Lambert Smith Hampton

Centres, Retail & Commercial Leisure Needs Assessment

Volume 1: Main Report - FINAL

Prepared for:

Thurrock Council

December 2025

lsh.co.uk

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This report meets the PDF/UA (Universal Accessibility) standard, which is equivalent to the WCAG 'AA' digital standard.

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Signed:

For and on behalf of Lambert Smith Hampton

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Lambert Smith Hampton

1. INTRODUCTION

1. Thurrock Borough Council (hereafter referred to as 'the Council') commissioned Lambert Smith Hampton (LSH) in January 2025 to prepare the 'Thurrock Centres, Retail & Commercial Leisure Needs Assessment' (TCRCLNA) (the 'Study').

2. This Study will provide the robust evidence needed to inform strategic and development management policies for the emerging new Local Plan covering the period up to 2044 particularly in relation to town centre uses across Thurrock's network of centres. This new Plan will replace the current Thurrock Core Strategy that was formally adopted in December 2011 and updated in January 2015 following an independent examination.

3. The study will assess how much additional retail and commercial leisure floorspace is needed over the Local Plan period. The findings of the Study will supersede the Council's current town centre policy evidence base, including the previous South Essex Study (2017) ('2017 SES').

4. Other key objectives of the study are to review and update the following:

- **Retail & Leisure Evidence Base**: Summarise current retail and commercial-leisure evidence base for Thurrock regionally and locally by centre.

- **Market & Economic Trends:** Assess national retail and leisure trends, considering economic and technological impacts on shopping habits.

- **Retail Spending Patterns:** to undertake household survey and analyse data on convenience and comparison retail spending, including Lakeside's regional influence.

- **Updated Health Check Assessments** for :

Regional Centre:	**Lakeside**
Town Centre	**Grays**
Existing Local Centres	**Aveley** **Corringham** **Socketts Heath** **South Ockendon** **Stanford-le-Hope** **Tilbury**

- **Lakeside's Role:** Define Lakeside's function within Thurrock's retail hierarchy and provide recommendations.

- **Centre Hierarchy & Network:** Establish a clear retail and leisure network across Thurrock, including town centres and large neighbourhood parades.

- **Future Floorspace Needs (to 2044):** Advise on the scale, format, and distribution of additional retail and leisure floorspace.

- **Town Centre Boundaries & Uses:** Define town centre areas, primary shopping areas and appropriate complementary uses.

- **Retail & Leisure Future Needs:** Make recommendations for any identified new floorspace requirements for the comparison and convenience retail sectors, and for the commercial leisure sector over the period to 2044. This includes sensitivity testing to assess the effect of new housing development across the Borough based on a target delivery of 1,444 dwelling units per annum to 2044 (resulting in 28,880 homes to 2044).

- **Hotel Accommodation:** Assess future demand for hotel bedspaces and recommend suitable locations.

- **Advise on Retail Impact Assessment Threshold**: Advise on setting a local retail floorspace threshold for impact assessments, considering NPPF and NPPG guidelines.

5. The study has been prepared in the context of current and emerging local, regional and national development plan policy guidance, as well as other key material considerations; principally the National Planning Policy Framework (NPPF). Where relevant, the study also draws on advice set out in the National Planning Practice Guidance (PPG). Both the NPPF and PPG place significant weight on the development of positive plan-led visions and strategies to help ensure the vitality and viability of town centres (Town centres or centres are defined by the NPPF (Annex 2) as city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in the development plan, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres).

6. The study is presented in a series of inter-related Volumes as follows:

- **Volume 2**: comprises the quantitative appendices that inform the economic capacity tables for retail needs.

- **Volume 3** sets out the findings of the 2025 town centre health check assessments for:
  - Regional Centre: Lakeside
  - Town Centre: Grays
  - Existing Local Centres:
    - Aveley
    - Corringham
    - Socketts Heath
    - South Ockendon

- Stanford-le-Hope
- Tilbury

- **Volume 4** presents the weighted results of the household telephone interview survey conducted by NEMS Market Research (NEMS) for this study. Some 1,000 households were interviewed across a defined Study Area in May 2025.

7. This Volume draws on the evidence and research in **Volumes 2-4**. It provides robust policy recommendations to help the Council prepare positive strategies, plans and policies for the growth, management and adaptation of the Council's designated town centres over the short, medium and long term to help ensure their future vitality and viability.

8. For ease of reference this report, (**Volume 1**), is divided into the following inter-related sections:

- **Section 2** reviews the national, regional and local planning policy context.

- **Section 3** highlights some of the key trends that are driving the dynamic changes in the retail and leisure sectors at the national and regional level, and how these trends have shaped (and are likely to shape) the urban and retail landscape over the short to long term.

- **Section 4** summarises the survey-derived market share analysis of shopping patterns for different types of comparison and convenience goods purchases across a defined catchment area (see **Volume 2**).

- **Section 5** sets out the health check methodology.

- **Section 6** provides a summary assessment of the relative vitality and viability of the centres detailed previously (see **Volume 3**).

- **Section 7** details the key assumptions and findings of the strategic retail capacity assessment for new convenience and comparison goods retailing up to 2044 based on LSH's in-house CREAT^{e} economic model and drawing on the results of the economic tabulations provided in **Volume 2**.

- **Section 8** sets out the findings of the commercial leisure need and 'gap' assessment, drawing on the evidence and market research, including the results of the household survey.

- **Section 9** details the findings of the hotel provision and bed assessment for the Council area.

- **Section 10** draws on the previous sections and provides recommendations to help inform the Council's preparation of robust policies and strategies aimed at maintaining and enhancing the vitality and viability, and competitive positions of its centres over the lifetime of the plan.

2. PLANNING POLICY CONTEXT

9. To help inform the preparation of this study, this section provides a summary of the key national, regional and local planning policies pertaining to retail, leisure and other main town centre uses.

NATIONAL PLANNING POLICY & GUIDANCE

National Planning Policy Framework (NPPF)

10. The NPPF was last updated in December 2024 and sets out the Government's planning policies for England. Planning law requires that applications for planning permission be determined in accordance with the development plan unless material considerations indicate otherwise. The NPPF must therefore be considered in plan-making and is a material consideration in planning decisions.

11. The NPPF states that the purpose of the planning system is to contribute to the achievement of sustainable development, which is defined as meeting the needs of the present without compromising the ability of future generations to meet their own needs. The Framework (paragraph 11) sets out the Government's view of what the presumption in favour of sustainable development means in practice. For **plan-making**: "…*plans should positively seek opportunities to meet the development needs of their area and be sufficiently flexible to adapt to rapid change*" (paragraph 11a).

12. Chapter 3 ('**Plan-Making'**) of the Framework provides guidance to local authorities on preparing local plans. Paragraph 20 states that policies should set out an *overall strategy for the pattern, scale and design quality of places and make sufficient provision* for new sustainable development. It requires that strategic policies should look ahead over a minimum 15-year period from adoption (paragraph 22), *except in relation to town centre development* (see paragraph 13 below). In preparing development plans, "*policies should be underpinned by relevant and up-to-date evidence*" (paragraph 32). To ensure the local plans and spatial strategies are relevant they should be reviewed at least once every five years and updated as necessary (paragraph 34).

13. Chapter 7 ('**Ensuring the vitality of town centres'**) provides guidance on plan-making and decision-taking for retail and other town centre uses. Paragraph 90 states that "*planning policies and decisions should support the role that town centres play at the heart of local communities*" and sets out criteria that local authorities should consider when preparing planning policies. These include: (a) defining a network and hierarchy of centres; (b) defining the extent of town centres and Primary Shopping Areas (PSAs); (c) retaining and enhancing existing markets; and (d) allocating a range of suitable sites in town centres to meet the sales and type of development likely to be needed, "*looking at least ten years ahead*".

14. Paragraphs 91-95 specifically set out the requirement to apply the sequential and impact tests to determine applications for new retail, leisure and main town centres

that are neither in an existing centre, nor in accordance with an up-to-date development plan.

15. Other Chapters in the NPPF are also relevant to the preparation of this study, and to the Council's plan-making and decision-taking policies for its network and hierarchy of centres. For example, Chapter 8 ('Promoting healthy and safe communities') sets out the need to achieve healthy, inclusive and safe places; including the need to plan positively for the provision and use of shared spaces, community facilities (such as local shops) and other local services to enhance the sustainability of communities and residential environments (paragraph 98a).

