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Rochford District Retail and Leisure Needs Assessment Update Final Report

Rochford District Council

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Glossary

Class A1

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

Class A2

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

Class A3

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

Class A4

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

Class A5

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

Class E

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

- a) Shop other than for the sale of hot food;
- b) Food and drink which is mostly consumed on the premises;
- c) financial services, professional services (other than medical services) and any other services which it is appropriate to provide in a commercial, business or service locality;
- d) Indoor sport and recreation (not swimming pools, ice rinks or motorised vehicles or firearms);
- e) Medical services not attached to the residence of the practitioner;
- f) Non-residential creche, day centre or nursery; and
- g) offices, the research and development of products or processes or any industrial process which can be carried out in any residential areas).

Convenience goods

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

Comparison goods

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

Experian

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

Food and Beverage

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

GlobalData

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

Goald Plans

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

Gross floorspace

Total external floorspace including exterior walls.

Market share/Penetration rate

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

Multi-channel shopping

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

Multiplex cinema

A cinema complex with five or more screens.

Net (sales) floorspace

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

Special forms of trading

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

1.0 Introduction

Purpose of the report

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

Background

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

Report structure

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

2.0 Updated floorspace capacity assessment

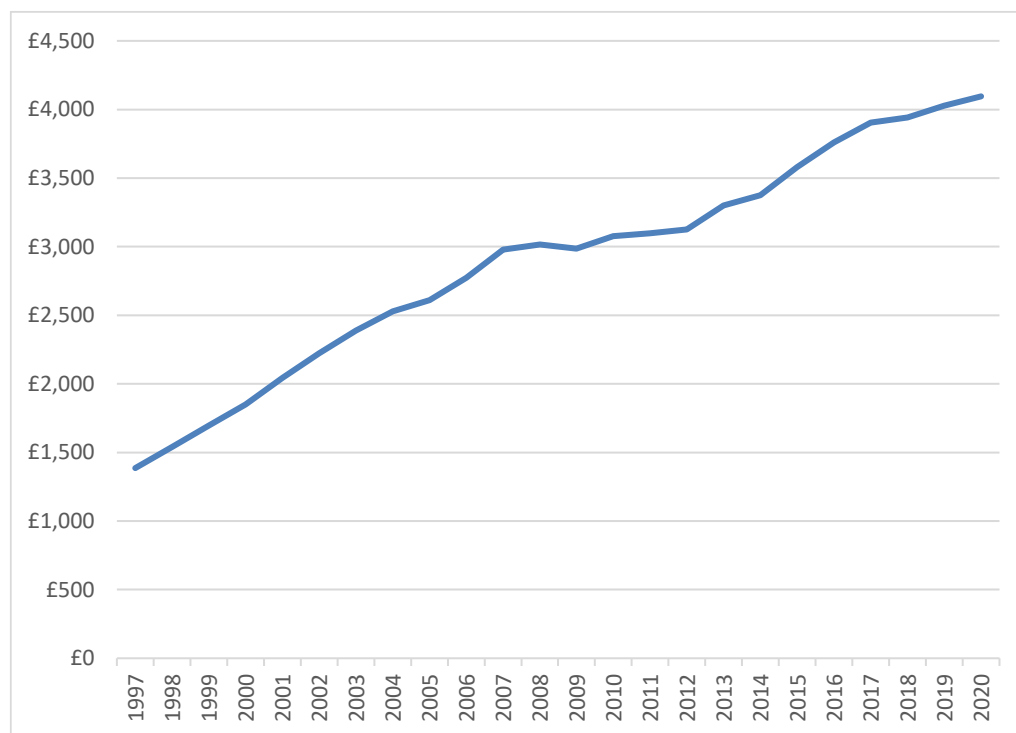
Introduction

2.1 This section updates and rolls forward the quantitative assessment of the scope for new retail and food/beverage floorspace in Rochford District for five-year intervals during the period up to 2040. The updated projections adopt Experian’s latest forecasts for population growth, average expenditure per person, special forms of trading (SFT) and sales density growth rates. A further consideration is the potential longer-term implications of the Covid-19 crisis.

Implications of Brexit, Covid-19 and other trends

2.2 Historic trends indicate that consumer expenditure has grown consistently in real terms, generally following a cyclical growth trend. The growth in expenditure per person on comparison retail goods between 1997 and 2020 is shown in Figure 2.1. High growth between 1997 and 2008 fuelled demand for new retail floorspace. Since the last recession in 2009 expenditure growth has been much slower and the demand for retail floorspace has reduced, particularly comparison goods floorspace. Experian is a data provider most often used in evidence base studies. Experian provides consumer expenditure data and other economic forecasts.

Figure 2.1 UK growth in comparison goods expenditure per head (2018 prices)



Source: Experian Retail Planner Briefing Note 19 (January 2021) – Appendix 4b.

2.3 Experian's latest forecasts suggest slower expenditure growth and home shopping/internet spending is expected to grow at a much faster rate than traditional bricks and mortar shopping. Experian's short-term expenditure growth projections (2021, 2022 and 2023) for retail and leisure were published in January 2022 and now reflect Brexit and the Covid-19

pandemic. The main implications of Brexit, Covid-19 and now high inflation, the cost of living and energy crisis for the evidence base are likely to be as follows:

- impact on the reliability of demographic and economic projections i.e., population growth and Experian expenditure forecasts;
- short term impacts on the mix of uses and customer behaviour that are likely to distort levels of expenditure during 2021, 2022 and 2023; and
- longer-term structural impacts that could affect the nature of town centres and the way households shop, eat/drink out and participate in leisure activities.

- 2.4 The key uncertainties relating to the first two points are primarily the length of the post Covid recovery period and impact of high inflation, the cost of living and energy crisis. The longer term structural implications are harder to predict and quantify at this stage, but recent data provides an early indication.
- 2.5 In the short term, operators have faced elevated risks to cash flow and increased costs arising from a slump in consumer demand and disruption to supply chains. Non-essential products, hospitality and leisure services were the hardest hit during the Covid-19 crisis. Short-term supply chain disruption has led to inflationary pressure, which will have an impact of consumer demand.
- 2.6 Retailers with infrastructure to fulfil on-line orders/home delivery have benefitted at least in the short term. There is likely to be a longer term structural shift towards multi-channel shopping (home, TV and internet shopping), reducing the demand for physical space within town centres.
- 2.7 Bearing these trends in mind, following Covid-19 and during the period of high inflation, cost of living and energy crisis, there is likely to be a spike in town centre vacancies with some businesses failing, particularly non-food retail operators, restaurants and leisure uses. Many national operators have already announced job losses and store closures e.g. most recently Gap, Wilko and Marks & Spencer.
- 2.8 Covid-19, Brexit and the Ukraine war could have some short-term impact in terms of population migration levels and a pause in construction activity. Given that the focus of this update is to assess the long-term need over the local plan period with interval projections (i.e. to 2025, 2025 to 2035, 2030 to 2035 and 2035 to 2040), development plan policy should assume population projections will return to projected levels by 2025. The first interval population projections in 2025, and certainly later years, should not be significantly affected by these circumstances.
- 2.9 Office of National Statistics (ONS) monthly sales volume information for Great Britain indicated total retail sales volumes during the first Covid-19 lockdown were over 22% lower in April 2020 compared with the pre-Covid position in February 2020 (seasonally adjusted). However, the period between lockdowns (July and August 2020) sales volumes had recovered to pre-Covid levels. By October 2020 retail sales were 7% higher than the pre-Covid figure in February 2020. However, the reintroduction of Covid-19 restrictions saw a reduction in sales in between November 2020 to January 2021, reaching 5% below pre-Covid levels. After January 2021, sales had recovered to 9% above pre-Covid levels by April 2021. In November 2021, the seasonally adjusted figures were 6% above pre-Covid levels.
- 2.10 The comparison goods (non-food) sector was significantly affected with a 50% drop in sales from February to April 2020, whilst the food sector experienced 10% growth in sales during

March 2020 in part due to panic buying at the start of the crisis. Food sales volumes were consistently higher than the February 2020 level during March to November 2020.

- 2.11 ONS data suggested on-line retail sales (seasonally adjusted) peaked at over 73% higher in May 2020 compared with February 2020. Figures for June 2020 to May 2021 were consistently higher than the pre-Covid sales in February 2020, with a second peak 81% higher than pre-Covid levels.
- 2.12 During the first Covid lockdowns food store on-line sales doubled during May and June 2020 but still represented a small proportion of total sales in this sector, reaching about 11.9% in January 2021, but reducing slightly to 9.7% in November 2021. For the non-food sector on-line sales as a percentage of total sales nearly trebled between February and April 2020, reaching 45% of sales. By November 2021 on-line sales in this sector were still 23.2% of total sales, compared with the pre-Covid level of 16.1% in February 2020.
- 2.13 It is difficult to predict the longer term implications for retail sales and the amount of on-line sales. Nevertheless, ONS's post lockdown data suggests retail sales have recovered to previous levels of growth, but the proportion of retail sales spent on-line is a higher proportion of total sales, which will have an impact of traditional bricks and mortar retailing. The potential impact of high inflation, the cost of living and energy crisis and predicted recession are unclear at this stage but suggest a cautious approach to short-term growth is required.
- 2.14 Reflecting these trends, Experian's latest projections recommend relatively modest levels of growth in on-line shopping when compared with historic trends. Non-store retailing's market share of total retail sales increased by five times between 2006 and 2020 (5.4% to 28.1%), but Experian forecast this market share will only increase to 35.3% over the next 15 years. It is too early to plan for a significant shift towards on-line shopping, over and above the levels of growth already predicted by Experian, but a higher shift to on-line shopping is possible. These longer term forecasts should be monitored and kept under review.

Long-term expenditure trends

- 2.15 Planning based on long terms expenditure growth projections has always had inherent uncertainties. Despite these uncertainties, development plans must assume a return to reasonable rates of growth and relative normality, although the implications of the short-term impacts should not be ignored. It is better to plan for a return to growth and then modify the strategy later if levels of growth are lower than originally predicted, rather than not planning for growth because there are significant uncertainties. The latter approach is likely to fail to respond in time if higher levels of growth are achieved, and any growth will go elsewhere. Nevertheless, a cautious approach to expenditure growth, as now suggested by Experian, is adopted bearing in mind the uncertainties relating to the growth in on-line shopping.
- 2.16 For convenience goods, Experian's latest forecasts (January 2022) suggest a 2% reduction in expenditure per capita during 2022 and then limited growth thereafter (0.1% per annum). Experian expects slow expenditure growth and most of this growth will relate to non-store sales. Any need for new convenience goods retail floorspace in Rochford District is likely to relate to population growth or qualitative areas of deficiency.
- 2.17 For comparison goods expenditure, higher levels of growth are expected in the future (between 2.8% to 2.9% per annum), but still at a lower rate than previous historic trends (8% per annum between 1997 and 2007). Historically comparison goods expenditure has

grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.

- 2.18 New forms of retailing (multi-channel and home shopping) have and will continue to grow. Home/electronic shopping and home delivery has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect / click and return shopping has become more popular. Recent trends suggest continued strong growth in multi-channel activity. Experian's Retail Planner Briefing Note 19 (January 2022) states:

"After having eased in 2021, we expect the SFT (special forms of trading) market share to continue to grow strongly in the mid-term, hitting above 30% in 2025. The pace of e-commerce is anticipated to moderate over the longer term, reaching 36.5% of total retail sales by 2040."

- 2.19 The floorspace capacity assessment in this study update makes an allowance for future growth in e-tailing based on Experian's latest projections. Given the likelihood that multi-channel expenditure will continue to grow at a faster pace than other consumer expenditure, the need assessment adopts relatively cautious growth projections for expenditure and an allowance is made for operators to increase their turnover/sales density, due to growth in home shopping and click and collect.

Demand for town centre floorspace

- 2.20 Lower expenditure growth and deflationary pressures (i.e., price cutting) in the non-food sector had an impact on the high street in the past 20 years. Because of these trends, the UK average shop vacancy rate (based on Goad Plan data) increased from around 10% in 2005 to about 14% in 2012. Vacancy rates gradually improved to 11.8% in 2018 but then increased to 14.7% in 2022. There was a sharp increase in shop vacancies in many town centres due to the impacts of Covid-19 and the growth in on-line shopping.
- 2.21 Property owners, landlords and funds have come under increasing pressure with struggling occupiers seeking to renegotiate terms through company voluntary arrangement (CVA) i.e., an insolvency process designed to let a firm with debt problems reach an agreement with creditors to help pay off part or all debts. Retailers have been continuing to 'right size' their portfolios, with operators announcing store closures. These trends have impacted on rental income and the capital value of retail/ leisure property assets. These trends are likely to be exacerbated by Covid-19 and the cost of living crisis, at least in the short-term.
- 2.22 Whilst the CVA process has created difficulties for landlords in terms of rent negotiations, at the same time newly freed-up space has provided new opportunities. Vacated premises have been reconfigured and reused for food/beverage, trampolines, escape rooms, climbing and indoor golf.

Study area

- 2.23 As in the SERS 2017, the quantitative capacity analysis is based on the defined study area zones that cover the South Essex sub-region. The study area is sub-divided into 23 residential zones as shown in Appendix 1. Of these 23 residential areas, Zones 7 to 13 cover most the Southend-on-Sea and Rochford authority areas. A small part of Zone 3 extends into Rochford District but this area is predominantly rural in nature with limited population.

Population projections

- 2.24 Experian's latest MMG3 population figures for 2020 and projections have been adopted as a *low* growth scenario, as shown in Table 1A (Appendix 1). These projections are consistent with ONS 2018 based projections. The *high* population growth scenario adopts the Standard Method population projections for Zones 1 to 17, which is the population that would be expected to result were housing needs, as calculated using the standard method in national planning policy, met in full.
- 2.25 The low growth scenario (Table 1A – Appendix 1) suggests population within the Southend-on-Sea and Rochford zones (7 to 13) is projected to increase by 9% between 2022 to 2040, increasing from 264,109 in 2022 to 287,905 in 2040. Growth in the Southend-on-Sea zones (Zones 11, 12 and 13) is 8.5% and growth in the Rochford zones (Zones 7, 8, 9 and 10) is 9.7%.
- 2.26 The high growth scenario in Table 1B suggests population within the Southend-on-Sea and Rochford zones will increase by 14.2%, reaching 301,558 in 2040. Growth in the Southend-on-Sea zones (Zones 11, 12 and 13) is 16.7% and growth in the Rochford zones (Zones 7, 8, 9 and 10) is 10.4%.
- 2.27 By way of comparison, the SERS 2017 also adopted Experian projections, which suggested population in zones 7 to 13 would reach 290,731 by 2037. Experian's latest population projections are lower. The higher SHMA population projection for 2037 was 297,869, which suggested similar growth when compared with the Standard Method projections.

Expenditure forecasts

- 2.28 All monetary values expressed in this update report are at 2020 prices, consistent with Experian's latest expenditure information. The SERS 2017 adopted a 2015 price base and therefore the figures are not directly comparable.
- 2.29 Experian's latest local expenditure figures for the study area in 2020 have been obtained. Experian's short term EBS growth forecast rates during 2021, 2022 and 2023 reflect recent economic circumstances, including the Covid-19 crisis. The forecast changes during this three year period are as follows:
- convenience goods: -5.5%;
 - comparison goods: +7.0%;
 - leisure: +52.8%.
- 2.30 Experian's short term forecasts, particularly for comparison goods and leisure, assume a post-Covid lockdowns recovery during 2021 and 2022. Experian's medium and long term growth average forecasts have been adopted, as follows:
- convenience goods: +0.1% per annum growth for 2024 and beyond;
 - comparison goods: +2.8% per annum growth for 2024 to 2028 and +2.9% per annum after 2028; and
 - leisure: +1.1% per annum growth for 2024 to 2028 and +0.9% per annum after 2028.
- 2.31 Experian's pre-Covid medium and long term projections (Retail Planner Briefing Note 17 – February 2020) suggest the same growth rate for convenience goods (+0.1% per annum) but slightly higher growth rates for comparison goods (+3.2% per annum) and leisure expenditure (+1.2% per annum). These growth figures relate to real growth and exclude

inflation. The current high levels of inflation should not affect Experian's long term expenditure projections that are over and above inflation.

- 2.32 Experian's latest adjusted deductions for SFT (i.e., home and online shopping through non-retail businesses) in 2020 were:
- 5.4% of convenience goods expenditure; and
 - 25.6% of comparison goods expenditure.
- 2.33 Experian's projections suggest that these SFT percentages will increase to 7.1% and 28.3% in 2030 respectively. The long term Experian projections suggest an increase to 7.7% and 30.1% in 2040 respectively.
- 2.34 Table 1 in Appendix 2 sets out the updated forecasts for spending per head on convenience goods within each zone in the study area up to 2040, excluding SFT. Average convenience goods expenditure is projected to reduce due to a higher proportional increase in SFT. Forecasts for comparison goods spending per capita are in Table 1 in Appendix 3. Food and beverage expenditure forecasts are shown in Table 1 in Appendix 4.
- 2.35 Allowing for the low population growth scenario, total convenience goods spending within the Southend-on-Sea and Rochford zones (7 to 13) is forecast to increase by +8.6% from £631 million in 2022 to £686 million in 2040, calculated from Table 2A (Appendix 2). Growth in the Southend-on-Sea zones (Zones 11, 12 and 13) is 8.1% from £379 million to £410 million and growth in the Rochford zones (Zones 7, 8, 9 and 10) is 9.3% from £252 million to £276 million. The high population growth scenario is an increase of 13.7% (£718 million by 2040). High growth in the Southend-on-Sea zones (Zones 11, 12 and 13) is 16.3% i.e. £441 million by 2040 and growth in the Rochford zones (Zones 7, 8, 9 and 10) is 10% i.e. £277 million by 2040.
- 2.36 The low growth scenario suggests comparison goods spending is forecast to increase by +66.5% from £800 million to £1,333 million, calculated from Table 2A in Appendix 3. Growth in the Southend-on-Sea zones (Zones 11, 12 and 13) is 65.7% from £466 million to £772 million and growth in the Rochford zones (Zones 7, 8, 9 and 10) is 67.6% from £335 million to £561 million. The high population growth scenario shows an increase of +74.2% (£1,395 million by 2040). High growth in the Southend-on-Sea zones (Zones 11, 12 and 13) is 78.2% i.e. £830 million by 2040 and growth in the Rochford zones (Zones 7, 8, 9 and 10) is 68.6% i.e. £565 million by 2040.
- 2.37 The low growth scenario suggests food/beverage spending is forecast to increase by +29.4% from £381 million to £493 million, calculated from Table 2A in Appendix 4. Growth in the Southend-on-Sea zones (Zones 11, 12 and 13) is 28.9% from £230 million to £296 million and growth in the Rochford zones (Zones 7, 8, 9 and 10) is 30.3% from £151 million to £197 million. The high population growth scenario shows an increase of +35.6% (£517 million by 2040). High growth in the Southend-on-Sea zones (Zones 11, 12 and 13) is 38.6% i.e. £319 million by 2040 and growth in the Rochford zones (Zones 7, 8, 9 and 10) is 31.1% i.e. £198 million by 2040.

Growth in turnover densities

- 2.38 Experian's Retail Planner Briefing Note 19 - January 2022 indicates comparison goods retail sales floorspace is expected to increase its average sales density by +9.4% during 2021 to 2023, recovering from the impact of the Covid crisis, but lower growth is envisaged in the medium term (+2.2% per annum up to 2028) and longer term (+2.6% per annum beyond

2028). These recommended increases have been adopted and will absorb much of the future expenditure growth.

2.39 These growth rates are higher than historic forecasts but are consistent with the expected high increase in on-line/home shopping through retail businesses i.e., the total sales of retail businesses will increase at a much higher rate than the amount of physical sales floorspace they provide. For convenience goods retail, Experian indicates a decrease of -5.5% during 2021 to 2023, but growth is envisaged in the medium term (+0.1% per annum up to 2028) and no predicted growth in sales densities thereafter.

2.40 Experian does not provide projections for food/beverage use sales densities. An increase in sales densities of 0.5% per annum has been adopted to allow existing facilities to improve their trading performance.

Base year market shares

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

Capacity for convenience goods retail floorspace

2.42 Available convenience goods expenditure attracted to Rochford District is projected from the 2022 base year forward to 2025, 2030, 2035 and 2040. Total convenience goods expenditure attracted to Rochford District in 2022 is £122.42 million as shown in Table 10A in Appendix 2. The benchmark expected turnover of the main food stores in the District is £83.02 million as shown in Table 9 in Appendix 2. This is not necessarily the actual turnover of each store but is the expected turnover based on the size of store and the company average sales density. The benchmark turnover excludes small convenience shops. If the large stores listed in Table 9 achieved their benchmark turnover (£83.02 million), then this implies large store's market share of total available convenience goods expenditure (£122.42 million) would be around 68%, which is within the low end of the range one would expect, but this reflects the flow of expenditure to large food stores in Southend-on-Sea and local role of centres in the District. These figures suggest a degree of equilibrium between convenience good sales floorspace and available expenditure i.e. there is no evidence of significant under or over-trading in 2022.

2.43 The low growth scenario results are summarised in Table 10A in Appendix 2 and the high growth scenario are shown in Table 10B. Convenience goods expenditure available to facilities within the Rochford District is expected to increase from about £122.42 million in 2022 to £132.83 million in 2040 (low growth). This increase is due to population growth, which offsets the slight reduction in average expenditure per person (excluding SFT).

2.44 Tables 10A and 10B in Appendix 2 subtract the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for future new development. Based on the low growth scenario, there is a projected convenience goods expenditure deficit up to and beyond 2030, due to increases in sales densities. Longer term growth suggests a surplus of +£1.47 million in 2035, increasing to +£4.46 million by 2040. Based on the high growth scenario, there is a small projected

convenience goods expenditure deficit of -£0.83 million in 2030. Longer term growth suggests a surplus of +£2.75 million in 2035, increasing to +£6.47 million by 2040.

- 2.45 The surplus expenditure projections, excluding SFT, are converted into potential new floorspace estimates in Tables 11A and 11B in Appendix 2, based on an average sales density of £12,000 per sq.m net in 2022, which is an approximate average for the main food store operators. This average turnover density is projected to increase in line with Experian's recommended growth rates. The low and high growth scenario results are summarised in Table 2.1.

