



# SOUTHEND BOROUGH COUNCIL

---

## Retail and Town Centre Study

January 2011

---



# CONTENTS

1.0	Introduction .....	9
2.0	Southend Borough Health Checks.....	15
3.0	Quantitative Assessment of Southend Borough .....	45
4.0	Quantitative Assessment of District Centres and Non Central Stores .....	52
5.0	Scope for New Development.....	58
6.0	Office Sector Analysis .....	64
7.0	Conclusions .....	76

# APPENDICES

A.	Survey Area and Shopping Area boundaries .....	83
B.	Retail Capacity Tables.....	84
C.	Development Opportunities .....	85
D.	Retailer Requirements as of May 2010.....	86
E.	Household Survey.....	87
F.	Retail Commitments as of June 2010 .....	88

## **GLOSSARY OF TERMS**

### **Town centre**

Defined area of predominantly leisure, business and other main town centre uses within or adjacent to the primary shopping area as defined on the proposals map.

### **District centre**

Usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library. As defined by the Core Strategy.

### **Local centre**

Include a range of small shops of a local nature, serving a small catchment. As defined by the Core Strategy.

### **Primary shopping area**

Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are contiguous and clearly related to the primary shopping frontage).

### **Primary frontage**

Primary frontages are likely to include a high proportion of retail uses.

### **Secondary frontage**

Secondary frontages provide greater opportunity for a diversity of uses.

### **Edge-of-centre**

For retail purposes, a location that is well connected and within easy walking distance (i.e. up to 300 metres) of the primary shopping area (PSA).

### **Out-of-centre**

A location which is not in or on the edge of a centre but not necessarily outside the urban area.

### **Out-of-town**

An out-of-centre location outside the existing urban area.

### **Supermarket**

Self-service stores selling mainly food, or food and non-food goods, usual with less than 2,500 sqm trading floorspace.

### **Superstore**

Self-service stores selling mainly food, or food and non-food goods, usual with more than 2,500 sqm trading floorspace.

### **Retail warehouse**

Large stores specialising in the sale of household goods (such as carpets, furniture and electrical goods), DIY items and other ranges of goods.

### **Retail Parks**

An agglomeration of at least three retail warehouses.

### **Convenience goods**

Everyday essential items, including food, drinks, newspapers/magazines and confectionary.

### **Comparison goods**

Items not obtained on a frequent basis. These include clothing, footwear, household and electrical goods.

### **Population projections**

Estimates of future population based on Pitney Bowes Population Forecasts up to 2025.

### **Expenditure growth rates**

Estimates of future increase/decrease in spend (£m) on certain types of goods. This is sourced from the Pitney Bowes Expenditure Guide 2009/2010.

### **Special forms of trading**

All retail sales not in shops and stores; including sales via the internet, mail order, TV shopping, party plan, vending machines, door-to-door and temporary open market stalls.

### **Gross retail floor-space**

The total built floor area measured externally which is occupied exclusively by a retailer or retailers; excluding open areas used for the storage, display or sale of goods.

### **Net retail sales area**

The total build floor area measured internally which is used for the sale of retail goods.

### **Retail sales density**

Convenience goods, comparison goods or all goods retail sales (stated as including or excluding VAT) for a specified year on the price basis indicated, divided by the net retail sales area generating those sales.

### **Floorspace efficiency**

The percentage by which a retail sales density is assumed to increase annually in real terms over a stated period.

### **Quantitative capacity**

Current and future retail capacity in numerical terms. Retail capacity is dependent on the following key factors:

- The economic capacity in terms of demand arising from expenditure growth within the catchment area of a proposal.
- Leakage of trade from an area, which suggests lack of provision to meet the needs of shoppers.
- Retailer requirements - demand from retailers for representation in a particular centre, and the potential for competition and innovation.

### **Leakage of trade**

Expenditure which is spent elsewhere and not within the study area.

### **Clawback**

Attracting expenditure which has been lost to towns outside the study area and non central floorspace.

### **Overtrading**

Overtrading is measured by comparing the total turnover potential of a store to the actual turnover which is derived from the household survey answers.

### **Store potential turnover**

The potential turnover is measured by multiplying the net retail floorspace by the company average turnover.

### **Company average turnover**

Company average turnovers are compiled from the food retailers' estimated company average sales densities based on Verdict research (2010).

## EXECUTIVE SUMMARY

1. CB Richard Ellis was instructed in November 2009 by Southend on Sea Borough Council to provide advice on retail and town centre issues in the Borough.
2. The objective of this study is to determine the level of different shopping needs in the Borough, and how these needs can be met most appropriately. The study identifies future capacity for additional retail floorspace and recommends where such capacity should be located. The study also recommends strategies for promoting centres in response to perceived strengths and weaknesses in both quantitative and qualitative terms and in relation to 'other' town centre uses.
3. The study is an important evidence base document which will help inform future plan making for the Borough and its centres which will be used alongside other evidence documents.
4. Southend's centres are vital and viable although there is scope for improvement in certain areas as evidenced by the strengths and weaknesses resulting from the health checks. Southend town centre does contain a large proportion of vacant retail floorspace although the High Street has a very low vacancy rate.
5. We consider that the major convenience stores in Southend Borough are currently performing well and will continue to do so. There is currently an over provision of convenience floorspace in Southend town centre (approximately -88 sqm net by 2015) although, by 2020, there is sufficient expenditure to support 308 sqm net, increase to 726 sqm net by 2025 (Table 6).
6. Although there is limited capacity identified for Southend town centre, there is scope to increase expenditure which is currently leaking from the town centre to freestanding foodstores. To achieve this reversal of expenditure, it will require additional bulk foodstore provision to help anchor the town centre's convenience provision particularly if/when Sainsbury's relocate to the former football ground at Roots Hall.
7. Unless adequately planned for, the departure of Sainsbury's from the town centre could result in a loss of market share and careful consideration, in accordance with PPS4, should be given to foodstore proposals beyond existing centres, in particular at the football training ground at Fossetts Way.
8. Southend town centre is performing successfully as a comparison shopping destination, drawing a good level of trade from the surrounding zones. We consider there is scope for additional comparison floorspace in Southend town centre, based upon forecast capacity of 36,841 sqm net at 2015, rising to 50,873 sqm net by 2020 and rising to 70,172 sqm net to 2025 (Table 6).
9. Before planning to allocate sites to accommodate this additional capacity for Southend town centre, careful consideration must be given to the ability of existing vacant floorspace (18,088 sqm gross) within the town centre to accommodate the identified need over the plan period.
10. Even allowing for the consideration of vacant floorspace, other sites will need to be considered for their retail potential if this capacity is to be absorbed. The review of Southend town centre suggests that several sites would offer a good prospect of integrating well with Southend's existing Primary Shopping Area, and therefore should ideally be prioritised for delivery and retail use. These sites are:
  - Tylers Avenue Car park;
  - The bus station, Heygate Avenue; and

- Alexandra Street car park.

11. The ability of these sites to accommodate retail uses would be subject to design and feasibility testing.
12. Edge of centre sites on the edge of Southend town centre may also contribute to meeting retail need given the amount of capacity identified. In particular, the former B&Q site at Short Street offers a good opportunity for retail development in the short term given its current availability although this will need careful consideration of its integration with the Queensway and The Victorias. Other edge of centre sites may also contribute to meeting retail need, as described in Section 5.
13. The core of Westcliff on Sea is a reasonably attractive and healthy district centre. The more peripheral trading areas are however much more varied in their quality. Leigh on Sea is a strong and healthy district centre, evidenced by a low vacancy rate and a high proportion of independent retailers, cafes and bars.
14. Both centres currently have an oversupply of retail floorspace when considered against available expenditure. This represents itself in negative capacity for additional floorspace over the forecast period (Tables 10 and 14, respectively).
15. Although there is no quantitative requirement to allocate retail sites, there may be qualitative reasons to consider. The Hamlet Court Road car park (north of the London Road) site at Westcliff which, if promoted for retail development, could, for example, provide a much stronger retail core than at present. Redevelopment here may also offer the prospect of delivering some larger units to meet potential occupier requirements.
16. A number of sites are also identified in Southend's local centres. Again, these could be promoted for retail development for qualitative rather than quantitative reasons. Particular attention should be drawn to Shoeburyness local centre (Ness Road/West Road), given concerns regarding the more marginal health of this location. For Shoeburyness, a more comprehensive examination of the centre, including its development potential may be a more positive way forward. This could take the form of an action plan or similar document to guide development in this centre.
17. Based upon our assessment, the major out of town convenience stores are overtrading, with Asda (North Shoebury) displaying a significantly higher turnover than expected based upon company averages. Overall, the level of turnover results in surplus expenditure which could support new convenience floorspace of 281 sqm net by 2015, 3,517 sqm net by 2020 and 9,972 by 2025. The available capacity could support a new convenience superstore (over 2,500 sqm net) by 2020. However, the surplus expenditure generated from the out of centre stores should be focused towards town centre development sites in accordance with PPS4 in order to increase each centre's market share. The first priority should be Southend town centre to ensure it maintains and enhances its convenience market share post the relocation of the Sainsbury's store within the town centre.
18. The non central comparison floorspace is also trading well, which is reflected in the high average sales densities. If the non central stores continue to trade at this level, there is no expenditure to support additional floorspace by 2015 (-4,949 sqm net) although some capacity will be generated by 2025 (19,261 sqm net) (Table 18, Appendix B).
19. In terms of policy recommendations and the retail hierarchy, we have reviewed all the centres as part of the health checks. Though some areas are in need of improvement, their function, size and character are appropriate and we do not recommend changing

the classification of the centres set out in the Core Strategy or changing any of the proposals map boundaries.

20. The health checks highlight a number of qualitative issues relating to each of the centres surveyed. For Southend town centre, a programme for public realm and shop front improvements (say through match funding for the latter) could enhance secondary shopping areas where the quality of the environment is viewed to be weaker. An obvious candidate for this programme could be Southchurch Road, which has a high concentration of independent traders. Such a programme could in turn help support independent traders, and perhaps attract new traders to enhanced areas.
21. The reinstatement of a market in Southend town centre is also seen as a possible way to diversify the offer. An initial scoping study suggests that there is demand for a market, and, if placed in a central location, would add to general retailing activity.
22. The health check for Southend town centre also notes that the range of commercial leisure uses on offer in the centre is moderate and enhancing this could serve to diversify the town centre offer overall. Clearly the Southend seafront offers a considerable commercial leisure offer, and potentially connecting these better to the town centre may well be a positive way of maximising the benefits available here. There may also be opportunities to encourage more outside café/dining seating. This would aim to increase the street activity in certain areas and enhance the viability of this offer.
23. For Westcliff district centre, a key initiative could be to look at further public realm improvements. Improvements already undertaken along parts of Hamlet Court Road have significantly enhanced the environmental quality of the centre. This approach might target specific nodes for improvement. A key opportunity for this action could be the area in the vicinity of the Palace Theatre.
24. For Leigh district centre, a key initiative could be to continue to improve the accessibility and shopper mobility. From the health check there appears to be an opportunity to improve cycle facilities, widen pavements in some places as well as improve pedestrian crossings around the Triangle.
25. In respect to the office sector within Southend, in broad terms, the analysis indicates that the market is oversupplied, and especially with outdated office stock. Much of this stock is too large and unlikely to meet the requirements of small to medium sized occupiers; the focus of demand for Southend office space. In qualitative terms, there are significant shortcomings in the office provision in Southend. The strengths, weaknesses and opportunities for Southend's office market are set out in Section 6.



## 1.0 Introduction

- 1.1 CB Richard Ellis was instructed in November 2009 by Southend on Sea Borough Council to provide advice on retail and town centre issues in the Borough. The advice is to be used to inform the preparation of the Local Development Framework (LDF).
- 1.2 The objective of this study is to determine the level of different shopping needs in the Borough, and how these needs can be met most appropriately. The study will identify future capacity for additional retail floorspace and recommend where such capacity should be located and consider the appropriate mix/scale of capacity. It will also recommend strategies for promoting centres in response to perceived strengths and weaknesses in both quantitative and qualitative terms and in relation to 'other' town centre uses.
- 1.3 The methodology for the study incorporates the following elements:
  - A qualitative assessment of existing shopping provision in the Borough. This part of the study focuses on the range, mix and quality of uses in Southend-on-Sea (hereafter referred to as Southend), Leigh-on-Sea (hereafter referred to as Leigh) and Westcliff-on-Sea (hereafter referred to as Westcliff) and local centres. The assessment examines their role and function in meeting local shopping needs.
  - A quantitative analysis of Southend town centre and the District Centres of Leigh and Westcliff. The analysis outlines the pattern of usage at the local level, and identifies the relative capacity for further town centre convenience and comparison goods floorspace. The analysis also identifies the pattern of usage within the Borough's out of centre retail areas.
  - Assess the hierarchy, role and function of all centres within Southend Borough.
  - A consideration of the scope, if any, for new retail and leisure development in the borough. This includes assessing the suitability, viability and availability of sites for new development.
  - Recommendations of strategies to enhance centres.
- 1.4 The study is an important evidence base document which will help inform future plan making for the Borough and its centres which will be used alongside other evidence documents. The document makes recommendations on appropriate sites and policy but does not commit the Council to allocate any parcels of land or drafting policies.

### Structure of the Report

- 1.5 Section 2 of the report sets out the qualitative analysis of the existing retail provision in Southend Borough. Our assessment of vitality and viability draws upon the indicators of performance set out in PPS4, on Town Centre uses and Retail Developments. We also assess out of centre shopping provision, reviewing the existing distribution, range and quality of both foodstores and retail warehouses. The assessments both draw on the PPS4 indicators, where data is available, and the results of our onsite survey work.
- 1.6 Section 3 outlines the results of our quantitative analysis of the performance and capacity of Southend town centre. We examine existing shopping patterns in the borough for food and non-food goods, drawing on a new household telephone interview survey undertaken in November 2009. Applying up to date population and expenditure forecasts, we assess the quantitative capacity for further food and non-food floorspace.
- 1.7 In Section 4, we outline the results of our analysis of the District Centres drawing on our new household interview survey.

# 1.0 Introduction

- 1.8 Section 5 deals with the scope for new retail development in the borough. It takes the findings of our quantitative analysis and combines it with the results of our qualitative assessment to assess the most appropriate locations for different types of new development.
- 1.9 Section 6 provides a strategic overview of the office sector in Southend town centre set within the sub regional context.
- 1.10 Section 7 summarises the findings of the research and presents a series of recommendations for strategies to enhance Southend town centre and the other defined District and Local centres.

## Background

### National Retail Policy

#### Planning Policy Statement 4: Planning for Sustainable Economic Growth

- 1.11 PPS4: ‘Planning for Sustainable Economic Growth’ was published in December 2009.
- 1.12 PPS4 supersedes previous national guidance including not only Planning Policy Statement 6: Planning for Town Centres (2005) but Planning Policy Guidance Note 4: Industrial, commercial development and small firms (1992); Planning Policy Guidance Note 5: Simplified Planning Zones (1992); and sections within Planning Policy Statement 7: Sustainable Development in Rural Areas and Planning Policy Guidance Note 13: Transport and provides consolidated advice for not only retail but other town centre related developments including B1(a) office use.
- 1.13 PPS4 is further supported by detailed practice guidance on the application of need, impact and the sequential approach.
- 1.14 PPS4 emphasises that local planning authorities in their LDF’s should positively and proactively plan for economic growth, simplify the planning process where appropriate (including using simplified planning zones), support existing business sectors and ensure that site allocations for economic development, particularly if for single or restricted uses, are not carried forward between plans without evidence of need and a reasonable prospect of use.
- 1.15 The Government’s objectives for prosperous economies and sustainable economic development are to:
  - Build prosperous communities by improving the economic performance of cities, towns, regions, sub-regions and local areas;
  - Reduce the gap in economic growth rates, promoting regeneration and tackling deprivation;
  - Deliver more sustainable patterns of development, reduce the need to travel, especially by car, and respond to climate change;
  - Promote the vitality and viability of town centres and others, including:
    - New economic growth and development of main town centre uses to be focused in existing centres, with the aim of offering a wide range of services to communities and remedying deficiencies in provision in areas with poor access to facilities
    - Competition between retailers and enhanced consumer choice through the provision of innovative and efficient shopping, leisure, tourism and local services in town centres

# 1.0 Introduction

- The historic, archaeological and architectural heritage of centres to be conserved and, where appropriate, enhanced to provide a sense of place and focus for the community
- Raise the quality of life and environment in rural areas.

## Key Changes

- 1.16 The key changes implemented in PPS4, when compared against the policy tests previously in place under PPS6 (2005), are that all new economic development proposals (including retail but excluding residential) now have to be considered against the following key planning tests set out in policy EC10.2:
- The contribution ‘over the lifetime of the development’ to limit carbon dioxide emissions and provide resilience to climate change
  - The accessibility of the proposals by a choice of means of transport, including on foot, by cycle and by public transport and the traffic impact of the development
  - The quality of the design and its contribution to the surrounding area
  - The impact of proposals on economic and physical regeneration
  - Its impact on local employment
- 1.17 In addition, there are specific tests for retail and other ‘town centre uses’ which are summarised below.

## Town Centres and Retail

- 1.18 The revised planning rules retain the 'sequential test' that requires the most central town centre sites to be developed first. However, the revised policy removes the 'needs test' in favour of a wider 'impact test' which is intended to provide Councils with a better tool to measure the wider positive and negative effects of retail and other town centre related development. Using this test, Councils are compelled to examine more factors, including retail diversity, impact on town centre investment, scope for regeneration and job creation.
- 1.19 The guidance emphasises an approach for Councils to set priorities through proactive and positive policies, underpinned by a ‘robust evidence base’. As part of this, councils are encouraged to make provision to target socially disadvantaged areas, support local and independent traders and encourage wider formats of retail, such as markets.
- 1.20 Under the new ‘impact test’, Councils are required to examine more factors including retail diversity, consumer spending, loss of trade, impact on town centre investment, scope for regeneration and job creation.
- 1.21 PPS4 Policy EC3 requires local planning authorities to set out a strategy for the management and growth of centres over the plan period and should:
- “a. set flexible policies for their centres which are able to respond to changing economic circumstances and encourage, where appropriate, high-density development accessible by public transport, walking and cycling.*
  - b. define a network and hierarchy of centres that is resilient to anticipated future economic changes, to meet the needs of their catchments.*
  - c. define the extent of the centre and the primary shopping area in their Adopted Proposals Map having considered distinguishing between realistically defined primary and secondary*

# 1.0 Introduction

*frontages in designated centres and set policies that make clear which uses will be permitted in such locations.*

*d. consider setting floorspace thresholds for the scale of edge-of-centre and out-of-centre development which should be subject to an impact assessment under (EC16.1) and specify the geographic areas these thresholds will apply to.*

*e. define any locally important impacts on centres which should be tested (see policy EC16.1.f)*

*f. encourage residential or office development above ground floor retail, leisure or other facilities within centres, ensuring that housing in out-of-centre mixed-use developments is not, in itself, used as a reason to justify additional floorspace for main town centre uses in such locations.*

*g. identify sites or buildings within existing centres suitable for development, conversion or change of use.*

*h. use tools such as development orders, area action plans, compulsory purchase orders and town centre strategies to address the transport, land assembly, crime prevention, planning and design issues associated with the growth and management of their centres. "*

- 1.22 It is noted as part of this balance of positive and negative impacts, that judgements about impact should be informed by the development plan (where this is up to date) and recent local health check assessments which take account of vitality and viability indicators and any other published local information will also be relevant.
- 1.23 In light of the new national planning policy guidance it is imperative that Southend Borough Council has a robust evidence base which informs the strategies adopted by the development plan and future development.

### **Regional Policy Background**

- 1.24 The East of England Plan recognises Southend as a key centre for development and change (Policy SS3) and a Regional centre (Policy E5) which means the town centre is considered to be of strategic importance for retail and other town centre uses.
- 1.25 Policy E5 directs major new retail development and complimentary town centre uses to regional and major town centres such as Southend provided the development is of an appropriate scale and character.
- 1.26 Although the East of England Plan remains part of the development plan, steps are being taken by the Government to revoke Regional Spatial Strategies including the East of England Plan.

### **Local Policy Background**

Southend Core Strategy (December 2007)

- 1.27 The Southend Core Strategy was adopted in December 2007 and sets out the key priorities for the borough until 2021.

# 1.0 Introduction

- 1.28 Policy CP2 states that Southend Town Centre will remain the first preference for all forms of retail development and for other town centre uses attracting large numbers of people, as set out in relevant national planning policy, the East of England Plan and local strategies and plans. It will be supported and developed in accordance with the spatial strategy set out in Policy KP1:
  - As a regional centre providing the full range of high quality sub-regional services and facilities required to meet the needs of Essex Thames Gateway for higher order retail, leisure, cultural and higher education services, for office based employment, and for higher quality mixed use development to secure new jobs and homes;
  - As the key focus and driver for the regeneration of Southend, and
  - As a priority location for urban renaissance.
- 1.29 The centres of Westcliff (Hamlet Court Road) and Leigh will support Southend town centre as District Centres providing a range of local comparison shopping, convenience shopping and services to the neighbouring communities.
- 1.30 Town centre and retail development should be located within these centres, should contribute to their vitality and viability and must be appropriate to the function, size and character of the centre concerned, in accordance with the above hierarchy and priorities.
- 1.31 Additional comparison floorspace should be located in accordance with the following sequential preference:
  - within Southend Town Centre;
  - on the edge of Southend Town Centre, where the development will contribute to and not prejudice achievement of the regeneration and urban renaissance objectives for the Town Centre. Local Development Framework documents supported by RSL’s Central Area Masterplan, will set out the detailed proposals for delivering the additional floorspace required to meet forecast needs;
  - the consolidation, improvement and modernisation of existing floorspace and their environments within the District Centres of Westcliff and Leigh, in order to provide and maintain a range of shopping, services and facilities for the neighbouring communities. The provision of significant additional retail floorspace within these centres, will not, however, be supported;
  - within other existing centres to support their role as a local centres only, where the development is in keeping with the function and scale of the centre concerned.