Planning Practice Guidance (PPG)

16. The Planning Practice Guidance (PPG) provides specific guidance on plan-making and decision taking for retail, leisure and town centre uses, including guidance on Permitted Development Rights (PDR), Article 4 Directions, and the new Use Classes Order ('UCO') that came into effect on 1st September 2020 (Paragraph: 007 Reference ID: 2b-007-20190722. Also refer to: Town and Country Planning (General Permitted Development) (England) Order 2015, as amended) (also discussed later in this section). The Guidance supports the policies and provisions of the NPPF, placing significant weight on the development of positive plan-led visions and strategies for town centres.

17. In terms of planning for town centres, the PPG states that a wide range of complementary uses can, if suitably located, help to support the vitality and viability of town centres. These include residential, employment, office, commercial, leisure/entertainment, healthcare and educational development. Evening and night-time activities also have the potential to increase economic activity within town centres and provide additional employment opportunities.

18. The PPG (paragraph 004) sets out the importance of evidence-based strategies and visions for town centres to help establish their role and function over the plan period, the need for new retail, leisure and town centre uses, and other interventions. However, given the uncertainty in forecasting long-term retail trends and consumer behaviour, the PPG states that forecasts **"…may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed**" (Paragraph: 004 Reference ID: 2b-004-20190722). In those cases where development cannot be accommodated in town centres, the PPG requires planning authorities to plan positively to identify the most appropriate alternative strategy for meeting the identified need, having regard to the sequential and impact tests (Refer to Paragraph: 005 Reference ID: 2b-005-20190722. Paragraph 010A ID: 2b-010-20190722 also provides a checklist for local planning authorities to consider when applying the sequential test). The PPG also sets out several Key Performance Indicators (KPIs) that "*may be relevant in assessing the health of town centres and planning for their future*"(Paragraph: 006 Reference ID: 2b-006-20190722).

Use Classes Order & Permitted Development Rights

19. The Government has issued a series of reforms to the planning system since 2020 that are relevant to this study. The reforms principally relate to Permitted Development Rights (PDR) and the Use Classes Order (UCO), alongside the Government's White Paper "Planning for the Future" (published in August 2020) and the 2021 Planning Reform Bill.

20. The new UCO came into effect from 1st September 2020 and is relevant to the Council's plan-making and decision-taking on new retail, leisure and town centre uses. The new UCO amended and revoked a number of use classes under the 1987 Order and has replaced them with much broader use classes. In summary, the main reforms introduced by the new UCO include :

- a new **Class E (commercial, business and service uses)**: which subsumes the former Use Classes A1 (shops), A2 (financial and professional services) and A3 (restaurants and cafés). It also incorporates: the former Class B1 (commercial, business and service uses), comprising office, research and development and light industry; Class D1 (non-residential institutions) in part, comprising medical or health services, clinics, crèches, day nurseries and day centres; and Class D2 (assembly and leisure) in part, comprising gyms or areas for indoor recreation.
- a new **Class F1 (learning and non-residential institutions)**: which includes some of the former uses under Class D1 (non-residential institutions), including museums, public libraries, art galleries, schools, and places of worship.
- a new **Class F2 (local community uses)**: which comprises (former Class A1) shops defined as being "*…not more than 280 sqm mostly selling essential goods, including food, and at least 1km from another similar shop*". This Use Class also includes former Class D2 (assembly and leisure), such as meeting places/halls, indoor/outdoor swimming baths, skating rinks, and outdoor sport and recreation.
- an extension to the **Sui Generis** uses (which fall outside the specified use classes) to include the former Use Classes A4 (pubs and drinking establishments) and A5 (hot food takeaways). It also incorporates some uses previously classified under D2 (assembly and leisure), including cinemas, concert halls, live music venues, bingo and dance halls.

21. The Government also issued the new PDR on 1st August 2021 (Town and Country Planning (General Permitted Development etc.) (England) (Amendment) Order 2021) that permits the change of Class E to Class C3 (residential), subject to prior approval applications. This PDR replaced the two existing commercial to residential PDRs under Class O (office to residential) and Class M (conversion of shops, financial services, betting offices and pay day loan or mixed uses to residential), with a new **Class MA**. In launching the PDR the Government stated that the regulations will give "*…greater freedom for buildings and land in our town centres to change use without planning permission and create new homes from the regeneration of vacant and redundant buildings*" (source: PM: Build, Build,

Build - PM Boris Johnson has announces the most radical reforms to our planning system since the Second World War (Prime Minister's Office, 10 Downing Street, 30/06/2020). The PDR (Class MA) does contain some conditions and limitations, such as: (i) it only applies to buildings that have been vacant for a least three continuous months; and (ii) it does not apply to buildings with a cumulative floorspace of more than 1,500 sqm. Although it does not apply to Listed Buildings, it can be applied in a Conservation Area (subject to an impact assessment if it involves converting the ground floor). Since it was introduced, we are aware some local authorities are planning to bring in new Article 4 restrictions under the GPDO to prevent parts of their area from being converted (including, for example, Westminster City Council and a number of other London Boroughs).

LOCAL PLAN CONTEXT

22. The key planning policy documents and associated policies pertaining to town centres and relevant to the preparation of this study include:

- the **Extant Plan (Thurrock Core Strategy)** was adopted in December 2011 and updated in January 2015 following an independent examination. Appendix 7 of the Core Strategy also lists saved policies from the Local Plan (adopted 1997) and identifies how they were intended to be replaced. Many of these policies were replaced by policies within the new Core Strategy. However, some policies were intended to be replaced by ones within a Site Specific Allocations and Policies document, which never evolved. Therefore, many of Thurrock's policies are fragmented and currently do not reflect national policy.

- the **Emerging Local Plan**: Thurrock Council is in the process of developing a new Local Plan which will become the principal Development Plan Document for Thurrock. The Council conducted public consultations in 2023/24 on the Local Plan Initial Proposals (Regulation 18) and are aiming for the publication of a Draft Consultation Local Plan in Spring 2026 with the aim to adopt the new Local Plan in Spring 2028.

Extant Local Plan - Thurrock Core Strategy (2015)

23. The **Thurrock Core Strategy** sets out a spatial vision, strategy and planning policies for Thurrock. The Core Strategy contains the existing local policy for town and local centres, as well as Lakeside Regional Centre, and includes the following policies:

- **Policy CSTP7** sets out the '**Network of Centres'** of centres as follows:

Regional Centre:	• Lakeside
Town Centre	• Grays
Existing Local Centres	• Corringham, • Stanford-le-Hope, • South

	• Ockendon, • Tilbury, • Aveley, • Socketts Heath
New Centres	• Purfleet
Existing Neighbourhood Centres	Larger neighbourhood parades identified at: • Chadwell St Mary, • Stifford Clays, • East Tilbury, • Corringham, • Grays, • Little Thurrock, • Chafford Hundred, • Tilbury. Smaller neighbourhood parades are identified at: • South Ockendon, • Aveley, • Grays, • Tilbury, • Linford, • Stanford-le-Hope, • Corringham, • Purfleet

- **Policy CSTP7** supports the transformation of the northern part of the Lakeside basin into a new regional centre. It also supports the regeneration of Grays town centre as the focus for cultural, administrative and educational functions whilst providing retail that is complementary to the Lakeside Basin. Development in Grays town centre is stated to include:
  - Up to 5,500-6,500 sqm of net comparison floorspace by 2026;
  - Up to 4,000-5,000 sqm of net bulky durable floorspace by 2026;
  - Between 1,500-2,000 sqm of net convenience floorspace by 2026;
  - Other cultural, administrative and education

- **Policy CSTP8** on the **'Vitality and Viability of Existing Centres'** states the Council will maintain and promote the retail function of existing centres. In relation to town centre uses the policy has a town centre first approach, followed by edge of town centre locations. It encourages diversification and improvement of the range and quality of facilities and seeks to improve access for public transport, pedestrians and cyclists. New development should protect and/or enhance designated centres including historic character, townscape and biodiversity. It also states that "*where appropriate seeking to improve personal safety and contribute to crime reduction by design and other measures*."

- **Policy CSTP9 on 'Wellbeing: leisure and sports'** supports the delivery of physically active, socially inclusive and healthy communities and states that the "*Council promotes smaller-scale sports and leisure facilities in town centres, local centres and Lakeside Regional centre*".