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

Low growth	2025	2030	2035	2040
Rochford	-39	-8	29	71
Rayleigh	-98	-50	11	67
Hockley	-6	-2	3	7
Great Wakering	-4	-1	3	8
Hullbridge	-3	-1	2	4
Other Rochford district	-309	-120	117	348
Low growth total	-459	-182	166	506
High growth				
Rochford	-39	-8	27	65
Rayleigh	-92	-30	46	127
Hockley	-6	-1	4	10
Great Wakering	-4	-1	3	7
Hullbridge	-3	0	2	5
Other Rochford district	-289	-53	229	521
High growth total	-433	-95	312	734

Source: Tables 11A and 11B, Appendix 2

- 2.46 There are floorspaces deficit up to 2030 for both scenarios because growth in population is offset by the slight reduction in average expenditure per person (excluding SFT). The low growth surplus expenditure up to 2040 indicates that there is capacity for additional convenience goods floorspace in the District of 354 sq.m net (506 sq.m gross) as shown in Table 11A in Appendix 2. The high growth projections suggest there is capacity for 514 sq.m net (734 sq.m gross) by 2040, as shown in Table 11B in Appendix 2.
- 2.47 In terms of accommodating these floorspace projections, small convenience goods stores (below the Sunday trading limited - 280 sq.m net) would require stores of up to 400 sq.m gross. Discount food stores such as Lidl and Aldi would require at least 1,800 sq.m gross and large food superstores are generally over 3,500 sq.m gross.
- 2.48 The 2037 projection in the SERS 2017 was slightly higher at 880 sq.m net (1,257 sq.m gross). This difference is primarily due to lower population projections and higher growth in sales densities adopted in this update.

Capacity for comparison goods floorspace

- 2.49 Available comparison goods expenditure attracted to Rochford District is projected from the 2022 base year forward to 2025, 2030, 2035 and 2040. The low growth scenario results are summarised in Table 9A in Appendix 3 and the high growth scenario are shown in Table 9B. Comparison goods expenditure available to facilities within the Rochford District is

expected to increase from about £167.8 million in 2022 to £276.55 million in 2040 (low growth).

2.50 Tables 9A and 9B in Appendix 3 subtract the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for future new development. Based on the low growth scenario, there is a projected comparison goods expenditure deficit up to and beyond 2035, due to increases in sales densities. Longer term growth suggests a surplus of +£4.45 million in 2040. Based on the high growth scenario, there is a small projected comparison goods expenditure deficit of -£2.78 million in 2030. Longer term growth suggests a surplus of +£2.9 million in 2035, increasing to +£12.7 million by 2040.

2.51 The surplus expenditure projections are converted into potential new floorspace estimates in Tables 10A and 10B in Appendix 3, based on an average sales density of £6,000 per sq.m net in 2022. This average turnover density is projected to increase in line with Experian's recommended growth rates. The low and high growth scenario results are summarised in Table 2.2.

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

Low growth	2025	2030	2035	2040
Rochford	-285	-148	-20	172
Rayleigh	-1,326	-805	-329	365
Hockley	-69	-34	-3	38
Great Wakering	-12	-4	3	14
Other Rochford district	-73	-30	10	66
Low growth total	-1,765	-1,021	-339	654
High growth	2025	2030	2035	2040
Rochford	-272	-114	36	252
Rayleigh	-1,173	-357	418	1,459
Hockley	-67	-26	12	65
Great Wakering	-12	-4	2	11
Other Rochford district	-73	-26	17	77
High growth total	-1,597	-527	485	1,864

Source: Tables 10A and 10B, Appendix 3

2.52 The low growth surplus expenditure up to 2040 indicates that there is capacity for additional comparison goods floorspace in the District of 458 sq.m net (654 sq.m gross) as shown in Table 10A in Appendix 3. The high growth projections suggest there is capacity for 1,305 sq.m net (1,854 sq.m gross) by 2040, as shown in Table 10B in Appendix 3.

2.53 The 2037 baseline projection in the SERS 2017 was much higher at 10,792 sq.m net (15,417 sq.m gross). This difference is primarily due to lower population and expenditure projections and higher growth in sales densities and SFT adopted in this update.

Capacity for food/beverage floorspace

2.54 Available food/beverage expenditure attracted to Rochford District is projected from the 2022 base year forward to 2025, 2030, 2035 and 2040. The low growth scenario results are summarised in Table 9A in Appendix 4 and the high growth scenario are shown in Table 9B. Food/beverage expenditure available to facilities within the Rochford District is

expected to increase from about £143.71 million in 2022 to £186.11 million in 2040 (low growth).

- 2.55 Based on the low growth scenario, there is a projected food/beverage expenditure surplus of £5.06 million in 2025, which will increase to £13.29 million in 2030. Longer term growth suggests a surplus of +£20.83 million in 2035, increasing to £28.9 million in 2040.
- 2.56 Based on the high growth scenario, there is a small projected comparison goods expenditure surplus of +£21.83 million in 2030. Longer term growth suggests a surplus of +£34.19 million in 2035, increasing to +£48.17 million by 2040.
- 2.57 The surplus expenditure projections are converted into potential new floorspace estimates in Tables 10A and 10B in Appendix 4, based on an average sales density of £5,000 per sq.m gross in 2022. The low and high growth scenario results are summarised in Table 2.3.

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

Low growth	2025	2030	2035	2040
Rochford	171	446	688	951
Rayleigh	475	1,207	1,841	2,469
Hockley	195	493	748	995
Great Wakering	72	188	293	408
Hullbridge	16	39	61	82
Other Rochford district	72	180	274	379
Low growth total	998	2,553	3,904	5,284
High growth	2025	2030	2035	2040
Rochford	174	452	696	953
Rayleigh	530	1,389	2,149	2,947
Hockley	217	564	870	1,195
Great Wakering	77	201	310	426
Hullbridge	17	44	68	93
Other Rochford district	70	183	281	386
High growth total	1,085	2,833	4,373	5,999

Source: Tables 10A and 10B, Appendix 4

- 2.58 The low growth surplus expenditure up to 2040 indicates that there is capacity for additional food/beverage floorspace in the District of 5,284 sq.m gross as shown in Table 10A in Appendix 4. The high growth projections suggest there is capacity for 5,999 sq.m gross by 2040, as shown in Table 10B in Appendix 4.

Planned commitments

- 2.59 The main development commitments in Rochford (as at April 2022) were:
- 18 Aviation Way, Rochford;
 - Land Rear of 98-128 High Street, Rayleigh;
 - 1 Fleethall Road, Rochford
 - Land North of London Road / South of Rawreth Lane / West of Rawreth Industrial Estate, Rayleigh;
 - 68 - 72 West Street, Rochford;

- Cherry Orchard Brickworks, Rochford; and
- Airport Business Park, Cherry Orchard Way, Rochford.

2.60 These mixed use developments could provide new retail and food/beverage floorspace of at least 3,800 sq.m gross. The precise mix of uses is not clear at this stage, but retail floorspace within Class E could total around 3,300 sq.m gross and food/beverage floorspace could exceed 600 sq.m gross.

2.61 When implemented new retail and food/beverage floorspace within these developments should be subtracted from the floorspace capacity projection shown in Tables 2.1, 2.2 and 2.3.

3.0 Commercial leisure uses

Introduction

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

Leisure and cultural expenditure

- 3.2 Experian local expenditure data for the Southend-on-Sea and Rochford zones (Zones 7 to 13) in 2020 and projections for 2021/22 indicate the resident population will generate £74.28 million in 2022 (an average of £281 person) on selected cultural, recreational and sporting services, broken down as follows:

- cinema admissions £7.53 million;
- live entertainment i.e., theatre/concerts/shows £15.79 million;
- museums, theme parks, houses and gardens £7.46 million;
- admissions to clubs, dances, discos, bingo £8.04 million;
- other miscellaneous entertainment £7.34 million;
- subscriptions to sports and social clubs £15.06 million; and
- leisure class fees £13.05 million.

- 3.3 The average spend in the Rochford zones (Zones 7, 8, 9 and 10) is marginally higher at £297 per person compared with £271 per person in the Southend-on-Sea zones (Zones 11, 12 and 13).

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

Leisure floorspace capacity

- 3.5 Experian's expenditure projections suggest leisure expenditure per person should increase in real terms by 13.6% between 2022 to 2035, or by 18.8% between 2022 to 2040.
- 3.6 With Experian's population growth (the low growth scenario), expenditure on these leisure/cultural activities should increase from £74.3 million to £90.0 million by 2035 and then to £96.1 million by 2040, an additional £15.7 million by 2035 or £21.8 million by 2040.
- 3.7 Adopting Standard Method population growth (the high growth scenario), expenditure on these leisure/cultural activities should increase from £74.3 million to £91.7 million by 2035 and then to £100.7 million by 2040, an additional £17.4 million by 2035 or £26.4 million by 2040.

3.8 This additional expenditure could support about 7,850 sq.m to 8,700 sq.m of new commercial leisure/cultural floorspace by 2035, based on £2,000 per sq.m, increasing to 10,900 sq.m to 13,200 sq.m by 2040.

3.9 On the basis that Rochford District will attract 30% of leisure expenditure growth generated in Zones 7 to 13, Rochford’s share of this floorspace projection is shown in Table 3.1.

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

	Low growth scenario	High growth scenario
By 2035	2,355	2,610
By 2040	3,270	3,960

Source: Experian expenditure projections and Lichfields’ estimates.

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

Cinemas

3.11 Cinema admissions in the UK reached a peak of 1.6 billion trips in 1946. However the number of trips declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s dropping to only 54 million trips in 1984 but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. Total admissions reduced to 157.5 million in 2014 but increased slowly to 176 million in 2019 (Source: British Film Institute). Cinema trips have not increased significantly since 2002, despite population growth of 9.6% during this period (59.4 million to 66.6 million). The national average visitation rate was about 2.6 trips per person per annum, before the Covid crisis. The number of trips during the Covid-19 crisis reduced significantly. This cinema assessment assumes trip levels will return to pre-Covid levels in the future (2.6 trips per person per annum).

3.12 The Cinema Advertising Association identifies 843 cinema facilities with 4,596 screens. Lichfields’ national CINESCOPE model identifies approximately 800,000 cinema seats in the UK. The CINESCOPE model assesses the provision of cinema screens/seats against projected customer cinema trips across the country, to identify areas of under and over-provision. The national average is about 38,000 cinema trips per screen per annum or 220 trips per seat per annum.

3.13 The Odeon, Victoria Circus in Southend-on-Sea is the only full time cinema in the Southend-on-Sea and Rochford local authority areas. It has 8 screens and 1,627 seats. A new 11-screen Empire Cinema with IMAX (1,370 seats) is proposed as part of the Seaway development in Southend-on-Sea. There is also a large Cineworld at Festival Leisure Park with 12 screens and 2,835 seats, which attracts customers from both Southend-on-Sea and Rochford.

3.14 The population within the Southend-on-Sea and Rochford zones (Zones 7 to 13) in 2022 (264,109 people) would generate around 687,000 cinema trips per annum, based on the national average visitation rate (2.6 trips per annum). Based on the low growth scenario, population is projected to increase to 287,905, which should generate 748,500 cinema trips. The high growth scenario population is projected to increase to 301,558, which should generate 784,000 cinema trips.

3.15 Experian's local expenditure data indicates these zones generates £7.53 million on cinema trips. This expenditure estimate appears to be broadly consistent with the 687,000 cinema trip estimate i.e., an average of just under £11 per person each trip.

3.16 Adopting the national average population per cinema screen (38,000 trips per screen), implies the low growth projection of 748,500 trips in 2040 generates demand for nearly 20 cinema screens, as shown in Table 3.2. The high growth scenario generates demand for nearly 21 screens, as shown in Table 3.3. Together the existing Odeon and proposed new cinema in the Seaway development will provide 19 screens and 2,997 seats.

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

Low growth scenario	2025	2030	2035	2040
Population	268,735	275,476	281,652	287,905
Cinema trips	698,711	716,238	732,290	748,553
Cinema trips per screen	38,000	38,000	38,000	38,000
Cinema trips per seats	220	220	220	220
Cinema screen potential	18.4	18.8	19.3	19.7
Cinema seat potential	3,176	3,256	3,329	3,403
Existing/proposed screens	19.0	19.0	19.0	19.0
Existing/proposed seats	2,997	2,997	2,997	2,997
Surplus screen capacity	-0.6	-0.2	0.3	0.7
Surplus seat capacity	179	259	332	406

3.17 In terms of seats, the national average (220 trips per seat) suggests 748,553 trips could support 3,403 seats, compared with the existing and proposed provision of 2,997 seats. The high growth trip projection (784,000 trips) could support 3,564 seats.

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

High growth scenario	2025	2030	2035	2040
Population	270,869	281,264	291,134	301,558
Cinema trips	704,259	731,286	756,948	784,051
Cinema trips per screen	38,000	38,000	38,000	38,000
Cinema trips per seats	220	220	220	220
Cinema screen potential	18.5	19.2	19.9	20.6
Cinema seat potential	3,201	3,324	3,441	3,564
Existing/proposed screens	19.0	19.0	19.0	19.0
Existing/proposed seats	2,997	2,997	2,997	2,997
Surplus screen capacity	-0.5	0.2	0.9	1.67
Surplus seat capacity	204	327	444	567

3.18 These projections deduct existing (8 screens – 1,627 seats) or proposed cinema provision (11 screens – 1,370 seats). The projections suggest there will be limited demand for additional cinema screens or seats in the Southend-on-Sea and Rochford local authority areas, over and above the Seaway proposed cinema and existing Odeon in the short to medium term. In the longer term, between 2035 to 2040 there may be scope for small scale additional cinema totalling 406 to 567 seats, which could be provided in Rochford District.

Theatres, nightclubs, live music and other cultural activities

- 3.19 The UK Theatre and Society of London Theatres (SOLT) indicated their member organisations (223) presented nearly 63,000 performances attracting over 34 million tickets visits, generating ticket revenue of £1.28 billion in 2018. The average ticket revenue per venue was £5.7 million. The UK average attendance per performance is 545 people.
- 3.20 Experian's local expenditure data indicates the Southend-on-Sea and Rochford zones (Zones 7 to 13) generates £15.79 million on live theatre, concerts and shows. Assuming the national average ticket revenue per venue (£5.7 million) these figures suggest there is capacity for three venues in the Southend-on-Sea and Rochford local authority areas. This implied demand is consistent with existing good provision of theatres, including Palace Theatre and Cliffs Pavilion in Westcliffe-on-Sea and Clifftown Theatre in Southend-on-Sea.
- 3.21 As indicated above, population and leisure expenditure growth in the Southend-on-Sea and Rochford zones (Zones 7 to 13) is projected to increase by 29.3% and 35.5% between 2022 and 2040, based on the low and high growth scenarios. Expenditure on live theatre, concerts and shows could increase by £4.6 million to £5.6 million between 2022 to 2040, which could support one new venue.
- 3.22 The nightclub/live music sector (not including music halls) has struggled in recent years. IBISWorld (providers of global industry research) suggests these venues have lost their competitive advantage over pubs or bars, with lower prices and a more relaxed atmosphere. Approximately one-quarter of nightclubs have closed in the past decade as operators have struggled to respond to new challenges from regulation, licensing, planning, business rates and policing.
- 3.23 The Pink Toothbrush in Rayleigh is the main nightclub in the District. Southend-on-Sea also has a relatively good provision of nightclubs, reflecting its role as a major tourist destination. Access to existing facilities in Southend and national trends suggest there may be limited potential for further nightclub/live music facilities in Rochford District.
- 3.24 Experian's local expenditure data indicates the Southend-on-Sea and Rochford zones (Zones 7 to 13) generates £7.46 million on museums, theme parks, houses and gardens. Population growth and expenditure growth could increase this expenditure to £9.65 million to £10.11 million. This £2.19 million to £2.65 million increase in expenditure could support additional facilities in Southend-on-Sea and Rochford District.
- 3.25 There may be potential quantitative capacity for additional cultural facilities in Rochford District. The development strategy needs to be flexible to respond to emerging opportunities for attractive new facilities of this kind.

Health and fitness clubs

- 3.26 The NPPF glossary indicates that some more intensive sport and recreational uses are included as main town centre uses. Indoor sports halls, swimming pools, pitches and courts are not considered to be intensive sport and recreational uses and are not main town centre uses. This section only assesses commercial health and fitness gyms and does not include sports halls.
- 3.27 The 2019 State of the UK Fitness Industry Report revealed that the UK health and fitness industry was continuing to grow pre-Covid. In 2019 there were more than 10 million fitness members in the UK and the industry was worth £5 billion, with a participation rate of 15.6%. The sector has more clubs, members and a greater market value than ever before. The 2019 report highlighted that the industry experienced growth over the twelve-month

period to the end of March 2019, with an increase of 4.7% in the number of memberships and 2.9% growth in the number of facilities.

3.28 The Sport England/Active Places data indicates that there are 805 registered health and fitness facilities in the East Region, with 47,604 fitness stations, an average of 59 fitness station per facility. This provision equates to 7.6 fitness station per 1,000 people across the region.

3.29 There are 32 facilities in the Southend-on-Sea and Rochford local authority areas, with 2,234 fitness stations, as shown in Table 3.4. There are 11 facilities in Rochford District with 838 fitness stations. There are 21 facilities in Southend-on-Sea with 1,396 fitness stations.

Table 3.4 Health and Fitness Clubs (Sport England/Active Places Data, 2022)

Name/location	Location	Type	No. Fitness Stations
JD Gym	Rochford	Registered Membership	400
Clements Hall Leisure Centre	Hockley	Pay and Play	120
Hockley Gym	Hockley	Registered Membership	60
Stack House Gym	Rayleigh	Registered Membership	50
Athenaeum Club,	Southend-on-Sea	Registered Membership	44
Rayleigh Leisure Centre	Rayleigh	Pay and Play	42
Leeman Fitness	Rayleigh	Registered Membership	40
Elite Fitness Gym	Rochford	Registered Membership	30
Fitzwimarc School	Rayleigh	Private Use	18
King Edmund School	Rochford	Sports Club/Com. Assoc.	20
Westcliff RFC	Southend-on-Sea	Private Use	14
Rochford District sub-total			838
Welcome Gym	Southend-on-Sea	Registered Membership	250
Pure Gym, Fossetts Park	Southend-on-Sea	Registered Membership	220
Anytime Fitness	Southend-on-Sea	Registered Membership	200
Southend Leisure & Tennis Centre	Southend-on-Sea	Pay and Play	150
Energie Fitness	Southend-on-Sea	Registered Membership	100
David Lloyd Club	Southend-on-Sea	Registered Membership	77
Simply Gyms	Southend-on-Sea	Registered Membership	76
SAS Gym	Southend-on-Sea	Registered Membership	60
Thorpe Hall School,	Southend-on-Sea	Private Use	40
Shoeburyness Leisure Centre,	Southend-on-Sea	Pay and Play	30
Westcliff High School for Boys	Westcliff-on-Sea	Sports Club/Com. Assoc.	28
Southend High School for Boys	Westcliff-on-Sea	Private Use	22
Chase Sports & Fitness Centre,	Westcliff-on-Sea	Pay and Play	21
Leigh Fitness Centre,	Leigh-on-Sea	Pay and Play	21
The Locker Room	Southend-on-Sea	Pay and Play	18
Belfairs Academy	Leigh-on-Sea	Private Use	17
Southend High School for Girls	Southend-on-Sea	Private Use	16
Cecil Jones Academy	Southend-on-Sea	Private Use	15
Westcliff High School for Girls	Westcliff-on-Sea	Private Use	15
St Bernards High School,	Westcliff-on-Sea	Private Use	13
St Christopher's School Academy	Leigh-on-Sea	Private Use	7
Southend-on-Sea sub-total			1,396
Grand Total			2,234

Source: Sport England Active Places

3.30 The 2022 base year population in the Southend-on-Sea and Rochford zones (Zones 7 to 13) is 264,109 people. This population indicates the Southend-on-Sea and Rochford zones have 8.46 fitness stations per 1,000 people (2,234 registered stations in total). This existing provision is slightly higher than the East Region average of 7.6 fitness stations per 1,000

people, suggesting higher participation rates and/or a relative over-supply of fitness stations.

- 3.31 The slightly higher provision in in the Southend-on-Sea and Rochford zones may be due to the demographic profile and higher participation rates. However, if the area's provision remains at 8.6 stations per 1,000 people, then the demand for fitness stations could increase from 2,234 to 2,383 stations by 2035, and then to 2,436 stations by 2040, based on the low growth scenario. The +149 station increase by 2035 could support about 3 medium sized facilities, which would increase to +202 stations by 2040, about 4 medium sized facilities.
- 3.32 The high growth scenario suggests an additional +229 stations by 2035 about 4 or 5 medium sized facilities, increasing to +317 by 2040 (about 6 medium sized facilities).
- 3.33 These projections suggest there is potential to increase the number of health and fitness facilities by 4 to 6 by 2040. There could be demand for 1 to 2 facilities in Rochford District and 3 to 4 facilities in Southend-on-Sea.

Tenpin bowling and other indoor leisure innovations

- 3.34 Across the country freed-up retail space in town centres has provided new opportunities for leisure uses. Vacated premises have been reconfigured and reused for trampolines, climbing and indoor golf etc. The innovations are likely to continue, and a flexible approach is required to respond to arising opportunities.
- 3.35 There are two tenpin bowling facilities in the Southend-on-Sea and Rochford local authority areas, i.e. Kingpins Bowl Southend (10 lanes) and CJ's Bowling in Hockley (12 lanes). The Kursaal Bowling on the Southend seafront closed in 2019.
- 3.36 The base year population in the Southend-on-Sea and Rochford zones (Zones 7 to 13) is 264,109 people in 2022. This base year catchment area population can theoretically support 22 tenpin bowling lanes, based on one lane per 12,000 people (national average). However, the Kingpins Bowl in Southend serves tourist visitors as well as residents.
- 3.37 Population growth within the study area between 2022 and 2040 would increase the theoretical capacity to 24 lanes based on the low growth scenario or 25 lanes based on the high growth scenario.
- 3.38 A new 20 lane Hollywood Bowl is proposed within the Seaway development in Southend-on-Sea. This new facility will be sufficient to meet future demand in the Southend and Rochford authority areas.
- 3.39 Indoor trampoline centres are a relatively new leisure activity in the UK. In America outdoor trampoline centres were popular in the late 1950s and 1960s. This format first seen in America has been adopted and modernised and is now becoming a popular indoor leisure activity for a variety of age groups in the UK. The UK's first indoor trampoline centre was opened by Bounce in 2014.
- 3.40 Trampoline and soft play centres offer a new, recreational experience for both children and adults. They typically have over 100 interconnected trampolines on site, consisting of differing courts including a Main Arena, Dodgeball Court, Kids Court, Slam Dunk Area, Foam Pit, Airbag Jump, Touch Walls, Gladiator Pits and Tumble Tracks, as well as an arcade and party rooms.
- 3.41 Base Jump Trampoline Park in Rayleigh is the only major trampoline facility in the Southend-on-Sea and Rochford zones. The Seaway development in Southend is expected to

include a Jump Inc Urban Playground (2,388 sq.m). This sector is still relatively new and there may be potential for continued growth. The strategy for Rochford should be flexible to respond to any emerging demand for trampoline centres.