**Southend Central Area Masterplan Consultation (Adopted March 2008)**

- 1.32 The Masterplan produced by Renaissance Southend Ltd (RSL) aims to identify a clear and distinctive vision for the central area of Southend. The remit is to facilitate the revitalisation of the town centre and seafront.
- 1.33 The Central Area Masterplan is designed around the core spine of Victoria Avenue, the High Street and seafront; extending from Milton Road in the west to Queen’s Way in the east; and as far as Harcourt Avenue/Carnaeron Road in the north, and the southernmost extent of the pier and associated foreshore area to the south. Future Local Development Plan Documents

# 1.0 Introduction

---

## Southend Central Area Action Plan

- 1.34 In accordance with Southend Borough Council’s adopted Local Development Scheme, the Strategic Objectives and the policies within its Core Strategy Development Plan Document [DPD], the Borough Council is preparing an Area Action Plan [AAP] for the central area of the town (to be known as Southend Central AAP) and associated Proposals Map.
- 1.35 The Southend Central AAP issues and options document was subject to public consultation in June 2010. It is a spatial plan that will eventually form part of the statutory Local Development Framework for the Borough.
- 1.36 It builds on the foundations set out in the Pre-Submission Consultation Issues and Options Report published in January 2007. Since this date, the Regulations governing the preparation of development plans has changed. In addition, following a lengthy consultation process, the Central Area Masterplan [CAM], prepared by Renaissance Southend Limited (RSL), has also been c.
- 1.37 In November 2007, the Council endorsed the principles of the Central Area Masterplan draft Development Framework. A year later (November 2008), the Council agreed to adopt the Central Area Masterplan prepared by RSL as a design brief and interim guidance.
- 1.38 The Southend Central AAP consultation document is derived from, and takes forward, the guiding principles from the Central Area Masterplan.

## Development Management DPD

- 1.39 The Development Management DPD will support the Core Strategy DPD. It will set out the Council's detailed policies for positively managing development in the borough. The Development Management document went out on consultation in June 2010 and sets out issues and options regarding; inter alia, economic development.

## Design and Townscape guide 2009 SPD

- 1.40 The Design and Townscape Supplementary Planning Document (SPD) was adopted in 2009 and provides guidance that aims to inspire and positively encourage high quality development proposals by providing a practical basis for achieving this and to assist the Council in resisting poor quality development.

## 2.0 Southend Borough Health Checks

- 2.1 In this health check we consider the vitality and viability of the key centres in Southend Borough. These are: Southend town centre, Westcliff and Leigh district centres and Southchurch, Eastwood, Thorpe Bay and Shoeburyness local centres. Our assessment draws on the performance indicators of town centre vitality and viability set out at Annex D of PPS4 (Town Centre Health Check Indicators). To support our analysis, we have drawn upon in-house data combined with observations from site visits, Experian Goad and other sources, such as the Valuation Office. The Health Check indicators are:
- Diversity of main town centre uses;
  - The amount of retail, leisure and office floor space in edge of centre and out of centre locations;
  - The potential capacity for growth or change of centres within the network and opportunities for centres to expand or consolidate;
  - Retailer representation and intention to change representation;
  - Shopping rents;
  - The proportion of vacant street level property;
  - Commercial yields on non-domestic property (i.e. the capital value in relation to the expected market rental);
  - Pedestrian flows;
  - Accessibility;
  - Customer and residents' views and behaviour;
  - Perception of safety and occurrence of crime; and
  - The state of the centre's environmental quality.
- 2.2 In addition, we comment on the overall quality of the retail offer in each of the centres.
- 2.3 It is also noted that PPS4 has introduced an additional health check indicator relating to land values. We are not aware of any specific data relating to trends in land values in town, district and local centres in the borough. As a broader analysis of this health check indicator, we are aware that land values have fallen back considerably since their peak in mid to late 2007. Anecdotally, in some cases, land values have fallen by over 50%, reflecting weakening demand and commercial yield prospects. This trend will undoubtedly have impacts on Southend Borough too, although it is not possible to comment in detail on any specific sites or locations.
- 2.4 Collectively, these indicators provide the framework within which a "health check" of the identified town centre or shopping destination can be undertaken. However, PPS4 recognises that none of the individual indicators provide a definitive picture of town centre health and performance. The value of the indicators derives from them being considered together.

## 2.0 Southend Borough Health Checks

### SOUTHEND TOWN CENTRE

#### Description of Centre

- 2.5 Southend town centre is located on the south-east coast of Essex. The main shopping provision is located on a traditional linear High Street which is supported to the north by The Victoria shopping centre and to the south by The Royals. The town is classified in the Southend Core Strategy as a regional centre.
- 2.6 The primary shopping frontage extends along the pedestrianised area of the High Street, from Victoria Circus to the intersection with Royal Terrace. The entire High Street frontage measures approximately 0.5 miles in length – a considerable distance. Typically, strong centres are compact and offer good retail circuits. The remainder of the primary shopping frontage extends along part of Southchurch and London Road and into the two shopping centres (The Victoria and The Royals).

#### Diversity of Main Town Centre Uses

- 2.7 The most recent Experian Goad data for Southend town centre (April 2009) shows a total of 427 retail units in the centre, which provide just over 109,420 sq m gross (1,177,800 sq ft) of floorspace. Experian Goad estimate that approximately 11,669 sqm gross (125,604 sq ft) of the total is made up of convenience floorspace, 57,544 sqm gross (619,400 sq ft) of comparison, and the remainder (21,070 sqm gross/226,800 sq ft) service uses or vacant units (18,088 sqm gross/194,700 sq ft).

**Table 2.1**  
Uses in Southend Town Centre by units

RETAIL CATEGORY	NO. OF UNITS	% OF TOTAL	NATIONAL AVERAGE %	VARIANCE %
Convenience	26	6.09	9.51	-3.42
Comparison	176	41.22	43.26	+2.04
Service	140	32.79	33.96	-1.17
Vacant	79	18.50	12.03	+6.47
TOTAL	427			

Source: GOAD Experian Report April 2009

- 2.8 According to GOAD there is a below average representation of convenience outlets (26 units) and also in terms of floorspace (10.7% versus UK average of 17.3%). Of the national multiples, the only major supermarket is the Sainsbury’s (4,136 sqm net) on London Road. The store is relatively constrained and does not have an ideal layout for trading but does provide a comprehensive food offer including a bakery, pharmacy, deli and fish counter. It is supported by a 450 space car park. During the survey, we noted that the store was busy and the lobby and kiosk areas were congested. The non-food offer is limited.
- 2.9 There is also food provision at the Tesco Express at The Royals, Marks and Spencer store and a limited range at Wilkinsons. There are also a few independent convenience outlets such as greengrocers or butchers.
- 2.10 The slightly above average representation of comparison retail units (+2.04%) and the scale of the centre suggests that Southend town centre’s primary role is as a comparison shopping destination meeting longer term needs. The amount of floorspace given over to comparison retailers is marginally higher than the UK average too (52.3% as compared to



## 2.0 Southend Borough Health Checks

49.1%). However, given the town’s sub-regional status, it might have been expected to have a higher proportion of floorspace in this sector, as comparison retailers tend to favour larger units.

- 2.11 The number of units and amount of floorspace devoted to service uses is slightly below the national average and, according to our centre visit, has declined considerably between the last GOAD survey in April 2009 and our survey in November 2009).
- 2.12 Other uses within Southend town centre include solicitors, estate agents, employment agencies (A2 units) and other small scale office space which is primarily located on Clarence Road, Clarence Street and Clifftown Road. Larger office blocks are present along Victoria Avenue, but is outdated stock. The centre has seen a decline in the number of national High Street banks, although the major banks have made notable investments and appear to be in more prominent locations than before. This includes the presence of HSBC and a new Barclays on the High Street. The Odeon Cinema is a relatively new addition to the town centre and is the only cinema in Southend. The closure of the New Empire Theatre has reduced the variety of leisure offer in the town. Other leisure facilities, and especially tourism and evening economy uses are located in the seafront area on the edge of the centre; for example, Lucy Road accommodates a number of nightclubs. The new University of Essex Campus and South East Essex College are considerable additions to the diversity of uses in the town and generate a good level of footfall in the mid section of the High Street. Overall, the range of leisure uses in the town centre could be enhanced. There are, for example, no major health and fitness centres or bowling alleys in the town. Both the Kursaal (bowling alley) and Mecca Bingo (Greyhound Estate) are not within the town centre boundary.

### Retailer Representation

- 2.13 Southend town centre contains a wide range of multiple retailers which are predominantly located on the High Street, The Royals and The Victoria shopping centres. As set out in table 2.2, Southend town centre has the majority of multiple retailers regarded as ‘key attractors’ with the exception of John Lewis, House of Fraser and Waitrose. Debenhams is the only major department store in the centre.

**Table 2.2**  
Key Multiple Retailers defined by GOAD

KEY RETAILER	NO.	KEY RETAILER	NO.
Argos	1	Next	1
BhS	1	O2	1
Boots	2	Phones 4 U	1
Burton	1	Primark	1
Carphone Warehouse	1	River Island	1
Clarks	1	Sainsbury’s	1
Clintons	2	Superdrug	2
Debenhams	1	TK Maxx	1
Dorothy Perkins	1	Tesco	1
H & M	2	Topman	1
HMV	1	Topshop	1
House of Fraser	0	Vodafone	1

## 2.0 Southend Borough Health Checks

John Lewis	0	Waitrose	0
Marks & Spencer	1	Waterstones	1
New Look	1	WH Smith	1
		Wilkinsons	1

Source: GOAD Experian Report April 2009/CB Richard Ellis Town Centre Survey November 2009

- 2.14 A good range of the fashion retailers are located on the High Street. Retailers such as H&M, TopMan, River Island, Burtons, Bon Marche, Miss Selfridge all operate from here. The improved trading environment of the refurbished Victoria Plaza has encouraged some fashion retailers away from the High Street. This might also reflect the retailers' requirements for larger units.
- 2.15 To the southern end of the High Street is The Royals shopping centre; a covered scheme which opened in 1988. The centre is anchored by a Debenhams department store and Primark (formerly Littlewoods). There is a dedicated car park, with approximately 480 spaces. The Victoria, at the northern end of the High Street, was opened in 1968 but has undergone extensive refurbishment in 2007 and is now a fully covered shopping centre which links the High Street to Southend Victoria Station. The scheme is anchored by a cluster of major shop units - Peacocks, Wilkinsons, New Look and Next. The updated configuration has improved the centre's attraction to retailers although there are a significant number of vacant units on the upper level walkway to Victoria Station.
- 2.16 Although there is a good representation from department and variety stores, other arguably higher end department stores, such as John Lewis and House of Fraser, are not present. Likewise, the unit retail offer is mainly mid-market with few operators presently targeting the top end of the market such as French Connection, Kookai, Zara and Reiss. Ideally, the town would benefit from an increased representation in this higher end fashion sector although it may be particularly challenging to secure new major anchor stores.
- 2.17 Away from the High Street and shopping centres, there is a reasonable range of independent retailers operating from the secondary frontages along side streets. There is a particularly high representation of independent retailers along Southchurch Road, Queens Road and Alexandra Street. These also tend to be the locations for more service orientated uses such as hairdressers, bars and cafes. York Road also offers a range of independent convenience and comparison retailers, with several of the units seeking to meet an ethnic/Asian market. The recent closure of York Road Market means that there is no longer a dedicated market in the town although a Farmers' market is present occasionally on the High Street.
- 2.18 The main restaurant/cafe use provision is located on London Road close to the Odeon Cinema. This area is dominated by national operators such as La Tasca, Bella Italia, Pizza Express and Nandos. Southchurch Road also offers a range of restaurants and bars including Pizza Hut, Frankie and Bennys and Slug and Lettuce. Other operators in the town include McDonalds, Starbucks and KFC. Independent bars and cafes are mostly clustered in the Clarence Street/Alexandra Road area. The centre has a more limited range of high end restaurants.

### Retailer Requirements for Southend town centre

- 2.19 The level of retailer demand to locate in Southend town centre provides another good indication of the centre's health. According to Focus, 21 retail and service businesses have expressed a demand for floorspace within Southend town centre (appendix B). Demand is

## 2.0 Southend Borough Health Checks

strongest from the comparison sector and includes retailers such as Tog 24 and The Fragrance Shop. There is also demand from off licences including Oddbins and Majestic Wine and from service sector retailers such as Subway, Marstons and Lava Ignite.

**Table 2.3**  
Retailer Requirements for Southend town centre

CATEGORY	REQUIREMENTS	MINIMUM FLOORSPACE SQ FT (SQM)	GROSS FLOORSPACE SQ FT (SQM)	MAXIMUM FLOORSPACE SQ FT (SQM)	GROSS FLOORSPACE SQ FT (SQM)
Comparison	13	66,640		99,600	
Convenience	2	3000		5,700	
Services	6	47,380		66,600	
<b>Total</b>	<b>21</b>	<b>117,020</b>		<b>171,800</b>	

Source: Focus 2009

- 2.20 It should be noted that generally main supermarket operators and small independent store operators do not post their requirements on national databases such as Pipnet and Focus. In part, this may explain why there are few requirements identified from the convenience sector.
- 2.21 According to Focus, Southend town centre had a retail demand ranking of 192 out of 711 (1st highest) in April 2009. Retail demand has fallen since a peak of around 65 requirements at the beginning of 2000 when Southend town centre’s retail rank was 102. The recent recession may well have impacted on retailer demand, but even so the town has fallen considerably in the retail demand rankings especially over the past 3 years. This suggests that there is more limited registered demand for retail units within Southend town centre. The competing centres of Chelmsford (77) and Basildon (178) have higher retail rankings and are therefore attracting greater demand from retailers.

### Shopping Rents

- 2.22 The level of rent that retailers are prepared to pay for space in a centre is an indication of the perceived attractiveness of that centre. Rental values can also provide a measure of the primacy of streets and locations within a centre. Table 2.3 shows the prime Zone A rental values achieved in Southend town centre and compares these to other nearby competing centres.

**Table 2.4**  
Prime Rental Values

CENTRE	ZONE A RENT	Q4 2005	Q3 2006	Q3 2007	Q3 2008	Q3 2009
Southend	Prime Zone A Rents £ per sq ft	110	120	120	120	115
Basildon	Prime Zone A Rents £ per sq ft	130	137.50	137.50	135	130
Lakeside Shopping Centre	Prime Zone A Rents £ per sq ft	360	360	360	360	360
Chelmsford	Prime Zone A	170	170	170	170	180

## 2.0 Southend Borough Health Checks

Rents  
£ per sq ft

Source: CB Richard Ellis Research Database 2010

2.23 Between 2005-2008 Southend town centre’s prime retail rent increased to £120 per sq ft (£1,292 per sqm) Zone A, although has fallen back marginally since then. Other competing centres in the area have experienced little rental growth too, save for Chelmsford which has experienced an increase in rental growth in the last year of around £10 per sq ft (£108 per sqm) Zone A. In the case of Basildon, 2006 and 2007 saw an increase in rental growth but like Southend this has since declined. Rental levels at Lakeside have remained steady and achieve very high rents in comparison to all the other centres considered. Overall, Southend town centre achieves the lowest rental level of the centres listed, potentially indicating it is a less attractive centre than its main competitors.

### Prime Rental Yields

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

**Table 2.5**  
Prime Retail Yields for Southend and competing centres

		Q4 2005	Q3 2006	Q3 2007	Q3 2008	Q3 2009
Southend	Prime Retail Yields (%)	5.0	5	5.5	6.75	7.5
Basildon	Prime Retail Yields (%)	5.25	5	5.5	7.15	7.75
Lakeside Shopping Centre	Prime Retail Yields (%)	4.15	4.15	4.5	5.75	6.25
Chelmsford	Prime Retail Yields (%)	4.5	4.5	4.85	6	6

Source: CB Richard Ellis, Research Database 2010

2.25 Since the end of 2005 prime retail yields in Southend town centre have decreased significantly, showing decreased investor confidence. This trend has however been mirrored across UK towns and the retail sector more generally. In December 2005, Southend town centre achieved a yield of 5% which increased to 7.5% by October 2009 – a differential of 2.5%. The other competing centres have also experienced increases in yields. Southend town centre, alongside Basildon centre, has however experienced the greatest shift in yields suggesting investor confidence in the centre is weakening in comparison to other nearby competing centres.

## 2.0 Southend Borough Health Checks

### Vacant Retail Property

- 2.26 The proportion of vacant street level property provides a strong indication of the health of the town centres. It should, however, be considered with a degree of caution as vacancies can arise even in the strongest town centre, particularly where properties are undergoing alterations or extensions. In addition, it is also important to consider this alongside the qualitative provision of a town as units may be let for a low rent, for example to charity shops.
- 2.27 From our centre survey conducted in November 2009, we have identified 87 vacancies across the town centre which comprises 20.37% of the town’s units. This is considerably higher than the national average of 12.03%. Previously, the GOAD report identified 79 vacant units (April 2009) or 18.5% of units present. Therefore, there has been an increase in vacant units in the last quarter of the year. This vacancy level is high.
- 2.28 At the time of the survey, there were notable clusters of vacancies on the upper level walkway (leading to Southend Victoria train station) of The Victoria and at the shopping centre’s entrance off Southchurch Road, along Chichester Road and the eastern end of Southchurch Road. Vacancies are generally more prominent on the side streets/secondary frontages. There are very few vacancies on the prime High Street area, the most notable being the former Woolworths unit. Typically, vacant units are small and poorly located and may well not meet modern occupier requirements. Even so, over 16% of retail floorspace was vacant as at April 2009.
- 2.29 The last Retail Study (2003) reported a considerably lower vacancy rate of 48 units, Overall, the increase in vacant property is a concern, especially in more secondary locations where the trading environment may be less appealing and therefore more challenging.

### POTENTIAL TO GROW

- 2.30 Southend town centre offers some scope to grow. Subject to detailed feasibility work, the following sites, among others, could offer potential for development in order to increase the town’s retail offer:
  - Tylers Car Park, Chichester Road
  - Alexandra Road/Clarence Street Car Parks
  - The former B&Q, Victoria Station
- 2.31 These opportunities are discussed in more detail in Section 5.

### Pedestrian Flows

- 2.32 Pedestrian flows are a useful indicator of the relative strengths of different parts of the town centre. Essentially, the pedestrian flows throughout the town centre would be expected to mirror the retail primacy of the streets.
- 2.33 From our observations, the footfall levels were good and broadly consistent along the pedestrianised High Street. Particularly notable for its good level of pedestrian flows was the area of the High Street between Clifftown Road and Alexandra Road, in particular where Marks and Spencer and BHS are located. There was also a reasonable level of pedestrian flow between The Victorias and Sainsbury’s along London Road. The Royals and The Victoria were also busy, although the upper level walkways of The Victoria experienced sporadic pedestrian flows. Most other secondary retail areas have weaker footfall levels. This pattern is arguably consistent with the higher level of vacancies.

## 2.0 Southend Borough Health Checks

### Accessibility

- 2.34 Southend is served by reasonable road communications via the A13 and A127. These roads can however be very congested, especially in peak hours. Southend town centre is highly accessible by public transport and benefits from two train lines which link to London (Fenchurch Street and Liverpool Street). Victoria Station is located to the north of the High Street. Train services from Victoria connect to Liverpool Street via Romford. Southend Central Station is located towards the middle of the centre immediately to the west of the High Street. Both stations provide local connections including to Westcliff, Leigh, Thorpe Bay, Prittlewell and Shoeburyness.
- 2.35 The main bus interchange is located on Chichester Road and adjacent to The Royals shopping centre and within easy walking distance of the High Street. The fairly new interchange offers a modern passenger environment with a covered waiting area and cafe. Buses run north to south along the Chichester Road which is parallel to the High Street.
- 2.36 Southend town centre itself is fairly accessible by car. However, the High Street is pedestrianised which restricts car access and movement around the centre. There is a wide range of mostly good quality parking with a mixture of at grade and multi-storey car parks. These provide a considerable number of shopper spaces (c. 4,648), as follows:
- Victoria Plaza (600 spaces)
  - Essex Street (210 spaces)
  - Warrior Square (388 spaces)
  - Elmer Avenue (690 spaces)
  - South East Essex College (200 spaces)
  - Sainsbury's London Road (450 spaces)
  - Southend Central Station (150 spaces)
  - Southend Victoria Station (former B&Q) (100 spaces)
  - Chichester Road next to Bus Station (260 spaces)
  - Clarence Road (130)
  - Alexandra Street (69 spaces)
  - The Victorias (651 spaces)
  - The Royals (450 spaces)
  - New public car park under college residential (300 spaces)
- 2.37 Most of the car parks are well maintained with good lighting and security surveillance. At the time of the survey, most were approaching capacity. One exception to this is Seaways car park, although it is somewhat peripheral to the centre. We understand however that it is busy during peak holiday periods due to its location close to the seafront. The car parks are also well distributed around the centre, with most offering easy access to the High Street

### Customer Views and behaviour

- 2.38 The assessment of stakeholder and public opinion is informed by our household telephone survey (December 2009) and the Southend-on-Sea Place Survey 2008 and the Town Centre Area Action Plan Issues and Options Paper, Southend Central Area Masterplan consultation

## 2.0 Southend Borough Health Checks

draft document (September 2007) which has been informed by work undertaken by consultants on behalf of RSL.

- 2.39 According to the household survey, shoppers like Southend town centre because of its proximity to home, range of non-food shops and attractive environment. However, shoppers' main dislikes are the limited range of shops, parking and the perception that too many shops are closing down. Stakeholders (for the Southend Central Area Masterplan consultation draft) also commented that there was a strong sense of pride in Southend's heritage, particularly the Victorian aspects.
- 2.40 Stakeholders have commented that they would like to see, as a priority, improvements to the High Street including the introduction of greenery, greater cleanliness and more street activity. There was also support for a greater range of shops including big stores, as well as independent retailers, market stalls and local businesses. At the time, respondents supported the enhancement of The Victorias shopping centre and suggested new features such as fountains, cafes and activity space. The majority of these suggestions have been incorporated and the enhancement works have now been completed.
- 2.41 Stakeholders also commented that all parts of the Chichester Road area should be improved as a retail location and more late night shopping should be provided within the town centre. In addition, some suggested the re-introduction of traffic or public transport to some parts of the High Street. The acknowledgement of the Chichester Road problem area correlates with the high vacancies here.
- 2.42 In terms of leisure provision, there is support for the provision of a wider range of sports and active leisure uses. There was also a large consensus in favour of a better food and drink offer and improving the evening economy with a greater diversity and quality of venues. These comments accord with our findings. Since the survey was undertaken, the range of food and drink establishments has declined and the New Empire Theatre has closed down.