- **Policy CSTP14 on 'Transport in the Thurrock Urban Area'** highlights that the Council will work with partners to deliver a 10% reduction in car traffic by delivering walking and cycling routes. It identifies Grays and Lakeside as priority areas to employ Smarter Choices programmes, to address congestion and air quality. The policy also states that "road space will be reorganised to improve the public realm and give further priority to sustainable modes at transport interchanges, with priority at Grays rail station." The Policy also states that the Council supports the transformation of the northern part of the Lakeside Basin into a new regional centre taking account of sustainable movement patterns including improving local accessibility and connectivity by public transport.

- **Policy CSTP20 on 'Open Space'** seeks to ensure that a diverse range of accessible public open spaces, including natural and equipped play and recreational spaces is provided and maintained to meet the needs of the local community.

Saved Policies from the Borough Local Plan 1997

24. The Thurrock Borough Local Plan, adopted in September 1997, contained policies that were automatically saved under the Planning and Compulsory Purchase Act 2004. These saved policies were intended to remain in effect until replaced by new policies within Thurrock's emerging Local Development Framework (LDF). The Core Strategy and Policies for Management of Development, adopted in December 2011 and amended in January 2015, serves as the foundation for this framework. **Appendix 7 of the Core Strategy lists numerous saved policies from the Local Plan (adopted 1997**). With reference to town and local centres, the following saved policies from the Local Plan (1997) are pertinent:

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SH1	**MAJOR RETAIL DEVELOPMENTS** **In the light of the cumulative impact on existing shopping centres of retail and retail warehousing facilities at Lakeside and other recent and proposed large-scale retail developments in and around Thurrock, planning permission will not be given for any new major retail developments outside existing and proposed shopping and town centres in the Borough, as defined on the Proposals Map, unless it can be shown that there would be no further impact on the vitality and viability of existing centres in the Borough and neighbouring areas and no adverse effect on traffic flows in the vicinity of the proposed development.**
SH3	**GRAYS SHOPPING CENTRE - ADDITIONAL RETAIL FLOORSPACE** **The Council will permit development which increases the provision of retail floorspace and improves the quality of shopping facilities in Grays Shopping Centre, as defined on the Proposals Map, providing such proposals are of an appropriate size and scale to ensure that the remainder of the town centre is not adversely affected by large scale retail development.**
SH4	**GRAYS SHOPPING CENTRE - MODERNISATION AND REFURBISHMENT** **The Council will grant planning permission for appropriate improvements to shops and shop fronts, in order to secure the continuing modernisation and refurbishment of existing shopping facilities in Grays Shopping Centre, as defined on the Proposals Map, providing the development meets other policies in the Plan protecting the environment.**
SH6	**EXISTING TOWN CENTRES - ADDITIONAL RETAIL FLOORSPACE** **Planning permission will be granted for the creation of additional retail floorspace in the town centres noted below and identified on the Proposals Map, providing the development meets other policies in the Plan protecting the environment. Such proposals should be of an appropriate size and scale to ensure that the remainder of the town centre is not adversely affected by large scale retail developments.** **(a) Aveley** **(b) South Ockendon** **(c) Stanford-le-Hope** **(d) Corringham** **(e) Socketts Heath** **(f) Tilbury**
SH8	**NEW LOCAL SHOPPING FACILITIES** **The Council will expect the provision by developers of new shopping facilities to meet local needs created by significant new housing developments unless there are adequate existing shopping facilities nearby to serve the development.**

SH10 NON-RETAIL USES IN DISTRICT AND LOCAL SHOPPING CENTRES

The Council will restrict the change of use from Class A1 (Shops) at ground floor level in district and local centres listed below in accordance with the following criteria:-

A) CORE AREAS (shown on the Proposals Map);No change of use will be permitted.

B) CENTRAL AREAS (shown on the Proposals Map):
Changes of use to Class A2 (Financial and Professional Services), Class A3 (Food and Drink) and Class D1(a) (Non-residential institutions) will be permitted providing the following criteria are adhered to and normal development control standards are met:

(i) The proposal does not result in more than two non-Class A1 (Shops) uses together;

(ii) No more than 30% of uses in each designated frontage are other than Class A1 (Shops).

The expansion of existing non-Class A1 (Shops) uses into neighbouring premises will be sympathetically considered even where the above policy criteria are not met but subsequent proposals to divorce an expansion unit from the original and use it for a separate non-retail purpose or occupier will not normally be acceptable.

C) PERIPHERAL AREAS (not shown on the Proposals Map);Uses in Class A1 (Shops), A2 (Financial and professional services) and A3 (Food and drink), B1 (Business), D1 (Non-residential institutions) and other community facilities, such as social clubs will be permitted provided normal development control standards are met.

SH11 LON-RETAIL USES IN NEIGHBOURHOOD SHOPPING PARADES

The Council will restrict the change of use from Class A1 (Shops) at ground floor level in neighbourhood parades, listed below and shown on the Proposals Map, in accordance with the following criteria:-

Changes of use will not be permitted unless it can be demonstrated that there is no long term demand for a retail use of the premises. If this can be demonstrated to the satisfaction of the Local Planning Authority then uses in Class A2 (Financial and Professional Services), Class A3 (Food and Drink), Class D1 (Non-Residential Institutions), other community facilities such as social clubs, or residential use will be acceptable providing normal development control standards are met.

SH12	NON-RETAIL USES IN OTHER PARADES AND ISOLATED SHOPS
	In the case of parades and isolated shops not covered by Policy SH4 and SH5, the Council will permit changes of use from Class A1 (Shop) to Class A2 (Financial and professional Services), Class A3 (Food and drink), Class B1 (Business), Class D1 (Non-residential institutions), other community facilities such as social clubs, or clubs, or residential use, provided normal development control standards are met. **However, in a case where there are no other shops within 400 metres of the application site, serving a convenience shopping function, permission will only be granted where the applicant can demonstrate to the satisfaction of the Local Planning Authority that there is no long term demand for a retail use of the premises.**

25. The saved policies from the Local Plan (adopted 1997), whilst still in effect, are historic and do not necessarily reflect the changed series of reforms to the planning system. These reforms principally relate to Permitted Development Rights (PDR); the Use Classes Order (UCO) and more recently the Levelling-up and Regeneration Act 2023. For example, the changes have implications for the former designations of primary and secondary shopping frontages, as the control of shopping and service uses is legally less enforceable in commercial areas, as a change of use between Class E does not constitute development and will therefore not require planning permission. Furthermore, and from a commercial market and retail capacity perspective (see later), there is need for a recalibration in terms of the projected need for additional retail floorspace. On this basis it is expected that these policies will be updated in the emerging Local Plan (see below).

Emerging Local Plan

26. As previously detailed, the Council is in the process of preparing a new Local Plan covering the period up to 2044. The Regulation 18 consultation on the Plan took place end of 2023/start of 2024.