- 3.42 The number of escape rooms in the UK grew rapidly in the last 4 years before the Covid pandemic, increasing from about 600 at the end of 2016 to over 1,500 by 2019. The market is fragmented and is still relatively new. There are three escape room facilities in Southend i.e. Room Escape, Escape and Escape Live. It is not clear whether this sector is approaching saturation point, therefore a flexible strategy is required.

Bingo, games of chance and gambling

- 3.43 Gala and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose-built units. Bingo clubs have become increasingly sophisticated and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. However, the significant increase in on-line gambling has, and will continue to affect this sector.
- 3.44 The Gambling Commission indicates there were 601 bingo facilities in Great Britain (August 2020) and 131 casinos. The number of bingo premises fell by over 15% between 2014 to 2020, due in part to the increase in on-line bingo. The latest figures equate to approximately one bingo facility per 110,000 people, and one casino per 480,000 people.
- 3.45 The 2022 base year population in the Southend-on-Sea and Rochford zones (264,109 people) is theoretically sufficient to support at least two bingo facilities, based on the national average. Mecca Bingo in Southend is the only major facility in the Southend-on-Sea and Rochford zones. Southend also has the Grosvenor Casino. Until recently, Southend had three casinos, but facilities have closed at the Kursaal and Palace Hotel.
- 3.46 There is theoretical scope for an additional bingo facility in the Southend-on-Sea and Rochford zones, although the national decline in the number of bingo premises and increase in on-line gambling suggest there may limited operator demand to open new facilities of this kind.

Conclusions on commercial leisure uses

- 3.47 The leisure, entertainment and cultural sectors are fragmented and innovative. In addition to the main leisure and entertainment uses outlined above, there are a larger number of other activities that could be promoted e.g., museum, gallery/exhibition space, tourist attractions and new emerging leisure activities such as escape rooms and virtual golf centres. Given the fragmented nature of these sectors it is difficult to precisely quantify the potential demand for these uses over the next 10-15 years. However, it is important that new emerging sectors can be accommodated.
- 3.48 Leisure expenditure growth up to 2040 could support new leisure floorspace of 3,270 sq.m to 3,960 sq.m in Rochford District. This floorspace capacity could, for example, include:
- a small theatre;
 - a museum/gallery; and
 - 1 or 2 medium sized health and fitness facilities;
 - a bingo club.

3.49 The development strategy for these uses should be flexible to respond to emerging opportunities for new leisure, entertainment and cultural related facilities.

4.0 Implications for emerging policy

Introduction

- 4.1 The National Planning Policy Framework (NPPF) indicates development plans should allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure and other main town centre uses over this period should not be compromised by limited site availability. The emerging new Local Plan should seek to accommodate retail, food/beverage and commercial leisure floorspace projections at least up to 2035.
- 4.2 The latest NPPF (as amended July 2021) indicates planning policies should (para. 86):
- define a network and hierarchy of town centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;
 - define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;
 - retain and enhance existing markets and, where appropriate, re-introduce or create new ones;
 - allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;
 - where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and
 - recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.
- 4.3 In relation to town centres, the latest NPPF does not change the overall aims of policy, although there are some important modifications. These changes are logical points of clarification that address areas of debate that have arisen in recent years.
- 4.4 The rapid changes that are affecting the retail sector and town centres, are acknowledged and reflected in the NPPF. It recognises that diversification is key to the long-term vitality and viability of town centres, to respond to ‘rapid changes in the retail and leisure industries’. Accordingly, planning policies should clarify ‘the range of uses permitted in such locations, as part of a positive strategy for the future of each centre’.
- 4.5 The importance of a mix of retail and other town centre activity has increased in recent years and town centres increasingly need to compete with on-line shopping. Town centres need a better mix of uses that extend activity throughout the daytime and into the evenings.
- 4.6 The updated projections confirm there is a need for town centres to maintain their primary retail function, whilst increasing their diversity with a range of complementary uses. The appropriate balance between retail and other town centre activity has been debated in

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

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

Floorspace capacity projections

- 4.9 Tables 4.1 and 4.2 summarise the low growth floorspace projections (cumulative) for convenience and comparison goods retail and food/beverage by broad location up to 2035 and 2040. The distribution of floorspace is based on the existing market shares and expenditure patterns. The high growth projections are shown in Table 4.3 and 4.4.

Table 4.1 Summary of retail and food/beverage floorspace projections from 2022 to 2035 (sq.m gross) – low growth

	Convenience	Comparison	Food/beverage	Total
Rochford	29	-20	688	697
Rayleigh	11	-329	1,841	1,523
Hockley	3	-3	748	748
Great Wakering	3	3	293	299
Hullbridge	2	0	61	63
Other Rochford District	117	10	274	401
Total	166	-339	3,904	3,731

Table 4.2 Summary of retail and food/beverage floorspace projections from 2022 to 2040 (sq.m gross) – low growth

	Convenience	Comparison	Food/beverage	Total
Rochford	71	172	951	1,194
Rayleigh	67	365	2,469	2,901
Hockley	7	38	995	1,040
Great Wakering	8	14	408	430
Hullbridge	4	0	82	86
Other Rochford District	348	66	379	793
Total	506	654	5,284	6,444

- 4.10 It is widely accepted that long-term projections have inherent uncertainties. In response to these uncertainties, the latest NPPF indicates that local planning authorities are no longer required to allocate sites to meet the need for town centre uses over the full plan period. The need for new town centre uses should still be accommodated over a minimum ten-year period, which reflects the complexities in bringing forward town centre development sites.

Table 4.3 Summary of retail and food/beverage floorspace projections from 2022 to 2035 (sq.m gross) – high growth

	Convenience	Comparison	Food/beverage	Total
Rochford	27	36	696	759
Rayleigh	46	418	2,149	2,613
Hockley	4	12	870	886
Great Wakering	3	2	310	315
Hullbridge	2	0	68	70
Other Rochford District	229	17	281	527
Total	312	485	4,373	5,170

Table 4.4 Summary of retail and food/beverage floorspace projections from 2022 to 2040 (sq.m gross) – high growth

	Convenience	Comparison	Food/beverage	Total
Rochford	65	252	953	1,270
Rayleigh	127	1,459	2,947	4,533
Hockley	10	65	1,195	1,270
Great Wakering	7	11	426	444
Hullbridge	5	0	93	98
Other Rochford District	521	77	386	984
Total	734	1,864	5,999	8,597

- 4.11 The global high and low growth retail/food/beverage capacity at 2035 ranges from 3,731 sq.m gross to 5,170 sq.m gross, which will increase to 6,444 sq.m gross to 8,597 sq.m gross in 2040. Recognising the high degree of uncertainty, it may be prudent to seek to accommodate the high growth projection up to 2035, i.e. 5,170 sq.m gross. The population growth scenarios will need to be monitored.
- 4.12 In addition to retail and food/beverage floorspace, leisure expenditure growth could support about 2,355 sq.m gross to 2,610 sq.m gross of new commercial leisure/cultural floorspace by 2035, increasing to 3,270 sq.m gross to 3,960 sq.m gross by 2040.
- 4.13 The proposed commitments listed at paragraph 2.59 could provide about 3,800 sq.m gross of retail and food/beverage floorspace, which would reduce the high growth projection up to 2035, from 5,170 sq.m gross to about 1,370 sq.m gross.
- 4.14 The existing stock of premises may help to accommodate some of the projected growth, particularly in the short-term. The floorspace capacity analysis in this report assumes that existing retail and food/beverage floorspace can, on average, increase its turnover to sales floorspace densities, particularly if retail businesses can maintain recent growth in on-line sales through stores. In addition to the growth in sales densities, vacant floorspace may help to accommodate some of the residual future growth. However, previous studies have shown relatively low shop vacancy rates within Rochford District's town centres. The scope to accommodate growth within vacant units may be limited.
- 4.15 The projections suggest there is no pressing need to bring forward major new allocations for retail and food/beverage development before 2030. The short term projections to 2030 suggest there is likely to be limited demand to reoccupy vacant retail floorspace. However, the need to retain retail floorspace in the longer term (up to 2035 and 2040) needs to be considered. In the longer term development opportunities will need to be identified to accommodate residual capacity for retail, food/beverage and leisure uses within town centres.
- 4.16 Some new retail, food/beverage and leisure floorspace may be required to support the day to day needs of any strategic housing allocations. These facilities should be commensurate

with the number of new dwellings proposed and the scale of development must have an acceptable impact on town centres. These strategic housing allocations could meet much of the residual floorspace capacity, over and above the reoccupation of vacant floorspace as outlined above or small scale windfall developments within town centres.

- 4.17 Despite the recent changes to the UCO, the new Local Plan can still refer to separate retail floorspace projections, which do not need to be merged with other uses in Class E, such as office and leisure uses. Historically, development plans have included separate floorspace projections for comparison and convenience goods retail although they both fell within Class A1, along with other non-retail services. Under the old system, there were permitted development rights for all food and beverage uses to change to Class A1. In a similar way, retail and restaurant/café uses now fall into one new Class E, whilst pubs/bars and takeaways are Sui Generis with no permitted changes.
- 4.18 The Council can still impose conditions on new development that restrict changes within the new Class E, in the same way comparison, convenience goods retail floorspace and the sale of specific types of goods have been controlled via conditions for many years. The floorspace projections in this study and retail impact assessments should help to determine when these types of conditions are necessary and appropriate.

Impact and sequential tests

- 4.19 The NPPF (paragraph 90) states that local planning authorities, when assessing applications for retail and leisure development outside of town centres, which are not in accordance with an up to-date Local Plan, should require an impact assessment if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500 sq.m). Impact assessments should consider:
- the impact of the proposal on existing, committed and planned public and private investment in centres in the catchment area of the proposal; and
 - the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider retail catchment (as applicable to the scale and nature of the scheme).
- 4.20 The NPPF (paragraph 87) indicates local planning authorities should apply a sequential test for main town centre uses outside of designated centres. The impact test should only apply to retail and leisure development outside of centres.
- 4.21 The NPPF minimum threshold of 2,500 sq.m gross may be inappropriate for Rochford District. This scale of development would still represent a significant proportion of the overall retail and food/beverage projections for the authority area. A lower impact threshold of 400 sq.m gross, consistent with the Sunday trading threshold, could be considered.

Town centre boundary and primary shopping areas

- 4.22 The new Local Plan should continue to define town centre boundaries on the proposals map to assist the application of the sequential test. Current and future market trends, the relatively low retail floorspace short term capacity projections, changes to the NPPF and the UCO, indicate a more flexible approach to shop frontage policies and the mix of uses within centre should be considered.
- 4.23 A balanced approach that recognises the need to maintain and enhance Rochford's retail position, as well as the early evening and night-time economy. There is still a need to

protect retail uses previously categorised as Class A1 uses within town centres. However, changes to the Use Classes Order (UCO) and Permitted Development Rights (PDR) will restrict the future policy approach.

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

Appendix 1 Study area and population

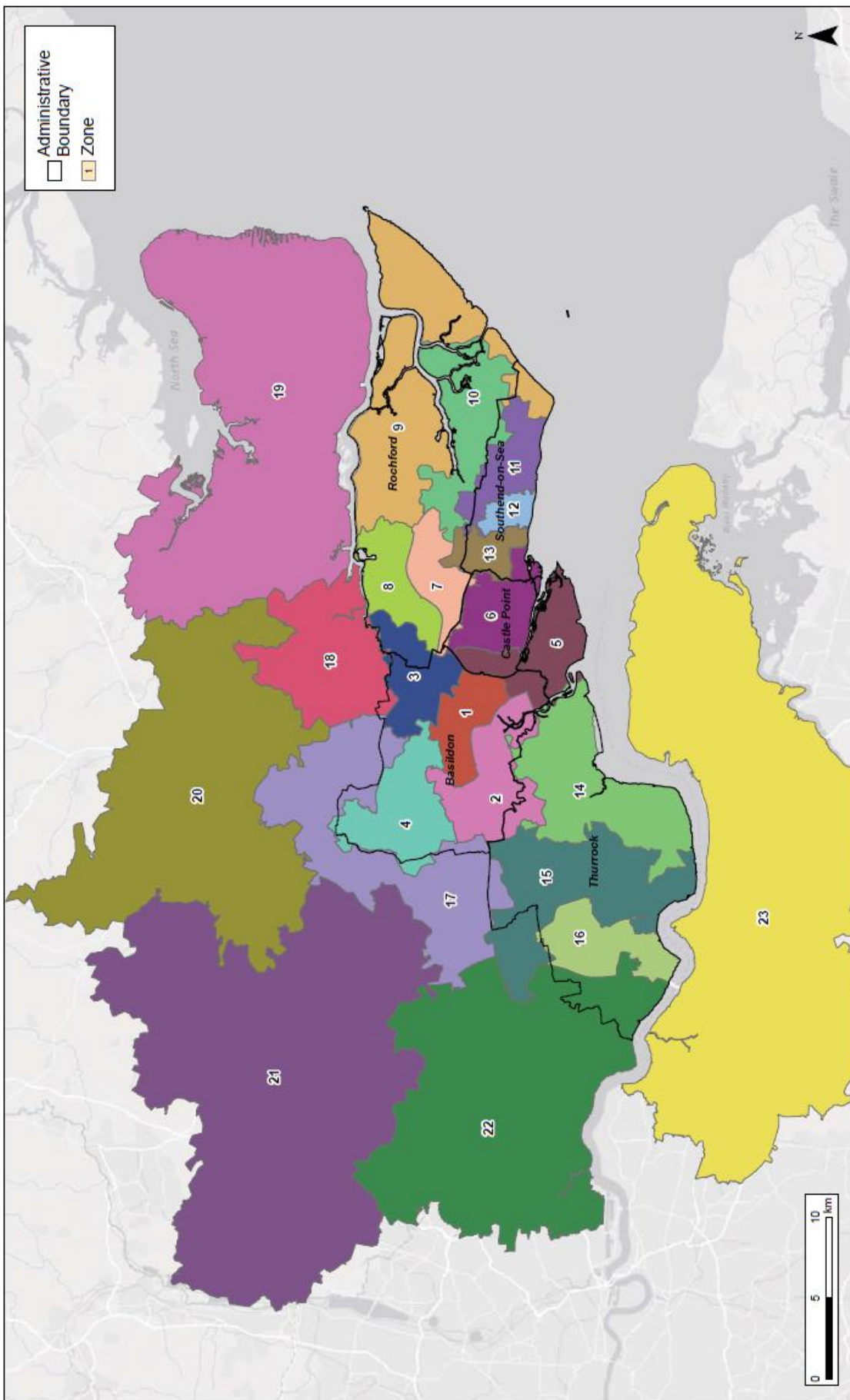


Table 1A - Study area population projections (low growth)

Zone	2022	2025	2030	2035	2040
1	41,571	42,119	42,873	43,647	44,573
2	75,998	77,206	79,006	80,766	82,751
3	29,640	30,039	30,638	31,307	31,921
4	33,182	33,543	34,054	34,438	34,814
5	59,506	60,003	60,793	61,580	62,537
6	39,794	40,124	40,594	41,047	41,535
7	30,906	31,411	32,150	32,742	33,189
8	25,745	26,254	26,984	27,697	28,370
9	26,320	26,811	27,634	28,418	29,286
10	21,550	21,979	22,630	23,199	23,859
11	74,510	75,836	77,685	79,438	81,351
12	42,340	43,077	44,034	45,010	46,036
13	42,738	43,367	44,359	45,148	45,814
14	48,550	49,653	51,166	52,439	53,709
15	71,418	73,000	75,027	76,874	78,714
16	45,215	46,784	48,828	50,488	52,084
17	28,442	28,511	28,769	29,005	29,246
18	28,668	29,291	30,091	30,816	31,592
19	49,667	50,627	52,122	53,476	54,808
20	147,437	150,399	154,542	158,103	161,493
21	140,772	141,690	143,379	145,113	147,088
22	641,195	648,908	659,991	671,025	683,117
23	504,054	512,286	523,367	533,393	544,091
Total	2,249,218	2,282,918	2,330,716	2,375,169	2,421,978

Source: Experian population projections

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

Zone	2022	2025	2030	2035	2040
1	41,571	42,699	44,627	46,415	48,263
2	75,998	78,061	81,584	84,854	88,232
3	29,640	30,445	31,819	33,094	34,411
4	33,182	34,083	35,621	37,048	38,524
5	59,506	60,632	62,544	64,449	66,230
6	39,794	40,547	41,826	43,099	44,291
7	30,906	31,493	32,414	33,245	34,115
8	25,745	26,234	27,001	27,694	28,418
9	26,320	26,820	27,604	28,312	29,053
10	21,550	21,959	22,601	23,181	23,788
11	74,510	76,739	80,139	83,434	86,927
12	42,340	43,607	45,538	47,411	49,396
13	42,738	44,017	45,966	47,857	49,860
14	48,550	50,468	53,292	55,880	58,585
15	71,418	74,240	78,394	82,200	86,180
16	45,215	47,001	49,631	52,041	54,561
17	28,442	29,648	31,756	33,677	35,479
18	28,668	29,291	30,091	30,816	31,592
19	49,667	50,627	52,122	53,476	54,808
20	147,437	150,399	154,542	158,103	161,493
21	140,772	141,690	143,379	145,113	147,088
22	641,195	648,908	659,991	671,025	683,117
23	504,054	512,286	523,367	533,393	544,091
Total	2,249,218	2,291,894	2,355,850	2,415,817	2,478,503

Source: *Experian population projections for Zones 18 to 23.*
Standard Method population projections for Zone 1 to 17 (South Essex).

Appendix 2 Convenience goods capacity

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

Zone	2022	2025	2030	2035	2040
1	2,337	2,324	2,321	2,325	2,329
2	2,361	2,348	2,345	2,349	2,353
3	2,432	2,419	2,415	2,420	2,424
4	2,639	2,624	2,620	2,625	2,630
5	2,350	2,337	2,334	2,338	2,342
6	2,533	2,519	2,515	2,520	2,524
7	2,456	2,443	2,439	2,444	2,448
8	2,455	2,442	2,438	2,443	2,447
9	2,369	2,356	2,353	2,357	2,361
10	2,355	2,342	2,338	2,343	2,347
11	2,340	2,327	2,323	2,328	2,332
12	2,327	2,314	2,311	2,315	2,319
13	2,488	2,475	2,471	2,475	2,480
14	2,294	2,282	2,278	2,282	2,286
15	2,309	2,296	2,293	2,297	2,301
16	2,231	2,219	2,216	2,220	2,223
17	2,706	2,691	2,688	2,692	2,697
18	2,488	2,475	2,471	2,475	2,480
19	2,483	2,469	2,466	2,470	2,474
20	2,466	2,452	2,449	2,453	2,458
21	2,569	2,555	2,551	2,556	2,560
22	2,274	2,261	2,258	2,262	2,266
23	2,419	2,406	2,402	2,406	2,411

Sources:

Experian Local Expenditure 2020 (2020 prices)

Experian growth rates from Retail Planner Briefing Note 19 - Figure 1a

Excludes Special Forms of Trading - Experian adjusted SFT Retail Planner Briefing Note 19 - Figure 5

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

Zone	2022	2025	2030	2035	2040
1	97.15	97.89	99.50	101.47	103.81
2	179.43	181.28	185.24	189.70	194.71
3	72.09	72.66	74.00	75.75	77.37
4	87.56	88.02	89.23	90.40	91.55
5	139.86	140.25	141.89	143.98	146.48
6	100.79	101.07	102.10	103.42	104.84
7	75.91	76.73	78.42	80.01	81.24
8	63.21	64.11	65.80	67.65	69.42
9	62.35	63.17	65.01	66.97	69.14
10	50.75	51.47	52.92	54.35	55.99
11	174.33	176.45	180.50	184.90	189.68
12	98.53	99.70	101.77	104.20	106.77
13	106.34	107.32	109.61	111.76	113.61
14	111.39	113.29	116.57	119.69	122.80
15	164.87	167.59	172.00	176.55	181.09
16	100.88	103.80	108.18	112.06	115.80
17	76.97	76.74	77.32	78.09	78.88
18	71.33	72.48	74.36	76.28	78.34
19	123.32	125.01	128.52	132.09	135.62
20	363.59	368.85	378.46	387.87	396.88
21	361.68	362.04	365.82	370.90	376.61
22	1457.96	1467.37	1490.29	1517.87	1547.94
23	1219.24	1232.33	1257.18	1283.52	1311.56
Total	5,359.55	5,409.62	5,514.70	5,629.49	5,750.11

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

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

Zone	2022	2025	2030	2035	2040
1	97.15	99.24	103.57	107.91	112.40
2	179.43	183.29	191.29	199.30	207.60
3	72.09	73.64	76.85	80.07	83.41
4	87.56	89.44	93.34	97.25	101.30
5	139.86	141.72	145.98	150.69	155.13
6	100.79	102.13	105.20	108.60	111.79
7	75.91	76.93	79.06	81.24	83.51
8	63.21	64.06	65.84	67.65	69.54
9	62.35	63.19	64.94	66.72	68.59
10	50.75	51.43	52.85	54.30	55.82
11	174.33	178.56	186.20	194.20	202.68
12	98.53	100.92	105.24	109.76	114.56
13	106.34	108.92	113.58	118.46	123.64
14	111.39	115.15	121.42	127.54	133.95
15	164.87	170.44	179.72	188.78	198.26
16	100.88	104.29	109.96	115.51	121.31
17	76.97	79.80	85.34	90.67	95.69
18	71.33	72.48	74.36	76.28	78.34
19	123.32	125.01	128.52	132.09	135.62
20	363.59	368.85	378.46	387.87	396.88
21	361.68	362.04	365.82	370.90	376.61
22	1457.96	1467.37	1490.29	1517.87	1547.94
23	1219.24	1232.33	1257.18	1283.52	1311.56
Total	5,359.55	5,431.22	5,575.02	5,727.19	5,886.13