### Perception of Safety and Crime

- 2.43 The following comments are based on our observations at the time of the survey. The majority of the main shopping streets in the town centre are covered by CCTV and are well lit. Although there was no visible police presence at the time, a temporary police community support trailer was situated in Victoria Circus.
- 2.44 There are a few narrow streets which could make people more vulnerable to crime, especially during dark evenings. The limited amount of residential accommodation and car access reduces the level of natural surveillance along the High Street, although it is a wide thoroughfare which compensates for this. The cinema/leisure cluster at the north of the centre provides active areas at night.
- 2.45 The Bostock Marketing Group (bmg) research Place Survey was undertaken in 2008 and has assessed perceptions of safety in the local area. During the day, nearly 9 out of 10 respondents felt safe, which corresponds with our findings. However, at night, only 36% feel safe or very safe after dark. Generally, the three biggest problem areas across the town are:
- Vandalism and graffiti (42%)
  - Rubbish and litter (41%)
  - Teenagers hanging around the streets (39%)

## 2.0 Southend Borough Health Checks

2.46 It is notable that ‘people being drunk and rowdy’ and ‘using or dealing drugs’ are bigger issues in the town centre; particularly in the southern part of the town where over 50% of the respondents thought drugs and alcohol were the biggest issues. Overall, Anti Social Behaviour issues were of more concern in the south rather than northern part of the town.

### Environmental Quality

2.47 Environmental quality of a shopping centre is becoming an increasingly important factor in the attractiveness of a centre. A high quality environment can set centres apart from their competition. To assess the state of the environment in Southend town centre a survey was undertaken of the main shopping streets/areas and an assessment made of the overall quality. Ten environmental features were assessed within these areas, and the features rated on a scale of 1 to 5, where 1 is very poor and 5 is very good. On this basis, 3 represents a ‘neutral’ or ‘fair score’.

- The table below sets out the results for the town centre as a whole, based on the scoring criteria:

**Table 2.6**  
Environmental Audit

SUMMARY	AVERAGE SCORE
Condition of carriageway [loose, broken, missing, uneven, temporary, obstructions]	3.0
Seats/planters/hanging baskets/litter bins [paintwork, broken, uneven, parts missing, not working, badly sited, not present]	3.0
Public facilities, telephones, bus stops/shelters [Condition]	3.5
Graffiti, fly-posting, vandalism	3
Market stalls and street traders [tidiness, waste disposal, appropriateness to street]	N/A
Barriers to movement [servicing, general traffic, lack of safe crossing facilities etc.]	4.0
Cycle parking [formal or informal, availability, capacity]	1.0
Maintenance and repair of buildings, shopfronts and canopies	2.5
Personal security and police presence	3.5
Wheelchairs access and facilities for the blind or partially sited	3.5
<b>OVERALL SCORE</b>	<b>3.0</b>

Source: CB Richard Ellis On Street Environmental Audit, November 2009

2.48 As a whole, our environmental rating for Southend town centre is considered ‘fair’. In most cases, the individual criteria were scored as ‘fair’ or above with notable exceptions such as the maintenance and repair of buildings, shopfronts and canopies and cycle parking which



## 2.0 Southend Borough Health Checks

scored less well. Barriers to movement scored highly which shows that work has been undertaken to improve the environment since the Place Survey was undertaken.

- 2.49 In general, dedicated cycle parking in the town centre is limited. There are some cycle ways within the environs of the town centre there appears not to be an integrated network.
- 2.50 Whilst the maintenance and repair of the two shopping centres (The Victorias and The Royals) is of a good standard, some of the building stock on the High Street is jaded. This is also the case for some of the buildings along the secondary shopping streets such as Southchurch Road. The state of the former York Road Market also detracts from the centre.
- 2.51 With the exception of the notable graffiti on the boarded up shopfronts within York Road Market, there was little by way of visible graffiti in the main shopping areas. Likewise, there was little evidence of vandalism or fly posting even where units had remained vacant for some time. The streets are generally wide and the pedestrianised shopping area makes it easy to walk between shops with few barriers to movement. Furthermore, the refurbishment of The Victorias has greatly improved the quality of the link between the High Street and Victoria Station.
- 2.52 A more detailed review on an area-by-area basis highlights where, in our opinion, some streets are of a higher environmental quality than others. This is based on three broad survey zones, as shown in the table below.

**Table 2.7**

**Area Rating**

AREA	AVERAGE RATING
High Street/Shopping Centres	3.5
East of High Street	2.5
West of High Street	3.0

Source: CB Richard Ellis On Street Environmental Audit (November 2009)

- 2.53 The areas attracting the highest score are the High Street and Shopping Centres. More secondary areas receive a lower rating, to the east and west of the High Street.

### High Street /Shopping Centres

- 2.54 These areas are regarded in the Local Plan as the primary shopping area. The recent redevelopment and modernisation of The Victorias shopping centre has uplifted what was previously a poor environment with high numbers of vacancies.
- 2.55 The pedestrian area appears well managed and maintained. There have been recent upgrade works to the lighting which adds to the quality of the built environment. The streetscape could perhaps be made more attractive with the provision of additional (and interesting) street furniture. The linear form of the High Street means that there is not a strong single focal point though Victoria Circus which creates a reasonable sense of place.
- 2.56 The highest quality public realm feature is Pier Hill at the southern end of the High Street. This area provides a very high standard paving, new crossing points and an attractive hard/soft landscaped area which provides panoramic views onto the seafront and pier. This is an undoubted benefit to the centre.

## 2.0 Southend Borough Health Checks

### East of the High Street

- 2.57 This area is highlighted because it scores poorly in terms of overall environmental quality. The building stock in this area often dates back to the sixties. The shop frontages are unappealing and sometimes brash and the standard of street maintenance and repair is much lower than the High Street. There is little in the way of street furniture. The entrance to the lower ground floor of The Victorias along Southchurch Road is narrow and does not encourage visitors to the centre. Nor does the vacant York Road market assist the ambience of the area. The quality of environment on Southchurch Road may in part explain the high levels of vacancies here. The area would benefit from environmental/streetscape improvements, as well as shop front improvements.

### West of the High Street

- 2.58 The secondary retail areas generally have a fairly good environment. Most of the streets are reasonably wide with some good quality paving and lighting. There is a lack of street furniture on most of the streets but they are generally clean and free of litter. As with the rest of the area there are very few areas for cycle parking. The building stock is mixed with many Victorian style residential buildings which have been converted at ground floor level to shops, offices and service uses.
- 2.59 London Road offers a reasonably good environment as well as Alexandra and Clarence Street. The secondary areas attract a good range of independent retailers and evening economy uses which helps the ambience of this area. Even so, the urban fabric could be improved in some places with the addition of some modest environmental/streetscape improvements and the upgrading of certain buildings.

### Quality of the Retail Offer

- 2.60 The quality of the retail offer in Southend town centre is geared towards the mass/middle market. Without doubt, the centre has far less representation of high end fashion retailers, either multiples or independents. This has the effect of reducing the breadth of offer, and therefore the attractiveness of the centre to appeal to a wider market.
- 2.61 Similar comments can also be made with regard to the representation of restaurants and cafes. While there are a few more higher end eateries around Alexandra Road and Clarence Street, in general the offer is mostly targeting the middle (or indeed lower end) of the market.
- 2.62 Food provision generally in the centre is fairly limited, with the main offer being Sainsbury's, M&S and Tesco Express. While there are a few bakeries and grocers there is, for example, no delicatessens or other more diverse food outlets. Together, the quality of Southend town centre's retail offer means that it is only likely to serve a certain segment of the catchment population.

## 2.0 Southend Borough Health Checks

### Conclusions and Recommendations

2.63 Overall, we conclude that Southend town centre is a vital and viable centre, although there is considerable scope for improvement, as evidenced by its strengths and weaknesses. There are also signs of a weakening trading environment; lower demand and higher vacancies in particular.

### Strengths and Weaknesses

- The large scale of the centre means it has the potential to be attractive to a wide customer base. However, the range is strongly focused on middle market offer. Attracting higher end retailers, especially fashion and good quality eateries, would serve to improve the centre.
- The elongated length of the High Street results in a dilution of shoppers. The centre also lacks any natural retail circuit. Creating a better circuit(s) would be expected to strengthen the centre, although this could be a challenging ambition.
- Attracting another high end department store would also be expected to improve the attraction of the centre, although undoubtedly this would be a very challenging aspiration.
- There is a high degree of vacancies in the centre and evidence that this is increasing, especially along more secondary streets. Many vacant units are small and may not meet modern retailer requirements. Larger units would also be expected to be more attractive to mainstream retailers.
- The range of foodstores and convenience offer is fairly low. This could be improved. There is, for example, no regular food market in the centre and this might contribute to diversity and activity in the centre were this a feasible proposition. Increasing foodstore provision too could serve to diversify the centre.
- The range of commercial leisure on offer in the centre is moderate, enhancing this may serve to diversify the offer and the trading potential of the centre in evening hours. This aim too could be served by better connections from the town centre to the seafront and the substantial leisure offer there.
- The centre offers very good accessibility and this should ideally be retained as best as possible. It might also be enhanced, say by improving cycling facilities.
- The range and quality of independent traders is perhaps less attractive than expected and ways to support this sector should be investigated.
- Allied to the above, the quality of the public realm and shop fronts in secondary retailing areas (those favoured by independent traders), is often poor and uninviting. This reduces the uniqueness of the centre, especially as mainstream retailers dominate the heart of the centre. Tackling poor quality property, such as York Road market, would improve the quality of the centre further.

## 2.0 Southend Borough Health Checks

### DISTRICT AND LOCAL CENTRE HEALTH CHECKS

#### WESTCLIFF-ON-SEA

2.64 Westcliff-on-Sea (hereinafter referred to as Westcliff) lies within the urban area of Southend and approximately 3km west of Southend town centre. The centre is based around Hamlet Court Road and London Road. The Core Strategy defines Westcliff as a District Centre, whilst the Saved Local Plan defines the primary shopping area as the extent of Hamlet Court Road running northwards from Canewdon Road up to the junction of London Road and a small portion of London Road from Ceylon Road to Richmond Avenue. It should be noted, however, that the retail area stretches considerably beyond the defined local plan boundary, both east and west along London Road. Our analysis covers the wider retail area of the centre. Overall, the centre forms a broad 'T' shape.

#### Diversity of Main District Centre Uses and Retailer Representation

2.65 The most recent Experian Goad data for Westcliff (March 2007) shows a total of 343 retail units in the centre, which provide just over 53,930 sq m gross (580,500 sq ft) of floorspace; representing a large district centre. Experian Goad estimate that approximately 5,379 sqm gross (57,900 sq ft) of the total is made up of convenience floorspace, 25,539 sq m gross (274,900 sq ft) of comparison and the remainder (17,215 sq m) services uses or vacant units (5,063sq m). The scale of the centre indicates that it is meeting more local short to mid term shopping needs.

**Table 2.8**  
**Uses in Westcliff Town Centre**

RETAIL CATEGORY	NO. OF UNITS	% OF TOTAL	NATIONAL AVERAGE %	VARIANCE %
Convenience	29	8.45	9.51	-1.06
Comparison	125	36.44	43.26	-6.82
Service	137	39.94	33.96	+5.98
Vacant	47	13.70	12.03	+1.67
TOTAL	343			

Source: GOAD Experian Report March 2007

2.66 According to GOAD there is a slightly below average representation of convenience outlets (29 units). Of the key national multiples a small Tesco Express is present on Hamlet Court Road. A larger Co-Op on Hamlet Court Road also provides top up shopping. Despite a below average provision of convenience goods units (29), most of the convenience categories are represented through independent outlets including several off licences, general convenience stores, newsagents, greengrocers, fishmongers, butchers and bakers. None of the convenience outlets would, however, be considered main food shopping destinations. Increasing the amount of convenience goods available may strengthen the centre, in particular on London Road where the food offer is much weaker.

2.67 There is a below average representation of comparison retailers (-6.82%). The only representation from national multiples is a small Boots the Chemist (Goad classification). The majority of other operators are independent with a varied offer. Generally the offer is mid market, although there are some high end quality outlets on the Hamlet Court Road including Crème Bespoke Ladies and Menswear. Clothing and fashion retailers are, however, limited overall. This is not unexpected given the district centre role that Westcliff is performing in meeting short to mid term shopping needs.

## 2.0 Southend Borough Health Checks

- 2.68 The centre has a strong service sector representation. This includes several national multiples including Pizza Hut, Wimpy and Subway. There is also a range of independent public houses and restaurants, including several Indian and Chinese restaurants. The town is also well represented by high street banks (Barclays, HSBC, Nat West, Halifax and Nationwide), betting offices (William Hill, Ladbrokes and Corals), estate agents, dry cleaners, hairdressers, opticians and beauty salons. While a good representation of service sector uses would be expected in a district centre, balancing the mix of other retail uses would serve to strengthen the centre.
- 2.69 Other uses are less prevalent in the centre. Some small offices are scattered throughout the centre. The key leisure offer in Westcliff is the Palace Theatre.

### Retailer Requirements for Westcliff

- 2.70 There are no recorded retailer requirements on national databases. According to local estate agents there has been low demand for some time and no known demand from national multiples. Local agents cite the small size and poor configuration of the units (particularly along London Road) as reasons for the weak demand. On that basis what demand exists is likely to be from independent operators, unless perhaps larger units become available.

### Shopping Rents

- 2.71 In 2005, average Zone A rents for Hamlet Court Road were approximately £15 psf (c. £155 sqm) Zone A (Valuation Office Valuation) and increased to £17.50 psf (c. £195 sqm) Zone A by 2009. By comparison, average rents on London Road have remained static at £11 psf (c. £120 sqm) Zone A suggesting that there have been little or no improvement to this area. The difference in rents reflects the primacy of the retailing areas in the centre, with the prime pitch located in the northern part of Hamlet Court Road. Other retailing areas are more secondary. It is also notable that increased rents appear to correlate with where significant public realm improvements have occurred in Hamlet Court Road.

### Yields

- 2.72 According to the Valuation Office, in 2005 average retail yields for the town were approximately 8% strengthening to 6.75% by the end of 2008. Since then there has been a marked weakening in the retail sector, and we would expect prime yields in the centre to be 8% or higher now.

### Potential to Grow

- 2.73 There are very few opportunities to extend Westcliff's retail offer, with one or two expectations:
- Car park at junction of London Road and Hamlet Court Road
  - Land bounded by London Road, North Road and Brighten Avenue.
- 2.74 These development opportunities are discussed in more detail in section 5. Other opportunities are likely to be small scale, say through extensions to, or amalgamation of existing units.

## 2.0 Southend Borough Health Checks

### Vacant Retail Property

- 2.75 From our centre survey, we have identified 63 vacancies in the wider Westcliff centre which comprises 18.3% of units. This is significantly higher than the national average (12.03%). With GOAD reporting 47 vacant units in March 2007, there has therefore been a sharp increase in vacancies.
- 2.76 At the time of the survey, there were notable clusters of vacancies on the north western side of Canewdon Road (although this appears to be subject to redevelopment proposals) and the retail frontage to the east side of Hamlet Court Road, south of Canewdon Road. While physically separated from the core of the centre, the units along Station Road are almost entirely vacant with the exception of two off licences. Since the GOAD survey, several of the units in this area have been converted to residential uses. This part of the town suffers from a particularly low footfall.
- 2.77 The remaining vacant units within Westcliff are scattered throughout the centre, though the former Budgens unit is a notable vacancy, especially as it is one of the largest units in the centre.
- 2.78 As a rule, most of the vacant units are either small or in poorly maintained properties. The GOAD survey for example shows that the amount of vacant floorspace (at c. 9% of stock) is below the UK average of over 10%. Thus, vacant units are typically quite small. Both characteristics are unlikely to appeal to potential retailers; a sentiment shared by local property agents.

### Accessibility

- 2.79 Westcliff is fairly accessible by public transport, car and foot. Westcliff rail station is located at the southern end of the Hamlet Court Road and within 300 metres of the retail area (albeit a steep climb to the core of the centre). There are several bus stops located along Hamlet Court Road and London Road.
- 2.80 There are two off-street surface car parks located to the north of the centre; to the rear of Boots the Chemist and at the junction of Hamlet Court Road and London Road. There is also parking located to the east of the centre between Brighton Avenue and North Road. Some limited on-street parking facilities are also present, especially at the southern end of Hamlet Court Road.

### Pedestrian Flows

- 2.81 From our observations, the highest pedestrian flows were on the northern part of the Hamlet Court Road and near to the former Budgens Supermarket. The southern part of the Hamlet Court Road and Station Road experience particularly low pedestrian flows. This is consistent with the higher level of vacancies in this part of the town. Pedestrian flows along London Road are moderate. Again, these footfalls levels mirror the primacy of the retail areas.

### Environmental Quality

- 2.82 To assess the state of the environment in Westcliff, a town centre survey was undertaken of the main shopping streets/areas and an assessment made of the overall quality. Ten environmental features were assessed within these areas, and the features rated on a scale of 1 to 5, where 1 is very poor and 5 is very good. On this basis, 3 represents a 'neutral' or 'fair score'.

## 2.0 Southend Borough Health Checks

**Table 2.9**

**Environmental Audit**

SUMMARY	AVERAGE SCORE
Condition of carriageway [loose, broken, missing, uneven, temporary, obstructions]	3.0
Seats/planters/hanging baskets/litter bins [paintwork, broken, uneven, parts missing, not working, badly sited, not present]	3.0
Public facilities, telephones, bus stops/shelters [Condition]	3.5
Graffiti, fly-posting, vandalism	3.0
Market stalls and street traders	N/A
Barriers to movement [servicing, general traffic, lack of safe crossing facilities etc.]	3.0
Cycle parking [formal or informal, availability, capacity]	3.5
Maintenance and repair of buildings, shopfronts and canopies	2.5
Personal security and police presence	3.5
Wheelchairs access and facilities for the blind or partially sighted	3.5
<b>OVERALL SCORE</b>	<b>3.2</b>

Source: CB Richard Ellis On Street Environmental Audit, November 2009

- 2.83 As a whole, our environmental rating for Westcliff town centre is considered ‘good’. In most cases, the individual criteria were scored as ‘good’ or above with no notable overall exceptions.
- 2.84 While not specifically assessed, there are a number of good focal points along Hamlet Court Road (for example, the Boulevard at the southern end of the street). On London Road however, public realm areas are generally much less attractive. Given the length of the retail parade here, punctuating its length with better quality focal points would serve to create a better sense of place. An obvious candidate is the area around the Palace Theatre.
- 2.85 The overall scoring however belies a very varied environmental quality between areas of the centre. We provide more detailed commentary below for the two key areas; Hamlet Court Road and London Road.

**Hamlet Court Road**

- 2.86 The maintenance and repair of the building stock in this area is good. Generally the quality of the shop fronts is also high. The notable exceptions are the vacant units along the north side of Canewdon Road which are dilapidated, although are likely to be redeveloped. There was also little notable graffiti.
- 2.87 In terms of barriers to movement, this area was perceived to be good. Although Hamlet Court Road is not pedestrianised, the pavements are mostly generous, particularly in the main shopping areas. The centre has benefited considerably from a programme of public realm improvements, with high quality paving and several attractive landscaping features including palm trees. The bus stops are well maintained and have been upgraded to include real time travel information displays. Overall, the Hamlet Court Road area is of good to very good environmental quality, especially toward the southern end of the street.

## 2.0 Southend Borough Health Checks

### London Road

- 2.88 In contrast to the Hamlet Court Road, the maintenance and repair of the building stock on London Road is typically of a lower standard. This is particularly the case running eastward from the junction of Hamlet Court Road. Although the general quality of paving is reasonably good, in some places pavement widths are narrow and the presence of high traffic volume prevents pedestrians from moving freely across the road. At the junction of London Road and Hamlet Court Road the area has been upgraded with new paving, landscaping and new bus stops. The public conveniences are also notable for their attractive design.
- 2.89 The Palace Theatre area is environmentally poor and does not provide an attractive environment for visitors, especially given that it is a key leisure destination. This area could benefit from public realm and shop front improvements.

### Safety and Crime/Customer and Resident Views

- 2.90 From the centre survey, our perception is that the main shopping area along Hamlet Court Road has a good sense of safety and benefits from wide streets and few narrow alleyways. There is also CCTV surveillance throughout this area.
- 2.91 The bmg research Place Survey found the majority of respondents felt safe during the day in the Westcliff area (Chalkwell Zone). The percentage of respondents feeling safe at night however fell to around 50%. This is one of the lower scores in the Southend area and indicates that there is a reasonable concern for safety around the town during the evening.

### Quality of the Retail offer

- 2.92 In the main, the quality of the retail offer is consistent with a typical district centre. Generally, the offer on Hamlet Court Road is targeted at the middle market in Westcliff. There is little by way of high quality eateries or comparison retailers, save for one or two outlets. The London Road area is more geared towards specialist and discount offers.

### Conclusions

- 2.93 The core of Westcliff district centre is reasonably attractive and a healthy centre. The more peripheral trading areas are however much more varied in their quality. The key strengths and weaknesses of the centre are:
  - Although the range of foodstores/foodstuff on offer is reasonable, a stronger representation would be expected to strengthen the centre, especially on London Road.
  - While there is an adequate representation of comparison retailers, the quality of the offer is only moderate.
  - There is a strong service sector. Although not unexpected, balancing this mix more towards other retail uses would be welcome.
  - The centre has few large, modern retail units which would be expected to be more attractive to multiple retailers. Securing such retailers may serve to strengthen the centre.
  - The quality of the centre’s environment is variable. The southern part of Hamlet Court Road has benefited significantly from public realm improvements. A similar course of action would be welcome along London Road. This approach should also seek to create better public realm focal points and spaces, such as around the Palace Theatre.



## 2.0 Southend Borough Health Checks

Enhancing pedestrian crossing in the London Road area would improve shopper mobility too.