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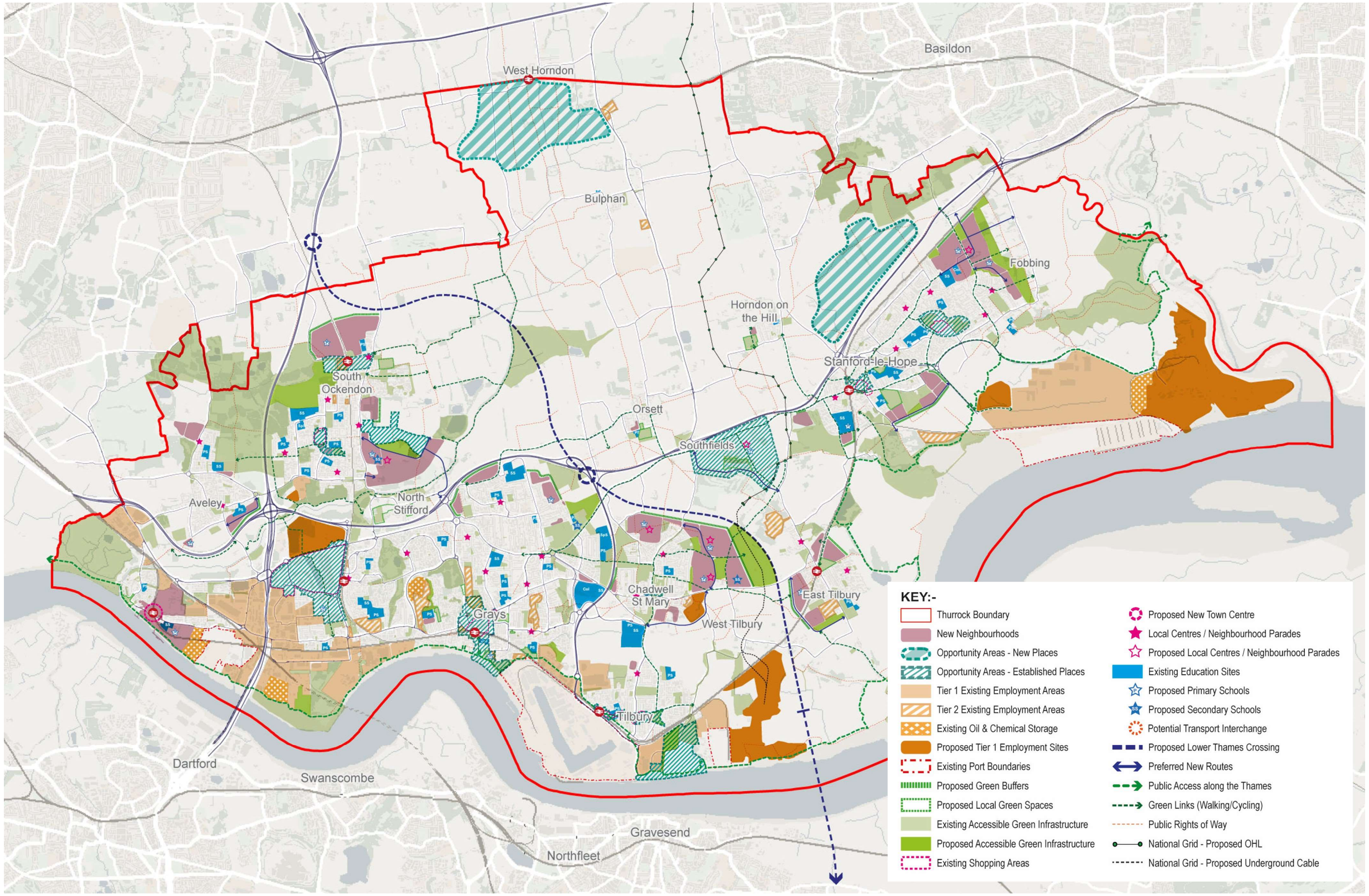
Figure 1: Emerging Local Plan: Council-wide Initial Proposals Map



Source: Thurrock Council: Creating Successful Places (Regulation 18 Document) (December 2023)

27. It is the broad aim of the Council to publish the Regulation 19 pre-submission draft plan in Spring 2026 and with the aim to adopt the new Local Plan in Spring 2028.

28. We have necessarily referred to the outputs from Regulation 18 Document '*Thurrock Council: Creating Successful Places (December 2023)'* which provides (inter alia) the following direction and outputs from the community consultations undertaken. The outputs relating to the centres covered in this study and mentioned in the document are detailed below.

- **Grays conurbation (including Lakeside):**
  - Lakeside as the main shopping & leisure hub: Development should not negatively impact other centres, especially Grays Town Centre.
  - Grays Town Centre issues: Expensive parking, concerns over betting shops attracting anti-social behaviour, increasing drug misuse, empty shops, and a desire for a farmers' market.
  - Traffic & transport concerns: Congestion affecting air quality, Grays Town Centre is too crowded, changes to the one-way system welcomed, interest in river taxis, improved bus services, and safe cycle paths.
  - Leisure facilities: Blackshots is outdated, demand for new facilities including a community football space and a more affordable swimming pool.
  - Youth & community activities: Need for more facilities for all ages, pop-up performance spaces, better promotion of activities, and availability in evenings & weekends. Potential for a stronger night-time economy.
  - Education: Need for a new primary school, improved parking near schools, and more tech education (web design, video editing, social media).
  - Housing needs: More housing for older people, students, and locals.
  - Public spaces & safety: Grays Beach and Kilverts Field are valuable but need improvements; safety in parks is a concern.
  - Healthcare services: Need for more GPs and mental health services; concern over potential loss of services if Orsett Hospital closes.
  - Employment & business opportunities: More incubator units, start-up spaces, and professional jobs in the creative sector.

- **Aveley**
  - Parking issues around the High Street; desire for a wider variety of shops.
  - Opportunity to enhance sports and recreation at Belhus Park; need for more affordable indoor sports facilities.
  - Safety concerns, especially in parks; calls for more CCTV and police patrols.
  - Desire to protect green spaces from development.
  - Unlawful HGV movements and inadequate road infrastructure; need for segregated walking and cycling paths.
  - Village cleanliness affects civic pride.

- **Corringham**
  - Desire for more active leisure alternatives e.g. a skate & BMX park at Old Corringham.
  - Support for more multi-generational homes to help people age in place.
  - Support for more planting to reduce climate change impact.
  - Preference for more open space.
  - Speeding and high-volume traffic.
  - Improvements needed for cycleways and safe cycle parking.

- **South Ockendon**
  - Opportunity for incubator/start-up spaces, more local employment, independent shops, casual eateries, larger supermarket, and improved town centre.
  - Community hubs, halls, and libraries highly valued.
  - More green spaces, sports pitches, accessible parks, wildlife protection, air quality concerns; Culver Playing Fields and allotments valued.

- **Stanford-le-Hope**
  - More diverse shops, night-time economy, and culture needed.
  - Limited parking.
  - Green Spaces & Parks are valued e.g. St Margaret's Church, parks.
  - Lack of youth activities and community spaces.

- **Tilbury**
  - Desire for more diverse shops.
  - Safety and crime especially at night.
  - High demand for housing for local residents.
  - Parking issues, especially at Civic Square; better walking and cycling links needed.

29. Other centres mentioned include the following:

- **Chadwell St Mary**
  - Limited Social and Recreational Opportunities especially for children.
  - Concerns about anti-social behaviour in the community.
  - Desire to preserve, clean up, and improve green spaces.
  - Concerns about high levels of HGV traffic, particularly at Cross Keys junction.
  - Desire for a better range of shops.
  - Could benefit from more trees, flowers, and shrubs to help combat climate change.
- **East Tilbury and Linford**
  - Valued building e.g. Coalhouse Fort, Bata Factory/Estate, Tilbury Fort, and the Churches.
  - Desire for better connections, including a pedestrian bridge over the railway line.

- Parks are valued and there is desire more green corridors.

- **Purfleet-on-Thames**
  - More variety of shops and facilities.
  - Need to improve parks.
  - Create better access to the riverfront.

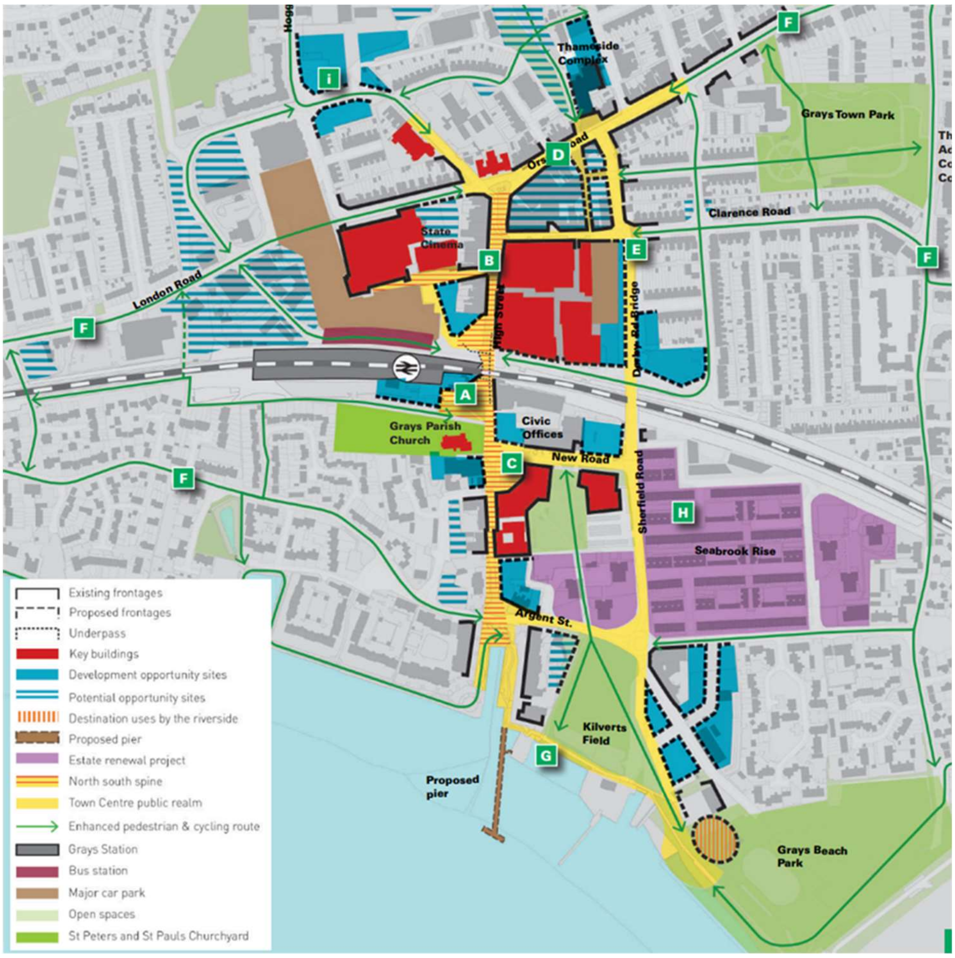
30. At this stage, the Council has to report back further on the conclusion of the Regulation 18 stage. It is anticipated that these conclusions will be supplemented with the outputs of this report and provide the evidence base for future retail and town centre policy matters.