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

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

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

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

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

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total	
Expenditure 2022		97.15	179.43	72.09	87.56	139.86	100.79	75.91	63.21	62.35	50.75	174.33	98.53	106.34	111.39	164.87	100.88	76.97	71.33	123.32	363.59	361.68	1457.96	1219.24	5359.55	
Southend-on-Sea																										
Southend town centre		0.00	0.00	0.17	0.00	0.00	0.51	0.74	0.62	1.60	3.53	40.95	18.25	8.04	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	45.34	0.00	119.75	
Southend out-of-centre		0.00	0.72	0.93	0.58	2.46	6.62	19.38	7.41	26.26	27.14	59.08	43.52	47.24	0.92	1.20	0.00	0.50	0.00	0.27	0.00	0.25	3.64	0.00	248.15	
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.36	1.28	0.00	0.00	3.38	11.59	0.97	0.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	17.69	
Eastwood town centre		0.00	0.00	0.00	0.00	0.00	0.92	0.99	1.05	0.52	2.66	0.96	5.10	7.70	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	19.90	
Leigh-on-Sea		0.00	0.00	0.00	0.00	0.15	7.09	0.00	0.07	0.25	0.03	0.65	2.49	21.50	0.00	0.25	1.17	0.00	0.00	0.00	0.00	0.00	0.00	0.00	33.65	
Thorpe Bay town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.27	0.00	0.04	0.00	4.29	5.96	0.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.68	
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.58	0.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.68	
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.22	0.11	0.59	0.00	1.81	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.80	
Southend total		0.00	0.72	1.10	0.58	2.62	15.14	21.96	10.54	29.27	33.36	115.70	87.08	85.56	1.05	1.45	1.17	0.50	0.00	0.27	0.00	0.25	48.99	0.00	457.31	
Rochford																										
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.18	0.00	6.55	4.05	0.00	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.91	
Rayleigh town centre		0.00	0.00	0.08	0.00	0.28	0.96	11.82	4.50	0.00	0.54	0.00	0.00	0.78	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.98	0.00	24.93	
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.74	0.87	0.09	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.70	
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.30	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.30	
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.16	
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.67	0.00	0.00	0.00	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.78	
Rochford out-of-centre		0.00	1.27	0.78	0.00	3.86	4.49	22.99	29.55	8.43	7.45	0.45	0.93	0.76	0.00	0.00	0.00	0.00	0.21	0.00	0.00	0.00	0.00	0.00	81.15	
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.16	0.00	0.32	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.48	
Rochford total		0.00	1.27	0.86	0.00	4.14	5.44	35.73	35.75	16.22	13.67	0.45	1.16	1.53	0.00	0.00	0.00	0.00	0.21	0.00	0.00	0.00	5.98	0.00	122.42	
Other destinations		97.15	177.44	70.14	86.98	133.10	80.21	18.22	16.93	16.86	3.72	58.17	10.29	19.25	110.34	163.42	99.71	76.47	71.13	123.05	363.59	361.43	1402.99	1219.24	4779.83	
TOTAL		97.15	179.43	72.09	87.56	139.86	100.79	75.91	63.21	62.35	50.75	174.33	98.53	106.34	111.39	164.87	100.88	76.97	71.33	123.32	363.59	361.68	1457.96	1219.24	5359.55	

Source: Tables 2A and 3.

Table 5A - Future 2025 convenience goods shopping patterns (£M) - low growth

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
Expenditure 2025		97.89	181.28	72.66	88.02	140.25	101.07	76.73	64.11	63.17	51.47	176.45	99.70	107.32	113.29	167.59	103.80	76.74	72.48	125.01	368.85	362.04	1467.37	1232.33	5409.62
Southend-on-Sea																									
Southend town centre		0.00	0.00	0.17	0.00	0.00	0.52	0.75	0.63	1.62	3.58	41.45	18.46	8.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	45.64	0.00	120.92
Southend out-of-centre		0.00	0.73	0.94	0.58	2.47	6.64	19.59	7.52	26.61	27.53	59.80	44.04	47.67	0.94	1.22	0.00	0.50	0.00	0.28	0.00	0.25	3.67	0.00	250.96
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.36	1.29	0.00	0.00	3.42	11.72	0.98	0.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	17.90
Eastwood town centre		0.00	0.00	0.00	0.00	0.00	0.92	1.00	1.06	0.53	2.70	0.97	5.16	7.77	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	20.11
Leigh-on-Sea		0.00	0.00	0.00	0.00	0.15	7.10	0.00	0.07	0.25	0.03	0.65	2.52	21.70	0.00	0.25	1.20	0.00	0.00	0.00	0.00	0.00	0.00	0.00	33.94
Thorpe Bay town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.28	0.00	0.04	0.00	4.34	6.03	0.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.81
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.64	0.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.74
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.22	0.11	0.59	0.00	1.84	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.83
Southend total		0.00	0.73	1.10	0.58	2.62	15.18	22.20	10.69	29.65	33.84	117.11	88.11	86.35	1.06	1.47	1.20	0.50	0.00	0.28	0.00	0.25	49.30	0.00	462.23
Rochford																									
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.18	0.00	6.63	4.11	0.00	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.06
Rayleigh town centre		0.00	0.00	0.08	0.00	0.28	0.96	11.95	4.56	0.00	0.55	0.00	0.00	0.78	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.02	0.00	25.18
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.75	0.88	0.09	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.73
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.32	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.32
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.17	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.17
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.68	0.00	0.00	0.00	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.79
Rochford out-of-centre		0.00	1.29	0.78	0.00	3.87	4.50	23.23	29.96	8.54	7.56	0.46	0.94	0.76	0.00	0.00	0.00	0.00	0.21	0.00	0.00	0.00	0.00	0.00	82.10
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.16	0.00	0.32	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.48
Rochford total		0.00	1.29	0.86	0.00	4.15	5.46	36.12	36.25	16.44	13.86	0.46	1.18	1.55	0.00	0.00	0.00	0.00	0.21	0.00	0.00	0.00	6.02	0.00	123.83
Other destinations		97.89	179.27	70.69	87.44	133.48	80.43	18.41	17.17	17.08	3.77	58.88	10.41	19.42	112.23	166.12	102.60	76.24	72.27	124.74	368.85	361.78	1412.05	1232.33	4823.56
TOTAL		97.89	181.28	72.66	88.02	140.25	101.07	76.73	64.11	63.17	51.47	176.45	99.70	107.32	113.29	167.59	103.80	76.74	72.48	125.01	368.85	362.04	1467.37	1232.33	5409.62

Source: Tables 2A and 3.

Table 5B - Future 2025 convenience goods shopping patterns (£M) - high growth

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
Expenditure 2025		99.24	183.29	73.64	89.44	141.72	102.13	76.93	64.06	63.19	51.43	178.56	100.92	108.92	115.15	170.44	104.29	79.80	72.48	125.01	368.85	362.04	1467.37	1232.33	5431.22
Southend-on-Sea																									
Southend town centre		0.00	0.00	0.17	0.00	0.00	0.52	0.75	0.63	1.62	3.57	41.94	18.69	8.23	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	45.64	0.00	121.77
Southend out-of-centre		0.00	0.73	0.95	0.59	2.49	6.71	19.64	7.51	26.61	27.51	60.51	44.58	48.38	0.96	1.24	0.00	0.52	0.00	0.28	0.00	0.25	3.67	0.00	253.14
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.36	1.29	0.00	0.00	3.46	11.87	0.99	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	18.11
Eastwood town centre		0.00	0.00	0.00	0.00	0.00	0.93	1.00	1.06	0.53	2.69	0.98	5.23	7.89	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	20.31
Leigh-on-Sea		0.00	0.00	0.00	0.00	0.16	7.18	0.00	0.07	0.25	0.03	0.66	2.55	22.02	0.00	0.26	1.21	0.00	0.00	0.00	0.00	0.00	0.00	0.00	34.39
Thorpe Bay town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.28	0.00	0.04	0.00	4.39	6.11	0.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.94
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.70	0.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.80
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.22	0.11	0.59	0.00	1.86	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.85
Southend total		0.00	0.73	1.12	0.59	2.65	15.34	22.26	10.68	29.66	33.81	118.51	89.20	87.64	1.08	1.50	1.21	0.52	0.00	0.28	0.00	0.25	49.30	0.00	466.32
Rochford																									
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.18	0.00	6.63	4.11	0.00	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.06
Rayleigh town centre		0.00	0.00	0.08	0.00	0.28	0.97	11.98	4.56	0.00	0.55	0.00	0.00	0.80	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.02	0.00	25.24
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.75	0.88	0.09	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.73
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.32	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.32
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.18	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.18
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.68	0.00	0.00	0.00	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.79
Rochford out-of-centre		0.00	1.30	0.80	0.00	3.91	4.54	23.29	29.94	8.54	7.55	0.46	0.95	0.77	0.00	0.00	0.00	0.00	0.21	0.00	0.00	0.00	0.00	0.00	82.28
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.16	0.00	0.32	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.48
Rochford total		0.00	1.30	0.88	0.00	4.19	5.52	36.21	36.23	16.44	13.85	0.46	1.19	1.57	0.00	0.00	0.00	0.00	0.21	0.00	0.00	0.00	6.02	0.00	124.06
Other destinations		99.24	181.25	71.64	88.85	134.88	81.28	18.46	17.16	17.09	3.77	59.58	10.54	19.72	114.07	168.94	103.08	79.28	72.27	124.74	368.85	361.78	1412.05	1232.33	4840.84
TOTAL		99.24	183.29	73.64	89.44	141.72	102.13	76.93	64.06	63.19	51.43	178.56	100.92	108.92	115.15	170.44	104.29	79.80	72.48	125.01	368.85	362.04	1467.37	1232.33	5431.22

Source: Tables 2B and 3.

Table 6A - Future 2030 convenience goods shopping patterns (£M) - low growth

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
Expenditure 2030		99.50	185.24	74.00	89.23	141.89	102.10	78.42	65.80	65.01	52.92	180.50	101.77	109.61	116.57	172.00	108.18	77.32	74.36	128.52	378.46	365.82	1490.29	1257.18	5514.70
Southend-on-Sea																									
Southend town centre		0.00	0.00	0.17	0.00	0.00	0.52	0.77	0.64	1.67	3.68	42.40	18.85	8.29	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	46.35	0.00	123.33
Southend out-of-centre		0.00	0.74	0.95	0.59	2.50	6.71	20.02	7.72	27.38	28.31	61.17	44.95	48.69	0.97	1.26	0.00	0.50	0.00	0.28	0.00	0.26	3.73	0.00	256.72
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.37	1.33	0.00	0.00	3.50	11.97	1.00	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	18.29
Eastwood town centre		0.00	0.00	0.00	0.00	0.00	0.93	1.02	1.09	0.55	2.77	0.99	5.27	7.94	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	20.56
Leigh-on-Sea		0.00	0.00	0.00	0.00	0.16	7.18	0.00	0.07	0.26	0.03	0.67	2.57	22.16	0.00	0.26	1.25	0.00	0.00	0.00	0.00	0.00	0.00	0.00	34.62
Thorpe Bay town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.28	0.00	0.05	0.00	4.44	6.16	0.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.05
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.75	0.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.85
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.23	0.11	0.61	0.00	1.88	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.90
Southend total		0.00	0.74	1.12	0.59	2.65	15.34	22.69	10.97	30.52	34.79	119.80	89.94	88.19	1.10	1.51	1.25	0.50	0.00	0.28	0.00	0.26	50.07	0.00	472.31
Rochford																									
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.19	0.00	6.83	4.23	0.00	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.38
Rayleigh town centre		0.00	0.00	0.08	0.00	0.28	0.97	12.21	4.68	0.00	0.57	0.00	0.00	0.80	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.11	0.00	25.71
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.77	0.91	0.09	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.77
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.35	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.35
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.21	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.21
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.70	0.00	0.00	0.00	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.81
Rochford out-of-centre		0.00	1.32	0.80	0.00	3.92	4.54	23.75	30.75	8.79	7.77	0.47	0.96	0.78	0.00	0.00	0.00	0.00	0.22	0.00	0.00	0.00	0.00	0.00	84.05
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.16	0.00	0.33	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.50
Rochford total		0.00	1.32	0.88	0.00	4.20	5.51	36.91	37.21	16.92	14.25	0.47	1.20	1.58	0.00	0.00	0.00	0.00	0.22	0.00	0.00	0.00	6.11	0.00	126.77
Other destinations		99.50	183.19	72.00	88.65	135.04	81.25	18.82	17.62	17.58	3.88	60.23	10.62	19.84	115.48	170.49	106.93	76.82	74.14	128.24	378.46	365.57	1434.10	1257.18	4915.61
TOTAL		99.50	185.24	74.00	89.23	141.89	102.10	78.42	65.80	65.01	52.92	180.50	101.77	109.61	116.57	172.00	108.18	77.32	74.36	128.52	378.46	365.82	1490.29	1257.18	5514.70

Source: Tables 2A and 3.

Table 6B - Future 2030 convenience goods shopping patterns (£M) - high growth

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
Expenditure 2030		103.57	191.29	76.85	93.34	145.98	105.20	79.06	65.84	64.94	52.85	186.20	105.24	113.58	121.42	179.72	109.96	85.34	74.36	128.52	378.46	365.82	1490.29	1257.18	5575.02
Southend-on-Sea																									
Southend town centre		0.00	0.00	0.18	0.00	0.00	0.54	0.77	0.65	1.67	3.67	43.74	19.49	8.59	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	46.35	0.00	125.64
Southend out-of-centre		0.00	0.77	0.99	0.62	2.57	6.91	20.19	7.72	27.35	28.27	63.10	46.49	50.45	1.01	1.31	0.00	0.55	0.00	0.28	0.00	0.26	3.73	0.00	262.57
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.37	1.33	0.00	0.00	3.61	12.38	1.03	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	18.86
Eastwood town centre		0.00	0.00	0.00	0.00	0.00	0.96	1.03	1.09	0.55	2.77	1.02	5.45	8.22	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	21.09
Leigh-on-Sea		0.00	0.00	0.00	0.00	0.16	7.40	0.00	0.07	0.26	0.03	0.69	2.66	22.97	0.00	0.27	1.28	0.00	0.00	0.00	0.00	0.00	0.00	0.00	35.78
Thorpe Bay town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.28	0.00	0.05	0.00	4.58	6.37	0.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.40
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.90	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.00
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.23	0.11	0.61	0.00	1.94	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.96
Southend total		0.00	0.77	1.17	0.62	2.73	15.80	22.87	10.98	30.48	34.75	123.58	93.01	91.39	1.14	1.58	1.28	0.55	0.00	0.28	0.00	0.26	50.07	0.00	483.31
Rochford																									
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.19	0.00	6.82	4.22	0.00	0.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.37
Rayleigh town centre		0.00	0.00	0.08	0.00	0.29	1.00	12.31	4.69	0.00	0.57	0.00	0.00	0.83	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.11	0.00	25.88
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.77	0.91	0.09	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.77
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.35	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.35
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.21	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.21
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.70	0.00	0.00	0.00	0.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.81
Rochford out-of-centre		0.00	1.36	0.83	0.00	4.03	4.68	23.94	30.77	8.78	7.76	0.48	0.99	0.81	0.00	0.00	0.00	0.00	0.22	0.00	0.00	0.00	0.00	0.00	84.65
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.16	0.00	0.33	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.50
Rochford total		0.00	1.36	0.91	0.00	4.32	5.68	37.22	37.23	16.90	14.23	0.48	1.24	1.64	0.00	0.00	0.00	0.00	0.22	0.00	0.00	0.00	6.11	0.00	127.54
Other destinations		103.57	189.16	74.77	92.72	138.93	83.72	18.98	17.63	17.56	3.87	62.13	10.99	20.56	120.28	178.14	108.69	84.79	74.14	128.24	378.46	365.57	1434.10	1257.18	4964.18
TOTAL		103.57	191.29	76.85	93.34	145.98	105.20	79.06	65.84	64.94	52.85	186.20	105.24	113.58	121.42	179.72	109.96	85.34	74.36	128.52	378.46	365.82	1490.29	1257.18	5575.02

Source: Tables 2B and 3.

Table 7A - Future 2035 convenience goods shopping patterns (£M) - low growth

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total	
Expenditure 2035		101.47	189.70	75.75	90.40	143.98	103.42	80.01	67.65	66.97	54.35	184.90	104.20	111.76	119.69	176.55	112.06	78.09	76.28	132.09	387.87	370.90	1517.87	1283.52	5629.49	
Southend-on-Sea																										
Southend town centre		0.00	0.00	0.17	0.00	0.00	0.53	0.78	0.66	1.72	3.78	43.43	19.30	8.45	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	47.21	0.00	126.03
Southend out-of-centre		0.00	0.76	0.98	0.60	2.53	6.79	20.43	7.94	28.21	29.07	62.66	46.03	49.64	0.99	1.29	0.00	0.51	0.00	0.29	0.00	0.26	3.79	0.00	0.00	262.77
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.38	1.37	0.00	0.00	3.59	12.25	1.02	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	18.73
Eastwood town centre		0.00	0.00	0.00	0.00	0.00	0.94	1.04	1.12	0.56	2.85	1.02	5.40	8.09	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	21.02
Leigh-on-Sea		0.00	0.00	0.00	0.00	0.16	7.27	0.00	0.07	0.27	0.03	0.68	2.64	22.60	0.00	0.26	1.30	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	35.29
Thorpe Bay town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.29	0.00	0.05	0.00	4.55	6.30	0.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.31
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.86	0.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.97
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.23	0.12	0.63	0.00	1.92	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.97
Southend total		0.00	0.76	1.15	0.60	2.69	15.53	23.15	11.28	31.44	35.73	122.71	92.10	89.92	1.13	1.55	1.30	0.51	0.00	0.29	0.00	0.26	51.00	0.00	483.09	
Rochford																										
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.19	0.00	7.03	4.34	0.00	0.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.70
Rayleigh town centre		0.00	0.00	0.08	0.00	0.29	0.98	12.46	4.82	0.00	0.58	0.00	0.00	0.82	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.22	0.00	26.25
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.78	0.93	0.09	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.81
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.39	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.39
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.25	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.25
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.72	0.00	0.00	0.00	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.83
Rochford out-of-centre		0.00	1.35	0.82	0.00	3.97	4.60	24.23	31.62	9.05	7.98	0.48	0.98	0.79	0.00	0.00	0.00	0.00	0.22	0.00	0.00	0.00	0.00	0.00	0.00	86.10
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.17	0.00	0.34	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.51
Rochford total		0.00	1.35	0.90	0.00	4.26	5.58	37.66	38.26	17.43	14.64	0.48	1.23	1.61	0.00	0.00	0.00	0.00	0.22	0.00	0.00	0.00	6.22	0.00	129.84	
Other destinations		101.47	187.60	73.70	89.80	137.03	82.31	19.20	18.12	18.11	3.98	61.70	10.88	20.23	118.56	174.99	110.76	77.58	76.06	131.80	387.87	370.64	1460.65	1283.52	5016.56	
TOTAL		101.47	189.70	75.75	90.40	143.98	103.42	80.01	67.65	66.97	54.35	184.90	104.20	111.76	119.69	176.55	112.06	78.09	76.28	132.09	387.87	370.90	1517.87	1283.52	5629.49	

Source: Tables 2A and 3.

Table 7B - Future 2035 convenience goods shopping patterns (£M) - high growth

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total	
Expenditure 2035		107.91	199.30	80.07	97.25	150.69	108.60	81.24	67.65	66.72	54.30	194.20	109.76	118.46	127.54	188.78	115.51	90.67	76.28	132.09	387.87	370.90	1517.87	1283.52	5727.19	
Southend-on-Sea																										
Southend town centre		0.00	0.00	0.18	0.00	0.00	0.55	0.80	0.66	1.71	3.77	45.62	20.33	8.96	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	47.21	0.00	129.79
Southend out-of-centre		0.00	0.80	1.03	0.64	2.65	7.13	20.74	7.93	28.10	29.05	65.81	48.48	52.62	1.06	1.38	0.00	0.59	0.00	0.29	0.00	0.26	3.79	0.00	272.37	
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.38	1.37	0.00	0.00	3.77	12.91	1.08	0.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	19.64
Eastwood town centre		0.00	0.00	0.00	0.00	0.00	0.99	1.06	1.12	0.56	2.85	1.07	5.69	8.58	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	21.90
Leigh-on-Sea		0.00	0.00	0.00	0.00	0.17	7.63	0.00	0.07	0.27	0.03	0.72	2.78	23.95	0.00	0.28	1.34	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	37.25
Thorpe Bay town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.29	0.00	0.05	0.00	4.78	6.64	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.89
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.11	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.22
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.24	0.11	0.63	0.00	2.02	0.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.07
Southend total		0.00	0.80	1.22	0.64	2.82	16.31	23.50	11.28	31.32	35.70	128.89	97.01	95.32	1.20	1.66	1.34	0.59	0.00	0.29	0.00	0.26	51.00	0.00	501.14	
Rochford																										
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.19	0.00	7.01	4.34	0.00	0.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.68
Rayleigh town centre		0.00	0.00	0.09	0.00	0.30	1.03	12.65	4.82	0.00	0.58	0.00	0.00	0.86	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.22	0.00	26.55
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.80	0.93	0.09	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.82
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.39	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.39
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.24	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.24
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.72	0.00	0.00	0.00	0.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.84
Rochford out-of-centre		0.00	1.42	0.86	0.00	4.16	4.83	24.60	31.62	9.02	7.97	0.50	1.03	0.84	0.00	0.00	0.00	0.00	0.22	0.00	0.00	0.00	0.00	0.00	0.00	87.08
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.17	0.00	0.34	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.51
Rochford total		0.00	1.42	0.95	0.00	4.46	5.86	38.24	38.25	17.36	14.62	0.50	1.30	1.71	0.00	0.00	0.00	0.00	0.22	0.00	0.00	0.00	0.00	6.22	0.00	131.12
Other destinations		107.91	197.09	77.90	96.61	143.41	86.42	19.50	18.12	18.04	3.98	64.80	11.46	21.44	126.34	187.12	114.17	90.08	76.06	131.80	387.87	370.64	1460.65	1283.52	5094.93	
TOTAL		107.91	199.30	80.07	97.25	150.69	108.60	81.24	67.65	66.72	54.30	194.20	109.76	118.46	127.54	188.78	115.51	90.67	76.28	132.09	387.87	370.90	1517.87	1283.52	5727.19	

Source: Tables 2B and 3.