### LEIGH-ON-SEA

2.94 Leigh is within the urban area of Southend and approximately 5km west of the town centre. The centre is situated to the south of the A13 and to the west of Westcliff. Leigh is an attractive historic centre based around a traditional high street. The main shopping provision is provided around The Broadway/Rectory Grove triangle and along The Broadway. This forms the designated district centre boundary, as described in the Local Plan. The retail offer also extends considerably eastward along Leigh Road and our analysis encompasses this area too, combining the Broadway and Leigh Road parades. Overall, the centre is therefore fairly elongated.

### Diversity of Main District Centre Uses and Retailer Representation

2.95 The most recent Experian Goad data for Leigh (March 2007) shows a total of 298 retail service units in the centre, which provide just over 35,120 sq m gross (378,200 sq ft) of floorspace. At this scale, it is a fairly large district centre. Experian Goad estimate that approximately 3,382 sq m gross (36,404 sq ft) of the total is made up of convenience floorspace, 18,748 sq m gross (201,802 sq ft) of comparison, and the remainder (10,461 sq m gross/112,601 sq ft) service uses or vacant units (2,118 sq m gross/22,800 sq ft).

**Table 2.10**  
Uses in Leigh

RETAIL CATEGORY	NO. OF UNITS	% OF TOTAL	NATIONAL AVERAGE %	VARIANCE %
Convenience	25	8.39	9.51	-1.12
Comparison	153	51.34	43.26	+8.08
Service	94	31.54	33.96	-2.42
Vacant	24	8.05	12.03	-3.98
TOTAL	298			

Source: GOAD Experian Report March 2007 CB Richard Ellis Town Centre Survey November 2009

2.96 According to GOAD there is a slightly below average representation of convenience outlets (25 units). Of the key national food multiples (defined by GOAD), the only supermarket is the new small Tesco Express (former Woolworths) on The Broadway. The Co-Op and Cost Cutter (also on the Broadway) provides a further top up shopping function. There are also many independent convenience outlets such as greengrocers, butchers and delicatessens offering a wide range of food items.

2.97 Although not within the local defined district centre, there are also three small convenience stores - Nisa, Londis and Co-Op - within the Leigh Road shopping area (which links to The Broadway). A Waitrose is also on London Road, but a considerable distance from the retail area of Leigh.

2.98 There is an above average representation of comparison retailers (+8.08%) although there is no representation by any major high street retailers. The high proportion of comparison retailers indicates a healthy and popular destination, particularly given that it is a district centre. These independent outlets include high end and boutique fashion retailers, and most clothing goods categories are represented. There are also a good number of art

## 2.0 Southend Borough Health Checks

galleries, craft and gift shops – all which add to the centre’s diversity. The quality and range of the independent retail offer is strong, and this is a key attribute.

- 2.99 Leigh has a good range of quality restaurants and bars which are almost exclusively run by independent operators such as the Stop the World Café, Ugo’s and Terracotta tea rooms. Wimpy (The Broadway) is the only national fast food operator. There are also several public houses scattered throughout the centre. In addition, Leigh provides a range of independent services including hairdressers/beauty salons and dry cleaners. The town is well represented by high street banks (HSBC, Lloyds TSB, Nat West, Abbey, Halifax and Nationwide), travel agents (First Choice and Thomson), and local and independent estate agents and opticians. The lower than average service provision also provides evidence of a strong centre. Overall, Leigh has a broad and diverse mix of uses, and especially so given the district centre status.

### Retailer Requirements for Leigh

- 2.100 According to local estate agents, demand is strongest from the service sector and this includes operators such as Costa Coffee and Café Nero seeking space. There is also reasonable demand from independent retailers.

### Shopping Rents

- 2.101 Since the end of 2005 retail rents in Leigh have increased by approximately £4.50 psf (c. £50 sqm) Zone A suggesting good demand for units. In 2005, average Zone A rents were approximately £23 psf (c.£250 sqm) Zone A (Valuation Office Valuation 2005 and 2009) and increased to £27.80 psf (c. £300 sqm) Zone A by 2009. The rents are however typical for a district centre although are considerably higher than for neighbouring Westcliff, suggesting it is a more attractive place to shop. The highest rents are likely to be achievable in properties in proximity to the Tesco Express store – the prime pitch of Leigh.

### Yields

- 2.102 According to local estate agents, in the last year prime retail yields in Leigh were approximately 8.5% - 9.5%. These have weakened in line with decreased investor confidence within the town and the UK retail sector more generally. Local agents view it however that the rise in yields is not as significant as in the other centres, suggesting a relatively stronger centre.

### Potential to Grow

- 2.103 Leigh’s historical and constrained built urban fabric means that there is very limited potential for the centre to grow. There are no obvious significant development opportunities, save for the reuse of vacant properties. The only possible redevelopment opportunity is at 130-136 Leigh Road and is discussed in Section 5 below.

### Vacant Retail Property

- 2.104 From our centre survey we have identified 24 vacancies across the centre comprising 8.1% of Leigh’s retail stock; lower than the national average of 12.03%. The GOAD report conducted in April 2007 identified 19 vacant units, indicating that there has been a small increase in the last 3 years. Overall, the low proportion of vacant floorspace is an indication that the centre is performing well.

## 2.0 Southend Borough Health Checks

---

2.105 At the time of the survey, the only notable area for vacancies was within the Clement's Arcade (This is as a result of the extension works which will result in 50% more floorspace). The combination of a narrow entrance, low footfall and small unit sizes are contributing factors to the high number of vacancies here. There are no other clusters of vacancies.

### Accessibility

- 2.106 In terms of accessibility Leigh is reasonably accessible by public transport, car and foot. Leigh train station is over 1km from the High Street. Chalkwell station is slightly nearer, although it is still around 1km away. The town centre is also connected via the bus network which links to Southend and neighbouring centres including Westcliff. Bus stops are located along The Broadway, at Rectory Grove and at Leigh Road.
- 2.107 There is very limited off-street parking, with only two car parks to the north of the centre on Elm Road and North Street. On-street car parking is available on The Broadway and Broadway West and is well used. There are significant volumes of traffic along Elm Road and The Broadway.
- 2.108 In some places, pedestrian flows are restricted due to the narrow width of pavements. This is most notable at the junction of Elm Road and The Broadway. We note that there have been some recent improvements to pedestrian accessibility along Leigh Road through the introduction of new road crossings. This assists shoppers' movement here. Improving pedestrian crossings around the Leigh Triangle would potentially benefit shopper movement in the centre further.

### Environmental Quality

- 2.109 To assess the state of the environment in Leigh, a town centre survey was undertaken of the main shopping streets/areas and an assessment made of the overall quality. Ten environmental features were assessed within these areas, and the features rated on a scale of 1 to 5, where 1 is very poor and 5 is very good. On this basis, 3 represents a 'neutral' or 'fair score'.

## 2.0 Southend Borough Health Checks

**Table 2.11**  
**Environmental Audit**

SUMMARY	AVERAGE SCORE
Condition of carriageway [loose, broken, missing, uneven, temporary, obstructions]	4.0
Seats/planters/hanging baskets/litter bins [paintwork, broken, uneven, parts missing, not working, badly sited, not present]	3.5
Public facilities, telephones, bus stops/shelters [Condition]	3.5
Graffiti, fly-posting, vandalism	4.0
Market stalls and street traders	N/A
Barriers to movement [servicing, general traffic, lack of safe crossing facilities etc.]	3.0
Cycle parking [formal or informal, availability, capacity]	2.5
Maintenance and repair of buildings, shopfronts and canopies	4.0
Personal security and police presence	4.0
Wheelchairs access and facilities for the blind or partially sighted	3.5
<b>OVERALL SCORE</b>	<b>3.6</b>

Source: CB Richard Ellis On Street Environmental Audit, November 2009

- 2.110 As a whole, our environmental rating for Leigh town centre is considered ‘good’. In most cases, the individual criteria were scored as ‘fair’ or above. The maintenance and repair of the building stock in the town centre is generally of a high standard. There are a few exceptions; the Grand Hotel on the corner of Leigh Road and The Broadway and the vacant unit at 136 Leigh Road (former Midel Cleaning Supplies which has planning permission for redevelopment) are notable exceptions. The overall quality of the shopfronts is also very high, supported by a number of buildings of good architectural quality and the area’s designation as a Conservation Area. There is also little sign of graffiti or boarded up shopfronts. The church area at the western end of The Broadway provides an attractive focal point.
- 2.111 Some minor weaknesses exist: narrow pavements in places; high volumes of traffic in the centre; and limited cycling facilities.

### Safety and Crime/Customer and Residents’ Views

- 2.112 From our centre survey the perception is that there is a good sense of safety and natural surveillance provided by the flow of traffic along the main streets, the close proximity of residential areas and generally the lively atmosphere of the centre. The narrow alleyways leading off the shopping streets are potential minor areas of concern.
- 2.113 This is reflected in the bmg research Place Survey. This found the majority of respondents felt safe when in Leigh. Although the percentage of respondents feeling safe at night fell to 73%, this is by far the highest score for the Southend area, and indicates a good perception of safety around the district centre.

### Quality of Offer

- 2.114 Leigh offers a very good quality of retail offer given the district centre status. The range and scope of goods on offer in the centre is a key strength, especially in relation to comparison goods, but also in terms of restaurants/cafes. Comparison good retailers present generally

## 2.0 Southend Borough Health Checks

---

target the higher end market through gifts, antiques and some fashion outlets. Although, however, the quality of foodstuffs in the centre does not quite match this.

### Conclusions

2.115 Leigh is a strong and healthy district centre, evidenced by a low vacancy rate. Its key strengths and weaknesses are:

- A diverse range of comparison retailers, especially given the district centre status of Leigh. The offer is also of a very high quality.
- While there are few vacancies, this limits the scope to extend the centre.
- Its uniqueness comes from the attractiveness of the independent retailers, who typically favour smaller outlets.
- The quality of public realm and shop fronts is mostly good and this serves to bolster the attractiveness of the centre. As with all centres, continuing to improve the quality of streetscape would be expected to bring benefits.
- Accessibility could potentially be enhanced, say through better cycle facilities and widening pavements in some places where this is possible. Improving pedestrian crossing around the Triangle could also help.

## 2.0 Southend Borough Health Checks

**Table 2.12**

**Thorpe Bay Local Centre**

Designation and Location	Moderate sized and compact local centre approximately 3km to east of Southend town centre. Main retail parade situated on the Broadway.
Diversity of Uses	Comparison: 8/22% Convenience: 6/17% Service: 19/53% Good range of service retailers. More limited range of convenience and comparison retailers
Potential for Growth	Constrained centre, abutting residential areas. No obvious scope for expansion.
Retailer Representation	Good mix of independent and multiple retailers. Multiples include Tesco. Demand possible from both sectors, although likely to mostly be from independents.
Rents	£210 psm Zone A (£19.52 psf). Typical of local centres.
Vacancies	Three vacant properties, equating to 9% of stock. Vacancy rate below national average.
Yields	No evidence available, but likely to be in excess of 8% were a suitable investment opportunity to arise.
Pedestrian Flows	Generally good throughout, given scale of local centre.
Accessibility	Nearby station, good provision of on street parking, and a small surface car park and wide pavements all assist in creating an accessible centre in the heart of a residential area.
Environmental Quality	High. Well maintained shop fronts and public realm. Attractive shopping environment.
Quality of Offer	High, in light of small size of centre and general quality of products on offer.
Overall Comments	Healthy local centre characterised by reasonable diversity of uses, underpinned by good food offer. Low vacancy rates suggest good demand for units. Good quality environment adds to quality of the centre.

Source: CB Richard Ellis On Street Environmental Audit, November 2009

**Table 2.13**

**Southchurch Local centre**

Designation and Location	Large, elongated local centre situated along Southchurch Road. Approximately 1.5 km east of Southend town centre.
Diversity of Uses	Comparison: 11/23% Convenience: 4/8% Service: 23/48% Low provision of convenience goods, although generally good if somewhat specialist service mix.
Potential for Growth	Some small sites capable of development to accommodate new retail space such as land at the junction of Southchurch Road. Reuse of vacant units could also extend offer.
Retailer Representation	Almost entirely independent traders, save for Tesco Express and Londis stores.
Rents	£200 psm Zone A (£18.70 psf)
Vacancies	Vacant units, equating to 21% of stock. Above national average. New units at western end of centre presently vacant.
Yields	No evidence available, but likely to be weak yields (9%+) should investment opportunities become available.
Pedestrian Flows	Low throughout the centre. Elongated nature of centre serves to dilute shopper flow.
Accessibility	Easy walking distance to Southend East train station. Well served by buses. Limited on street

## 2.0 Southend Borough Health Checks

	parking/surface car parking. Limited pedestrian crossings throughout centre, although some recent improvements to environment evident.
Environmental Quality	Moderate. In some places poor maintenance of shop fronts, narrow pavements and generally tired streetscape. Lack of street furniture, landscaping or focal point for the centre.
Quality of Offer	Retailers generally targeting low to mid market sector.
Overall Comments	Centre of moderate health. Weaknesses include the very long length of the retail offer, a weak environmental quality in places and a fairly limited convenience offer. A greater sense of place would also be desirable alongside enhancing local accessibility.

Source: CB Richard Ellis On Street Environmental Audit, November 2009

**Table 2.14**  
Eastwood local centre

Designation and Location	Moderate sized local centre. Some 6km north west of Southend town centre. Set out along Rayleigh Road between Bellhouse Road and Bosworth Road
Diversity of Uses	Comparison: 3/11% Convenience: 3/11% Service: 30/70% High proportion of service units, reasonable representation of convenience units. Few comparison retailers, but reflective of local centre status.
Potential for Growth	Limited to reuse of vacant units and possible development of one or two more challenging infill sites.
Retailer Representation	Predominantly independent retailers, although Co-Op and Tesco present.
Rents	£170 psm Zone A (£15.90 psf)
Vacancies	Very low vacancy rate; only limited vacancies at time of survey.
Yields	No evidence available, but likely to be in excess of 8% if any suitable investment opportunity were to arise.
Pedestrian Flows	Generally low, although more activity around key convenience stores.
Accessibility	Moderate. Some on street parking, and a small of street car park. No train station in easy walking distance of centre, although is served by some bus routes. Very narrow pavements in places and high volumes of traffic alongside limited crossings make centre more difficult to navigate for shoppers.
Environmental Quality	Fair. Shopfronts are generally reasonable. Public realm and paving is, at best, moderate quality. Little by way of landscaping or public focal points. Retail frontage fragmented in places.
Quality of Offer	Reasonable, although skewed toward the service sector.
Overall Comments	The centre is of reasonable health, evidenced by a low vacancy rate. There is obvious scope to improve the centre, especially in relation to the public realm and by improving shopper mobility.

Source: CB Richard Ellis On Street Environmental Audit, November 2009

## 2.0 Southend Borough Health Checks

**Table 2.15**  
**SHOEBURYNNESS (West Road/Ness Road)**

Designation and Location	Small local centre at the eastern periphery of Southend’s urban area. Comprises essentially two separate retail areas; Ness Road and West Road which run parallel to each other.
Diversity of Uses	Comparison: 11/18% Convenience: 4/5.2% Service: 34/44% High proportion of service units but lower range of food on offer.
Potential for Growth	Scope to reuse vacant units. Potential to use vacant land at southern end of Ness Road, if need arose.
Retailer Representation	Strong independent trader representation
Rents	£130 psm Zone A (£12,15psf)
Vacancies	Overall totalling 10 vacant. However, far higher vacancy rate along West Road (24% of stock); lower along Ness Road (only 2 units).
Yields	No evidence available, although likely to be 9%+; consistent with status and scale of centre.
Pedestrian Flows	At best moderate, although not inconsistent with status and scale of centre.
Accessibility	Poorly accessed by public transport. Limited services along Ness Road, more along West Road. Some on street parking provided. Pavements narrow in places. Limited clear signage linking the two separate parades. Few pedestrian crossings.
Environmental Quality	Generally poor. Most shopfronts reasonably maintained but tired along Avon Way. Pavements uneven in places. Lacks of any good quality landscaping.
Quality of Offer	Generally weak, with a limited range of both food and non food goods on offer.
Overall Comments	Shoeburyness is a marginal centre in need of investment. This could be in the form of attractive streetscape and signage improvements, as well as generally enhancing the accessibility of the centre.

Source: CB Richard Ellis On Street Environmental Audit

### OUT OF CENTRE RETAIL PROVISION

#### Food stores

- 2.116 Southend has three out of centre food superstores; Waitrose Food and Home, Eastern Avenue (5,202 sqm net), Asda (3,838 sqm net), North Shoebury and Tesco Extra, Prince Avenue (3,740).
- 2.117 The Waitrose ‘Food and Home’ format comprises of a large non-food section (50%) which includes items such as garden furniture, kitchenwares, CDs, books, household textiles, curtains, small electrical items and toys. Services provided include a café, post office and pharmacy. The store has an extensive car park and a petrol filling station.
- 2.118 The Tesco Extra store has an extensive non-food offering (40%) though the range of goods sold is more limited than Waitrose. The store provides services such as a pharmacy, photo shop and travel shop. The store is open 24 hours, has a large surface car park and petrol filling station.
- 2.119 The Asda complex comprises a larger supermarket, separate George retail unit and small unit shops adjacent to it which are mainly service uses including a hairdressers, travel agents and take-away restaurant. The store itself stocks mainly food items (80%) with a



## 2.0 Southend Borough Health Checks

small comparison goods section. Services provided include a café, pharmacy and photo centre. The store is open 24 hours, has a dedicated bus stop, large surface car park and petrol filling station.

2.120 The stores are summarised below.

**Table 2.16**  
Out of Centre Main Food Superstores

SUPERSTORE	CHECK OUTS	SERVICES	PRODUCT RANGE	CONVENIENCE/COMPARISON PROVISION
Waitrose Food and Home , Eastern Avenue	15	Café Cash Machine Post Office Pharmacy Petrol Filling Station	Fish counter Deli Rotisserie Meat counter Salad bar  Clothing & Accessories Electronics Bath and bed linen Toys Kitchen and Diningware	50:50
Tesco Extra	43	Café Cash Machine Pharmacy Photo Shop Travel Money Petrol Filling Station	Asian & world food section Chicken counter Fish counter Meat counter Clothing & Accessories Electronics	60:40
Asda, North Shoebury	35	Café Cash Machine Photo Centre Pharmacy Petrol Filling Station Dedicated Bus stop  Separate retail George unit Shopping parade	Fish counter Bakery Pizza counter Deli Rotisserie	80:20 (in store)

Source: CB Richard Ellis Town Centre Survey November 2009

## 2.0 Southend Borough Health Checks

### Retail warehouses

- 2.121 Southend has three retail warehouse parks: Airport; Greyhound; and London Road which are located relatively centrally. The borough also has a retail area at Fossetts Way.
- 2.122 The Airport Retail Park is located to the north of the town with access from Southend/Rochford Road. It comprises of several occupiers selling a range of non-food goods including Pets at Home, Argos Extra and PC World. The Park including McDonalds is just outside the borough boundary in Rochford District but has been included in this assessment because it serves the Southend catchment. The tenants are summarised below.

**Table 2.17**  
**Airport Retail Park (Rochford District)**

TENANT	RANGE OF GOODS
Pets at Home	Pets goods
Dreams	Beds and linen
Carpet Right	Carpets
Argos Extra	Most non food goods
Harveys	Furnishings
Allied Carpets	Carpets
PC World	Electronics
Staples	Stationary
Sport Direct	Sports goods

Source: CB Richard Ellis Town Centre Survey November 2009

- 2.123 Greyhound Retail Park is located under 1km from Southend town centre and is accessed from Sutton Road. The park comprises a range of leisure, non-food and food retailers including Mecca Bingo (leisure) Lidl, Matalan and Bottoms Up. The retail tenants are summarised below.

**Table 2.18**  
**Greyhound Retail Park**

TENANT	RANGE OF GOODS
Lidl	Discount food
Matalan	Clothing
Paul Simon	Furnishings
Farmfoods	Frozen food
Poundstretcher	Household goods
Bottoms Up	Off-licence

Source: CB Richard Ellis Town Centre Survey November 2009

- 2.124 London Road Retail Park is located on the western edge of the town centre. The park comprises of a Currys, Homebase and Right Price tiles retail unit. The tenants are summarised below.

## 2.0 Southend Borough Health Checks

**Table 2.19**  
London Road Retail Park

TENANT	RANGE OF GOODS
Currys	Electrical
Homebase	DIY
Right price tiles	Tiles

Source: CB Richard Ellis Town Centre Survey November 2009

2.125 The Fossett Farm complex is situated to the north of Southend town centre and is accessed from Fossetts Way which links to Eastern Avenue. The area comprises of four stand alone units including a large Waitrose, B&Q and Comet.

**Table 2.20**  
Fossett Farm Retail Area

TENANT	RANGE OF GOODS
Waitrose Food & Home	Food and homeware
B&Q	DIY
Comet	Electrical
Majestic Wine	Off Licence

Source: CB Richard Ellis Town Centre Survey November 2009

### Conclusion

2.126 Most of the borough is within the vicinity of some retail warehouse facilities and the north is particularly well catered for. The borough has 3 large out of town food superstores; Waitrose, Asda and Tesco. The range and choice of bulky goods stores within the borough remains limited and the stores that are available are somewhat dated (with the exception of the Fossetts Farm bulky goods retail facilities).