OTHER MATERIAL CONSIDERATIONS

Grays Town Centre Framework (2017)

31. This framework sets out a detailed spatial framework for the physical and social regeneration of the town centre. It sets out several critical projects for the long term success of Grays town centre shown below:

Figure 2: Grays Town Centre Framework: Concept Plan



Source: Grays Town Centre Framework (2017)

Grays Town Centre Study (September 2023)

32. The Grays Town Centre Study (September 2023) details the critical projects, delivered projects and those that are advanced including the future projects. In the context of this report, we have necessarily referred to the projects that were referred to as being ‘advanced,’ ‘in progress’ or ‘anticipated in the future’ as these will be of contemporary relevance to this study. The following provides the latest position on these projects:

- **Grays Underpass** and associated projects are understood to have been discontinued due to escalating costs and technical challenges.

- **Town Investment Plan (TIP) Projects**: through Government funding of £19.9m, three projects being considered to create a destination park space including (i) Grays Riverfront & Beach Project (revitalising the riverside); (ii) Grays Beach Riverside Park & Kilverts Field (new leisure & physical events space) and (iii) Riverfront Activities Centre (a hub for recreation & community engagement). This is to revitalise the riverfront & public spaces; improve connectivity & transport links and provide community & leisure facilities. Projects are set for completion by 2026/27.

- **Darnley Road/Crown Road - Residential Development** – It is understood that the project has received planning approval, and preparations for construction are underway.

- **Civic Offices (CO1) - Potential Residential Development**. In August 2023, the building was listed for sale, offering potential for conversion or redevelopment. This notwithstanding, no transaction has taken place.

- **Thameside Theatre & Complex** - Despite its cultural significance, the theatre has faced financial and structural challenges. It is understood that its continuity as a cultural venue remains uncertain. The council (as owner) has allowed the booking of acts until the end of December 2025. Its long-term sustainability is still under question.

- **High Street (North and South) and Orsett Road** - The ambition to improve connectivity between town centre and riverfront remains.

- **Cromwell Road Car Park** - Potential redevelopment for residential. It is understood that the ambitions remain, but no further progress has been made. The car park continues to operate as a Council owned surface car park.

- **Hogg Lane South and associated roundabout** - Potential redevelopment for residential. It is understood that planning permission for residential has been granted.

- **Western Gateway / London Road - Potential redevelopment for residential.** Status is unclear at the time of authoring this report.

- **Key Buildings: Redevelopment of Grays Shopping Centre** - The owners NewRiver REIT, submitted a formal planning application to Thurrock Council in March 2024. The proposal includes demolishing the existing shopping centre, multi-story car park, and Crown Road office block to construct up to 860 residential units and 7,436 square meters of commercial space. The development will feature four high-rise blocks reaching up to 16 stories. A public exhibition has been conducted recently detailing the potential regeneration of Grays Shopping Centre to provide a mixed-use development comprising ground floor town centre uses with residential above.

- **Potential Opportunity Site: Titan Works on Hogg Lane:** Titan Works received planning permission in December 2024 for the redevelopment of the site to provide flexible industrial and warehousing floorspace for Use Classes E(g)(iii), B2 and B8, together with associated access, parking, and landscaping (Planning Reference 22/01606/FUL).

SUMMARY

33. In summary, the underlying objective of national, regional and local plan policy is to maintain and enhance the vitality and viability of town centres, and to promote new sustainable development and economic growth in town centre locations 'first.' This policy objective is even more critical now as town centres and high streets are facing increasing economic challenges.

34. The reforms to the planning system issued by the Government including updates and changes to Permitted Development Rights (PDR) and the reform of the Use Classes Order (UCO) with much broader classifications (discussed later) require any policies that reflect the previous UCO classifications to be amended. It should be emphasised the changes have implications for the former designations of primary and secondary shopping frontages, as the control of shopping and service uses is legally less enforceable in commercial areas, as a change of use between Class E does not constitute development and will therefore not require planning permission and therefore an urgent requirement for the Council to update relevant policies to reflect national policy.

35. Given the current challenges that town centres are facing and the recent changes to national planning policy and guidance, it is important that local policy is relevant and fit for purpose. The emerging policy will need to address key local issues including provision of new homes, employment opportunities and sustainability of town centres. It is no longer sufficient to view them solely through the lens of retail. As town centres evolve, the future will need to encompass a more diverse ecosystem trough adaptation and change to ensure their future vitality and vibrancy.

3. TOWN CENTRE TRENDS

36. This section summarises some of the key economic, consumer and property market trends that have driven the changes in the retail and leisure sectors over the last decade and how town centres can respond to these dynamic trends to remain competitive and enhance their overall vitality and viability in the future.

37. The pandemic created one of the toughest trading environments for the retail and leisure sectors and the post pandemic phase has been characterised by low growth, rising inflation and the cost-of-living crisis. This section details the impact of these factors on the commercial retail and leisure market.

UK ECONOMIC OUTLOOK

38. Over the past five years, the UK economy has endured multiple shocks including the COVID-19 pandemic, high inflation, elevated energy costs, supply chain disruptions, and trade tensions. Despite these challenges, the Office for Budget Responsibility (OBR) (Economic and Fiscal Outlook – March 2025) projects a gradual economic recovery, with real GDP growth expected to rise from near zero in 2023 to 1% in 2025 and 1.9% in 2026. It is expected to stabilise at an average potential growth rate of 1.75% through 27/28/29, however, uncertainty remains high due to UK labour force, GDP and productivity data as well as global geopolitical disruptions on trade policy.

39. Inflation, measured by the consumer price index CPI, is forecast to increase from 2.5% in 2024 to 3.2% in 2025, peaking at 3.8% in July 2025, driven by energy price caps, food prices, and utility bills. From mid-2026 inflation is expected to return to the Bank of England’s 2% target as these pressures ease.

40. Experian Business Strategies (Experian) predict in their latest Retail Planner Briefing Note 22 (March 2025) (**‘RPBN 22’**) that GDP growth is expected to strengthen slightly in 2025 compared to 2024 aided by the ‘front-loaded’ nature of the Government’s spending plans. Additionally, retail sales growth is anticipated to rebound modestly, particularly in the comparison category which will see positive effects from rising real discretionary incomes.

RETAIL SPENDING

41. The latest Experian forecasts from RPBN 22 for retail spending per capita show:

- **Convenience goods**: The impact of COVID-19 resulted in a significant +6.8% surge in spend per head in 2020 but a contraction of -1.3% in 2021. This followed negative growth of -2.3% between 1998 and 2023. The overall level of negative growth in convenience goods spending has had a significant impact on the grocery sector and on retailer business models. Experian reported a fall in convenience spend in 2023 (-3.5%); 2024 (-1.8%); and 2025 (-0.8%). With no growth projected over the medium term to 2030 and beyond over the longer term to 2040.

- **Comparison goods**: Experian figures show negative growth to 2024 (-3.2% in 2023; -1% in 2024). The predicted (per capita) growth for 2025 is a nominal 0.1%, 1.3% in 2026 which will settle at around +2.5% to 2031 and to +2.6% up to 2040. The longer-term growth forecast is higher than the historic long-term trend (1998-2023) of +1.5% per annum.

42. These expenditure growth trends, and forecasts, have informed the updated assessments of retail capacity. Clearly any further dampening of growth rates over the short to medium term due to external shocks such as rising inflation and the cost-of-living crisis will have implications for the viability of existing retail businesses and the demand for new space. Experian's expenditure and productivity growth only provide forecasts to 2040 and as such, we have assumed the same rate of growth from 2041 to 2045 for this assessment.