Table 8A - Future 2040 convenience goods shopping patterns (£M) - low growth

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
Expenditure 2040		103.81	194.71	77.37	91.55	146.48	104.84	81.24	69.42	69.14	55.99	189.68	106.77	113.61	122.80	181.09	115.80	78.88	78.34	135.62	396.88	376.61	1547.94	1311.56	5750.11
Southend-on-Sea																									
Southend town centre		0.00	0.00	0.18	0.00	0.00	0.53	0.80	0.68	1.78	3.89	44.56	19.77	8.59	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	48.14	0.00	128.92
Southend out-of-centre		0.00	0.78	1.00	0.60	2.58	6.89	20.74	8.14	29.12	29.95	64.28	47.16	50.46	1.02	1.32	0.00	0.51	0.00	0.30	0.00	0.26	3.87	0.00	268.99
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.38	1.40	0.00	0.00	3.68	12.56	1.03	0.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	19.19
Eastwood town centre		0.00	0.00	0.00	0.00	0.00	0.95	1.06	1.15	0.58	2.93	1.04	5.53	8.23	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	21.48
Leigh-on-Sea		0.00	0.00	0.00	0.00	0.16	7.37	0.00	0.08	0.28	0.03	0.70	2.70	22.97	0.00	0.27	1.34	0.00	0.00	0.00	0.00	0.00	0.00	0.00	35.91
Thorpe Bay town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.29	0.00	0.05	0.00	4.67	6.46	0.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.59
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.99	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.10
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.24	0.12	0.65	0.00	1.97	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.05
Southend total		0.00	0.78	1.18	0.60	2.74	15.75	23.50	11.57	32.45	36.81	125.89	94.36	91.41	1.15	1.59	1.34	0.51	0.00	0.30	0.00	0.26	52.01	0.00	494.22
Rochford																									
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.19	0.00	7.26	4.47	0.00	0.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.07
Rayleigh town centre		0.00	0.00	0.09	0.00	0.29	1.00	12.65	4.94	0.00	0.60	0.00	0.00	0.83	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.35	0.00	26.74
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.80	0.96	0.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.85
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.43	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.43
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.29	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.29
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.74	0.00	0.00	0.00	0.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.85
Rochford out-of-centre		0.00	1.38	0.84	0.00	4.04	4.67	24.60	32.45	9.35	8.22	0.49	1.00	0.81	0.00	0.00	0.00	0.00	0.23	0.00	0.00	0.00	0.00	0.00	88.07
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.17	0.00	0.35	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.53
Rochford total		0.00	1.38	0.92	0.00	4.34	5.66	38.24	39.26	17.99	15.08	0.49	1.26	1.64	0.00	0.00	0.00	0.00	0.23	0.00	0.00	0.00	6.35	0.00	132.83
Other destinations		103.81	192.54	75.28	90.94	139.40	83.43	19.50	18.59	18.70	4.10	63.30	11.15	20.56	121.65	179.49	114.46	78.36	78.11	135.32	396.88	376.35	1489.58	1311.56	5123.06
TOTAL		103.81	194.71	77.37	91.55	146.48	104.84	81.24	69.42	69.14	55.99	189.68	106.77	113.61	122.80	181.09	115.80	78.88	78.34	135.62	396.88	376.61	1547.94	1311.56	5750.11

Source: Tables 2A and 3.

Table 8B - Future 2040 convenience goods shopping patterns (£M) - high growth

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
Expenditure 2040		112.40	207.60	83.41	101.30	155.13	111.79	83.51	69.54	68.59	55.82	202.68	114.56	123.64	133.95	198.26	121.31	95.69	78.34	135.62	396.88	376.61	1547.94	1311.56	5886.13
Southend-on-Sea																									
Southend town centre		0.00	0.00	0.19	0.00	0.00	0.57	0.82	0.68	1.76	3.88	47.61	21.22	9.35	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	48.14	0.00	134.22
Southend out-of-centre		0.00	0.83	1.08	0.67	2.73	7.34	21.32	8.16	28.89	29.86	68.69	50.60	54.92	1.11	1.45	0.00	0.62	0.00	0.30	0.00	0.26	3.87	0.00	282.70
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.39	1.40	0.00	0.00	3.93	13.47	1.13	0.15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	20.47
Eastwood town centre		0.00	0.00	0.00	0.00	0.00	1.02	1.09	1.15	0.58	2.93	1.11	5.93	8.95	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	22.76
Leigh-on-Sea		0.00	0.00	0.00	0.00	0.17	7.86	0.00	0.08	0.27	0.03	0.75	2.90	25.00	0.00	0.30	1.41	0.00	0.00	0.00	0.00	0.00	0.00	0.00	38.77
Thorpe Bay town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.30	0.00	0.05	0.00	4.99	6.93	0.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.40
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.33	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.45
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.24	0.12	0.64	0.00	2.11	0.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.19
Southend total		0.00	0.83	1.27	0.67	2.90	16.79	24.16	11.59	32.20	36.70	134.52	101.25	99.48	1.26	1.74	1.41	0.62	0.00	0.30	0.00	0.26	52.01	0.00	519.96
Rochford																									
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.20	0.00	7.20	4.46	0.00	0.15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.01
Rayleigh town centre		0.00	0.00	0.09	0.00	0.31	1.06	13.00	4.95	0.00	0.60	0.00	0.00	0.90	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.35	0.00	27.26
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	0.82	0.96	0.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.87
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.43	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.43
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.28	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.28
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.74	0.00	0.00	0.00	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.86
Rochford out-of-centre		0.00	1.47	0.90	0.00	4.28	4.97	25.29	32.50	9.27	8.19	0.53	1.08	0.88	0.00	0.00	0.00	0.00	0.23	0.00	0.00	0.00	0.00	0.00	89.60
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.17	0.00	0.35	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.53
Rochford total		0.00	1.47	0.99	0.00	4.59	6.04	39.31	39.32	17.85	15.03	0.53	1.35	1.78	0.00	0.00	0.00	0.00	0.23	0.00	0.00	0.00	6.35	0.00	134.84
Other destinations		112.40	205.30	81.15	100.63	147.64	88.97	20.04	18.62	18.55	4.09	67.63	11.96	22.38	132.69	196.52	119.90	95.06	78.11	135.32	396.88	376.35	1489.58	1311.56	5231.34
TOTAL		112.40	207.60	83.41	101.30	155.13	111.79	83.51	69.54	68.59	55.82	202.68	114.56	123.64	133.95	198.26	121.31	95.69	78.34	135.62	396.88	376.61	1547.94	1311.56	5886.13

Source: Tables 2B and 3.

Table 9 - Convenience goods floorspace in Rochford District (2020 prices)

Store	Sales floorspace (sq.m net)	Convenience goods floorspace (%)	Convenience goods floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Co-op, Spa Road, Hockley	486	95%	461	£10,990	£5.07
Co-op, Ferry Road, Hockley	193	95%	183	£10,990	£2.01
Co-op, Ferry Road, Hockley	270	95%	257	£10,990	£2.82
Co-op, Main Road, Hockley	159	95%	151	£10,990	£1.66
Co-op, Main Road, Hockley	31	95%	30	£10,990	£0.33
Tesco Express, London Road, Rayleigh	191	95%	181	£14,075	£2.55
Sainsburys Local, Eastwood Road, Rayleigh	360	95%	342	£12,482	£4.26
M&S Simply Food (BP), London Road, Rayleigh	84	95%	79	£11,095	£0.88
M&S Foodhall, Eastwood Road, Rayleigh	2,282	95%	2,168	£11,095	£24.05
Iceland, High Street, Rayleigh	437	95%	415	£7,447	£3.09
Asda, Rawreth Lane, Rayleigh	2,195	90%	1,976	£14,248	£28.15
Co-op, Golden Cross Parade, Rochford	256	95%	243	£10,990	£2.68
Sainsburys Local, West Street, Rochford	199	95%	189	£12,482	£2.36
Co-op, High Street, Great Wakering, Southend-on-Sea	137	95%	130	£10,990	£1.43
Home Bargains, Rochford Road, Southend-on-Sea	643	30%	193	£5,272	£1.02
B&M Bargains, Southend-on-Sea	946	30%	284	£2,319	£0.66
TOTAL	8,868		7,282		£83.02

Source: ORC Storepoint 2022 and Global Data 2021

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

	2022	2025	2030	2035	2040
Available expenditure					
Rochford town centre	10.91	11.06	11.38	11.70	12.07
Rayleigh town centre	24.93	25.18	25.71	26.25	26.74
Hockley town centre	1.70	1.73	1.77	1.81	1.85
Ashingdon	1.30	1.32	1.35	1.39	1.43
Great Wakering	1.16	1.17	1.21	1.25	1.29
Hullbridge	0.78	0.79	0.81	0.83	0.85
Rochford out-of-centre	81.15	82.10	84.05	86.10	88.07
Other Rochford District	0.48	0.48	0.50	0.51	0.53
Total	122.42	123.83	126.77	129.84	132.83
Turnover of existing facilities					
Rochford town centre	10.91	11.40	11.44	11.44	11.44
Rayleigh town centre	24.93	26.04	26.15	26.15	26.15
Hockley town centre	1.70	1.78	1.79	1.79	1.79
Ashingdon	1.30	1.36	1.36	1.36	1.36
Great Wakering	1.16	1.21	1.22	1.22	1.22
Hullbridge	0.78	0.81	0.82	0.82	0.82
Rochford out-of-centre	81.15	84.76	85.10	85.10	85.10
Other Rochford District	0.48	0.50	0.50	0.50	0.50
Total	122.42	127.86	128.37	128.37	128.37
Surplus/deficit expenditure £M					
Rochford town centre	0.00	-0.34	-0.07	0.26	0.62
Rayleigh town centre	0.00	-0.86	-0.44	0.10	0.59
Hockley town centre	0.00	-0.05	-0.02	0.02	0.06
Ashingdon	0.00	-0.04	-0.01	0.03	0.07
Great Wakering	0.00	-0.04	-0.01	0.03	0.07
Hullbridge	0.00	-0.02	-0.01	0.02	0.04
Rochford out-of-centre	0.00	-2.66	-1.05	1.00	2.97
Other Rochford District	0.00	-0.01	0.00	0.01	0.03
Total	0.00	-4.03	-1.60	1.47	4.46

Source: Tables 4 to 8A and Experian sales density growth rates from Retail Planner Briefing Note 19 - Figure 4a

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

	2022	2025	2030	2035	2040
Available expenditure					
Rochford town centre	10.91	11.06	11.37	11.68	12.01
Rayleigh town centre	24.93	25.24	25.88	26.55	27.26
Hockley town centre	1.70	1.73	1.77	1.82	1.87
Ashingdon	1.30	1.32	1.35	1.39	1.43
Great Wakering	1.16	1.18	1.21	1.24	1.28
Hullbridge	0.78	0.79	0.81	0.84	0.86
Rochford out-of-centre	81.15	82.28	84.65	87.08	89.60
Other Rochford District	0.48	0.48	0.50	0.51	0.53
Total	122.42	124.06	127.54	131.12	134.84
Turnover of existing facilities					
Rochford town centre	10.91	11.40	11.44	11.44	11.44
Rayleigh town centre	24.93	26.04	26.15	26.15	26.15
Hockley town centre	1.70	1.78	1.79	1.79	1.79
Ashingdon	1.30	1.36	1.36	1.36	1.36
Great Wakering	1.16	1.21	1.22	1.22	1.22
Hullbridge	0.78	0.81	0.82	0.82	0.82
Rochford out-of-centre	81.15	84.76	85.10	85.10	85.10
Other Rochford District	0.48	0.50	0.50	0.50	0.50
Total	122.42	127.86	128.37	128.37	128.37
Surplus/deficit expenditure £M					
Rochford town centre	0.00	-0.34	-0.07	0.24	0.57
Rayleigh town centre	0.00	-0.81	-0.27	0.41	1.12
Hockley town centre	0.00	-0.05	-0.01	0.04	0.09
Ashingdon	0.00	-0.04	-0.01	0.03	0.07
Great Wakering	0.00	-0.04	-0.01	0.02	0.06
Hullbridge	0.00	-0.02	0.00	0.02	0.05
Rochford out-of-centre	0.00	-2.48	-0.45	1.98	4.50
Other Rochford District	0.00	-0.01	0.00	0.01	0.02
Total	0.00	-3.80	-0.83	2.75	6.47

Source: Tables 4 to 8B and Experian sales density growth rates from Retail Planner Briefing Note 19 - Figure 4a

Table 11A - Convenience goods floorspace capacity - low growth

	2022	2025	2030	2035	2040
Turnover density new floorspace (£ per sq.m)	£12,000	£12,534	£12,584	£12,584	£12,584
Sales floorspace projection (sq.m net)					
Rochford town centre	0	-27	-5	21	50
Rayleigh town centre	0	-69	-35	8	47
Hockley town centre	0	-4	-2	2	5
Ashingdon	0	-3	-1	2	6
Great Wakering	0	-3	-1	2	6
Hullbridge	0	-2	-1	1	3
Rochford out-of-centre	0	-212	-83	79	236
Other Rochford District	0	-1	0	1	2
	0	-321	-127	116	354
Gross floorspace projection (sq.m gross)					
Rochford town centre	0	-39	-8	29	71
Rayleigh town centre	0	-98	-50	11	67
Hockley town centre	0	-6	-2	3	7
Ashingdon	0	-4	-1	3	8
Great Wakering	0	-4	-1	3	8
Hullbridge	0	-3	-1	2	4
Rochford out-of-centre	0	-303	-119	113	337
Other Rochford District	0	-2	0	1	3
	0	-459	-182	166	506

Source: Table 10A and Experian sales density growth rates from Retail Planner Briefing Note 19 - Figure 4a.

Table 11B - Convenience goods floorspace capacity - high growth

	2022	2025	2030	2035	2040
Turnover density new floorspace (£ per sq.m)	£12,000	£12,534	£12,584	£12,584	£12,584
Sales floorspace projection (sq.m net)					
Rochford town centre	0	-27	-6	19	45
Rayleigh town centre	0	-64	-21	32	89
Hockley town centre	0	-4	-1	3	7
Ashingdon	0	-3	-1	2	5
Great Wakering	0	-3	-1	2	5
Hullbridge	0	-2	0	2	4
Rochford out-of-centre	0	-198	-36	157	357
Other Rochford District	0	-1	0	1	2
	0	-303	-66	218	514
Gross floorspace projection (sq.m gross)					
Rochford town centre	0	-39	-8	27	65
Rayleigh town centre	0	-92	-30	46	127
Hockley town centre	0	-6	-1	4	10
Ashingdon	0	-5	-1	3	8
Great Wakering	0	-4	-1	3	7
Hullbridge	0	-3	0	2	5
Rochford out-of-centre	0	-283	-52	225	510
Other Rochford District	0	-2	0	1	3
	0	-433	-95	312	734

Source: Table 10B and Experian sales density growth rates from Retail Planner Briefing Note 19 - Figure 4a.

Appendix 3 Comparison goods capacity

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

Zone	2022	2025	2030	2035	2040
1	2,591	2,733	3,050	3,460	3,958
2	2,716	2,866	3,198	3,628	4,150
3	3,230	3,408	3,803	4,314	4,935
4	3,594	3,791	4,231	4,800	5,490
5	3,017	3,182	3,552	4,029	4,608
6	3,413	3,601	4,019	4,559	5,214
7	3,365	3,550	3,962	4,494	5,141
8	3,385	3,572	3,986	4,522	5,172
9	3,000	3,165	3,532	4,007	4,583
10	3,014	3,180	3,549	4,026	4,605
11	2,768	2,920	3,259	3,697	4,229
12	2,864	3,021	3,372	3,825	4,375
13	3,236	3,414	3,810	4,322	4,943
14	2,890	3,049	3,403	3,860	4,415
15	2,794	2,948	3,290	3,732	4,268
16	2,707	2,856	3,187	3,615	4,135
17	3,800	4,008	4,474	5,075	5,805
18	3,431	3,619	4,039	4,582	5,241
19	3,294	3,476	3,879	4,400	5,033
20	3,230	3,407	3,802	4,313	4,934
21	3,439	3,628	4,049	4,594	5,254
22	2,597	2,740	3,058	3,468	3,967
23	3,066	3,235	3,610	4,095	4,685

Sources:

Experian Local Expenditure 2020 (2020 prices)

Experian growth rates from Retail Planner Briefing Note 19 - Figure 1a

Excludes Special Forms of Trading - Experian adjusted SFT Retail Planner Briefing Note 19 - Figure 5

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

Zone	2022	2025	2030	2035	2040
1	107.69	115.11	130.77	151.02	176.40
2	206.45	221.26	252.69	293.02	343.41
3	95.75	102.37	116.53	135.07	157.53
4	119.25	127.17	144.09	165.29	191.13
5	179.50	190.95	215.92	248.10	288.19
6	135.83	144.48	163.14	187.12	216.58
7	104.00	111.51	127.37	147.15	170.61
8	87.16	93.77	107.56	125.24	146.73
9	78.96	84.85	97.61	113.86	134.22
10	64.96	69.89	80.31	93.39	109.86
11	206.24	221.45	253.17	293.67	344.00
12	121.25	130.14	148.47	172.15	201.40
13	138.29	148.04	169.00	195.12	226.48
14	140.30	151.38	174.09	202.40	237.12
15	199.55	215.18	246.82	286.87	335.99
16	122.40	133.60	155.62	182.53	215.39
17	108.07	114.28	128.70	147.19	169.76
18	98.35	106.01	121.54	141.20	165.57
19	163.63	175.96	202.17	235.29	275.84
20	476.15	512.42	587.64	681.94	796.76
21	484.16	514.11	580.61	666.58	772.84
22	1665.13	1777.79	2018.00	2327.38	2710.12
23	1545.64	1657.23	1889.57	2184.49	2548.82
Total	6,648.69	7,118.94	8,111.40	9,376.07	10,934.75

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

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

Zone	2022	2025	2030	2035	2040
1	107.69	116.70	136.12	160.59	191.01
2	206.45	223.71	260.94	307.85	366.16
3	95.75	103.75	121.02	142.78	169.82
4	119.25	129.22	150.72	177.82	211.50
5	179.50	192.95	222.14	259.65	305.21
6	135.83	146.00	168.09	196.47	230.95
7	104.00	111.80	128.42	149.41	175.37
8	87.16	93.70	107.63	125.22	146.98
9	78.96	84.88	97.50	113.44	133.15
10	64.96	69.83	80.21	93.32	109.54
11	206.24	224.09	261.17	308.44	367.58
12	121.25	131.74	153.54	181.34	216.10
13	138.29	150.26	175.13	206.82	246.48
14	140.30	153.86	181.33	215.68	258.64
15	199.55	218.83	257.89	306.75	367.86
16	122.40	134.23	158.18	188.15	225.63
17	108.07	118.84	142.06	170.90	205.94
18	98.35	106.01	121.54	141.20	165.57
19	163.63	175.96	202.17	235.29	275.84
20	476.15	512.42	587.64	681.94	796.76
21	484.16	514.11	580.61	666.58	772.84
22	1665.13	1777.79	2018.00	2327.38	2710.12
23	1545.64	1657.23	1889.57	2184.49	2548.82
Total	6,648.69	7,147.89	8,201.62	9,541.52	11,197.86

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

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

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

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

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

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
Expenditure 2022		107.69	206.45	95.75	119.25	179.50	135.83	104.00	87.16	78.96	64.96	206.24	121.25	138.29	140.30	199.55	122.40	108.07	98.35	163.63	476.15	484.16	1665.13	1545.64	6648.69
Southend-on-Sea																									
Southend town centre		0.99	1.69	0.19	0.00	10.48	26.62	27.12	9.52	39.05	20.30	130.73	66.13	53.80	0.10	0.34	0.26	1.22	2.14	2.05	0.19	0.00	0.00	0.00	392.93
Southend out-of-centre		0.04	2.09	0.02	0.00	2.35	2.65	5.01	4.08	18.97	19.32	24.32	22.36	21.77	0.45	0.02	0.18	1.60	0.05	0.00	0.00	10.75	2.00	8.66	146.68
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.32	0.00	0.00	0.44	0.28	0.21	0.80	8.71	1.80	0.00	0.00	0.00	0.02	0.19	0.00	0.00	0.00	0.00	0.00	12.77
Westcliff-on-Sea out-of-centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.12	0.00	0.00	0.00	0.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.24
Leigh-on-Sea		0.46	1.69	0.37	0.00	1.06	7.95	0.63	0.80	0.22	0.19	0.82	3.07	17.59	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	34.87
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.05	0.00	0.00	0.00	0.93	0.00	7.32	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.31
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.18	0.00	0.45	0.19	3.84	0.65	0.25	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.44	0.00	0.00	6.00
Southend total		1.50	5.47	0.58	0.00	14.27	37.22	32.95	14.96	59.91	40.22	167.84	101.04	95.20	0.55	0.36	0.44	2.84	2.38	2.05	0.19	11.18	2.00	8.66	601.79
Rochford																									
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.24	2.77	1.68	5.63	5.95	2.41	0.13	1.37	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.53	6.99	0.00	27.71
Rayleigh town centre		1.09	0.31	0.91	0.68	4.27	9.10	32.53	20.43	0.62	2.60	0.54	1.27	6.00	0.00	0.00	0.00	0.42	2.69	0.26	0.00	0.00	0.00	0.00	83.74
Rayleigh out-of-centre		0.20	0.37	0.45	0.05	13.44	8.35	2.60	5.51	0.58	0.85	0.10	0.40	2.95	0.01	0.00	0.07	0.02	0.37	0.02	0.76	0.00	0.17	3.40	40.68
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	4.06	2.35	0.09	0.37	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.87
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.02	0.13	3.16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.31
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.18	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.18
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.98	2.94	0.00	0.00	0.37	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.29
Rochford total		1.29	0.68	1.36	0.73	17.72	17.70	42.93	32.93	8.24	12.94	3.42	1.81	10.32	0.01	0.00	0.07	0.44	3.07	0.28	0.76	0.53	7.16	3.40	167.80
Other destinations		104.90	200.29	93.80	118.52	147.52	80.91	28.12	39.27	10.80	11.80	34.98	18.41	32.78	139.74	199.19	121.88	104.78	92.90	161.30	475.20	472.45	1655.97	1533.59	5879.10
TOTAL		107.69	206.45	95.75	119.25	179.50	135.83	104.00	87.16	78.96	64.96	206.24	121.25	138.29	140.30	199.55	122.40	108.07	98.35	163.63	476.15	484.16	1665.13	1545.64	6648.69

Source: Tables 2A and 3.