### Shopping Rents

2.127 The table below provides a summary of the shopping rents achieved in Southend, Westcliff and Leigh.

**Table 2.21**  
Shopping Rents

CENTRE	AVERAGE ZONE A RENT (£SQM)	AVERAGE ZONE A RENT (SQ FT)
Southend	1,238	120
Westcliff		
• Hamlet Court Road	195	15
• London Road	120	11
Leigh	300	27.80

Source: CB Richard Ellis Research Database / Valuation Office 2009

## 2.0 Southend Borough Health Checks

### MARKETS

- 2.128 The contributions markets make to the vitality and viability of town centre is recognised in PPS4. The East of England Plan and Core Strategy supports all forms of retail development and whilst the local plan policy relating specifically to the provision of a permanent market in Southend town centre has been deleted, the provision of a market in an appropriate location should not be considered contrary to town centre policy.
- 2.129 CB Richard Ellis have been instructed by Southend Borough Council to provide a separate Market Viability Assessment. Following the closure and demolition of the York Road market in early 2010, we summarise our findings below.
- There is currently no permanent market in Southend Town Centre or the Central Business District (CBD).
  - The York Road market comprised of permanent fixed structures which were operational throughout the week before the decision to demolish it in March 2010. Besides the market’s poor state of repair, it also suffered from low footfall and high vacancies. These characteristics resulted in it contributing little to the vitality and viability of the town centre.
  - Following the closure and demolition of York Road, the market provision is limited to a Farmers Market run by Essex Farmers’ Markets Ltd (EFM) on a bi monthly basis and the seasonal food market in the lead up to Christmas. Both are situated in the High Street.
  - Beyond the town centre there is also a 40 stall weekly market at Roots Hall Stadium. This caters for predominantly comparison goods and has been in existence for nearly 40 years. Its future in light of aspirations to relocate the football stadium to Fossetts Park is now questionable although it may be some time before the Football club moves.
  - The research conducted points toward Southend town centre having the right characteristics to sustain a market. It has an adequate sized population, limited geographical competition as well as confirmed demand from at least two multiple market operators. These factors alone however will not guarantee a successful and viable market. Very careful consideration will need to be given to where the market is located, how it will be managed and what type of market might be appropriate.
- 2.130 In considering further market position careful regard will need to be had to the diversity and mix of stakeholders, the proximity of discount retailers and the ability of stalls to integrate with the town centre and maximise footfall.
- 2.131 In terms of location, our view is that the market should be on the High Street. The obvious location would be at Victoria Circus, possibly spilling down the High Street itself and including London Road. There appears to be significant room to accommodate a market in this area. We do, however, acknowledge that York Road is a proven location for a market and may be a suitable initial location to reinstate this facility. If this were to prove successful then it would be considered a possible location for a more permanent market, or alternatively allow time for the Council to investigate the possibility of other locations.
- 2.132 Above all, we consider that an attractive market could help to diversify Southend town centre’s retail offer. It could bring additional street activity and add to the general shopping experience Southend town centre has to offer. For these reasons, we believe that there is a good foundation to investigate further the potential of delivering a market, and how this may be taken forward.

## 3.0 Quantitative Assessment of Southend Borough

- 3.1 In Sections 3 and 4 we examine the capacity for additional convenience and comparison floorspace in Southend town centre (Section 3) and Leigh and Westcliff (Section 4). We have also had regard to the turnover of the retail floorspace within the catchment area but outside identified centres. This is referred to as 'Non Central floorspace' in the remainder of this study. This quantitative assessment forms a key input into our consideration of the need for further retail floorspace in the borough over the forecast period and in considering sequential development opportunities in the main centres of Southend, Leigh on Sea and Westcliff.
- 3.2 In order to carry out our quantitative assessment we have used a conventional and widely accepted step-by-step methodology. This draws upon the results of a household telephone interview survey of existing shopping patterns, which enables us to model the existing flows of available expenditure to each centre. To summarise, we have:
- Established a survey area for the Study (Appendix A);
  - Calculated the total amount of convenience and comparison goods expenditure which is available within the postcode areas (Zone 1 to 10) comprising the Southend survey area (Appendix B);
  - Allocated the available expenditure to the convenience and comparison goods shops in each centre, drawing on the results of the household interview survey of shopping patterns, so as to provide estimates of current sales and forecasts of future sales (Appendix B);
  - Compared the total expenditure attracted to each centre with existing retail floorspace, to assess sales densities in each shopping designation and the degree of under or over trading (Appendix B).
- 3.3 Once we establish the baseline position we then explore the capacity for further retail floorspace. The results of all the modelling are set out in Tables 1-22, Appendix B.

### Data Inputs

#### Survey Area and Household Interview Survey

- 3.4 In order to provide detailed information on the current shopping patterns within the Southend area, we commissioned a new household interview survey covering 1,000 households. The survey questionnaire was designed by CB Richard Ellis, in consultation with Council Officers. Interviewing and data processing was undertaken by Research and Marketing Ltd. The survey questionnaire and results are included at Appendix E.
- 3.5 The survey sought to determine shopping habits of households for both convenience and comparison goods. Where necessary, the survey results have been re-based to remove inappropriate responses, such as catalogue/internet/mail order shopping, shopping abroad and 'don't shop' for particular goods. These responses are considered special forms of trading (SFT) which are not identifiable to specific shopping locations. We deduct SFT from the overall available expenditure (as explained at paragraph 3.15).
- 3.6 For food and convenience goods, the household interview survey included some questions on 'main' and 'top-up' food and convenience goods shopping. The modelling uses weighted averages of the responses to these questions; weighting the responses to each category according to our estimate of the relative expenditures in each. The survey also included seven questions on specific comparison goods types. Accordingly, the modelling

## 3.0 Quantitative Assessment of Southend Borough

uses the weighted averages of the household survey responses for each goods type based on the proportion of per capita expenditure on that goods type.

- 3.7 The Southend survey area is shown at Appendix A. In arriving at an appropriate survey area regard was had to the results of the National Survey of Local Shopping Patterns (NSLSP) and the previous 2003 survey area. The survey area incorporates relevant areas outside the Southend Borough boundary, including the eastern fringes of Basildon and parts of Wickford. The survey area has been subdivided into 10 zones, based on postcode sectors. For ease of interpretation and consistency the survey area remains largely unchanged from that employed in the previous 2003 study.

### Estimates of Population in the Survey Area

- 3.8 Population estimates and forecasts for each of the survey zones were prepared by drawing upon information published by Pitney Bowes. Population change is a key driver of changes in consumer retail demand and provides a valuable insight into projected future demand within the catchment area. Estimates of the catchments zonal population at 2010 and 2019 are based upon mid-year estimates. Beyond 2019 we have applied a consent growth rate to the test years at 2020 and 2025 based upon an historic 0.3% increase pa. As such an allowance has been made for the likely growth in population resulting from expected housing growth. Overall, the population of the whole survey area is currently 414,567. It is forecast to rise to 425,045 by 2015, an increase in 2.53%. Subsequently, population is forecast to grow by a further 1.5%, reaching 436,718 by 2020, and 443,269 in 2025 (Table 1).

### Available Expenditure in the Survey Area

- 3.9 Pitney Bowes estimates of per capita expenditure on convenience and comparison goods have been applied. These are at 2007 prices and an individual estimate has been prepared for each survey zone, to reflect any variations in affluence across the catchment area. The outer parts of the catchment including the fringes of Basildon and Canvey Island are the least affluent, whereas areas including Leigh, Hadleigh, Rayleigh and Wickford are more affluent. The rural areas to the east also show lower expenditure rates than the urban areas adjacent to Southend.
- 3.10 We have updated the expenditure forecasts to 2010 and beyond, and made a deduction for Special Forms of Trading (SFT). SFT represents retail spending which does not take place in shops i.e. mail order, catalogue shopping, markets and the internet. Per capita spending figures are reduced by SFT percentages usually on the basis of national averages. Accordingly a deduction of 2% and 5.8% pa have been made for convenience and comparison goods respectively (Table 2).
- 3.11 The following growth rates have been applied to comparison and convenience expenditure per head across the study period.

### 3.0 Quantitative Assessment of Southend Borough

**Table 3.1**  
Catchment Area Convenience Expenditure Forecasts

FORECAST PERIOD	GROWTH RATES (%)
2007-2008	-0.7
2008-2012	0.5
2012-2017	0.6
2017-2025	1.2

Source: Pitney Bowes Retail Expenditure Guide 2009/2010; Table 2.2, 3.2 and 3.3.

**Table 3.2**  
Catchment Area Comparison Expenditure Forecasts

FORECAST PERIOD	GROWTH RATES (%)
2007-2008	4.6
2008-2012	1.6
2012-2017	2.9
2017-2025	4.9

Source: Pitney Bowes Retail Expenditure Guide 2009/2010; Table 2.2, 3.2 and 3.3.

- 3.12 The available convenience goods expenditure within the study area is estimated to be £697.6m in 2010. This is forecast to increase by approximately 22% to reach £854m by 2025. The available expenditure on comparison goods is currently £1,451m. It is forecast to increase by about 100% to reach £2,949m by 2025 (Table 2).
- 3.13 In estimating available expenditure no allowance has been made for the inflow of tourist expenditure. Whilst it is accepted that Southend is a popular tourist destination, the following issues are pertinent when considering the implications of tourist expenditure on the assessment of capacity:
  - Tourist expenditure in the area by its very nature is seasonal and easily affected by the weather;
  - The inflow of tourist expenditure must be offset by those residents of the study area taking expenditure out of the area as they themselves go on holiday; and
  - Tourist expenditure will not be evenly spent across all good types. In areas with a high proliferation of self catering accommodation more tourist expenditure will be spent on convenience goods for example. However, it is unrealistic to assume that tourists will spend money on larger, bulky comparison items.
- 3.14 Whilst it is recognised that tourist expenditure may contribute to overall spending patterns it is we believe more appropriate to exclude it from this study which is based upon a robust, transparent ‘baseline’ position. Applications which predicate their retail case on the existence of tourist expenditure will need to be able to justify the robustness of their approach and the assumptions employed.

## 3.0 Quantitative Assessment of Southend Borough

### Floorspace Data

- 3.15 The comparison and convenience goods floorspace data used in our modelling has been drawn from a variety of different sources, including Experian Goad, the Institute of Grocery Distribution (IGD) Report and Southend Borough Council. Having established the amount of potential available expenditure in the catchment area to support floorspace, we now assess the proportion of that potential expenditure which is usually attached to Southend Town Centre, Westcliff and Leigh District Centres, based upon the household survey.
- 3.16 In November 2009 CB Richard Ellis commissioned Research and Marketing to undertake a household survey of shopping patterns within the study area. The result of this study has been used to model shopping patterns and identify 'spending retention' in the catchment area and individual centres.
- 3.17 For the purpose of convenience good expenditure we have assumed that 75% would be 'main' food shopping trips, with the remaining 25% representing 'top-up' shopping. Tables 5, 9, 13 and 17 provide an estimate of turnover for convenience and comparison goods floorspace within Southend town centre, Leigh and Westcliff and Non central locations at 2010.

### Estimated Company Average Sales Densities

- 3.18 Company average or 'benchmark' turnovers are levels at which it is generally accepted shops trade at. Due to competitive sensitivity information is not available as to the turnover of a specific store. However we have sought to provide a robust assessment of such convenience sales density based upon research published by Mintel and Verdict. For comparison goods, we have relied upon our experience of the turnover of other similar centres.

### Southend Town Centre Convenience Goods Assessment

- 3.19 We have estimated the draw of Southend Town Centre for convenience goods and the respective main foodstores based upon the survey results (Table 3, Appendix B). It is evident that Southend town centre's catchment for convenience goods shopping focuses on those areas immediately covering the town centre. The highest trade draw for convenience goods is in Zone 7, where the town centre draws 32.1% of total convenience spending. Zone 8 is the next most significant catchment zone, with 18.4% of convenience expenditure going to Southend town centre, followed by Zone 6 with 7.2%. Beyond this, the market shares fall off to less than 6% in the remainder of the survey zones. The main draw in Zone 7 is to Sainsbury's which draws 32% of total convenience expenditure.
- 3.20 Based on these shopping patterns, we have calculated the current total convenience goods turnover of Southend town centre to be of approximately £59m (Table 3a). With this level of turnover and a net sales floorspace approximately 9,335 sq m (100,481 sq ft) Southend town centre currently has a convenience goods sales density of £6,264 per sqm net (72,247 sq ft) (Table 6). We consider that this sales density is around the estimated company average sales densities for the principal and local food stores in the town centre (estimated at £6,712 per sqm net) at 2010.
- 3.21 The turnover of Southend town centre and sales density has decreased since the last study was undertaken. We suggest this is reflective of the reduced expenditure rates from 2007 to 2010 and the underperformance of some of the independent traders.



### 3.0 Quantitative Assessment of Southend Borough

- 3.22 The level of trading is dominated by the performance of Sainsbury’s in Southend town centre and its anchoring role within the town centre. We estimate that the store currently has a convenience goods turnover of approximately £43m (73% of the town’s convenience trade draw), whereas if it were trading at company average levels we would expect the turnover to be closer to £30.3m. From our observations in the store it appeared very busy, with the entrance/kiosk area in particular was being congested, and the majority of check outs in use. This further demonstrates that the store is overtrading. It is unclear at this time what the future of the J Sainsbury’s in the town centre will be now that planning permission has been granted for a new store at Roots Hall as part of the planned football club relocation. It is however reasonable to assume that an enlarged new store at Roots Hall will draw trade from the town centre and this should be carefully monitored.
- 3.23 Despite Sainsbury’s performance, the results show there to be little scope for further convenience provision in Southend town centre over the study period. The existing performance of the town centre convenience goods stores results in no capacity by 2015. There is a small amount of capacity of 308 sqm net (3315 sq ft) by 2020 and 736 sqm net (7922 sq ft) by 2025 (Table 6). There are no commitments in the pipeline.
- 3.24 Although the results show there to be little capacity, Southend town centre’s market share is very low at just 8% and could be improved. There is clearly room to improve this level of retention and the Council should consider carefully opportunities to promote appropriate foodstore development which accords with PPS4 in the town centre. Such development will also help alleviate the overtrading within Sainsbury’s and claw back expenditure currently leaking to the non central foodstores referred to later in this study. Improving the convenience market share will attract more people to Southend town centre and increase the opportunity for linked trips.

#### Southend Town Centre Comparison Goods Assessment

- 3.25 The comparison catchment for Southend town centre is more extensive than that for convenience shopping (Table 4). This reflects the sub-regional role of the town centre. It is evident that the core catchment of Southend is focused in Survey Zones 7, 8, 9 and 10 (in each of which Southend town centre accounts for approximately 55-59% of comparison goods shopping). Southend town centre also draws significant amounts of comparison goods trade from Zones 6 and 10. Zones 1, 2 and 4 are the only three zones with less than 10% of their population visiting Southend. This is largely due to their proximity to the competing sub-regional centres of Basildon, Chelmsford and the Lakeside Shopping Centre. Southend town centre’s market share of the catchment has decreased since the last study by around 10% for Zones 7 – 9.
- 3.26 Southend town centre draws a large proportion of the study area’s comparison trade for clothing and footwear. The next highest draw is for ‘Audio-visual equipment’ (Table 2a). This illustrates that Southend town centre is performing the role that is to be expected of a centre of this size, in catering for the more recreational types of comparison shopping. The shopping patterns in relation to bulky goods, including furniture and carpets, household textiles and electrical appliances reflect the more limited offer of these goods in Southend town centre, relative to the out-of-centre provision.
- 3.27 We estimate that in 2010, Southend has a town centre comparison goods turnover of about £435m (Table 5). With a town centre comparison goods sales area of approximately 47,205 sqm net (508,110 sq ft), this level of turnover equates to a sales density of approximately 9,214 per sqm net (99,180 sq ft) (Tables 6). Drawing on comparisons with other centres that we have studied elsewhere in the country, this sales density suggests that

### 3.0 Quantitative Assessment of Southend Borough

Southend town centre is trading well for a centre of its size, function and catchment area characteristics. Indeed, we estimate the turnover for equivalent centres should be around £6,500 per sqm (£604 per sq ft) therefore the turnover is higher than expected, especially when considered against the catchment area being bounded by water on one side.

- 3.28 We have not examined scenarios for Southend town centre to further enhance its market share. The town centre currently has a good level of trade retention from the core and secondary catchment areas and trade falls off notably beyond this in the face of competition from alternative shopping destinations, including Basildon, Chelmsford and Lakeside Shopping Centre. As such we consider it would be very challenging to seek to uplift market share. Rather we have considered the effect on Southend town centre maintaining its existing market share, using growth in population and available expenditure to support the development of some new floorspace in the town centre, in conjunction with the renewal of exiting space.
- 3.29 In assessing the future comparison capacity, we have assumed that the efficiency with which existing floorspace is being used will gradually increase over the study period: we have assumed an annual growth rate in existing sales per square meter of 1.5% pa. We have also assumed that new floorspace will achieve sales of approximately £6,500 per sq m (£604 per sq ft) at 2015, i.e. a broadly similar level of trading to expected turnover.
- 3.30 Overall, therefore we forecast that by 2015 there could be capacity for about 37,000 sq m (net) (398,265 sq ft) of additional comparison goods floorspace. This will increase to about 70,172 sq m (net) (755,325 sq ft) by 2020 on the basis of existing market shares.
- 3.31 Where this capacity might be accommodated is considered in Section 5, however currently vacancies in the town centre are estimated to total approximately 18,580 sq m. A significant proportion of this vacant floorspace is contained within the refurbished Victoria Shopping Centre. Whilst it is unrealistic to plan for a zero vacancy rate careful consideration should be had to directing additional capacity towards these units particularly those with a larger floorplate before considering other development opportunities in or on the edge of the town centre.

#### Summary

- 3.32 We consider that the major convenience stores in Southend town centre are currently performing well and will continue to do so. The Sainsbury's store in the town centre is trading very successfully. Future foodstore development at Roots Hall will no doubt affect this and should be carefully monitored.
- 3.33 Overall, we consider that there is limited capacity to enhance the provision of convenience goods retailing in Southend town centre. We have forecast capacity for between -88 sq m net (-947 sq ft) and 736 sq m net (7,922 sq ft) of additional convenience goods floorspace between 2015 and 2025. However, there is scope to increase Southend town centre's market share and clawback convenience expenditure currently leaking to out of town foodstores.
- 3.34 Southend town centre is also performing successfully as a comparison shopping destination, drawing a good level of trade from the surrounding zones, as well as some from further away to the east, where competition is very limited. We consider that there is scope for additional comparison floorspace in Southend town centre, based upon forecast growth in population and expenditure over the Core Strategy period. We are not aware of any commitments in the pipeline to absorb expenditure growth and as such we forecast capacity

### 3.0 Quantitative Assessment of Southend Borough

---

for between 36,841 sqm net (396,553 sq ft) (2015) and 70,172 sqm net (755,325 sq ft) (2025) during the forecast period.

- 3.35 Careful consideration should be had to bringing forward the occupation of the existing vacancies, particularly in the Victoria Shopping Centre, before considering other town or edge of centre sites.

## 4.0 Quantitative Assessment of District Centres and Non Central Stores

4.1 In this Section we set out the results of our quantitative assessment of convenience and comparison floorspace in Westcliff and Leigh. We also have regard to the performance of retail floorspace beyond existing centres in the study area, including stand alone foodstores and retail parks which are referred to as 'Non central' floorspace for the remainder of the Study. The assessment draws on the data inputs set out in Section 3 and the modelling tables set out in Appendix B.

### Westcliff Convenience Goods Assessment

- 4.2 Table 7 shows the level of market share in Westcliff for convenience goods by store. The centre only draws from Zone 7, its home zone. This shows Westcliff has a limited trade draw for convenience retailers, reflecting the limited offer in Westcliff and the proliferation of convenience provision along the London Road and Sainsbury's at Southend. The Co-Op on Hamlet Court Road has the high trade draw and attracts 3.3% of trade from Zone 7 which results in the largest turnover in the centre of £3.4m.
- 4.3 Total convenience sales in Westcliff are in the region of £5.9m at 2010, which, based upon an existing floorspace of 4,303 sq m net (46,317 sq ft) equates to a sales density of approximately £1,377 per sq m net (£128 per sq ft) (Table 10). At a more detailed level, it appears the Co-Op on Hamlet Court Road shows a significantly higher turnover than expected with a total of around £3.4m. This is much higher than the turnover based on estimated company averages (£0.8m). By comparison, the Tesco Express on Hamlet Court Road is undertrading when compared to company averages. The store is estimated to turnover at £1m which is lower than the estimated turnover potential of £3.2m.
- 4.4 Overall the district centre appears to be underperforming when compared to company averages. The sales density of £1,377 per sqm net (£128 per sq ft) is below the expected turnover of £4,641 per sq m (£431 per sq ft). However, our observations, undertaken as part of the health checks, do not support the apparent disparity between the trading performance of the Co-op and Tesco stores. This may be because the store has only recently opened and the household survey is not reflective of the settled trading patterns for this unit or, more likely, those respondents to the survey may have confused their answers producing a bias towards the Co-op because of the close proximity of both stores. Nevertheless we believe it conceivable that both the stores are turning over nearer to company averages.
- 4.5 Based upon the overall performance of Westcliff, we consider that there is no quantitative need for additional convenience floorspace provision over the Core Strategy period based upon constant market share.

### Leigh Convenience Goods Assessment

- 4.6 Table 11 shows the market for convenience goods in Leigh with the most amount of trade drawn from Zone 6. Although the market share is small, it attracts a greater trade draw than Westcliff. Leigh also attracts trade from other Zones including Zone 7 and 10. This reflects the attractive shopping environment and retail offer in the town centre. Although we regard Westcliff to be more accessible (especially by public transport), the offer is clearly more influential in Leigh.
- 4.7 We estimate that overall, Leigh has a convenience goods turnover of approximately £6.7m at 2010. Based upon the current district centre turnover within the existing shop floorspace of 2,706 sqm net (29,127 sq ft), we estimate that Leigh has a convenience sales density of

## 4.0 Quantitative Assessment of District Centres and Non Central Stores

approximately £2,466 per sqm net (£229 per sq ft) (Table 14, Appendix B). This is below estimated company average sales densities for the convenience goods stores currently present in Leigh (£5,165 per sqm net/£480 per sq ft), and indicates that the centre is slightly underperforming as a convenience shopping destination. The previous Retail Study estimated Leigh to be over performing when compared to company averages. Since our previous study, Waitrose have occupied the former Somerfield on the London Road, Tesco Metro has opened in The Broadway and on the London Road. Londis has opened on Leigh Road. Collectively these stores will have recovered overtrading in the centre.

- 4.8 At a more detailed level, it appears that Co-Op on Leigh Road shows a significantly higher turnover than expected, with a total of around £2.8m (compared to a turnover based on estimated company averages of £0.8m). The other multiple convenience stores are turning over at around company averages. This we suspect is an overestimation and due to respondents confusing their answers given the existence of 2 other Co-op's in Leigh. Furthermore, we would expect this turnover to decrease as the shopping pattern for Tesco on The Broadway settle down over the longer period.
- 4.9 Based upon the existing level of trading of the convenience goods stores in Leigh, we consider that there is no capacity over the forecast period for additional floorspace.