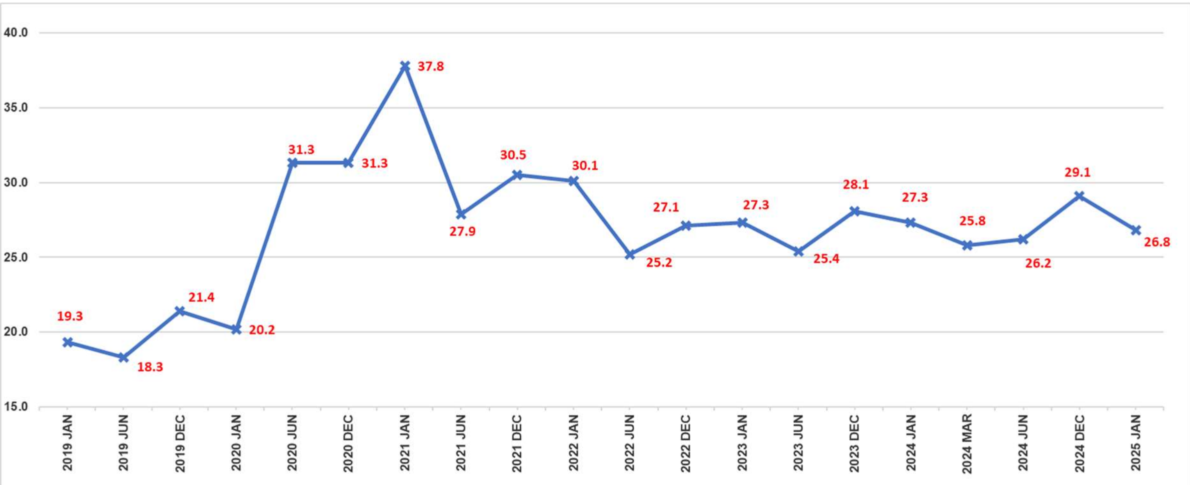
ONLINE SHOPPING

43. The growth in non-store retail sales has undoubtedly had the most significant impact on consumer spend and behaviour over the last decade, and on our High Streets and traditional shops. Non-store retailing is commonly referred to as Special Forms of Trading (SFT).

44. This comprises all non-store retail sales made via the internet, mail order, stalls and markets, door-to-door and telephone sales. On-line sales by supermarkets, department stores and catalogue companies are also included in the data collected by the Office for National Statistics (ONS).

45. ONS figures show that as a percentage of total sales, online retail sales accounted for up to 26.8% of sales in January 2025. The graph also shows the steep increase from 20.2% in January 2020 to 37.8% in January 2021. Overall, the trend suggests that since 2020 online accounts for between a quarter to a third of the amount spent on retail goods. This compares to less than 5% in 2008.

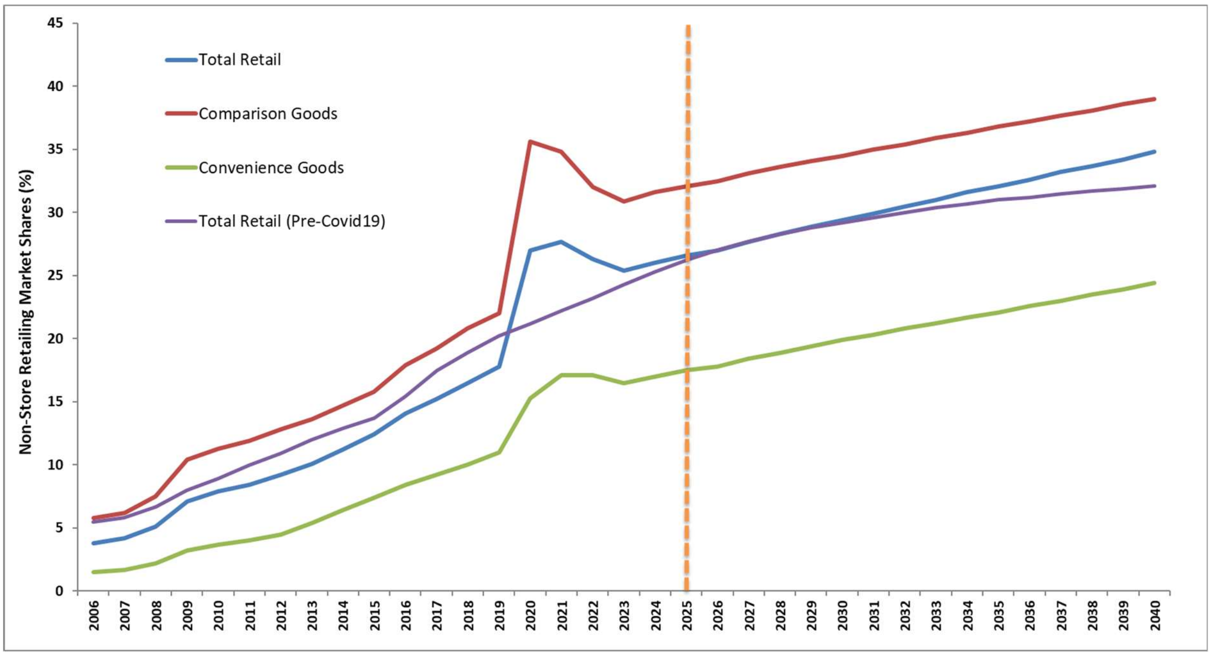
Figure 3: Internet Sales as a Percentage of Total Sales (%) (to September 2024)



Source: ONS: Retail sales, Great Britain: November 2024

46. As the figure below from Experian shows, SFT's overall market share (as a proportion of total UK retail sales) increased from 3.8% in 2006 to 27% in 2020. In other words, online accounted for almost one in every three pounds spent on retail goods in 2020. Of this total non-store retail sales, Experian estimate that comparison and convenience goods retailing achieved market shares of 35.6% and 15.3% respectively in 2020. They further estimate that comparison and convenience goods retailing will attain market shares of 32.1% and 17.5% respectively in 2025.

Figure 4: Estimated and Projected Market Shares of Non-Store Retail Sales (SFT), 2006-2040 (Not Adjusted)



Source: Experian Retail Planner Briefing Note 22 (March 2025)

47. The latest Experian forecasts indicate that total SFT market shares will increase to 34.8% by 2040. Comparison and convenience goods non-store retail sales are forecast to reach 39% and 24.4% respectively by 2040.

48. According to Experian, the rising share of internet sales in total retail transactions is the key trend. The ease of online purchasing has also continued to improve rapidly, with technological advances, particularly around smartphones and connectivity. Faster delivery times, including same day delivery, and easier returns processes have also encouraged the trend. The expansion of 5G and fibre networks should ensure the momentum is maintained over the medium term. The proliferation of the buy now pay later business model and price tracker sites is also supporting growth.

49. With the growth predicted in online sales and market shares, it is clear that high streets, town centres and physical retailers will need to thrive by focusing on their strengths. This will be through offering a diverse mix of retail and services, specialist shops, food and drink venues, nightlife, leisure and residential to retain

their existing customer base and attract new customers over the short, medium and long term.

50. In terms of forecasting the potential capacity for new physical retail floorspace, Experian estimate that approximately 25% of all SFT sales for comparison goods and 70% for convenience goods are still sourced through traditional (‘bricks-and-mortar’) retail space, rather than through ‘virtual’ stores and/or ‘dot com’ distribution warehouses. On this basis, Experian adjust their SFT market shares downwards for total retail to 16.9% in 2025, 18.9% by 2030 and 22.9% by 2040. In line with standard approaches these adjusted / recalibrated market share figures are preferred for retail capacity assessments and used in this assessment.

51. In summary, both retailers and high streets will need to compete for shoppers and expenditure through a variety of means including creating experiences that will attract the interest and attention of potential consumers across all age and socio-economic groupings.

RETAILER BUSINESS MODELS AND REQUIREMENTS

52. The recent challenging economic conditions and growth in online sales have had a significant and permanent impact on consumer shopping and spending behaviour. Retailers in the recent past have faced challenges across the supply chain, inflationary pricing, economic uncertainty and geo-political factors.