Table 5A - Future 2025 comparison goods shopping patterns (£M) - low growth

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
Expenditure 2025		115.11	221.26	102.37	127.17	190.95	144.48	111.51	93.77	84.85	69.89	221.45	130.14	148.04	151.38	215.18	133.60	114.28	106.01	175.96	512.42	514.11	1777.79	1657.23	7118.94
Southend-on-Sea																									
Southend town centre		1.06	1.81	0.20	0.00	11.15	28.32	29.08	10.24	41.97	21.84	140.38	70.98	57.59	0.11	0.37	0.28	1.29	2.31	2.20	0.20	0.00	0.00	0.00	421.38
Southend out-of-centre		0.05	2.23	0.02	0.00	2.50	2.82	5.37	4.39	20.39	20.79	26.11	24.00	23.30	0.48	0.02	0.20	1.69	0.05	0.00	0.00	11.41	2.13	9.28	157.25
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.34	0.00	0.00	0.47	0.31	0.22	0.86	9.34	1.92	0.00	0.00	0.00	0.02	0.20	0.00	0.00	0.00	0.00	0.00	13.70
Westcliff-on-Sea out-of-centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.13	0.00	0.00	0.00	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.26
Leigh-on-Sea		0.49	1.81	0.40	0.00	1.13	8.45	0.68	0.86	0.24	0.21	0.89	3.29	18.83	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	37.29
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.06	0.00	0.00	0.00	1.00	0.00	7.86	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.92
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.19	0.00	0.48	0.21	4.12	0.70	0.27	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.46	0.00	0.00	6.43
Southend total		1.60	5.86	0.62	0.00	15.18	39.59	35.32	16.09	64.39	43.28	180.21	108.45	101.91	0.59	0.39	0.48	3.01	2.57	2.20	0.20	11.88	2.13	9.28	645.23
Rochford																									
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.26	2.97	1.81	6.05	6.40	2.59	0.14	1.47	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.57	7.47	0.00	29.72
Rayleigh town centre		1.16	0.33	0.97	0.72	4.54	9.68	34.88	21.98	0.67	2.80	0.58	1.37	6.43	0.00	0.00	0.00	0.45	2.90	0.28	0.00	0.00	0.00	0.00	89.75
Rayleigh out-of-centre		0.22	0.40	0.48	0.05	14.30	8.89	2.79	5.93	0.62	0.92	0.11	0.43	3.15	0.02	0.00	0.08	0.02	0.40	0.02	0.82	0.00	0.18	3.65	43.46
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	4.35	2.53	0.10	0.40	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.38
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.02	0.14	3.40	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.57
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.27	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.27
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	1.05	3.16	0.00	0.00	0.40	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.61
Rochford total		1.38	0.73	1.45	0.78	18.85	18.83	46.03	35.43	8.86	13.92	3.68	1.94	11.04	0.02	0.00	0.08	0.47	3.31	0.30	0.82	0.57	7.64	3.65	179.75
Other destinations		112.13	214.66	100.29	126.39	156.92	86.07	30.15	42.25	11.61	12.69	37.56	19.76	35.09	150.77	214.79	133.04	110.81	100.14	173.46	511.39	501.66	1768.01	1644.31	6293.96
TOTAL		115.11	221.26	102.37	127.17	190.95	144.48	111.51	93.77	84.85	69.89	221.45	130.14	148.04	151.38	215.18	133.60	114.28	106.01	175.96	512.42	514.11	1777.79	1657.23	7118.94

Source: Tables 2A and 3.

Table 5B - Future 2025 comparison goods shopping patterns (£M) - high growth

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
Expenditure 2025		116.70	223.71	103.75	129.22	192.95	146.00	111.80	93.70	84.88	69.83	224.09	131.74	150.26	153.86	218.83	134.23	118.84	106.01	175.96	512.42	514.11	1777.79	1657.23	7147.89
Southend-on-Sea																									
Southend town centre		1.07	1.83	0.21	0.00	11.27	28.62	29.16	10.23	41.98	21.82	142.05	71.85	58.45	0.11	0.37	0.28	1.34	2.31	2.20	0.20	0.00	0.00	0.00	425.36
Southend out-of-centre		0.05	2.26	0.02	0.00	2.53	2.85	5.39	4.39	20.40	20.77	26.42	24.29	23.65	0.49	0.02	0.20	1.76	0.05	0.00	0.00	11.41	2.13	9.28	158.36
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.35	0.00	0.00	0.47	0.31	0.22	0.87	9.46	1.95	0.00	0.00	0.00	0.02	0.20	0.00	0.00	0.00	0.00	0.00	13.86
Westcliff-on-Sea out-of-centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.13	0.00	0.00	0.00	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.26
Leigh-on-Sea		0.50	1.83	0.40	0.00	1.14	8.54	0.68	0.86	0.24	0.21	0.90	3.33	19.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	37.75
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.06	0.00	0.00	0.00	1.00	0.00	7.96	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.01
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.19	0.00	0.48	0.21	4.17	0.71	0.27	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.46	0.00	0.00	6.50
Southend total		1.62	5.93	0.63	0.00	15.34	40.00	35.42	16.08	64.41	43.24	182.36	109.78	103.44	0.60	0.39	0.48	3.13	2.57	2.20	0.20	11.88	2.13	9.28	651.11
Rochford																									
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.26	2.97	1.81	6.05	6.40	2.62	0.14	1.49	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.57	7.47	0.00	29.78
Rayleigh town centre		1.18	0.34	0.99	0.74	4.59	9.78	34.97	21.96	0.67	2.80	0.58	1.38	6.52	0.00	0.00	0.00	0.46	2.90	0.28	0.00	0.00	0.00	0.00	90.15
Rayleigh out-of-centre		0.22	0.40	0.49	0.05	14.45	8.98	2.79	5.92	0.62	0.91	0.11	0.43	3.20	0.02	0.00	0.08	0.02	0.40	0.02	0.82	0.00	0.18	3.65	43.78
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	4.36	2.53	0.10	0.40	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.39
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.02	0.14	3.40	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.56
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.27	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.27
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	1.05	3.16	0.00	0.00	0.40	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.61
Rochford total		1.40	0.74	1.47	0.79	19.04	19.02	46.15	35.40	8.86	13.91	3.72	1.96	11.21	0.02	0.00	0.08	0.49	3.31	0.30	0.82	0.57	7.64	3.65	180.55
Other destinations		113.67	217.04	101.65	128.43	158.57	86.97	30.23	42.22	11.61	12.68	38.00	20.00	35.61	153.25	218.44	133.66	115.23	100.14	173.46	511.39	501.66	1768.01	1644.31	6316.23
TOTAL		116.70	223.71	103.75	129.22	192.95	146.00	111.80	93.70	84.88	69.83	224.09	131.74	150.26	153.86	218.83	134.23	118.84	106.01	175.96	512.42	514.11	1777.79	1657.23	7147.89

Source: Tables 2B and 3.

Table 6A - Future 2030 comparison goods shopping patterns (£M) - low growth

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total	
Expenditure 2030		130.77	252.69	116.53	144.09	215.92	163.14	127.37	107.56	97.61	80.31	253.17	148.47	169.00	174.09	246.82	155.62	128.70	121.54	202.17	587.64	580.61	2018.00	1889.57	8111.40	
Southend-on-Sea																										
Southend town centre		1.20	2.07	0.23	0.00	12.61	31.97	33.22	11.75	48.28	25.10	160.49	80.98	65.74	0.12	0.42	0.33	1.45	2.65	2.53	0.24	0.00	0.00	0.00	0.00	481.37
Southend out-of-centre		0.05	2.55	0.02	0.00	2.83	3.18	6.14	5.03	23.45	23.89	29.85	27.38	26.60	0.56	0.02	0.23	1.90	0.06	0.00	0.00	12.89	2.42	10.58	179.66	
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.39	0.00	0.00	0.54	0.35	0.26	0.99	10.66	2.20	0.00	0.00	0.00	0.03	0.23	0.00	0.00	0.00	0.00	0.00	0.00	15.64
Westcliff-on-Sea out-of-centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.15	0.00	0.00	0.00	0.15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.30
Leigh-on-Sea		0.56	2.07	0.45	0.00	1.27	9.54	0.78	0.99	0.27	0.24	1.01	3.76	21.50	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	42.45
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.06	0.00	0.00	0.00	1.15	0.00	8.99	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.20
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.22	0.00	0.56	0.24	4.71	0.80	0.30	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.52	0.00	0.00	7.35	
Southend total		1.82	6.70	0.71	0.00	17.17	44.70	40.35	18.46	74.06	49.73	206.03	123.72	116.34	0.68	0.44	0.56	3.38	2.94	2.53	0.24	13.41	2.42	10.58	736.97	
Rochford																										
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.29	3.39	2.08	6.96	7.36	2.96	0.16	1.67	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.64	8.48	0.00	0.00	33.99
Rayleigh town centre		1.32	0.38	1.11	0.82	5.14	10.93	39.84	25.21	0.77	3.22	0.66	1.56	7.33	0.00	0.00	0.00	0.50	3.33	0.32	0.00	0.00	0.00	0.00	0.00	102.45
Rayleigh out-of-centre		0.25	0.45	0.55	0.06	16.17	10.03	3.18	6.80	0.71	1.05	0.13	0.49	3.60	0.02	0.00	0.09	0.03	0.46	0.02	0.94	0.00	0.20	4.16	49.39	
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	4.97	2.90	0.12	0.46	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.45	
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.02	0.17	3.91	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.10
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.46	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.46
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	1.20	3.62	0.00	0.00	0.46	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.28	
Rochford total		1.57	0.83	1.65	0.88	21.31	21.26	52.58	40.64	10.19	16.00	4.20	2.21	12.61	0.02	0.00	0.09	0.53	3.79	0.34	0.94	0.64	8.68	4.16	205.12	
Other destinations		127.38	245.16	114.16	143.21	177.44	97.18	34.44	48.47	13.35	14.58	42.94	22.54	40.05	173.40	246.37	154.97	124.79	114.81	199.30	586.46	566.56	2006.90	1874.83	7169.30	
TOTAL		130.77	252.69	116.53	144.09	215.92	163.14	127.37	107.56	97.61	80.31	253.17	148.47	169.00	174.09	246.82	155.62	128.70	121.54	202.17	587.64	580.61	2018.00	1889.57	8111.40	

Source: Tables 2A and 3.

Table 6B - Future 2030 comparison goods shopping patterns (£M) - high growth

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
Expenditure 2030		136.12	260.94	121.02	150.72	222.14	168.09	128.42	107.63	97.50	80.21	261.17	153.54	175.13	181.33	257.89	158.18	142.06	121.54	202.17	587.64	580.61	2018.00	1889.57	8201.62
Southend-on-Sea																									
Southend town centre		1.25	2.14	0.24	0.00	12.97	32.94	33.49	11.75	48.22	25.07	165.56	83.74	68.12	0.13	0.44	0.33	1.61	2.65	2.53	0.24	0.00	0.00	0.00	493.42
Southend out-of-centre		0.05	2.64	0.02	0.00	2.91	3.28	6.19	5.04	23.43	23.86	30.79	28.31	27.57	0.58	0.03	0.24	2.10	0.06	0.00	0.00	12.89	2.42	10.58	182.99
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.40	0.00	0.00	0.54	0.35	0.26	1.02	11.02	2.28	0.00	0.00	0.00	0.03	0.23	0.00	0.00	0.00	0.00	0.00	16.12
Westcliff-on-Sea out-of-centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.15	0.00	0.00	0.00	0.15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.30
Leigh-on-Sea		0.59	2.14	0.47	0.00	1.31	9.83	0.78	0.99	0.27	0.24	1.04	3.88	22.28	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	43.83
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.07	0.00	0.00	0.00	1.15	0.00	9.27	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.49
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.22	0.00	0.56	0.24	4.86	0.83	0.32	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.52	0.00	0.00	7.54
Southend total		1.89	6.91	0.74	0.00	17.66	46.06	40.68	18.47	73.98	49.67	212.54	127.95	120.56	0.71	0.46	0.57	3.74	2.94	2.53	0.24	13.41	2.42	10.58	754.70
Rochford																									
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.30	3.42	2.08	6.95	7.35	3.06	0.17	1.73	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.64	8.48	0.00	34.17
Rayleigh town centre		1.37	0.39	1.15	0.86	5.29	11.26	40.17	25.23	0.77	3.22	0.68	1.61	7.60	0.00	0.00	0.00	0.55	3.33	0.32	0.00	0.00	0.00	0.00	103.81
Rayleigh out-of-centre		0.26	0.47	0.57	0.06	16.64	10.34	3.21	6.80	0.71	1.05	0.13	0.51	3.73	0.02	0.00	0.09	0.03	0.46	0.02	0.94	0.00	0.20	4.16	50.40
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	5.01	2.91	0.12	0.46	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.49
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.02	0.17	3.91	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.09
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.46	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.46
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	1.21	3.63	0.00	0.00	0.47	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.30
Rochford total		1.63	0.86	1.72	0.92	21.92	21.90	53.01	40.66	10.18	15.98	4.34	2.29	13.06	0.02	0.00	0.09	0.58	3.79	0.34	0.94	0.64	8.68	4.16	207.72
Other destinations		132.59	253.16	118.56	149.80	182.55	100.13	34.72	48.50	13.34	14.57	44.29	23.31	41.51	180.60	257.43	157.52	137.74	114.81	199.30	586.46	566.56	2006.90	1874.83	7239.19
TOTAL		136.12	260.94	121.02	150.72	222.14	168.09	128.42	107.63	97.50	80.21	261.17	153.54	175.13	181.33	257.89	158.18	142.06	121.54	202.17	587.64	580.61	2018.00	1889.57	8201.62

Source: Tables 2B and 3.

Table 7A - Future 2035 comparison goods shopping patterns (£M) - low growth

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
Expenditure 2035		151.02	293.02	135.07	165.29	248.10	187.12	147.15	125.24	113.86	93.39	293.67	172.15	195.12	202.40	286.87	182.53	147.19	141.20	235.29	681.94	666.58	2327.38	2184.49	9376.07
Southend-on-Sea																									
Southend town centre		1.39	2.40	0.27	0.00	14.49	36.68	38.38	13.68	56.32	29.18	186.16	93.89	75.90	0.14	0.49	0.38	1.66	3.08	2.94	0.27	0.00	0.00	0.00	557.69
Southend out-of-centre		0.06	2.96	0.03	0.00	3.25	3.65	7.09	5.86	27.36	27.78	34.62	31.74	30.71	0.65	0.03	0.27	2.18	0.07	0.00	0.00	14.80	2.79	12.23	208.15
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.45	0.00	0.00	0.63	0.41	0.30	1.15	12.36	2.54	0.00	0.00	0.00	0.03	0.27	0.00	0.00	0.00	0.00	0.00	18.12
Westcliff-on-Sea out-of-centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.18	0.00	0.00	0.00	0.17	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.35
Leigh-on-Sea		0.65	2.40	0.53	0.00	1.46	10.95	0.90	1.15	0.32	0.28	1.17	4.36	24.82	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	48.99
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.07	0.00	0.00	0.00	1.34	0.00	10.43	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.84
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.25	0.00	0.65	0.28	5.46	0.93	0.35	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.60	0.00	0.00	8.52
Southend total		2.10	7.77	0.82	0.00	19.72	51.27	46.62	21.49	86.40	57.83	238.99	143.45	134.32	0.79	0.52	0.66	3.87	3.42	2.94	0.27	15.40	2.79	12.23	853.66
Rochford																									
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.34	3.91	2.42	8.12	8.55	3.44	0.19	1.93	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.73	9.78	0.00	39.41
Rayleigh town centre		1.53	0.44	1.28	0.94	5.90	12.54	46.03	29.36	0.90	3.75	0.76	1.81	8.47	0.00	0.00	0.00	0.57	3.87	0.38	0.00	0.00	0.00	0.00	118.52
Rayleigh out-of-centre		0.29	0.53	0.63	0.07	18.58	11.51	3.68	7.91	0.83	1.22	0.15	0.57	4.16	0.02	0.00	0.11	0.03	0.54	0.02	1.09	0.00	0.23	4.81	56.97
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	5.74	3.38	0.14	0.53	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.79
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.03	0.19	4.55	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.77
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.71	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.71
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	1.38	4.22	0.00	0.00	0.53	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.13
Rochford total		1.81	0.97	1.92	1.01	24.49	24.38	60.74	47.31	11.89	18.60	4.87	2.57	14.56	0.02	0.00	0.11	0.60	4.41	0.40	1.09	0.73	10.01	4.81	237.29
Other destinations		147.10	284.29	132.33	164.28	203.89	111.47	39.79	56.43	15.58	16.96	49.81	26.13	46.24	201.59	286.35	181.77	142.72	133.37	231.95	680.58	650.45	2314.58	2167.45	8285.11
TOTAL		151.02	293.02	135.07	165.29	248.10	187.12	147.15	125.24	113.86	93.39	293.67	172.15	195.12	202.40	286.87	182.53	147.19	141.20	235.29	681.94	666.58	2327.38	2184.49	9376.07

Source: Tables 2A and 3.

Table 7B - Future 2035 comparison goods shopping patterns (£M) - high growth

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
Expenditure 2035		160.59	307.85	142.78	177.82	259.65	196.47	149.41	125.22	113.44	93.32	308.44	181.34	206.82	215.68	306.75	188.15	170.90	141.20	235.29	681.94	666.58	2327.38	2184.49	9541.52
Southend-on-Sea																									
Southend town centre		1.48	2.52	0.29	0.00	15.16	38.51	38.97	13.67	56.11	29.16	195.52	98.90	80.45	0.15	0.52	0.40	1.93	3.08	2.94	0.27	0.00	0.00	0.00	580.03
Southend out-of-centre		0.06	3.11	0.03	0.00	3.40	3.83	7.20	5.86	27.26	27.76	36.37	33.44	32.55	0.69	0.03	0.28	2.53	0.07	0.00	0.00	14.80	2.79	12.23	214.30
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.47	0.00	0.00	0.63	0.41	0.30	1.20	13.02	2.69	0.00	0.00	0.00	0.03	0.27	0.00	0.00	0.00	0.00	0.00	19.01
Westcliff-on-Sea out-of-centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.18	0.00	0.00	0.00	0.18	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.36
Leigh-on-Sea		0.69	2.52	0.56	0.00	1.53	11.49	0.91	1.15	0.32	0.28	1.23	4.59	26.31	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	51.59
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.08	0.00	0.00	0.00	1.34	0.00	10.95	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.37
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.25	0.00	0.65	0.28	5.74	0.98	0.37	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.60	0.00	0.00	8.87
Southend total		2.23	8.16	0.87	0.00	20.64	53.83	47.33	21.49	86.08	57.78	251.01	151.11	142.38	0.84	0.55	0.68	4.49	3.42	2.94	0.27	15.40	2.79	12.23	886.53
Rochford																									
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.35	3.97	2.42	8.09	8.55	3.61	0.20	2.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.73	9.78	0.00	39.74
Rayleigh town centre		1.62	0.46	1.36	1.01	6.18	13.16	46.73	29.35	0.90	3.74	0.80	1.90	8.98	0.00	0.00	0.00	0.67	3.87	0.38	0.00	0.00	0.00	0.00	121.12
Rayleigh out-of-centre		0.31	0.55	0.67	0.07	19.45	12.08	3.74	7.91	0.83	1.22	0.15	0.60	4.41	0.02	0.00	0.11	0.03	0.54	0.02	1.09	0.00	0.23	4.81	58.85
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	5.83	3.38	0.14	0.53	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.88
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.03	0.19	4.54	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.76
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.70	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.70
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	1.40	4.22	0.00	0.00	0.56	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.18
Rochford total		1.93	1.02	2.03	1.08	25.63	25.60	61.68	47.31	11.84	18.59	5.12	2.70	15.43	0.02	0.00	0.11	0.70	4.41	0.40	1.09	0.73	10.01	4.81	242.23
Other destinations		156.43	298.68	139.88	176.74	213.38	117.04	40.40	56.42	15.52	16.95	52.31	27.53	49.02	214.81	306.20	187.36	165.70	133.37	231.95	680.58	650.45	2314.58	2167.45	8412.76
TOTAL		160.59	307.85	142.78	177.82	259.65	196.47	149.41	125.22	113.44	93.32	308.44	181.34	206.82	215.68	306.75	188.15	170.90	141.20	235.29	681.94	666.58	2327.38	2184.49	9541.52

Source: Tables 2B and 3.

