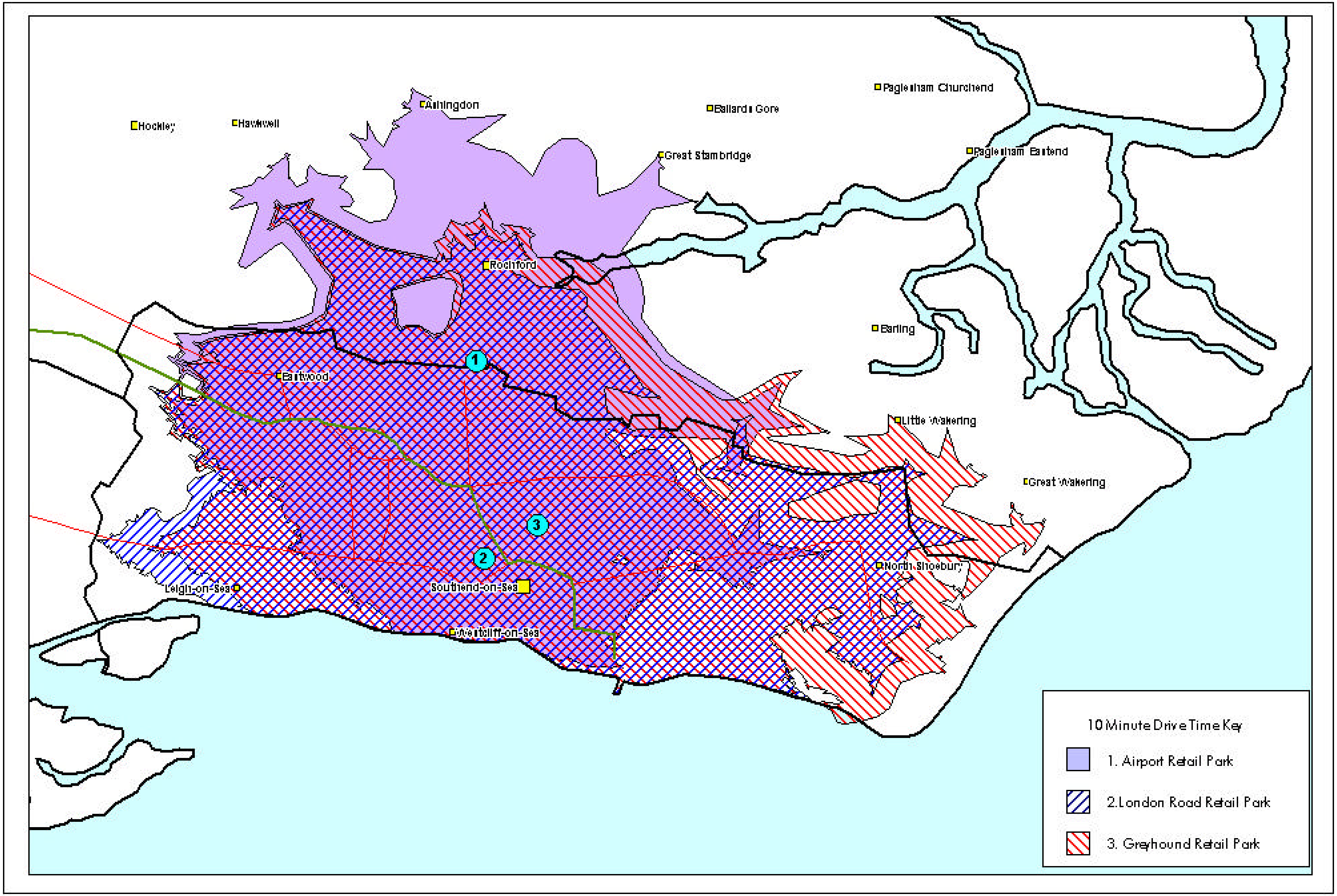
Retail Warehouse Locations

Southend: Retail Warehouse Locations

Plan 5

Retail Warehouse 10 Minute Drive Times

Southend: Retail Warehouse 10 Minute Drive Times



CBRE