53. This has created significant challenges for traditional “bricks-and-mortar” retailing and the high street. Consequently, national multiple retailers are having to constantly review and rapidly adapt their business strategies, requirements and store formats to keep pace with the dynamic changes in the sector and consumer demand. As retailers adjust to “new normal,” a seamless experience and hybrid shopping are shaping the future of retail; the key trends that will impact the industry include:

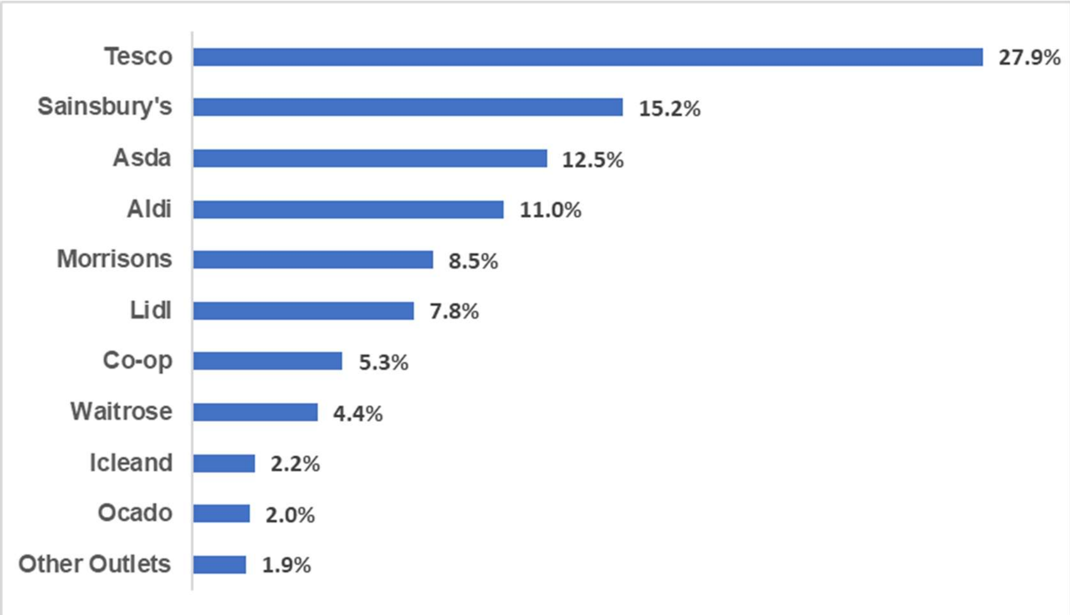
- Hybrid or ‘Phygital’ (physical and digital) shopping – Retailers want to deliver a seamless experience across all shopping methods, including online, in-store, mobile devices, social media, live streaming and shopping and virtual storefronts.
- Use of Artificial Intelligence (AI): using AI in augmented chatbots to aid customers with product inquiries, sizing questions, and order tracking, further enhancing the customer experience. Retailers are leveraging AI and big data to offer highly personalized shopping experience through product recommendations and personalised promotions.
- Social media sentiment monitoring is collecting and analysing information about a retailer or brand on social media. Actively engaged on social media, retailers are able to better understand data about their customers' sentiments, preferences, and attitudes toward their company and its competitors. Social media and e-commerce are converging, enabling brands, influencers and other sellers to pitch products directly on social platforms in an engaging way, creating stronger consideration and higher conversions to online sales.

- Physical retail stores and websites are becoming increasingly crucial as sources for additional advertising revenue for retailers. 'Click-and-collect' and 'Buy Online, Pick Up In Store' (BOPIS), enables retailers to make the transition between online and in-store frictionless.
- Changes to retail formats and design – retailers are testing different formats as well as including new offerings on the click and collect method such as IKEA opening a store on Oxford Street.
- Changes in consumer behaviour – the growing trend in repair, recycling, reuse, and thrifting is set to grow i.e. circular economy initiatives. This is seen in the rise of the popularity of second-hand shops, vintage clothing and markets, and charity shops once again. Consumers - especially younger generations - are placing more importance on eco-friendly packaging, sustainable sourcing and transparent supply chains.

54. These dynamic trends are best illustrated by the changes in the grocery sector over the last decade. Historically, the top 5 main grocery operators have been Tesco, Sainsbury's, Asda, Waitrose and Morrisons who dramatically changed their business models; their focus has been on growing market share through online sales and new smaller convenience store formats (including Tesco Express, Sainsbury's Local, Asda Express and Little Waitrose). As a consequence, applications for large store formats have slowed to a virtual standstill over the last decade and extant permissions have not been implemented.

55. Previously outside of the so-called top 5 grocers, the 'deep discount' food operators (namely Aldi and Lidl) have significantly increased their respective market shares through new store openings. In fact, Aldi has now replaced Morrisons to be in top 5 league.

Figure 5: UK Grocery Market Share

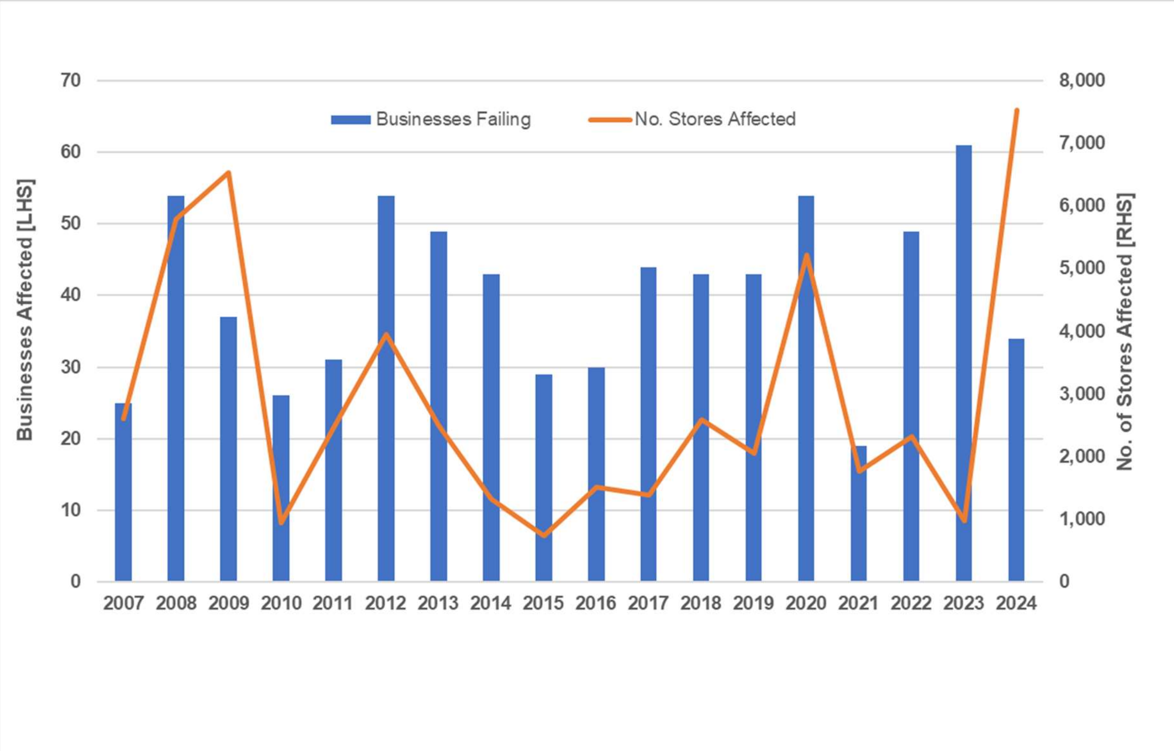


Source: Kantar (April 2025)

56. The non-food retail sector has also experienced a significant impact from the rise of online shopping over the last decade, which has impacted on business models and store viability. Many well-known retailers have either closed or have significantly reduced their store portfolios. Contributing factors included reduced financial support post-COVID-19, rising operational costs, and the shift towards online shopping. Additionally, the recent reduction in business rates discounts from 75% to 40% increased financial pressures on retailers.

57. The latest industry research shows that over 971 closed stores in 2023 due to businesses entering administration, with almost 21,000 jobs lost. This compared with 5,200 store closures in 2020, and over 109,000 job losses. At the end of 2024, there were 7,537 store closures with almost 55,900 job losses. These numbers included shop closure numbers for major chains such as The Body Shop and WHSmith during this period.

Figure 6: Major Retail Failures (2007 – 2024 (June))



Source: Centre for Retail Research (April 2025)

58. National retailers with extensive high street store portfolios are struggling to maintain market shares and remain profitable in the increasingly competitive environment. The higher costs of trading from high streets compared with online and out-of-centre retailing, also means that it is not a “level playing field.” This is a further contributing factor to the sizeable number of store closures that have occurred over recent years.