Table 8A - Future 2040 comparison goods shopping patterns (£M) - low growth

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total	
Expenditure 2040		176.40	343.41	157.53	191.13	288.19	216.58	170.61	146.73	134.22	109.86	344.00	201.40	226.48	237.12	335.99	215.39	169.76	165.57	275.84	796.76	772.84	2710.12	2548.82	10934.75	
Southend-on-Sea																										
Southend town centre		1.62	2.82	0.32	0.00	16.83	42.45	44.49	16.02	66.38	34.33	218.06	109.85	88.10	0.17	0.57	0.45	1.92	3.61	3.45	0.32	0.00	0.00	0.00	0.00	651.76
Southend out-of-centre		0.07	3.47	0.03	0.00	3.78	4.22	8.22	6.87	32.25	32.68	40.56	37.14	35.65	0.76	0.03	0.32	2.51	0.08	0.00	0.00	17.16	3.25	14.27	243.33	
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.52	0.00	0.00	0.73	0.48	0.35	1.34	14.46	2.94	0.00	0.00	0.00	0.03	0.31	0.00	0.00	0.00	0.00	0.00	0.00	21.18
Westcliff-on-Sea out-of-centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.21	0.00	0.00	0.00	0.20	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.41
Leigh-on-Sea		0.76	2.82	0.61	0.00	1.70	12.67	1.04	1.35	0.38	0.33	1.38	5.10	28.81	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	56.93
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.09	0.00	0.00	0.00	1.58	0.00	12.21	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	13.88
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.29	0.00	0.77	0.33	6.40	1.09	0.41	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.70	0.00	0.00	9.97	
Southend total		2.45	9.10	0.96	0.00	22.91	59.34	54.05	25.18	101.84	68.03	279.94	167.83	155.91	0.92	0.60	0.78	4.46	4.01	3.45	0.32	17.85	3.25	14.27	997.47	
Rochford																										
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.39	4.54	2.83	9.57	10.06	4.02	0.22	2.24	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.85	11.38	0.00	0.00	46.11
Rayleigh town centre		1.78	0.52	1.50	1.09	6.86	14.51	53.37	34.39	1.06	4.41	0.89	2.11	9.83	0.00	0.00	0.00	0.66	4.54	0.44	0.00	0.00	0.00	0.00	0.00	137.96
Rayleigh out-of-centre		0.34	0.62	0.74	0.08	21.59	13.32	4.27	9.27	0.98	1.44	0.17	0.66	4.82	0.02	0.00	0.13	0.03	0.63	0.03	1.27	0.00	0.27	5.61	66.29	
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	6.65	3.96	0.16	0.63	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.40
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.03	0.23	5.35	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.61
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.01	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.01
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	1.60	4.94	0.00	0.00	0.62	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.17	
Rochford total		2.12	1.13	2.24	1.17	28.44	28.22	70.43	55.43	14.01	21.88	5.71	3.00	16.90	0.02	0.00	0.13	0.70	5.17	0.47	1.27	0.85	11.65	5.61	276.55	
Other destinations		171.83	333.18	154.33	189.97	236.84	129.01	46.13	66.12	18.36	19.95	58.34	30.57	53.67	236.17	335.38	214.48	164.60	156.40	271.93	795.17	754.13	2695.22	2528.94	9660.73	
TOTAL		176.40	343.41	157.53	191.13	288.19	216.58	170.61	146.73	134.22	109.86	344.00	201.40	226.48	237.12	335.99	215.39	169.76	165.57	275.84	796.76	772.84	2710.12	2548.82	10934.75	

Source: Tables 2A and 3.

Table 8B - Future 2040 comparison goods shopping patterns (£M) - high growth

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total	
Expenditure 2040		191.01	366.16	169.82	211.50	305.21	230.95	175.37	146.98	133.15	109.54	367.58	216.10	246.48	258.64	367.86	225.63	205.94	165.57	275.84	796.76	772.84	2710.12	2548.82	11197.86	
Southend-on-Sea																										
Southend town centre		1.76	3.00	0.34	0.00	17.82	45.27	45.74	16.05	65.86	34.23	233.01	117.86	95.88	0.18	0.63	0.47	2.33	3.61	3.45	0.32	0.00	0.00	0.00	0.00	687.79
Southend out-of-centre		0.08	3.70	0.03	0.00	4.00	4.50	8.45	6.88	32.00	32.59	43.34	39.85	38.80	0.83	0.04	0.34	3.05	0.08	0.00	0.00	17.16	3.25	14.27	253.22	
Westcliffe-on-Sea town centre		0.00	0.00	0.00	0.00	0.55	0.00	0.00	0.73	0.48	0.35	1.43	15.52	3.20	0.00	0.00	0.00	0.04	0.31	0.00	0.00	0.00	0.00	0.00	0.00	22.62
Westcliff-on-Sea out-of-centre		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.21	0.00	0.00	0.00	0.22	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.42
Leigh-on-Sea		0.82	3.00	0.66	0.00	1.80	13.51	1.07	1.35	0.37	0.33	1.47	5.47	31.35	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	61.21
Shoeburyness town centre		0.00	0.00	0.00	0.00	0.09	0.00	0.00	0.00	1.57	0.00	13.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	14.71
Other Southend		0.00	0.00	0.00	0.00	0.00	0.00	0.30	0.00	0.76	0.33	6.84	1.17	0.44	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.70	0.00	0.00	10.53	
Southend total		2.65	9.70	1.04	0.00	24.26	63.28	55.56	25.22	101.03	67.82	299.13	180.08	169.68	1.01	0.66	0.81	5.42	4.01	3.45	0.32	17.85	3.25	14.27	1050.51	
Rochford																										
Rochford town centre		0.00	0.00	0.00	0.00	0.00	0.42	4.66	2.84	9.49	10.03	4.30	0.24	2.44	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.85	11.38	0.00	0.00	46.66
Rayleigh town centre		1.93	0.55	1.61	1.21	7.26	15.47	54.86	34.45	1.05	4.39	0.96	2.27	10.70	0.00	0.00	0.00	0.80	4.54	0.44	0.00	0.00	0.00	0.00	0.00	142.49
Rayleigh out-of-centre		0.36	0.66	0.80	0.08	22.86	14.20	4.38	9.29	0.97	1.43	0.18	0.71	5.25	0.03	0.00	0.14	0.04	0.63	0.03	1.27	0.00	0.27	5.61	69.21	
Hockley town centre		0.00	0.00	0.00	0.00	0.00	0.00	6.84	3.97	0.16	0.62	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.59
Ashingdon		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.03	0.23	5.33	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.59
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.00
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	1.65	4.95	0.00	0.00	0.66	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.26	
Rochford total		2.29	1.21	2.41	1.29	30.12	30.09	72.39	55.53	13.90	21.82	6.10	3.22	18.39	0.03	0.00	0.14	0.84	5.17	0.47	1.27	0.85	11.65	5.61	284.80	
Other destinations		186.06	355.25	166.37	210.21	250.82	137.58	47.42	66.23	18.21	19.89	62.34	32.80	58.42	257.61	367.19	224.68	199.68	156.40	271.93	795.17	754.13	2695.22	2528.94	9862.55	
TOTAL		191.01	366.16	169.82	211.50	305.21	230.95	175.37	146.98	133.15	109.54	367.58	216.10	246.48	258.64	367.86	225.63	205.94	165.57	275.84	796.76	772.84	2710.12	2548.82	11197.86	

Source: Tables 2B and 3.

Table 9A - Summary of comparison goods expenditure 2022 to 2040 (£M) - low growth

	2022	2025	2030	2035	2040
Available expenditure					
Rochford town centre	27.71	29.72	33.99	39.41	46.11
Rayleigh	124.42	133.21	151.85	175.49	204.25
Hockley town centre	6.87	7.38	8.45	9.79	11.40
Ashingdon	3.31	3.57	4.10	4.77	5.61
Great Wakering	1.18	1.27	1.46	1.71	2.01
Other Rochford District	4.29	4.61	5.28	6.13	7.17
Total	167.80	179.75	205.12	237.29	276.55
Turnover of existing facilities					
Rochford town centre	27.71	31.06	34.77	39.53	44.94
Rayleigh	124.42	139.45	156.09	177.46	201.76
Hockley town centre	6.87	7.70	8.62	9.80	11.15
Ashingdon	3.31	3.72	4.16	4.73	5.38
Great Wakering	1.18	1.33	1.49	1.69	1.92
Other Rochford District	4.29	4.80	5.38	6.11	6.95
Total	167.80	188.06	210.50	239.33	272.10
Surplus/deficit expenditure £M					
Rochford town centre	0.00	-1.34	-0.78	-0.12	1.17
Rayleigh	0.00	-6.24	-4.24	-1.97	2.48
Hockley town centre	0.00	-0.32	-0.18	-0.02	0.26
Ashingdon	0.00	-0.15	-0.06	0.04	0.23
Great Wakering	0.00	-0.05	-0.02	0.02	0.09
Other Rochford District	0.00	-0.20	-0.10	0.02	0.22
Total	0.00	-8.31	-5.38	-2.03	4.45

Source: Tables 4 to 8A and Experian sales density growth rates from Retail Planner Briefing Note 19 - Figure 4b.

Table 9B - Summary of comparison goods expenditure 2022 to 2040 (£M) - high growth

	2022	2025	2030	2035	2040
Available expenditure					
Rochford town centre	27.71	29.78	34.17	39.74	46.66
Rayleigh	124.42	133.93	154.21	179.96	211.70
Hockley town centre	6.87	7.39	8.49	9.88	11.59
Ashingdon	3.31	3.56	4.09	4.76	5.59
Great Wakering	1.18	1.27	1.46	1.70	2.00
Other Rochford District	4.29	4.61	5.30	6.18	7.26
Total	167.80	180.55	207.72	242.23	284.80
Turnover of existing facilities					
Rochford town centre	27.71	31.06	34.77	39.53	44.94
Rayleigh	124.42	139.45	156.09	177.46	201.76
Hockley town centre	6.87	7.70	8.62	9.80	11.15
Ashingdon	3.31	3.72	4.16	4.73	5.38
Great Wakering	1.18	1.33	1.49	1.69	1.92
Other Rochford District	4.29	4.80	5.38	6.11	6.95
Total	167.80	188.06	210.50	239.33	272.10
Surplus/deficit expenditure £M					
Rochford town centre	0.00	-1.28	-0.60	0.22	1.71
Rayleigh	0.00	-5.52	-1.88	2.50	9.94
Hockley town centre	0.00	-0.31	-0.14	0.07	0.44
Ashingdon	0.00	-0.15	-0.07	0.03	0.21
Great Wakering	0.00	-0.05	-0.02	0.01	0.08
Other Rochford District	0.00	-0.19	-0.07	0.07	0.31
Total	0.00	-7.52	-2.78	2.90	12.70

Source: Tables 4 to 8B and Experian sales density growth rates from Retail Planner Briefing Note 19 - Figure 4b.

Table 10A - Comparison goods floorspace capacity - low growth

	2022	2025	2030	2035	2040
Turnover density new floorspace (£ per sq.m)	£6,000	£6,725	£7,527	£8,558	£9,730
Sales floorspace projection (sq.m net)					
Rochford town centre	0	-200	-104	-14	121
Rayleigh	0	-928	-564	-230	255
Hockley town centre	0	-48	-24	-2	26
Ashingdon	0	-22	-8	5	24
Great Wakering	0	-8	-3	2	10
Other Rochford District	0	-29	-13	2	22
	0	-1,235	-715	-238	458
Gross floorspace projection (sq.m gross)					
Rochford town centre	0	-285	-148	-20	172
Rayleigh	0	-1,326	-805	-329	365
Hockley town centre	0	-69	-34	-3	38
Ashingdon	0	-32	-11	6	34
Great Wakering	0	-12	-4	3	14
Other Rochford District	0	-42	-19	3	32
	0	-1,765	-1,021	-339	654

Source: Table 9A and Experian sales density growth rates from Retail Planner Briefing Note 19 - Figure 4b.

Table 10B - Comparison goods floorspace capacity - high growth

	2022	2025	2030	2035	2040
Turnover density new floorspace (£ per sq.m)	£6,000	£6,725	£7,527	£8,558	£9,730
Sales floorspace projection (sq.m net)					
Rochford town centre	0	-191	-80	25	176
Rayleigh	0	-821	-250	292	1,021
Hockley town centre	0	-47	-18	8	46
Ashingdon	0	-23	-9	4	22
Great Wakering	0	-8	-3	1	8
Other Rochford District	0	-29	-10	8	32
	0	-1,118	-369	339	1,305
Gross floorspace projection (sq.m gross)					
Rochford town centre	0	-272	-114	36	252
Rayleigh	0	-1,173	-357	418	1,459
Hockley town centre	0	-67	-26	12	65
Ashingdon	0	-32	-12	6	31
Great Wakering	0	-12	-4	2	11
Other Rochford District	0	-41	-14	11	46
	0	-1,597	-527	485	1,864

Source: Table 9B and Experian sales density growth rates from Retail Planner Briefing Note 19 - Figure 4b.

Appendix 4 Food/beverage capacity

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

Zone	2022	2025	2030	2035	2040
1	1,136	1,173	1,234	1,290	1,350
2	1,230	1,270	1,336	1,397	1,461
3	1,475	1,523	1,602	1,675	1,752
4	1,705	1,760	1,852	1,936	2,025
5	1,381	1,426	1,500	1,569	1,641
6	1,611	1,663	1,750	1,830	1,914
7	1,528	1,577	1,659	1,735	1,815
8	1,523	1,573	1,654	1,730	1,810
9	1,346	1,390	1,462	1,529	1,599
10	1,354	1,398	1,470	1,538	1,608
11	1,336	1,379	1,451	1,517	1,587
12	1,489	1,537	1,617	1,691	1,768
13	1,578	1,629	1,714	1,792	1,874
14	1,312	1,354	1,424	1,490	1,558
15	1,306	1,348	1,418	1,483	1,551
16	1,257	1,298	1,365	1,428	1,493
17	1,781	1,838	1,934	2,022	2,115
18	1,520	1,570	1,651	1,727	1,806
19	1,436	1,482	1,559	1,631	1,705
20	1,570	1,621	1,705	1,784	1,865
21	1,646	1,699	1,788	1,869	1,955
22	1,372	1,416	1,490	1,558	1,630
23	1,416	1,462	1,538	1,608	1,682

Sources:

Experian Local Expenditure 2020 (2020 prices)

Experian growth rates from Retail Planner Briefing Note 19 - Figure 1a

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

Zone	2022	2025	2030	2035	2040
1	47.23	49.40	52.90	56.32	60.15
2	93.47	98.03	105.53	112.83	120.90
3	43.72	45.74	49.08	52.45	55.93
4	56.57	59.04	63.06	66.69	70.51
5	82.19	85.55	91.19	96.61	102.60
6	64.11	66.73	71.03	75.11	79.49
7	47.22	49.55	53.35	56.82	60.24
8	39.22	41.29	44.64	47.92	51.34
9	35.44	37.27	40.41	43.46	46.84
10	29.18	30.72	33.28	35.68	38.37
11	99.53	104.58	112.70	120.53	129.08
12	63.03	66.20	71.19	76.10	81.40
13	67.43	70.64	76.02	80.91	85.87
14	63.68	67.23	72.88	78.12	83.68
15	93.24	98.39	106.38	113.99	122.07
16	56.84	60.72	66.67	72.09	77.78
17	50.64	52.41	55.63	58.66	61.86
18	43.59	45.97	49.69	53.21	57.05
19	71.30	75.03	81.27	87.20	93.47
20	231.52	243.80	263.56	281.99	301.23
21	231.70	240.75	256.30	271.29	287.58
22	879.78	919.16	983.51	1045.77	1113.39
23	713.72	748.84	804.85	857.86	915.15
Total	3,204.33	3,357.01	3,605.13	3,841.60	4,095.97

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

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

Zone	2022	2025	2030	2035	2040
1	47.23	50.08	55.06	59.89	65.13
2	93.47	99.11	108.98	118.54	128.90
3	43.72	46.36	50.97	55.44	60.29
4	56.57	59.99	65.96	71.74	78.02
5	82.19	86.45	93.82	101.11	108.66
6	64.11	67.44	73.19	78.87	84.76
7	47.22	49.67	53.79	57.70	61.92
8	39.22	41.26	44.67	47.92	51.42
9	35.44	37.28	40.36	43.30	46.47
10	29.18	30.69	33.23	35.65	38.26
11	99.53	105.82	116.26	126.59	137.93
12	63.03	67.01	73.62	80.16	87.34
13	67.43	71.70	78.77	85.77	93.45
14	63.68	68.33	75.91	83.25	91.28
15	93.24	100.06	111.15	121.89	133.65
16	56.84	61.00	67.76	74.31	81.48
17	50.64	54.50	61.41	68.11	75.04
18	43.59	45.97	49.69	53.21	57.05
19	71.30	75.03	81.27	87.20	93.47
20	231.52	243.80	263.56	281.99	301.23
21	231.70	240.75	256.30	271.29	287.58
22	879.78	919.16	983.51	1045.77	1113.39
23	713.72	748.84	804.85	857.86	915.15
Total	3,204.33	3,370.30	3,644.11	3,907.54	4,191.88

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

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

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

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

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

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
Expenditure 2022		47.23	93.47	43.72	56.57	82.19	64.11	47.22	39.22	35.44	29.18	99.53	63.03	67.43	63.68	93.24	56.84	50.64	43.59	71.30	231.52	231.70	879.78	713.72	3204.33
Southend-on-Sea																									
Southend town centre		0.00	1.55	1.44	0.00	1.36	6.96	6.03	0.39	11.26	3.73	61.41	34.04	17.54	0.82	0.00	1.28	0.00	0.00	0.00	0.00	0.00	0.00	0.00	147.81
Westcliffe-on-Sea		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.88	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.88
Leigh-on-Sea		2.59	0.00	0.63	0.64	0.00	18.15	0.75	0.39	1.41	0.31	1.54	11.34	41.84	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	79.59
Shoeburyness		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.24	0.00	8.89	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.13
Other Southend		0.86	0.00	13.29	0.00	0.00	0.00	0.00	0.00	0.83	0.31	1.54	0.00	2.61	0.00	0.00	0.00	0.00	12.87	0.00	0.00	0.00	0.00	0.00	32.32
Southend total		3.46	1.55	15.36	0.64	1.36	25.11	6.78	0.78	14.74	4.34	73.38	54.27	61.98	0.82	0.00	1.28	0.00	12.87	0.00	0.00	0.00	0.00	0.00	278.73
Rochford																									
Rochford town centre		0.00	0.87	0.00	0.00	0.00	0.00	0.58	2.58	10.18	8.79	0.00	0.54	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	23.54
Rayleigh town centre		1.73	2.61	3.17	0.00	0.00	8.48	21.72	24.82	0.00	4.34	0.00	0.00	3.38	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	70.24
Hockley		0.00	0.68	0.00	0.00	0.00	0.00	15.68	5.32	0.00	1.45	0.00	5.02	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	28.15
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.69	0.00	1.62	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.31
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.95	0.00	2.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.01
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.39	1.74	6.62	0.00	0.71	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.46
Rochford total		1.73	4.16	3.17	0.00	0.00	9.16	37.98	34.74	19.87	21.21	2.06	5.55	4.09	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	143.71
Other destinations		42.04	87.76	25.19	55.93	80.83	29.84	2.47	3.70	0.83	3.62	24.09	3.21	1.36	62.86	93.24	55.56	50.64	30.71	71.30	231.52	231.70	879.78	713.72	2781.89
TOTAL		47.23	93.47	43.72	56.57	82.19	64.11	47.22	39.22	35.44	29.18	99.53	63.03	67.43	63.68	93.24	56.84	50.64	43.59	71.30	231.52	231.70	879.78	713.72	3204.33

Source: Tables 2A and 3.

Table 5A - Future 2025 food/beverage expenditure patterns (£M) - low growth

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
Expenditure 2025		49.40	98.03	45.74	59.04	85.55	66.73	49.55	41.29	37.27	30.72	104.58	66.20	70.64	67.23	98.39	60.72	52.41	45.97	75.03	243.80	240.75	919.16	748.84	3357.01
Southend-on-Sea																									
Southend town centre		0.00	1.63	1.50	0.00	1.41	7.25	6.33	0.41	11.84	3.92	64.52	35.75	18.37	0.87	0.00	1.37	0.00	0.00	0.00	0.00	0.00	0.00	0.00	155.18
Westcliffe-on-Sea		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.33	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.33
Leigh-on-Sea		2.71	0.00	0.66	0.67	0.00	18.89	0.78	0.41	1.48	0.33	1.62	11.92	43.82	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	83.30
Shoeburyness		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.30	0.00	9.34	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.64
Other Southend		0.90	0.00	13.90	0.00	0.00	0.00	0.00	0.00	0.87	0.33	1.62	0.00	2.73	0.00	0.00	0.00	0.00	13.58	0.00	0.00	0.00	0.00	0.00	33.94
Southend total		3.62	1.63	16.07	0.67	1.41	26.14	7.11	0.83	15.50	4.57	77.10	57.00	64.93	0.87	0.00	1.37	0.00	13.58	0.00	0.00	0.00	0.00	0.00	292.38
Rochford																									
Rochford town centre		0.00	0.91	0.00	0.00	0.00	0.00	0.60	2.71	10.71	9.26	0.00	0.56	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	24.76
Rayleigh town centre		1.81	2.73	3.32	0.00	0.00	8.82	22.79	26.13	0.00	4.57	0.00	0.00	3.54	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	73.71
Hockley		0.00	0.72	0.00	0.00	0.00	0.00	16.45	5.60	0.00	1.52	0.00	5.27	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	29.57
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.71	0.00	1.71	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.42
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.36	0.00	2.16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.52
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.41	1.83	6.97	0.00	0.00	0.74	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.96
Rochford total		1.81	4.36	3.32	0.00	0.00	9.54	39.84	36.57	20.90	22.33	2.16	5.83	4.28	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	150.94
Other destinations		43.97	92.04	26.35	58.37	84.14	31.06	2.59	3.89	0.87	3.82	25.31	3.37	1.43	66.36	98.39	59.35	52.41	32.40	75.03	243.80	240.75	919.16	748.84	2913.69
TOTAL		49.40	98.03	45.74	59.04	85.55	66.73	49.55	41.29	37.27	30.72	104.58	66.20	70.64	67.23	98.39	60.72	52.41	45.97	75.03	243.80	240.75	919.16	748.84	3357.01

Source: Tables 2A and 3.