### Westcliff Comparison Goods Assessment

- 4.10 As with the convenience trade draw, Westcliff draws most of its expenditure from Zone 7 at 2010 (6%) (Table 8). The amount of comparison goods trade drawn to Westcliff is very limited, which again largely reflects the more limited retail offer and its proximity to Southend town centre.
- 4.11 We estimate that Westcliff has a total comparison goods turnover of approximately £20.8m at 2010 (Table 9). Based upon an existing floorspace of approximately 20,456 sqm net (220,190 sq ft), this equates to a sales density of only £1,019 per sqm (£95 per sq ft) which is below what we would expect the turnover of comparison goods within district centres to be (£3,500 per sqm/£325 per sq ft). This suggests there is unlikely to be any capacity for further comparison shopping floorspace at current market shares. Any surplus expenditure generated as a result of growth should be absorbed by existing retailers.

### Leigh Comparison Goods Assessment

- 4.12 Leigh draws much of its comparison goods trade from Zone 6 (9 %) (Table 12) at 2010. It draws more comparison goods trade than Westcliff, and overall has a turnover of approximately £22.3m at 2010 which is more than the level for Westcliff. We estimate that Leigh has a comparison goods floorspace of 18,789 sqm net (202,243 sq ft) which results in a sales density of approximately £1,187 per sqm net (£110 per sq ft). This is marginally higher than the sales density of Westcliff and reflects the more specialist nature of the retail offer. Overall, the centre is trading reasonably well although our observations conclude that there is a high turnover of tenants.
- 4.13 Similar to Westcliff, we have identified an oversupply of comparison floorspace when considered against available retained expenditure and conclude that there is no capacity over the plan period for additional floorspace.

## 4.0 Quantitative Assessment of District Centres and Non Central Stores

### Non Central Convenience Goods Assessment

- 4.14 Our assessment of capacity over the plan period has focused upon Southend town centre and the District centres of Leigh and Westcliff. However, the borough and wider catchment area contain a significant proportion of retail floorspace in the form of retail parks and stand-alone foodstores which are outside the existing centres (excluding local centres). This 'non central'/out of town floorspace often benefits from easy accessibility by the private car, free car parking and large floorplates. These attribute to results in trade being drawn from existing centres at the expense of market share. Overall the 'non central' floorspace within the study area represents 35,336 sqm net (380,353 sq ft) and 52,778 sqm net (568,100 sq ft) of convenience and comparison respectively. This represents nearly 4 times as much convenience floorspace as currently provided for in Southend town centre and includes the likes of Asda, Tesco, Waitrose and Morrisons.
- 4.15 Table 18 illustrates the draw to out of centre convenience stores upon the study area.
- 4.16 In terms of sales, we estimate that the stand alone foodstores have a combined turnover of approximately £440.3m, equating to a sales density of approximately £12,460 per sq m net (£1,158 per sq ft). This is above the combined expected company average sales densities for the out of centre food stores, based upon estimated company averages (£11,233 per sqm net/£1,044 per sq ft).
- 4.17 According to our estimates all the major out of town convenience stores are slightly overtrading including Tesco on Prince Avenue, Waitrose on Fossetts Way and on the London Road.
- 4.18 Asda, North Shoebury shows a significantly higher turnover than expected with a total of around £63.2m (Table 15). This is much higher than the turnover based on estimated company averages (£45.3m). From our observations the store appeared busy, the car park was relatively full and whilst not overcrowded the stores was being well used. The store also attracts visitors to the separate George (clothes) unit and neighbouring shopping parade. The Morrisons, Western Approach store is also trading slightly above company averages.
- 4.19 There are no identified commitments i.e. those schemes which have planning permission but have yet to be implemented within Southend town centre, Westcliff or Leigh on Sea. Commitments beyond identified centres approximately 6,584 sq m of convenience and 20,877 sq m net of comparison floorspace. Collectively these are estimated to be turning over at £63.3m and £135.2m for convenience and comparison goods respectively based upon our review of supporting retail statements and our own assumptions as to turnover. A full schedule is attached at Appendix F.
- 4.20 On the assumption that the turnover of this non-central floorspace is reduced to company averages the following capacity exists, post commitments, over the plan period.

## 4.0 Quantitative Assessment of District Centres and Non Central Stores

**Table 4.1**  
Non-Central Capacity – Convenience Floorspace (sq m)

	2015	2020	2025
Capacity	66.7	102.1	140.7
Commitments	63.0	63.0	63.0
Residual Capacity	3.4	42.2	140.7
Capacity to support new floorspace	281	3,517	9,972

*N.B. Allowance for commitments. Assumed convenience turnover of £12,000 per sqm based upon CB Richard Ellis assumptions.*

- 4.21 This capacity, in itself, would be sufficient to support a new convenience superstore by 2020 (3,517 sqm net/38,000 sq ft) and over the forecast period. However, the surplus expenditure generated from the out of centre stores should be focussed towards town centre development sites in the first instance to increase each centre’s market share. Should additional floorspace come forward in existing centres, this will claw back expenditure leakage to freestanding stores, increase market share and foster linked trips and restore their turnover.

### Comparison Goods Assessment

- 4.22 It is evident that the existing Retail Parks and solus retail warehouses draw significant trade for the study area. The largest proportions of trade are drawn from Zones 3, 5 and 6 with trade draws of 44%, 37% and 40% respectively. There tends to be more expenditure leakage from those areas which are on the edge of the catchment area though the zone which attracts the lowest proportion of trade (zone 4) still contributes 22% of its expenditure.
- 4.23 The level of trade draw has increased significantly since the last study. Overall, we estimate that the out of centre stores have a combined turnover of £496m, equating to a sales density of £9,390 per sqm net (£872 per sq ft). This compares with an estimated company average sales density of £6,500 per sqm net (£604 per sq ft) and indicates that the existing stores are performing particularly well. This, in part, reflects the improvements in warehouse provision since the last survey
- 4.24 As above an allocation is made for commitments which total £135.2 sq m at 2015. Capacity post commitments are summarised below.

**Table 4.2**  
Non Central Capacity – Comparison Floorspace (Sq m)

	2015	2020	2025
Capacity	278.4	410.3	607.3
Commitments	135.2	145.7	157.0
Residual Capacity	143.1	264.6	450.3
Capacity to support new floorspace	22,022	37,785	59,700

*Floorspace turnover grown at 1.5% pa.*

## 4.0 Quantitative Assessment of District Centres and Non Central Stores

- 4.25 Expenditure growth is such that even after allowing for existing commitments in the longer term there is capacity to support further floorspace. In the short term, if market shares remain the same and the commitments including proposals at Fossetts Way and Roots Hall, are implemented, expenditure growth is such that capacity exists for approximately 22,022 sqm net (237,043 sq ft) of retail warehouse floorspace by 2015, 37,785 sq m net (406,714 sq ft) by 2020 and 59,700 sq m net (642,605 sq ft) by 2025.
- 4.26 The above assumes that the trading performance of floorspace is reduced to an assumed benchmark turnover. In reality this is only likely to happen when development comes forward which will clawback trade thereby reducing market share and available expenditure. Whilst this may occur to a small degree following the implementation of commitments, in the absence of a major town centre scheme we consider it appropriate to assume that this non central floorspace will continue to trade at about current levels. The effect of this is illustrated in Table 18 and resulted in reduced capacity over the plan period.
- 4.27 After allowing for commitments there is an oversupply of comparison floorspace to 2015 (-4,715 sq m net). There is a small underprovision of comparison floorspace of 5,414 sq m net by 2020 and 19,495 sq m net by 2025.
- 4.28 In accordance with PPS4 this should be directed to existing centres in the first instance and does not in any way predicate the acceptability of development beyond existing centres. Any applications seeking to promote such development would need to satisfy the key tests of PPS4.

### Summary

- 4.29 We estimate that the convenience stores in the District Centres are performing adequately. The Co-Op stores (Hamlet Court Road and Leigh Road) in Westcliff and Leigh are trading at levels in excess of estimated company averages and stores in Leigh are trading at the expected level (at or around company averages across the country). The remaining stores within Westcliff are trading below estimated company averages.
- 4.30 We have not identified any surplus convenience capacity for the District centres. Any growth in available comparison goods expenditure should be absorbed by existing retailers, and as such we do not consider there is likely to be any capacity for new convenience floorspace over the Core Strategy (up to 2021) or study (up to 2025) period in these centres.
- 4.31 According to our estimates, all the major out of town convenience stores are overtrading with Asda, North Shoebury showing a significantly higher turnover than expected. Overall, the level of turnover results in some surplus expenditure capacity to support new floorspace by 2015. This capacity in itself would be sufficient to support a new convenience superstore by 2020 (3,517 sqm net/38,000 sq ft) and over the study period. However, we recommend that the surplus expenditure generated from the out of centre stores should be focussed towards Southend town centre, district and local centre development sites to increase each centre’s market share provided the development is of an appropriate scale for the centre’s position in the retail hierarchy.
- 4.32 We consider that Westcliff is not trading particularly well with a low average sales density. As a result we have not identified any capacity for new comparison floorspace and recommend any surplus expenditure generated over the forecast period should be used to support existing retailers, rather than new comparison goods floorspace. We also recommend that in order to make the comparison offer more attractive to retailers, some of



## 4.0 Quantitative Assessment of District Centres and Non Central Stores

---

the existing floorspace is reconfigured to create larger floorplates. Leigh is trading reasonably successfully as a comparison shopping destination and has an attractive specialist/quality retail offer. As with Westcliff, there is no identified capacity for new comparison floorspace and, again, recommend any surplus expenditure generated over the Core Strategy period should be used to support existing retailers.

- 4.33 The non central comparison stores in the study area are trading particularly well which is reflective in the high average sales density. If these stores continue to trade at this level, there is no expenditure capacity to support new floorspace by 2015 (-4,949sq m net/-53271 sq ft net) but some capacity will be generated over the study period of up to 19,261 sqm net (207,324 sq ft net) (2025). The capacity should be directed to existing centres in the first instance in accordance with PPS4.
- 4.34 The retail capacity analysis considers the need for A1 floorspace only. In reality, vital and viable centres will include other Class A2/A5 uses.

## 5.0 Scope for New Development

- 5.1 In this section, we review potential retail development sites in Southend town centre, Westcliff, Leigh, Thorpe Bay, Southchurch, Eastwood and Shoeburyness. For each potential development site, a proforma and red outline plan are provided at Appendix C. More detailed site information in the appendix relates to the site’s location, characteristics and current uses, policy considerations, accessibility, development potential and other comments as appropriate. A summary of the key points arising from this review is contained below on a centre-by-centre basis.
- 5.2 Prior to discussing the centres, the policy basis is described in terms of site selection for retail development as guided by PPS4, alongside recapping on the identified need for retail development over coming years.

### Policy Basis

- 5.3 In PPS4: Planning for Sustainable Economic Growth under Policy EC5.1:
  - “Local planning authorities should identify an appropriate range of sites to accommodate the identified need, ensuring sites capable of accommodating a range of business models in terms of scale, format, car parking provision and scope for disaggregation”.*
- 5.4 Local planning authorities should also base their approach on the identified need for development and adopt a sequential approach to site selection. Another key issue is identifying the appropriate scale of development which is in keeping with the role and function of the centres within the hierarchy and the catchment served. Other considerations include physical regeneration benefits, employment opportunities and increased investment in the area or social inclusion which are also material to considering assessing locations for development.
- 5.5 In Policy EC5.2 of PPS4, the approach to selecting sites is described:-
  - a. *“Sites for main town centre uses should be identified through a sequential approach to site selection. Under the sequential approach, local planning authorities should identify sites that are suitable, available and viable in the following order:-*
  - b. *Locations in appropriate existing centres where sites or buildings for conversion are, or are likely to become, available within the plan period;*
  - c. *Edge of centre locations, with preference given to sites that are or will be well connected to the centre;*
  - d. *Out of centre sites, with preference given to sites which are or would be well served by a choice of means of transport and which are closest to the centre and have a high likelihood of forming links with the centre”.*
- 5.6 Policy EC5.5 goes on to explain that planning authorities should allocate sufficient sites in development plan documents to meet at least the first five years identified need. There is also an emphasis on ensuring that those sites in preferred locations within centres are developed ahead of less central locations.
- 5.7 Policy EC5.6 is also clear that local authorities should make full use of planning tools to facilitate development. This includes Compulsory Purchase Orders and other planning tools such as Area Action Plans.
- 5.8 In terms of the sequential approach – and specifically relating to retail development - ‘in-centre’ is defined by PPS4 as the Primary Shopping Area (PSA). This is where retail

## 5.0 Scope for New Development

development is concentrated, generally comprising primary and secondary shopping frontages which are contiguous and closely related to the PSA.

- 5.9 Edge of centre locations are ones that are well connected to and within easy walking distance (i.e. up to 300 metres) of the PSA. Out-of-centre locations are sites which is not in or on the edge of a centre but not necessarily outside the urban area. These parameters guide site selection in Southend Borough.

### Retail Capacity

- 5.10 In Section 4 of this report, the identified retail capacity is illustrated for Southend town centre. This is described in the tables below:-

**Table 5.1**  
Convenience Floorspace Capacity

	2015	2020	2025
Southend	-88	308	736

**Table 5.2**  
Comparison Floorspace Capacity

	2015	2020	2025
Southend	36,841	50,873	70,172

NB: All figures are net sales areas (sq m)

Source: Table 6, Appendix B

- 5.11 For Southend town centre there is considerable capacity identified for comparison goods at 2015 and this rises further to 2025. Some limited capacity is also identified for convenience goods. In addition there is capacity (convenience and comparison) identified within non-centre stores which we recommend could be directed towards Southend town centre.
- 5.12 There is no capacity identified for either of the district centres of Westcliff or Leigh. Despite there being no capacity in either of the district centres, a number of development opportunities are still highlighted, given that they could still contribute to strengthening the centres overall. Likewise, while no capacity estimates have been generated for the smaller local centres, again reference is made to sites which may offer retail development potential.
- 5.13 It should be noted that the comments for each site are made in the absence of any specific scheme. The sites would need to be considered further in the context of such information, and in light of further design and feasibility testing.

### SOUTHEND TOWN CENTRE

- 5.14 In the first instance it should be recognised that Southend town centre has a considerable number of vacant units in the town centre which could go toward meeting the retail capacity identified, if this space is reoccupied. Experian Goad (2009) identified around 18,088 sq m (200,000 sq ft) gross of vacant space in the centre. Our recent health check identified that the number of vacant units has increased since then, suggesting the amount of space available has also increased. This vacant space would be expected to contribute to soaking up the retail demand, especially in the short term. In addition to this, there are a number of

## 5.0 Scope for New Development

- other sites identified (in the proformas attached at Appendix C) in or on the edge of the PSA that, if progressed, would be expected to contribute toward meeting retail need.
- 5.15 Two of the opportunity sites appear to offer very good scope to integrate well with the PSA and therefore should ideally be prioritised. These sites are:
- Tylers Avenue Car Park (total site coverage of c. 9,712 sqm)
  - Bus Station, Heygate Avenue (c. 2,540 sqm)
  - Alexandra Street Car Park (c. 3,880 sqm)
- 5.16 These sites are also highlighted as strong potentials, given that the Council is a significant landowner in each of these interests and therefore is in a good position to promote their delivery. In identifying these sites it is also recognised that while in the main they are characterised by low intensity uses (surface car parks, save for the bus station) the release of these sites may need to be carefully co-ordinated to ensure that a suitable amount of parking is reprovided on site or elsewhere in the town centre if they are to be redeveloped. The same is true for the Clarence Road Car Park opportunity, at the edge of the PSA. A wider town centre car park study could be undertaken to examine if this can be achieved, and how it may be co-ordinated. Assuming this can be achieved, and that they become available, then these sites could be regarded as likely to be sequentially preferable.
- 5.17 Likewise, if the bus station at Heygate Avenue is to become available for redevelopment, then careful examination of how bus services are provided will need to be assessed. Less land hungry solutions, such as a series of bus super stops might for example pave the way for this. Reconfiguration of the bus station may also need to consider what impact the proposed SERT system (guided buses) could have – this in itself could create an opportunity for redeveloping the bus station.
- 5.18 Importantly, the development of Tylers Avenue Car Park and the bus station could enable the creation of a new retail circuit for Southend town centre. This would help tackle a weakness of the centre; the elongated nature of the High Street. There is also scope to consider Tylers Avenue Car Park and the bus station as a single development package or as a phased development (with possibly Tylers Avenue Car Park being redeveloped first).
- 5.19 Another key site which may also contribute toward meeting the retail capacity is the land at the junction of Queensway and Short Street (the former B&Q unit). This vacant site is understood to be currently available, and a redevelopment may well offer the opportunity to increase the amount of retail floorspace here. A key issue with this site will be to secure good links with the Victoria Shopping Centre (part of the PSA), given the severance caused by Queensway between this site and the shopping mall (albeit that a modern upper level walkway is provided).
- 5.20 Two other potentially more challenging opportunities may exist. Firstly, there could be the opportunity to redevelop the existing car park adjacent to the Sainsbury's store (and perhaps including the foodstore itself as well as a couple of smaller units to the west of the car park) on the London Road, although is likely to require a willing landowner to facilitate this. This could provide new retail floorspace at ground floor level. A smaller site at the eastern end of the Southchurch Road (a car wash operation) might also offer a redevelopment opportunity, and possibly serve to provide a stronger anchor retail use in a weaker shopping area of the centre.
- 5.21 Together these sites should offer opportunities capable of accommodating a range of possible retailing formats to meet retail demand over the coming years. Clarence Road and Alexandra Street car park would, for example, be likely to meet the needs of smaller

## 5.0 Scope for New Development

niche retailers. Tylers Avenue Car Park and the bus station may well have the capacity to provide larger format stores geared toward multiple comparison retailers. There would also be expected to be scope to include more moderate sized retail units, and perhaps smaller units flanking the northern side of York Road. The retail mix here might also be able to accommodate a moderate sized foodstore, geared toward meeting food shopping needs in the town centre. The former B&Q site has good scope to meet large/big box retailing formats and, again, perhaps a foodstore.

- 5.22 Together, these sites and the current vacant units in the centre would be expected to have sufficient capacity to meet the retail capacity for at least the next 5 years (subject to detailed design/feasibility work). It should however be recognised that the Council will need to take a proactive role in their delivery. Assuming that these opportunities are progressed, and taken up for retail purposes, then in the longer term, the Council may need to look toward wider opportunities to meet future forecast retail capacity. Obvious considerations for this may be the extension of the existing shopping malls – The Victorias and The Royals. Another, perhaps longer term opportunity, may be through redevelopment of poorer quality office stock either in or on the edge of the town centre. One example of this might be through regeneration of office stock along Victoria Avenue, with perhaps potential for the inclusion of some retail uses here. It should be noted however that this would be at an edge of centre location and other more sequentially preferable sites should ideally be prioritised.

### DISTRICT CENTRES

#### Westcliff

- 5.23 While no retail capacity has been identified for Westcliff, there are potentially two opportunities that could provide new retail floorspace in the centre. In addition to vacant units present in the centre, Hamlet Court Road car park (c. 4,522 sqm) is a centrally located site, which if available and redeveloped could arguably serve to strengthen the heart of the centre, and integrate well into the existing shopping frontage. Were the Council minded to do this, then consideration would need to be given to the re-provision of car parking here. If this matter can be resolved, then the site could offer modern retailing floorspace with units of a small to medium size, with such units potentially attractive to comparison and convenience retailers.
- 5.24 The second site – North Road Car Park (c. 2,900 sqm) and adjacent land – lies at an edge of centre location. Again, low intensity uses characterise this site. If the land could be assembled here then this could provide a prominent frontage to London Road which may meet retailer requirements. A more ambitious approach could be to include all of the land bounded by North Road, Brighten Road and London Road to form a redevelopment package. This approach could generate a significant physical improvement to this area, given the generally poor quality of the urban fabric here.

## 5.0 Scope for New Development

---

### Leigh

- 5.25 Leigh is a constrained centre. Opportunities for significant retail development are limited. However, while there is no additional retail capacity identified for this centre, the land at 130-136 The Broadway (c.1,400 sqm) could offer a small extension to the retail space in the centre. This would require the assessment of land interests here or alternatively, two separate plots (i.e. 130 The Broadway and 136 The Broadway) being delivered. This may be a more realistic approach given that planning permission already exists for the vacant unit at this location.

## 5.0 Scope for New Development

### LOCAL CENTRES

#### Thorpe Bay

- 5.26 Thorpe Bay is a constrained centre, abutting residential areas. As a result there are no immediate development opportunities. Even so, there are a few existing vacant units which could soak up some demand.

#### Southchurch

- 5.27 Southchurch has two potential development opportunities which could allow for additional retail floorspace. Land between Oakleigh Avenue and Surbiton Avenue already has planning permission for a mixed use residential/commercial scheme. The commercial floorspace (380 sqm) has potential to meet the needs of comparison and convenience retailers, and lies adjacent to the secondary shopping frontage of Southchurch Road. Redevelopment of this currently vacant site would be expected to provide a stronger frontage to Southchurch Road. The second site – land at the junction of Southchurch Road and Ilfracombe Avenue – is currently used as a surface car park, and lies in an of edge of centre location. Were the site to become available, then it could accommodate small or medium sized retail units.

#### Eastwood

- 5.28 Eastwood offers a potential development opportunity to increase retail space at 366-368 Rayleigh Road. This site, under mixed ownership would need to be assembled if the benefits are to be optimised of redeveloping this site. If this could be facilitated then there could be scope to provide new retail space fronting Rayleigh Road, which in turn would reduce the fragmented nature of the retail offer which characterises this local centre.

#### Shoeburyness (Ness Road/West Road)

- 5.29 A number of vacant units already exist in this local centre and these would be expected to soak up any immediate retail demand. If however, the Council were keen to consider a more proactive approach to development in the centre then there is the possibility to provide additional retail space at land along Cambridge Road. This would however be expected to be part of a more comprehensive approach to addressing weaknesses in the centre overall, say through a masterplanning exercise or Area Action Plan. Due to our concerns regarding the general health of the centre a more holistic approach to examining the potential for change at Shoeburyness would be a positive step.