Table 5B - Future 2025 food/beverage expenditure patterns (£M) - high growth

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total	
Expenditure 2025		50.08	99.11	46.36	59.99	86.45	67.44	49.67	41.26	37.28	30.69	105.82	67.01	71.70	68.33	100.06	61.00	54.50	45.97	75.03	243.80	240.75	919.16	748.84	3370.30	
Southend-on-Sea																										
Southend town centre		0.00	1.65	1.53	0.00	1.43	7.32	6.34	0.41	11.85	3.92	65.29	36.19	18.65	0.88	0.00	1.37	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	156.83
Westcliffe-on-Sea		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.44	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.44
Leigh-on-Sea		2.75	0.00	0.67	0.68	0.00	19.09	0.78	0.41	1.48	0.33	1.64	12.06	44.48	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	84.38
Shoeburyness		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.30	0.00	9.45	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.75
Other Southend		0.92	0.00	14.09	0.00	0.00	0.00	0.00	0.00	0.87	0.33	1.64	0.00	2.77	0.00	0.00	0.00	0.00	13.58	0.00	0.00	0.00	0.00	0.00	0.00	34.20
Southend total		3.67	1.65	16.29	0.68	1.43	26.42	7.13	0.83	15.50	4.57	78.02	57.70	65.90	0.88	0.00	1.37	0.00	13.58	0.00	0.00	0.00	0.00	0.00	0.00	295.60
Rochford																										
Rochford town centre		0.00	0.92	0.00	0.00	0.00	0.00	0.61	2.71	10.71	9.25	0.00	0.57	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	24.77
Rayleigh town centre		1.83	2.77	3.36	0.00	0.00	8.92	22.85	26.11	0.00	4.57	0.00	0.00	3.59	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	73.99
Hockley		0.00	0.72	0.00	0.00	0.00	0.00	16.50	5.60	0.00	1.52	0.00	5.33	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	29.68
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.72	0.00	1.71	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.43
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8.36	0.00	2.19	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.55
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.41	1.83	6.97	0.00	0.00	0.75	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.96
Rochford total		1.83	4.41	3.36	0.00	0.00	9.64	39.95	36.54	20.91	22.31	2.19	5.90	4.34	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	151.39
Other destinations		44.58	93.06	26.71	59.31	85.02	31.39	2.60	3.89	0.87	3.81	25.61	3.41	1.45	67.45	100.06	59.63	54.50	32.40	75.03	243.80	240.75	919.16	748.84	2923.31	
TOTAL		50.08	99.11	46.36	59.99	86.45	67.44	49.67	41.26	37.28	30.69	105.82	67.01	71.70	68.33	100.06	61.00	54.50	45.97	75.03	243.80	240.75	919.16	748.84	3370.30	

Source: Tables 2B and 3.

Table 6A - Future 2030 food/beverage expenditure patterns (£M) - low growth

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total	
Expenditure 2030		52.90	105.53	49.08	63.06	91.19	71.03	53.35	44.64	40.41	33.28	112.70	71.19	76.02	72.88	106.38	66.67	55.63	49.69	81.27	263.56	256.30	983.51	804.85	3605.13	
Southend-on-Sea																										
Southend town centre		0.00	1.75	1.61	0.00	1.50	7.71	6.81	0.45	12.84	4.25	69.54	38.45	19.77	0.94	0.00	1.50	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	167.13
Westcliffe-on-Sea		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.03	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.03
Leigh-on-Sea		2.90	0.00	0.71	0.71	0.00	20.11	0.84	0.45	1.60	0.35	1.75	12.81	47.16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	89.40
Shoeburyness		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.41	0.00	10.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.48
Other Southend		0.97	0.00	14.92	0.00	0.00	0.00	0.00	0.00	0.95	0.35	1.75	0.00	2.94	0.00	0.00	0.00	0.00	14.67	0.00	0.00	0.00	0.00	0.00	0.00	36.55
Southend total		3.87	1.75	17.25	0.71	1.50	27.82	7.66	0.89	16.81	4.95	83.10	61.29	69.87	0.94	0.00	1.50	0.00	14.67	0.00	0.00	0.00	0.00	0.00	0.00	314.60
Rochford																										
Rochford town centre		0.00	0.98	0.00	0.00	0.00	0.00	0.65	2.93	11.61	10.03	0.00	0.61	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	26.81
Rayleigh town centre		1.94	2.94	3.56	0.00	0.00	9.39	24.54	28.26	0.00	4.95	0.00	0.00	3.81	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	79.38
Hockley		0.00	0.77	0.00	0.00	0.00	0.00	17.72	6.06	0.00	1.65	0.00	5.67	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	31.86
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.76	0.00	1.85	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.61
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.06	0.00	2.33	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.40
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.45	1.98	7.55	0.00	0.00	0.80	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.78
Rochford total		1.94	4.70	3.56	0.00	0.00	10.15	42.90	39.54	22.66	24.19	2.33	6.27	4.61	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	162.85
Other destinations		47.09	99.08	28.27	62.34	89.69	33.06	2.79	4.21	0.94	4.13	27.27	3.62	1.54	71.94	106.38	65.17	55.63	35.01	81.27	263.56	256.30	983.51	804.85	3127.68	
TOTAL		52.90	105.53	49.08	63.06	91.19	71.03	53.35	44.64	40.41	33.28	112.70	71.19	76.02	72.88	106.38	66.67	55.63	49.69	81.27	263.56	256.30	983.51	804.85	3605.13	

Source: Tables 2A and 3.

Table 6B - Future 2030 food/beverage expenditure patterns (£M) - high growth

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
Expenditure 2030		55.06	108.98	50.97	65.96	93.82	73.19	53.79	44.67	40.36	33.23	116.26	73.62	78.77	75.91	111.15	67.76	61.41	49.69	81.27	263.56	256.30	983.51	804.85	3644.11
Southend-on-Sea																									
Southend town centre		0.00	1.81	1.68	0.00	1.55	7.95	6.87	0.45	12.83	4.24	71.73	39.76	20.49	0.98	0.00	1.52	0.00	0.00	0.00	0.00	0.00	0.00	0.00	171.86
Westcliffe-on-Sea		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.37	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.37
Leigh-on-Sea		3.02	0.00	0.74	0.75	0.00	20.72	0.85	0.45	1.60	0.35	1.80	13.25	48.87	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	92.40
Shoeburyness		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.41	0.00	10.38	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.79
Other Southend		1.01	0.00	15.50	0.00	0.00	0.00	0.00	0.00	0.94	0.35	1.80	0.00	3.05	0.00	0.00	0.00	0.00	14.67	0.00	0.00	0.00	0.00	0.00	37.32
Southend total		4.03	1.81	17.91	0.75	1.55	28.67	7.72	0.89	16.79	4.95	85.72	63.39	72.41	0.98	0.00	1.52	0.00	14.67	0.00	0.00	0.00	0.00	0.00	323.75
Rochford																									
Rochford town centre		0.00	1.01	0.00	0.00	0.00	0.00	0.66	2.94	11.60	10.02	0.00	0.63	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	26.85
Rayleigh town centre		2.02	3.04	3.70	0.00	0.00	9.68	24.74	28.27	0.00	4.95	0.00	0.00	3.95	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	80.33
Hockley		0.00	0.80	0.00	0.00	0.00	0.00	17.86	6.06	0.00	1.65	0.00	5.86	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	32.23
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.78	0.00	1.85	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.63
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.05	0.00	2.41	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.46
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.45	1.98	7.54	0.00	0.00	0.83	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.80
Rochford total		2.02	4.85	3.70	0.00	0.00	10.46	43.26	39.57	22.64	24.16	2.41	6.49	4.77	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	164.30
Other destinations		49.02	102.32	29.36	65.21	92.27	34.06	2.81	4.21	0.94	4.13	28.14	3.75	1.59	74.93	111.15	66.24	61.41	35.01	81.27	263.56	256.30	983.51	804.85	3156.06
TOTAL		55.06	108.98	50.97	65.96	93.82	73.19	53.79	44.67	40.36	33.23	116.26	73.62	78.77	75.91	111.15	67.76	61.41	49.69	81.27	263.56	256.30	983.51	804.85	3644.11

Source: Tables 2B and 3.

Table 7A - Future 2035 food/beverage expenditure patterns (£M) - low growth

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total	
Expenditure 2035		56.32	112.83	52.45	66.69	96.61	75.11	56.82	47.92	43.46	35.68	120.53	76.10	80.91	78.12	113.99	72.09	58.66	53.21	87.20	281.99	271.29	1045.77	857.86	3841.60	
Southend-on-Sea																										
Southend town centre		0.00	1.87	1.73	0.00	1.59	8.16	7.26	0.48	13.81	4.56	74.36	41.10	21.05	1.01	0.00	1.62	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	178.59
Westcliffe-on-Sea		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.72	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.72
Leigh-on-Sea		3.09	0.00	0.76	0.75	0.00	21.26	0.90	0.48	1.73	0.38	1.87	13.70	50.20	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	95.12
Shoeburyness		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.52	0.00	10.76	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.28
Other Southend		1.03	0.00	15.94	0.00	0.00	0.00	0.00	0.00	1.02	0.38	1.87	0.00	3.13	0.00	0.00	0.00	0.00	15.71	0.00	0.00	0.00	0.00	0.00	0.00	39.08
Southend total		4.12	1.87	18.43	0.75	1.59	29.42	8.15	0.96	18.07	5.31	88.86	65.52	74.37	1.01	0.00	1.62	0.00	15.71	0.00	0.00	0.00	0.00	0.00	0.00	335.80
Rochford																										
Rochford town centre		0.00	1.05	0.00	0.00	0.00	0.00	0.69	3.15	12.49	10.75	0.00	0.65	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	28.78
Rayleigh town centre		2.06	3.15	3.80	0.00	0.00	9.93	26.13	30.33	0.00	5.31	0.00	0.00	4.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	84.77
Hockley		0.00	0.82	0.00	0.00	0.00	0.00	18.87	6.50	0.00	1.77	0.00	6.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	34.02
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.80	0.00	1.98	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.79
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.75	0.00	2.49	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.24
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.48	2.13	8.10	0.00	0.00	0.85	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.56
Rochford total		2.06	5.02	3.80	0.00	0.00	10.73	45.70	42.45	24.37	25.93	2.49	6.70	4.90	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	174.17
Other destinations		50.14	105.93	30.22	65.94	95.01	34.96	2.97	4.52	1.01	4.43	29.17	3.87	1.63	77.11	113.99	70.47	58.66	37.50	87.20	281.99	271.29	1045.77	857.86	3331.64	
TOTAL		56.32	112.83	52.45	66.69	96.61	75.11	56.82	47.92	43.46	35.68	120.53	76.10	80.91	78.12	113.99	72.09	58.66	53.21	87.20	281.99	271.29	1045.77	857.86	3841.60	

Source: Tables 2A and 3.

Table 7B - Future 2035 food/beverage expenditure patterns (£M) - high growth

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total	
Expenditure 2035		59.89	118.54	55.44	71.74	101.11	78.87	57.70	47.92	43.30	35.65	126.59	80.16	85.77	83.25	121.89	74.31	68.11	53.21	87.20	281.99	271.29	1045.77	857.86	3907.54	
Southend-on-Sea																										
Southend town centre		0.00	1.97	1.82	0.00	1.67	8.57	7.37	0.48	13.76	4.55	78.11	43.30	22.31	1.07	0.00	1.67	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	186.64
Westcliffe-on-Sea		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.29	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.29
Leigh-on-Sea		3.29	0.00	0.80	0.81	0.00	22.33	0.91	0.48	1.72	0.38	1.96	14.43	53.21	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	100.32
Shoeburyness		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.52	0.00	11.30	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.82
Other Southend		1.10	0.00	16.85	0.00	0.00	0.00	0.00	0.00	1.01	0.38	1.96	0.00	3.32	0.00	0.00	0.00	0.00	15.71	0.00	0.00	0.00	0.00	0.00	0.00	40.34
Southend total		4.38	1.97	19.48	0.81	1.67	30.89	8.28	0.96	18.01	5.31	93.33	69.02	78.84	1.07	0.00	1.67	0.00	15.71	0.00	0.00	0.00	0.00	0.00	0.00	351.41
Rochford																										
Rochford town centre		0.00	1.10	0.00	0.00	0.00	0.00	0.70	3.15	12.44	10.74	0.00	0.68	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	28.82
Rayleigh town centre		2.19	3.31	4.02	0.00	0.00	10.43	26.53	30.33	0.00	5.31	0.00	0.00	4.30	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	86.41
Hockley		0.00	0.87	0.00	0.00	0.00	0.00	19.16	6.50	0.00	1.77	0.00	6.38	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	34.68
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.84	0.00	1.98	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.83
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.71	0.00	2.62	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.33
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.48	2.13	8.09	0.00	0.00	0.90	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.60
Rochford total		2.19	5.27	4.02	0.00	0.00	11.27	46.40	42.44	24.28	25.91	2.62	7.06	5.20	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	176.67
Other destinations		53.32	111.29	31.94	70.93	99.44	36.71	3.02	4.52	1.01	4.43	30.63	4.08	1.73	82.17	121.89	72.64	68.11	37.50	87.20	281.99	271.29	1045.77	857.86	3379.46	
TOTAL		59.89	118.54	55.44	71.74	101.11	78.87	57.70	47.92	43.30	35.65	126.59	80.16	85.77	83.25	121.89	74.31	68.11	53.21	87.20	281.99	271.29	1045.77	857.86	3907.54	

Source: Tables 2B and 3.

Table 8A - Future 2040 food/beverage expenditure patterns (£M) - low growth

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
Expenditure 2040		60.15	120.90	55.93	70.51	102.60	79.49	60.24	51.34	46.84	38.37	129.08	81.40	85.87	83.68	122.07	77.78	61.86	57.05	93.47	301.23	287.58	1113.39	915.15	4095.97
Southend-on-Sea																									
Southend town centre		0.00	2.01	1.84	0.00	1.69	8.63	7.69	0.51	14.89	4.90	79.64	43.97	22.33	1.08	0.00	1.75	0.00	0.00	0.00	0.00	0.00	0.00	0.00	190.94
Westcliffe-on-Sea		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.47	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.47
Leigh-on-Sea		3.30	0.00	0.81	0.80	0.00	22.50	0.95	0.51	1.86	0.41	2.00	14.65	53.27	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	101.07
Shoeburyness		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.64	0.00	11.53	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	13.17
Other Southend		1.10	0.00	17.00	0.00	0.00	0.00	0.00	0.00	1.10	0.41	2.00	0.00	3.32	0.00	0.00	0.00	0.00	16.85	0.00	0.00	0.00	0.00	0.00	41.78
Southend total		4.40	2.01	19.65	0.80	1.69	31.14	8.64	1.03	19.48	5.71	95.17	70.09	78.93	1.08	0.00	1.75	0.00	16.85	0.00	0.00	0.00	0.00	0.00	358.42
Rochford																									
Rochford town centre		0.00	1.12	0.00	0.00	0.00	0.00	0.73	3.37	13.46	11.57	0.00	0.69	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	30.95
Rayleigh town centre		2.20	3.37	4.05	0.00	0.00	10.51	27.70	32.49	0.00	5.71	0.00	0.00	4.30	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	90.35
Hockley		0.00	0.88	0.00	0.00	0.00	0.00	20.00	6.97	0.00	1.90	0.00	6.48	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	36.24
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.85	0.00	2.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.98
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.51	0.00	2.67	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	13.18
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.51	2.30	8.71	0.00	0.00	0.90	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.43
Rochford total		2.20	5.38	4.05	0.00	0.00	11.36	48.44	45.47	26.27	27.89	2.67	7.17	5.20	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	186.11
Other destinations		53.55	113.51	32.22	69.71	100.91	36.99	3.15	4.84	1.09	4.77	31.24	4.14	1.73	82.60	122.07	76.03	61.86	40.21	93.47	301.23	287.58	1113.39	915.15	3551.43
TOTAL		60.15	120.90	55.93	70.51	102.60	79.49	60.24	51.34	46.84	38.37	129.08	81.40	85.87	83.68	122.07	77.78	61.86	57.05	93.47	301.23	287.58	1113.39	915.15	4095.97

Source: Tables 2A and 3.

Table 8B - Future 2040 food/beverage expenditure patterns (£M) - high growth

Destination	Zone	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total	
Expenditure 2040		65.13	128.90	60.29	78.02	108.66	84.76	61.92	51.42	46.47	38.26	137.93	87.34	93.45	91.28	133.65	81.48	75.04	57.05	93.47	301.23	287.58	1113.39	915.15	4191.88	
Southend-on-Sea																										
Southend town centre		0.00	2.14	1.98	0.00	1.79	9.21	7.91	0.51	14.77	4.89	85.10	47.17	24.31	1.18	0.00	1.83	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	202.79
Westcliffe-on-Sea		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.31	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.31
Leigh-on-Sea		3.58	0.00	0.87	0.88	0.00	24.00	0.98	0.51	1.84	0.41	2.14	15.72	57.98	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	108.91
Shoeburyness		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.63	0.00	12.32	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	13.94
Other Southend		1.19	0.00	18.33	0.00	0.00	0.00	0.00	0.00	1.09	0.41	2.14	0.00	3.62	0.00	0.00	0.00	0.00	16.85	0.00	0.00	0.00	0.00	0.00	0.00	43.62
Southend total		4.77	2.14	21.19	0.88	1.79	33.20	8.89	1.03	19.32	5.70	101.70	75.20	85.90	1.18	0.00	1.83	0.00	16.85	0.00	0.00	0.00	0.00	0.00	0.00	381.57
Rochford																										
Rochford town centre		0.00	1.20	0.00	0.00	0.00	0.00	0.76	3.38	13.35	11.53	0.00	0.74	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	30.96
Rayleigh town centre		2.38	3.60	4.37	0.00	0.00	11.21	28.48	32.55	0.00	5.70	0.00	0.00	4.68	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	92.96
Hockley		0.00	0.94	0.00	0.00	0.00	0.00	20.56	6.98	0.00	1.90	0.00	6.95	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	37.33
Hullbridge		0.00	0.00	0.00	0.00	0.00	0.91	0.00	2.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.04
Great Wakering		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.42	0.00	2.86	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	13.28
Other Rochford District		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.51	2.28	8.68	0.00	0.00	0.98	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.46
Rochford total		2.38	5.74	4.37	0.00	0.00	12.11	49.79	45.55	26.06	27.81	2.86	7.70	5.66	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	190.03
Other destinations		57.98	121.03	34.73	77.14	106.87	39.45	3.24	4.85	1.08	4.75	33.38	4.45	1.89	90.10	133.65	79.64	75.04	40.21	93.47	301.23	287.58	1113.39	915.15	3620.29	
TOTAL		65.13	128.90	60.29	78.02	108.66	84.76	61.92	51.42	46.47	38.26	137.93	87.34	93.45	91.28	133.65	81.48	75.04	57.05	93.47	301.23	287.58	1113.39	915.15	4191.88	

Source: Tables 2B and 3.

Table 9A - Summary of food/beverage expenditure 2022 to 2040 (£M) - low growth

	2022	2025	2030	2035	2040
Available expenditure					
Rochford town centre	23.54	24.76	26.81	28.78	30.95
Rayleigh town centre	70.24	73.71	79.38	84.77	90.35
Hockley	28.15	29.57	31.86	34.02	36.24
Hullbridge	2.31	2.42	2.61	2.79	2.98
Great Wakering	10.01	10.52	11.40	12.24	13.18
Other Rochford District	9.46	9.96	10.78	11.56	12.43
Total	143.71	150.94	162.85	174.17	186.11
Turnover of existing facilities					
Rochford town centre	23.54	23.89	24.49	25.11	25.75
Rayleigh town centre	70.24	71.30	73.10	74.95	76.84
Hockley	28.15	28.58	29.30	30.04	30.79
Hullbridge	2.31	2.34	2.40	2.46	2.53
Great Wakering	10.01	10.16	10.42	10.68	10.95
Other Rochford District	9.46	9.61	9.85	10.10	10.35
Total	143.71	145.88	149.56	153.34	157.21
Surplus/deficit expenditure £M					
Rochford town centre	0.00	0.87	2.32	3.67	5.20
Rayleigh town centre	0.00	2.41	6.28	9.82	13.51
Hockley	0.00	0.99	2.57	3.99	5.44
Hullbridge	0.00	0.08	0.20	0.32	0.45
Great Wakering	0.00	0.36	0.98	1.56	2.23
Other Rochford District	0.00	0.35	0.93	1.46	2.07
Total	0.00	5.06	13.29	20.83	28.90

Source: Tables 4 to 8A and Experian sales density growth rates from Retail Planner Briefing Note 19 - Figure 4b.

Table 9B - Summary of food/beverage expenditure 2022 to 2040 (£M) - high growth

	2022	2025	2030	2035	2040
Available expenditure					
Rochford town centre	23.54	24.77	26.85	28.82	30.96
Rayleigh town centre	70.24	73.99	80.33	86.41	92.96
Hockley	28.15	29.68	32.23	34.68	37.33
Hullbridge	2.31	2.43	2.63	2.83	3.04
Great Wakering	10.01	10.55	11.46	12.33	13.28
Other Rochford District	9.46	9.96	10.80	11.60	12.46
Total	143.71	151.39	164.30	176.67	190.03
Turnover of existing facilities					
Rochford town centre	23.54	23.89	24.49	25.11	25.75
Rayleigh town centre	70.24	71.30	73.10	74.95	76.84
Hockley	28.15	28.58	29.30	30.04	30.79
Hullbridge	2.31	2.34	2.40	2.46	2.53
Great Wakering	10.01	10.16	10.42	10.68	10.95
Other Rochford District	9.46	9.61	9.85	10.10	10.35
Total	143.71	145.88	149.56	153.34	157.21
Surplus/deficit expenditure £M					
Rochford town centre	0.00	0.88	2.35	3.71	5.21
Rayleigh town centre	0.00	2.69	7.23	11.46	16.12
Hockley	0.00	1.10	2.93	4.64	6.54
Hullbridge	0.00	0.09	0.23	0.36	0.51
Great Wakering	0.00	0.39	1.04	1.65	2.33
Other Rochford District	0.00	0.36	0.95	1.50	2.11
Total	0.00	5.51	14.74	23.33	32.82

Source: Tables 4 to 8B and Experian sales density growth rates from Retail Planner Briefing Note 19 - Figure 4b.

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

	2022	2025	2030	2035	2040
Turnover density new floorspace (£ per sq.m)	£5,000	£5,075	£5,204	£5,335	£5,470
Sales floorspace projection (sq.m gross)					
Rochford town centre	0	171	446	688	951
Rayleigh town centre	0	475	1,207	1,841	2,469
Hockley	0	195	493	748	995
Hullbridge	0	16	39	61	82
Great Wakering	0	72	188	293	408
Other Rochford District	0	69	179	274	379
	0	998	2,553	3,904	5,284

Source: Table 9A.

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

	2022	2025	2030	2035	2040
Turnover density new floorspace (£ per sq.m)	£5,000	£5,075	£5,204	£5,335	£5,470
Sales floorspace projection (sq.m gross)					
Rochford town centre	0	174	452	696	953
Rayleigh town centre	0	530	1,389	2,149	2,947
Hockley	0	217	564	870	1,195
Hullbridge	0	17	44	68	93
Great Wakering	0	77	201	310	426
Other Rochford District	0	70	183	281	386
	0	1,085	2,833	4,373	5,999

Source: Table 9B.

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