## 6.0 Office Sector Analysis

- 6.1 This section will seek to provide a strategic overview of the office sector in Southend town centre with an emphasis on the town centre, and set within the sub regional context. The existing office stock is reviewed, in Southend town centre and adjacent areas, using trend-based information as well as qualitative analysis. Known requirements for office users in the area are identified in order to gain an idea of the extent to which companies are looking to locate in Southend town centre. Comparisons are drawn with competing centres, namely Basildon and Chelmsford, in order to provide the sub-regional context; and our analysis is set within the wider Regional Spatial Plan proposals. The strengths and weaknesses of the Southend town centre office market is assessed as well as the opportunities and impediments to future office development, with particular emphasis on qualitative issues.

### PLANNING CONTEXT

#### Regional Spatial Strategy – East of England Plan

- 6.2 The East of England Plan identifies Southend-on-Sea as a ‘Key Centre for Development and Change’. According to Policy ETG4, Local Development Documents for Southend town centre should:
- Facilitate physical, economic and social regeneration of the urban area including maximising the re-use of previously developed land;
  - Achieve an urban renaissance of the town centre by establishing it as a focus for cultural and intellectual activities led by the development of a university campus, securing a full range of high quality sub-regional services and facilities, and providing for mixed use development to create new jobs and homes.
  - Upgrade strategic and local passenger transport accessibility, including the development of strategic transport interchanges around existing transport nodes; and
  - Improve surface access to London Southend Airport and support employment uses there that would benefit from an airport location.
- 6.3 Basildon is also identified as a Key Centre for development and change in the East of England Plan Policy ETG4; as is Chelmsford in Policy CH1.
- 6.4 Policy ETG5 of the East of England Plan sets out targets for job growth in the Essex Thames Gateway area.
- 6.5 Although the Government proposes to revoke all Regional Spatial Strategies including the East of England, the RSS provides some context for Southend and the office sector.

**Table 6.1**

Number of additional jobs to be created for the period 2001-2021

TOWN	JOB GROWTH TARGET
Southend-on-Sea	13,000
Basildon	11,000
Essex Thames Gateway	55,000

Source: East of England Plan - May 2008

- 6.6 As summarised in the table above, 55,000 net additional jobs are to be created in the Essex Thames Gateway region for the period 2001 - 2021, of which 13,000 should be in Southend and 11,000 in Basildon. No specific job-creation targets are set out for



## 6.0 Office Sector Analysis

Chelmsford in the East of England Plan, however, Policy CH1 states that *'the strategy for Chelmsford should further increase and diversify its employment base.'*

- 6.7 As stated above, the Government proposes to revoke the RSS but the reference to 13,000 jobs being created in Southend will remain relevant due to its inclusion in the Borough's Core Strategy.

### Southend Core Strategy – DPD1

- 6.8 The Core strategy refers to the Council's in depth scrutiny project 'Economic Growth Aspirations for Southend' (2006) which sets out how the Council should utilise its assets, policies, powers and influence to assist in achieving the net additional jobs target of 13,000 additional jobs within a sustainable economic base. The RSS (under review) identifies the economic growth areas for Southend based on existing nuclei and clusters of activity, and those that are aligned with a number of sectors identified:

- i. aviation/airport and associate industries;
- ii. health and medical industries;
- iii. business and financial services;
- iv. cultural and intellectual hub and HE centre of excellence;
- v. tourism and leisure, and long term opportunities from Olympics.

- 6.9 The reference to business and financial services is particularly relevant to the town centre office market and future provision of office space. The opening of the centrally located University campus has also brought a very strong Higher Education focus into the heart of the town centre.

- 6.10 Policy CP1: Employment Generating Development reaffirms the target of 6,500 net additional jobs between 2001 and 2021 in the Southend Town Centre and central area outlined in KP1, equating to 325 additional jobs per annum. It states that offices, retailing, leisure and other uses generating large numbers of people should be focused in the town centre. It does not however specify what part of the target 6,500 additional jobs would need to be accommodated in office (Use Class B1) space.

- 6.11 The Southend Central Area Action Plan will contain detailed policies and site specific proposals aimed at strengthening the centre's role as a major regional retail, employment and commercial centre, cultural hub and education centre of excellence to provide for 6,500 new jobs.

### Renaissance Southend - Southend Central Area Masterplan

- 6.12 The Central Area Masterplan asserts the importance of Southend continuing to play a role as a centre for employment, both for local people, but also for the wider sub-region.

- 6.13 It suggests that civic offices should be retained in their current location as the boulevard characteristics of Victoria Avenue seem appropriate to such functions. This will be further enhanced if the western side of the Avenue is redeveloped, as described below.

- 6.14 It recommends that the western side of Victoria Avenue should take on a 'new role' as a 'green living quarter' with a mix of uses including civic and residential uses as well as employment uses and offices albeit on a smaller scale than at present. The Masterplan draws on the Regeneration Framework's recommendation that high quality office uses should be brought into the town centre. Warrior Square is identified in the Masterplan as a

## 6.0 Office Sector Analysis

potential alternative location for the replacement of Victoria Avenue’s office stock. London Road is also highlighted as providing major opportunities for the Southend office market. The Masterplan does, however, specify that development should be phased to ensure that sufficient office floorspace is re-provided before any significant redevelopment of Victoria Avenue occurs. The Council, in partnership with RSL, is also preparing a Supplementary Planning Document to further detail and guide change at Victoria Avenue.

**Table 6.2**  
Indicative Office Development Capacity for Areas within Southend through to 2021

AREA	VISION / PROPOSED USES	INDICATIVE OFFICE DEVELOPMENT CAPACITY
The Victorias	New green mixed use quarter	54,621 sq m
London Road	Mixed use commercial quarter - new office, market residential and student housing scheme on London Road	24,962 sq m
Warrior Square	A new quarter for the community - prime office and residential-led mixed use quarter	12,861 sq m
Cliffdown Quarter	Mixed use	2,804 sq m
<b>Southend (in total)</b>	-	<b>114,639 sq m</b>

Source: Development capacity figures described are drawn from the Southend Central Area Masterplan. N.B. Total for Southend includes other minor development areas

- 6.15 As the table above illustrates, almost half of the total indicative development capacity for Southend is focussed around the Victorias, with just under a quarter being identified at London Road as well as some space at Warrior Square. According to the Central Area Masterplan, which establishes a framework for development through to 2021, the total development capacity for office space in Southend is 114,639 sq m.

### FUTURE OFFICE SUPPLY AND DEMAND

#### Southend Borough Council Employment Land Review –May 2010 - Baker Associates.

- 6.16 According to the Employment Land Review, the town centre currently contains 40% of all employment within Southend. A high proportion (23%) of the work force is employed in financial and business services, which is above the average for Eastern England and Great Britain as whole. The Employment Land Review suggests that there could be a market for small to medium sized professional service companies, albeit not on the same scale as back office relocations previously seen in Southend. It suggests that demand could be fuelled by a local workforce skilled in administrative and financial activities as well as comparatively low rents and Southend’s relatively strong transport connections.
- 6.17 The Employment Land Review also identifies potential demand from start-up businesses looking for managed office accommodation and ‘grow-on space’ from the Business Incubation Centre located in the University of Essex building in Southend town centre. Southend was identified by Barclays as one of the ‘start-up hotspots’ outside of London with 122 new businesses per 10,000 people of working age; although there is also evidence of a high closure rate. It is, therefore, important that the future office provision provides choice in terms of location and size of premises, if it is to foster and promote growth of indigenous companies.

## 6.0 Office Sector Analysis

6.18 The Employment Land Review predicts that the future additional supply of employment floorspace (office, industrial and retail) could be 82,000 sqm by 2021 in Southend. Based on projected demand the document concludes that this would leave a requirement of 176,718 sqm. The supply for the town centre/seafront is estimated at 17,000 sqm resulting in a future demand gap of 107,605 sqm. Whilst this figure includes all employment types, it is likely that the majority of the floorspace in the town centre/seafront will be for office and commercial (including retail) uses, as industrial uses are unlikely to be located in these areas.

**Table 6.3**

**Identified Gaps in Floorspace and Land Requirements by 2021**

LOCATION	FUTURE DEVELOPMENT SUPPLY	FUTURE DEMAND GAP
Town Centre/Seafront	17,000 sqm	107,605 sqm
Business Park	42,000 sqm	63,574 sqm
Other Urban Locations	23,000 sqm	0 sq m
District Centres	0 sq m	5,751 sq m
Total	82,000 sqm	176,718 sq m

Source: Employment Land Review - Draft

### OFFICE TRENDS

#### Rents and Yields

6.19 The prime metropolitan areas in Essex of Basildon, Chelmsford, Braintree and Thurrock have seen prime rental values drop from £25.00 per sq ft to £21.00 per sq ft (£269 to £226 per sq m) over 2009. More specifically, Southend appears to have become a less desirable office location with Chelmsford being better regarded and having a more active office market. This is reflected in the rental levels achieved, Chelmsford commands £21.50 per sq ft (£231 per sq m) for prime office accommodation and £15.50 per sq ft (£167 per sq m) for secondary space. Southend rents typically vary from approximately £12.00 per sq ft (£129 per sq m) for good quality space in the town centre to £5.00 per sq ft (£54 per sq m) for secondary dated office space. Our analysis of available premises suggests rents are typically around £9-£10 per sq ft (Focus 2010). Office space in Basildon, which has approximately the same amount of office stock as Southend, commands a substantially higher rent with prime rents standing at around £16 per sq ft (£172 per sq m).

**Table 6.4**

**Prime Rents – Southend, Chelmsford and Basildon**

TOWN	PRIME RENT
Southend-on-sea	£12 per sq ft (£129 per sq m)
Chelmsford	£21.50 per sq ft (£231 per sq m)
Basildon	£16 per sq ft (£172 per sq m)

Source: Local Agents/CB Richard Ellis

6.20 As the schedule of comparables below shows, lettings within the last year achieved between £4 per sq ft (approximately £43 per sq m) and £10 per sq ft (approximately £108 per sq m). According to local agents reasonably good quality second-hand space such as that on Victoria Avenue typically achieves £7-£9.50 per sq ft depending on how recently it was last

## 6.0 Office Sector Analysis

refurbished. Office space in Thamesgate House, which is on Victoria Avenue is currently on the market for £9.50 per sq ft although will probably achieve a lower rate on letting. A letting did occur at Maitland House on Warrior Square in June 2008 at a rate of £12 per sq ft. However, this is one of the few buildings in Southend that have been refurbished to a high specification.

- 6.21 Rents achieved for smaller offices on Clarence Road, Western Road and Clarence Street, range from £5 per sq ft to £9.50 per sq ft depending on the quality of the space.

**Table 6.5**  
Schedule of Office Comparables in Southend

LOCATION	SIZE	ACHIEVED RENT - £ PER SQ FT (£ PER SQ M)	LETTING DATE	COMMENT
34 Clarence Street	2,026 sq ft (188 sq m)	£9.38 per sq ft (£100.97 per sq m)	31/08/09	Second-hand
Kingswood House, 58-64 Baxter Avenue	1,094 sq ft (102 sq m)	£10.05 per sq ft (£108.18 per sq m)	01/06/09	Second-hand
18-19 Aviation Way	2,573 sq ft (239 sq m)	£4.08 per sq ft (£43.92 per sq m)	28/05/09	Second-hand
29 Queens Road	964 sq ft (90 sq m)	£4.15 per sq ft (44.67 per sq m)	27/05/09	Second-hand
Thamesgate House, 37 Victoria Avenue	28,324 sq ft (2,631 sq m)	£8 per sq ft (£86.11 per sq m)	18/05/09	Second-hand
Princess Caroline House, 1 High Street	1,452 sq ft (135 sq m)	£10.33 per sq ft (£111.19 per sq m)	28/02/09	Second-hand
20-24 Clarence Road	4,590 sq ft (426 sq m)	£5.34 per sq ft (£57.48 per sq m)	19/02/09	Second-hand

Source: Focus 2009

- 6.22 On the investment side, the secondary provincial office market has been largely inactive over the last 18 months with investors solely concentrating on secure long income streams providing a decent return. Buildings with short term income with potential voids and associated costs have been offered to investors at a large discount. It is very difficult to identify a yield for offices in Southend as very few significant investment transactions have taken place recently.
- 6.23 However, Victoria House, Victoria Avenue, was sold at auction in December 2008. This 3,122 sq m (33,608 sq ft) 1970's vacant office building is arranged over seven storeys with 54 car parking spaces (1:622 sq ft) and achieved £800,000 reflecting a Capital Value per sq ft of £23.80.
- 6.24 Overall, our view is that typical office space in Southend would do well to achieve a yield of any better than 10.50% in current market conditions. This weak yield also reflects the strengths of the covenants likely to be associated with investments; local rather than national occupiers.

### Demand and Take-up

- 6.25 In the Essex occupational market, the six months to the end of September 2009 saw 22,298 sq m (240,000 sq ft) of letting activity. This is 25% above the six monthly trend for the Essex market, which currently stands at 17,652 sq m (190,000 sq ft) (source: CB Richard Ellis). Office availability currently equates to just over 1.5 million sq ft although there are few significant office requirements focused on the Essex market. In recent years, demand for

## 6.0 Office Sector Analysis

office property in Southend has largely come from telesales companies, the banking sector and local and professional service companies.

- 6.26 Evidence suggests that there is a significant oversupply (approximately (32,516 sq m / 350,000 sq ft) of cheap second-hand office space of varying quality along Victoria Avenue. Demand for such property in this location is extremely low with only a series of small lettings of 65-177 sq m (700- 1,900 sq ft) achieved over the last year.

**Table 6.6**  
Southend-on-Sea Office Requirements

COMPANY	INDUSTRY	REQUIREMENT SIZE (SQ FT)	COMMENT
Nicholas Hall and Co.	Healthcare Marketing	3,000 – 4,000	Requirement for alternative office space in Southend due to expansion.
Walker Joice Recruitment Ltd.	Employment and Recruitment Agents	1,000 -1,500	Alternative office space in Southend required to accommodate 9 staff.

Source: Focus

- 6.27 Tenant demand for office space in the town remains weak despite an historically low rental base (with the low rent in part probably reflecting low demand). As the table above illustrates, there are two office requirements reported for Southend according to the databases consulted. These are both relatively small at 1,000 -1,500 sq ft and 3,000 – 4,000 sq ft. It is also notable that these requirements are from locally based, rather than national occupiers.
- 6.28 In comparison there are currently only two office requirements for Chelmsford from an insurance company and an environmental consultancy. There are three requirements in Basildon from a firm of Civil Engineers, a power tool company and a leasing company. These requirements are for office space of 3,000 - 4,000 sq ft, 1,000 -1,500 sq ft and 14,000 – 15,000 sq ft respectively. Demand for office space in Essex as a whole therefore appears to be relatively weak. These are however only office requirements published on national databases and it is likely that others will arise.

### Existing Stock

- 6.29 In terms of volume of stock, Southend had 244,000 sq m of office space in 2008. This is slightly higher than Basildon’s office stock of 229,000 sq m of, but significantly lower than the 329,000 sq m of floorspace in Chelmsford (Source: ONS). There has been a net decrease in Southend’s office stock between 2006 and 2008 of 16,000 sq m. This pattern is expected to continue as potential redevelopments such as Heath House and Carby House may further decrease Southend’s office stock with no significant office developments coming forward. Nevertheless, reducing the amount of poor quality office space, which there appears to be a glut of, may better align Southend’s stock with likely requirements.

**Table 6.7**  
Amount of Office Floorspace

YEAR	AMOUNT OF OFFICE FLOORSPACE ( 000 SQ M)		
	SOUTHEND-ON-SEA	BASILDON	CHELMSFORD
2008	244	229	326

## 6.0 Office Sector Analysis

2007	260	230	318
2006	260	230	290
2005	256	233	285

Source: Office for National Statistics

### Supply

- 6.30 According to Focus, there are currently over 57 available office premises in Southend equating to over 230,000 sq ft; a considerable amount of stock. Most of the stock is second-hand although there are a handful of refurbished premises.

**Table 6.8**  
Available Office Space

TOWN	NO. OF AVAILABLE PREMISES	OFFICE AMOUNT OF AVAILABLE SPACE (SQ FT)
Southend	56	280,251
Basildon	43	253,533
Chelmsford	113	524,767

Source: Focus / CBRE

- 6.31 According to the databases consulted, there is more available stock in Southend than in Basildon but significantly less than in Chelmsford. Chelmsford is a larger commercial centre and we would therefore probably expect there to be more available space, although this might also reflect the current economic downturn.

### Office Development

- 6.32 There has been no significant office development in Southend since the 1980s other than small office villages that have been developed on Comet Way and Stock Road, on the Temple Farm Industrial Estate and the 200,000 sq ft RBS building on Prince Avenue. This arguably reflects a weak demand profile for this type of space in Southend. It also probably reflects the fact that, with low rents and high yields, office development in Southend is unlikely to be a viable prospect.
- 6.33 Databases were consulted in order to identify the current office planning proposals in the pipeline. The results are summarised below:

**Table 6.9**  
Office Planning Applications

ADDRESS	STATUS	APPLICATION DATE	SUBSECTOR	PROPOSED SIZE (SQ M)
47 Victoria Avenue, Southend-On-Sea, Essex, SS2 6DR	App	14/10/2009	Retail (A1), Residential Institutional (C2), Business (B1a)	N/A
9 Elmer Approach, Southend-On-Sea, Essex, SS1 1NE	App	17/06/2009	Hotels (C1), Retail (A3), Business (B1a), Non-resi Institutional (D1)	N/A
319-321 Sutton Road, Southend-On-Sea, Essex, SS2 5PF	OutRef	05/05/2009	Residential (C3), Business (B1a), Retail (A2)	N/A

## 6.0 Office Sector Analysis

662 Southchurch Road, Southend-On-Sea, Essex, SS1 2PW	App	13/11/2008	Residential (C3), Business (B1a), General, General	380
Former Prudential Office Building, Elmer Approach, Southend-On-Sea, Essex, SS1 1LW	Ref	20/10/2008	Hotels (C1), Retail (A3), Retail (A4), Business (B1a), Non-resi Institutional (D1)	N/A
662 Southchurch Road, Southend-On-Sea, Essex, SS1 2PS	Ref	28/07/2008	Residential (C3), Business (B1a), General, General	380
South East Essex College, London Road, Southend-on-sea, Essex, SS1 1NX	App	21/11/2007	Residential (C3), Retail (A1/2/3/4/5), Business (B1a), Non-resi Institutional (D1), General	N/A
25 Roots Hall Avenue, Southend-On-Sea, Essex, SS2 6HN	OutApp	01/08/2007	Retail (A1), Sui Generis, Retail (A1/2/3/4/5), Business (B1a), Residential (C3), Residential (C3)	N/A

- 6.34 According to EGi, there are no planning applications for exclusively office buildings in Southend. The office space included as part of recent applications is generally only a small element of a mixed use scheme. Our research supports the assertion contained within Renaissance Southend’s Central Area Masterplan that low rents discourage new development from coming forward in Southend.
- 6.35 One of the main developments of note is the redevelopment of Heath House and Carby House. It is intended that these office blocks will be redeveloped to incorporate different uses with a much smaller quantum of office space.

### QUALITY OF STOCK AND ACCESSIBILITY

#### Quality of Office Stock

- 6.36 Southend’s main town centre office cluster is situated to the north of the town centre along Victoria Avenue. Here the stock is predominantly large 1960s-1980s office blocks which offer substantial floor plates. Victoria Avenue has been the key office location in Southend for some time. Estimates place the vacancy rate on Victoria Avenue at approximately 80% - a reflection of its desirability. Most potential occupiers are likely to consider the current stock unsuitable for modern purposes despite some units, including the Pinnacle, having been recently refurbished. Whilst, no internal inspections were undertaken, it is our belief that (although the RBS building and Keymed are notable exceptions), there is very little ‘grade A’ office stock in Southend. Nor is any new build stock available. Most large occupiers would seek buildings which are modern and of a high quality both internally and externally; Southend has very little of this type of stock. Nor is the scale of this offer likely to meet typically smaller requirements.
- 6.37 Victoria Avenue also has few, if any, adjacent facilities such as shops and food outlets which can be important in occupiers considering locations. Whilst the Victoria shopping centre is

## 6.0 Office Sector Analysis

in relatively close proximity to the southern end of Victoria Avenue, the northern end in particularly suffers from a lack of amenities.

- 6.38 It should also be noted that parking associated with office blocks is considered to be a positive factor in creating an appealing building for potential occupiers. There are arguably too few car parking spaces serving the office buildings on Victoria Avenue in proportion to their size.
- 6.39 There is a reasonable provision of office space on Baxter Avenue which is adjacent to Victoria Avenue. These buildings are smaller in scale to those on Victoria Avenue. A number of them have more appealing and less dated external design. Quite a lot of this stock, however, is also vacant. Overall, the general ambience of Victoria Avenue probably does little to assist in creating an attractive office environment.
- 6.40 Professional service offices in the town centre are concentrated around Clarence Road, Western Road and Clarence Street. By contrast, these seem to better fit the needs of office occupants, perhaps because of their close proximity to Southend Central station and to the town centre, and the range of services on offer here as well as the smaller size of floorplates on offer. Occupancy here is focussed on smaller professional services targeting a regional or local market. A large number of these offices are located above retail space.

**Table 6.10**  
Key Office Locations – Southend

AREA	QUALITATIVE DESCRIPTION OF EXISTING STOCK
Victoria Avenue / London Road	Large office buildings which appear dated externally. Lack of facilities including shops and food outlets. Limited parking space in comparison to the size of the buildings. Poor quality environment.
Baxter Avenue	Medium-sized office buildings, many with brick cladding. Lack of facilities in close proximity.
Clarence Street/ Clarence Road/Alexandra Street/ Western Road	Mix of small to medium sized stock located in close proximity to town centre. Primarily appears to be the focus for local professional service providers. Quality of area is reasonable.
Warrior Square	Location of Maitland House. One of few office buildings in Southend that has been refurbished to a high standard. In close proximity to the town centre and its amenities.

- 6.41 The quality of the office space and surrounding environs is illustrated in the photos below. To provide a comparison, images of office buildings in Chelmsford are also shown. The images clearly demonstrate a wide difference in the quality of stock available in the two towns, if only externally. In qualitative terms, it is difficult to argue that Southend’s office stock is likely to be more appealing to occupiers.



## 6.0 Office Sector Analysis

**Refurbished Office Block**  
Victoria Avenue, Southend



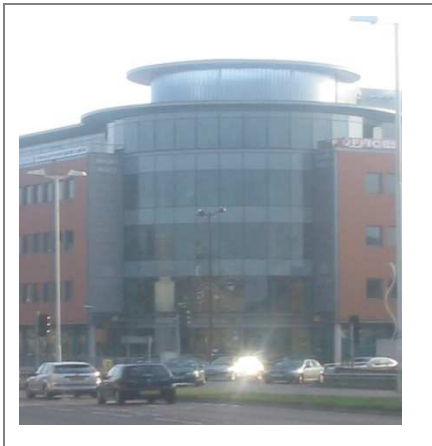
**Town Centre Office Space**  
Alexandra Street/ High Street, Southend



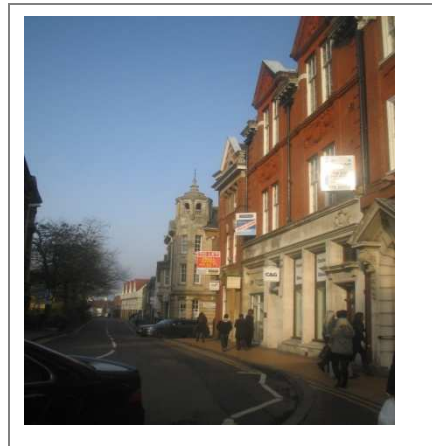
**Medium Sized Brick Clad Office Building**  
Baxter Avenue, Southend



**Refurbished Office Building**  
London Road, Chelmsford



**Town Centre Office Space**  
Waterloo Lane, Chelmsford



**Medium Sized Brick Clad Office Building**  
Parkway, Chelmsford



Source: CB Richard Ellis 2010

6.54 The commentary above is largely focussed on Southend’s town centre stock. There is limited office stock elsewhere in the borough. Some space is provided in the larger district centres of Westcliff and Leigh, but this is almost exclusively small scale, again with no new build. Office space is also dotted along the A127, but most of this is ancillary to industrial and distribution uses (although there are a few exceptions, such as the large RBS building on the A127). There is however some new speculative build offices at the Garrison scheme in Shoeburyness and at Aviation Way, close to the Southend Airport. Essentially though, Southend does not have a recognised large modern out of centre business park. In Chelmsford for example, Springfield at the north-east fringe of the town provides this type of accommodation, and offers good access to the nearby A12. Paramount to creating an attractive business park is a high quality working environment which is readily accessible by car.

## 6.0 Office Sector Analysis

### Accessibility

- 6.55 Accessibility is another important factor in offering attractive office space. Arguably Southend is less well placed in this respect in comparison to other office centres in Essex. Whilst less sustainable, travel to work by car is still very prevalent. In terms of road connections, Southend is located at the end of the A127 and A13. Basildon, on the other hand is accessible from the A13, A130 and A127 in both directions. Chelmsford also benefits from numerous road linkages including the A12, A130 and A414. Southend is therefore at a disadvantage as it does not have 360 degree road accessibility, unlike Basildon and Chelmsford.
- 6.56 Linked to this, the availability of car parking with office space is also an important and positive key attribute. New town centre office development in Chelmsford is almost always provided with a significant amount of associated parking.
- 6.57 Access to Southend by train is reasonably good. However, whilst Southend has two train stations, both offer relatively slow links into central London compared to Basildon and Chelmsford, thus making Southend a less appealing prospect for large office occupiers. Southend Central Station provides train links to London Fenchurch Street Station in around 55 minutes and National Express East Anglia operates a service from Southend Victoria Station to London Liverpool Street Station which takes just under an hour too. These stations do however offer good local connections. In contrast, trains from Chelmsford to London Liverpool Street take just over half an hour and trains from Basildon to London Fenchurch Street take approximately 35 minutes. Furthermore, Chelmsford benefits from direct train links to Ipswich, Brentwood, Colchester, Norwich and beyond which makes it an even more appealing regional centre. Therefore, in regional terms Southend struggles to compete with other centres due to its constrained geographical location and more compromised communication infrastructure.

### CONCLUSIONS: STRENGTHS, WEAKNESSES AND OPPORTUNITES OF THE SOUTHEND OFFICE MARKET.

- 6.58 In broad terms, the analysis of Southend’s office sector indicates that the market is oversupplied, and especially with outdated office stock. Much of this stock is too large and unlikely to meet the requirements of small to medium sized occupiers; the focus of demand for Southend office space. In qualitative terms, there are significant shortcomings in the office provision in Southend. We detail the strengths, weaknesses and opportunities for Southend’s office market below.

### Strengths

- The new centrally located Univeristy campus could offer further business connections and opportunities.
- There is a high start up business rate in Southend.
- Demand for office space does arise, almost exclusively from local service providers with small requirements.
- The office stock around Clarence Street, Western Road and Clarence Road is popular with local and professional firms. This area offers smaller scale stock in close proximity to the centre and rail services, and a fairly good quality environment.
- Southend offers direct rail links to London from two stations, with good local rail connections.

## 6.0 Office Sector Analysis

---

- Office rents are low, which may be an attractive proposition to occupiers.

### Weaknesses

- There is no new build modern stock available in Southend town centre, and little high quality second hand space.
- Available large scale office space does not match with typically smaller sized requirements. Southend is unlikely to see the relocation of back office functions on the same scale as in previous decades.
- The quality of the Southend office stock is generally poor, and in comparison to other nearby competing centres. For example, the Victoria Avenue stock is seen as dated and unfit for modern needs by potential occupiers – it also suffers from a poor quality environment with few associated facilities. There is a very high vacancy rate here.
- Rental values in Southend are low, especially when compared with other commercial centres such as Basildon and Chelmsford. Yields are also weak. This makes creating viable office developments very challenging.
- In comparison to other nearby centres, Southend is less accessible, especially in a regional context.

### Opportunities

- There is potential to better meet market requirements for small to medium sized professional service companies.
- There may be potential to further assist start-up businesses looking for managed office accommodation and 'grow-on space'. This could be allied to other start-up services, to help foster indigenous businesses.
- There may be opportunities to capitalise further on business links with the University to generate demand for office stock.
- There may exist development opportunities to considerably improve the quality of town centre office stock. This would also seek to reduce the amount of vacant and unused office space. A key candidate for this would be wholesale redevelopment of Victoria Avenue office stock.
- Allied to the above, a mixed use approach to new office developments may help to create viable proposals and a better balance of space on offer.
- Providing attractive new business space could strengthen the diversity of uses in the town centre and generally bolster the health of the town centre.

## 7.0 Conclusions

### SUMMARY OF FINDINGS

- 7.1 Overall, we conclude that Southend Town Centre is vital and viable, although there is consideration scope for improvement, as evidenced by strengths and weaknesses resulting from the health checks. There are also signs of a weakening trading environment, lower demand and higher vacancies in particular.
- 7.2 We consider that the major convenience stores in Southend borough are currently performing well and will continue to do so. The Sainsbury's store in the town centre is trading particularly well.
- 7.3 There is currently an over provision of convenience floorspace in Southend town centre (approximately -88 sq m net by 2015). It is not until 2020 where expenditure exists to support 308 sq m net, increasing to 736 sq m net by 2025 (Table 6).
- 7.4 Our assessment of capacity is based upon a constant market share approach throughout the study period. However, there is scope to increase Southend town centre's market share and claw back convenience expenditure which is currently leaking from the town centre to freestanding foodstores. To achieve this reversal of expenditure it will require additional bulk foodstore provision to help anchor the town centre's convenience provision particularly if/when Sainsbury's relocate to the former football ground at Roots Hall. The majority of the claw back in expenditure should be from identified Non-central capacity which could be directed towards Southend town centre.
- 7.5 Unless adequately planned for, the departure of Sainsbury's from the town centre could result in a loss of market share and careful consideration, in accordance with PPS4, should be given to foodstore proposals beyond existing centres, in particular by Morrisons on the football training ground at Fossetts Way.
- 7.6 Southend Town Centre is performing successfully as a comparison shopping destination, drawing a good level of trade from the surrounding zones, as well as some from further away to the east where competition is more limited. We consider that there is scope for additional comparison floorspace in Southend Town Centre, based upon forecast growth in population and expenditure over the core strategy period. We are not aware of any commitments in the pipeline to absorb expenditure growth and as such we forecast capacity of 36,841 sq m net at 2015, rising to 50,873 sq m net by 2020 and rising to 70,172 sq m net to 2025 (Table 6).
- 7.7 The Town Centre does however contain a large proportion of vacant retail floorspace. Whilst some of this is small scale and considered secondary in nature, larger refurbished units which would be attractive to retailers do exist, particularly within the recently refurbished Victoria Centre. Therefore, before planning to allocate sites to accommodate this additional capacity, careful consideration must be given to the ability of existing vacant floorspace within the town centre to accommodate the identified need over the plan period.
- 7.8 Turning to the district centres, the core of Westcliff is a reasonably attractive and healthy. The more peripheral trading areas are however much more varied in their quality. Leigh on Sea is a strong and healthy district centre, evidenced by a low vacancy rate and a high proportion of independent retailers and cafes and bars.
- 7.9 Both centres currently have an oversupply of retail floorspace when considered against available expenditure. This represents itself in negative capacity over the plan period (Tables 10 and 14, respectively).
- 7.10 As part of our assessment we have also had regard to Non central floorspace i.e. retail floorspace beyond identified centres within the study area. Based upon our assessment the

## 7.0 Conclusions

major out of town convenience stores are overtrading, with Asda (north Shoebury) displaying a significantly higher turnover than expected based upon company averages. Overall, the level of turnover results in surplus expenditure which could support new floorspace of 281 sqm net by 2015, 3,517 sqm net by 2020 and 9,972 by 2025. The available capacity could support a new convenience superstore (over 2,500 sq m net) by 2020. However, the surplus expenditure generated from the out of centre stores should be focused towards town centre development sites in accordance with PPS4 and to increase each centres market share. The first priority should be Southend town centre to ensure it maintains and enhances its convenience market share post the relocation of Sainsbury's.

- 7.11 The Non central comparison floorspace is also trading well, which is reflected in the high average sales densities. If the non central stores continue to trade at this level, there is no expenditure capacity to support additional floorspace by 2015 (-4,715 sq m net) although some capacity will be generated by 2025 (19,495 sq m net) (Table 18).
- 7.12 Elsewhere in our assessment the calculation of capacity has resulted from the assumption that existing (implied) turnover is reduced to assumed benchmark/company average levels – the surplus represents residual expenditure which is capable of supporting new floorspace. However, such an approach has not been applied to the Non Central comparison floorspace as we believe the existing shopping patterns/turnovers will only be affected by in centre development which will claw-back leaking expenditure. Should town centre initiatives come forward it is therefore realistic to assume that they will increase market share and reduce leakage to non central locations.
- 7.13 The retail capacity analysis considers the need for A1 floorspace only. In reality any vital and viable centre will include other classes including A2, A3, A4 and A5 uses.
- 7.14 We note from our Health Check analysis that Southend town centre and Leigh have a slightly below average (UK) service uses. Southend town centre's level of service provision has declined significantly since the last GOAD survey (April 2009) and has seen a decline in the number of high street banks. Despite the decrease in number of service units, some banks have increased the floorspace of their operations (Barclays and HSBC) which corresponds with the latest trends in high street retail banking where banks are seeking larger floorspace units for customers and banking facilities.
- 7.15 The lower than average service provision for Leigh provides evidence of a strong centre. We conclude that Leigh has a broad and diverse mix of uses, and especially so given the town's district centre status.
- 7.16 By contrast, Westcliff has a strong service sector representation including several national multiples including Pizza Hut, Wimpy and Subway. While a good representation of service uses would be expected in a district centre, balancing the mix of other retail uses would serve to strengthen the centre.

### Retail Hierarchy and Classification of Centres

- 7.17 Policy CP2 of the Southend Core Strategy (2007) states that Southend Town Centre will remain the first preference for all forms of retail development.
- 7.18 The centres of Westcliff (Hamlet Court Road) and Leigh will support Southend town centre as District Centres providing a range of local comparison shopping, convenience shopping and services to the neighbouring communities.

## 7.0 Conclusions

- 7.19 Town centre and retail development should be located within these centres, should contribute to their vitality and viability, and must be appropriate to the function, size and character of the centre concerned, in accordance with the above hierarchy and priorities.
- 7.20 Existing centres elsewhere will be supported as local centres only, meeting chiefly the day to day convenience needs of their local communities. The local centres are defined as Southchurch, Thorpe Bay, Eastwood and Shoebury (Ness Road/West Road).
- 7.21 As part of the Health Checks, we have reviewed all the centres and, though some areas are in need of improvement (which we set out in our recommendations in Section 2), their function, size and character are appropriate and we do not recommend changing the classification of centres set out in the Core Strategy.

### STRATEGIES FOR MEETING RETAIL NEEDS

- 7.22 The test of soundness introduced by PPS12 requires Council's to demonstrate that the Core Strategy is: the most appropriate, when considered against reasonable alternatives and; is effective and deliverable. PPS12 further requires a core strategy to include:
- An overall vision which sets out how the area and the place within it should develop;
  - Strategic objectives focusing on the key issues to be addressed;
  - A delivery strategy setting out how much development is intended to be accommodated, where, when and by what means it will be delivered; and
  - Arrangements for managing and monitoring the delivery of the strategy.
- 7.23 The Southend Core Strategy was adopted in December 2007 and sets out the key priorities for the borough until 2021. Southend Town Centre remains the first preference for all forms of retail development (Policy CPZ) and should be developed in accordance with the spatial strategy (Policy KP1).
- 7.24 When developing strategies, it is also imperative to ensure that the proposed course of intervention is deliverable in market terms. This is particularly pertinent given the current unfavourable market conditions whereby funding is less available and investors/developers are less willing/able to commit to schemes without having some security over tenants and deliverability.
- 7.25 Another factor to take into consideration is the necessity to ensure that whilst retail and commercial lead strategies are likely to form the basis of intervention, the economic base of the centres is broadened so as to ensure that these are less susceptible to the shock inherent with such a volatile market sector. Thus, where the opportunity arises, other viable uses should be encouraged. Whilst the focus of this assessment has been upon retail uses we have also had regard to the office sector and due regard will need to be had with the other supporting evidence base to the LDF strategy.
- 7.26 It is also important to emphasise that strategies cannot be prescriptive, and must recognise local circumstances and build on strengths and weaknesses.
- 7.27 The Core Strategy takes a long term view that in general should 'not include site specific details which can date quickly' (para 4.7, PPS12). Whilst the broad policies for the town centre are set out in the adopted Core Strategy the Retail and Town Centre Study is intended to inform more precise definitions through future masterplanning or supplementary planning documents. This approach is in line with requirements of PPS12.



## 7.0 Conclusions

- 7.28 In light of the current economic conditions there may be a greater level of uncertainty over proposals particularly in the short term. Many strategies/projects may also involve public sector investment which is currently being reviewed by the coalition government.
- 7.29 The strategies which we consider would be implemented have a short medium and long term. Whilst there is still uncertainty as to the length of the current economic slowdown the consensus is that we will return to a previous peak by 2015. Indeed past evidence has shown that following economic recessions expenditure per head increases at a rate excess of the down turn.
- 7.30 Given the current economic climate, we consider it more important than ever to ensure that regeneration of areas come forward as these initiatives can provide jobs, assist in investor confidence and reduce social exclusion.

### Strategic Growth Options

- 7.31 The sequential approach suggests Southend town centre should be the first choice for retail development, moreover those forms of retail facilities that serve smaller, more localised centres should be located in smaller district and local centres where gaps have been identified.
- 7.32 In this context and based upon the findings of our assessment we consider it more appropriate to assume the distribution of floorspace remains unchanged across the study area, in line with existing market share and the current role of each centre within the hierarchy though, as we highlight elsewhere, any expenditure growth should be directed towards the borough’s centres with the town centre as the first preference.

### DEVELOPMENT OPPORTUNITIES

- 7.33 With retail capacity identified for Southend town centre to 2015 and beyond - and especially for comparison goods - consideration must be given to where this could potentially be accommodated in the centre. Firstly, it is recognised that existing vacant units (This could total approximately 18,000 sqm gross of non specified retail floorspace) would be expected to soak up some of this capacity. In The Victorias, for example, there are vacant units which would be expected to meet multiple retailer requirements. Over the plan period opportunities would also be expected to arise for some incremental increase in existing floorspace through extending shop units, developing mezzanines or creating larger trading areas through internal unit reconfiguration.
- 7.34 Even allowing for this, other sites will need to be considered for their retail potential if this capacity is to be absorbed. The review of Southend town centre suggests that several sites could offer a good prospect of integrating well with Southend town centre’s existing Primary Shopping Area, and therefore should ideally be prioritised for delivery and retail use. These sites are:
  - Tylers Avenue car park;
  - The bus station, Heygate Avenue; and
  - Alexandra Street car park.
- 7.35 The ability of these sites to accommodate retail uses would be subject to design and feasibility testing. For Tylers Avenue and Alexandra Street a key issue will be the need to examine issues of car parking loss, replacement or reconfiguration. This might be informed by a wider car park study for the whole centre. In the case of the bus station, then any redevelopment will need to ensure that passenger facilities continue to be available. A

## 7.0 Conclusions

solution to these issues may then make these sites more readily available. Together, the Tylers Avenue and bus station sites could create a new retail circuit for Southend town centre – thus mitigating the apparent lack of an existing strong retail circuit. Assuming these sites can be developed out for retail purposes then, on completion, they would be expected to form part of Southend town centre’s Primary Shopping Area.

- 7.36 Edge of centre sites in Southend town centre may also contribute to meeting retail need given the amount of capacity identified. In particular, the former B&Q site at Short Street offers a good opportunity for retail development in the short term given its current availability. Severance caused by the Queensway between this site and The Victorias would however need to be considered carefully to ensure that development here is integrated as best as possible into Southend town centre’s Primary Shopping Area. Other edge of centre sites may also contribute to meeting retail need (as described in Section 6) though careful consideration will need to be given to the location of the proposal, its relationship with the town centre and potential impact and other PPS4 criteria.
- 7.37 For Westcliff and Leigh no retail capacity is identified, and therefore there may not be a quantitative requirement to allocate retail sites. There may, however, be qualitative reasons to consider doing so such as the lack of modern retail units, limited supply of a certain fascia and regenerative benefits. Hamlet Court Road car park site at Westcliff which, if promoted for retail development could, for example, provide a much stronger retail core in this district centre. Redevelopment here too may offer the prospect of delivering some larger units to meet potential occupier requirements. If suitably designed, then development here would be expected to integrate well with Westcliff’s Primary Shopping Area.
- 7.38 A number of sites are also identified in Southend’s local centres. Again, these could be promoted for retail development for qualitative rather than quantitative reasons. Particular attention should also be paid to Shoeburyness local centre (Ness Road/West Road), given concerns regarding the more marginal health of this location. For Shoeburyness, a more comprehensive examination of the centre, including its development potential may be a more positive way forward. This could take the form of an action plan or similar document to guide improvement in this centre.

### Other Initiatives

- 7.39 It is recognised that town centres are not just about retail. Nor should initiatives be solely concerned with retail capacity issues. PPS4 has strengthened the importance of qualitative issues in considering town centres and retail development overall. The health checks highlight a number of qualitative issues relating to each of the centres surveyed. For Southend town centre, a programme of public realm and shop front improvements (say through match funding for the latter) could enhance secondary shopping areas where the quality of the environment is viewed to be weaker. An obvious candidate for this programme could be Southchurch Road, which has a high concentration of independent traders. Such a programme too could in turn help support independent traders, and perhaps attract new traders to enhanced areas.
- 7.40 The reinstatement of a market in Southend town centre was also seen as a possible way to diversify the offer. An initial scoping study suggests that there is demand for a market, and if placed in a central location would add to general retailing activity. A market could also aim to diversify the range of foodstuffs available in the centre, given the fairly tight range of outlets currently available in this sector in Southend town centre.
- 7.41 There may be other initiatives that could serve to strengthen Southend town centre and other centres in the borough. This might include promotional events focussing on retailers



## 7.0 Conclusions

---

in the town, shop care schemes for empty shops, possible discretionary rate relief or even local shop campaigns. A more radical approach to supporting independent traders in centres could be for the Council to acquire a number of retail units and offer these to the market at discounted rents, or with extensive rent free periods.

- 7.42 The health check for Southend town centre also noted that, potentially, the range of commercial leisure uses on offer in the centre is moderate and enhancing this could serve to diversify the town centre offer overall. It is however clear that Southend seafront does offer a considerable commercial leisure offer, and potentially connecting these better to the town centre may well be a positive way of maximising the benefits available here. There may also be opportunities to encourage more outside café/dining seating. This would aim to increase the street activity in certain areas and enhance the viability of this offer.
- 7.43 Another possible approach to improving the evening economy could be to look at the Purple Flag Scheme. This could help Southend look objectively at issues such as mobility, sense of place and the appeal of the offer to the market. From this, the Council could look to ways to meet any perceived shortcomings such as providing improved street lighting and CCTV as well as creating more active frontages at night-time.
- 7.44 For Westcliff, a key initiative could be to look at further public realm improvements. Improvements already undertaken along parts of Hamlet Court Road have significantly enhanced the environmental quality of the centre. A similar approach to public realm improvements along London Road – albeit outside the core centre area – might be expected to enhance the perception of this area more generally. This approach might target specific nodes for improvement. A key opportunity for this action could be area in the vicinity of the Palace Theatre.
- 7.45 For Leigh district centre a key initiative could be to continue to improve accessibility and shopper mobility. From the health check there appears to be an opportunity to improve cycle facilities, widen pavements in some places (where possible) as well as improved pedestrian crossings around the Triangle.

---

# APPENDICES

---

# Survey Area and Shopping Area boundaries

---

# Retail Capacity Tables

---

# Development Opportunities

---

# Retailer Requirements as of May 2010

---

# Household Survey

---

# Retail Commitments as of June 2010

---