59. In summary, although some retailers are better positioned to cope with the growth in online shopping and the shifts in consumer behaviour and preferences, many are struggling to position themselves quickly enough to absorb rising costs and

engineer the vital transition to a more technology-focussed business model. However, the adoption of these technologies by small and medium sized enterprises enables them to reach out to consumers beyond their immediate catchment and to understand consumer preferences and trends better. Notwithstanding this, it is recognised that it is not a level playing field especially in terms of costs for adoption and overall digital literacy.

RISING OCCUPANCY COSTS

60. ‘Bricks and mortar’ retailers are having to absorb higher than inflation increases in year-on-year occupancy costs (for example, rents, business rates, service charges, utility bills, staff costs, etc). This outpaces sales growth for many retailers, eroding profitability and resulting in more store closures.

61. As described above it is not a “level playing field” between high street and online retailing, or between high street and out-of-centre retailing. In response to the budgetary challenges from rising costs and tight margins, retailers will need to drive up efficiencies and productivity from existing floorspace to remain viable.

62. It is standard practice for retail planning assessments to make a reasonable and robust allowance for the year-on-year growth in the average sales densities of existing and new (comparison and convenience) retail floorspace for it to remain vital and viable. However, there is limited evidence detailing actual changes in the turnover and profitability of retailers over time.

63. The latest Retail Planner Briefing Note (RPBN 22) (March 2025) provides forecasts of annual floorspace productivity growth rates up to 2040 based on two different scenarios: (i) the ‘constant floorspace scenario’, based on limited potential for new retail development, resulting in greater efficiency of existing floorspace; and (ii) the ‘changing floorspace scenario’, which takes account of the impact of new retail development on average retailer sales performance. The table below sets out the differences between the two scenarios.

Table 1: Floorspace Productivity Growth Rates (year-on-year growth %)

	2023	2024	2025	2026	2027-2031	2032-2040
CONSTANT FLOORSPACE						
Convenience Goods	-2.4%	-2.3%	0.0%	0.1%	0.1%	0.1%
Comparison Goods	-0.5%	-0.1%	0.5%	1.7%	2.5%	2.5%
CHANGING FLOORSPACE						
Convenience Goods	-2.4%	-2.3%	-0.1%	0.0%	0.0%	-0.1%
Comparison Goods	-0.5%	-0.2%	0.4%	1.6%	2.3%	2.3%

Source: Experian Retail Planner Briefing Note 22 (March 2025); Figures 3a/3b and 4a/4b

64. As Experian explain, sales density growth rates have been volatile in recent years given sharp swings in retail spending due to temporary closures in businesses during the pandemic, and subsequently the impact of high inflation. There is anticipated growth in sales density in 2025 as retail sales volumes rebound, driven by the comparison component, aided by mildly improving consumer affordability. However, over the medium and longer term, budgetary challenges from rising

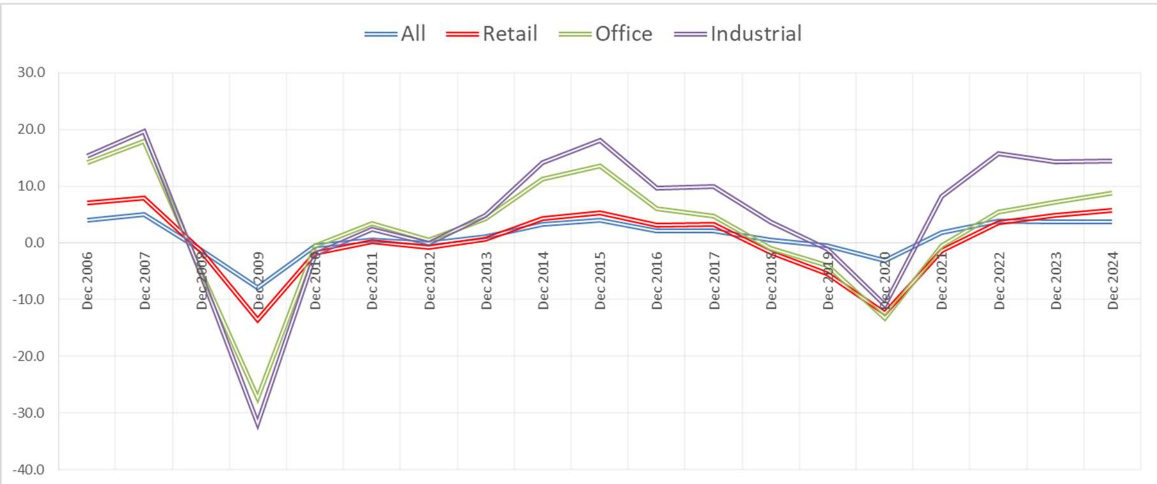
costs and tight margins will be a key factor underpinning floor space efficiencies over the coming years. These results reflect national trends and there will be marked differences between local areas.

65. On this basis, budgetary pressures mean that retailers will have to increase efficiencies from current floorspace including through redevelopment/repurposing of existing floorspace; adoption of modern technology and innovations; more effective marketing strategies; and adopting an 'omni-channel' strategy (refers to the integration of different methods of shopping available to consumers e.g. via the internet, in a physical shop, or by phone) that uses internet sales to increase the sales performance of physical shops. This is against a backdrop of weak demand for retail property, high vacancy levels and a significant fall in new retail-led development in centres across the UK.

66. For these reasons we prefer to test higher **'constant floorspace productivity'** growth rates for retail planning assessments, as they better reflect national trends and the need for existing retailers to increase their sales potential and profit margins to remain viable.

67. Demand for retail space in centres across the UK has fallen dramatically since 2007 and is currently at an all-time low. In turn this fall in demand is impacting on property values and rents. As shown below the retail sector has performed poorly compared with the other property sectors with its origins back to the economic crisis in 2007/08. This trend was exacerbated by the pandemic and the cost of living crisis.

Figure 7: Property: Average Rental Growth (2006-2024) (%)



Source: MSCI UK Quarterly Property Index (April 2025)

68. One of the obvious impacts of the difficulties experienced within the retail sector is the fall in retail rental values. The larger retail groups have enjoyed a particularly strong negotiating position, and lease events represent an opportunity to reduce costs and increase flexibility. Over the past eighteen months we have experienced multiple retailers seeking some or all the following lease provisions when agreeing lettings:

- An increase in rentals linked to turnover as opposed to contracted rents linked to market rental value.
- Where rent reviews are to market value a cap as to the quantum of any future increase.
- Shorter leases and regular tenant break options.
- Capped increases to service charge.
- Pandemic clauses with rent cessation provisions in case of forced closure.
- Larger incentive packages, including capital contributions.

69. Overall, many centres and shopping locations across the UK simply have too much retail floorspace stock, or they have the “wrong type” of retail floorspace that does not meet the needs of modern national retailers for larger format shop units.

70. LSH’s research together with REVO titled ‘**Shaping Tomorrow’s Places**’ (June 2025) provides a barometer of the main issues and challenges facing our centres, and the opportunities and potential interventions available (&/or needed) to support their future recovery, reinvention and renaissance.

71. This research indicated that business rates have consistently been identified as one of the main challenges impacting on the viability of our centres alongside an oversupply of retail space and the growth of online retail spend.

72. This over-supply of retail floorspace and limited market demand is placing further pressures on the viability of existing stores and shopping centres. In turn, this makes it difficult for landlords, investors and retailers to justify additional capital expenditure.

OUT-OF-CENTRE RETAILING

73. The development and take-up of food and non-food out-of-centre space has also slowed over recent years, in line with the trends impacting on high streets and town centres. The main grocery retailers have pulled back from new larger format superstore openings in edge and out of centre locations to focus on maintaining and increasing market shares through online sales and opening smaller convenience outlets. The exception to this is the discounters, Aldi and Lidl, who continue to seek new sites in mainly edge and out-of-centre locations.

74. Notwithstanding this, most out-of-centre shopping locations retain their significant competitive advantages over town centres and high streets in terms of their supply of larger format modern outlets, ease of access, their lower occupancy costs, extensive free parking as well as their ability to serve as last-mile delivery hubs. This remains an attractive proposition for those retailers that are still seeking space in the current market. For example, as part of its revised business model Marks & Spencer has closed a number of its traditional high street stores and “replaced” these with ‘Simply Food/Food Hall’ branded stores in out-of-centre locations.

75. The latest Investment Property Forum (IPF) Consensus Forecasts, published in February 2025, indicates that shopping centre rental growth is estimated at 1.3%

for 2025. Retail warehouses are forecast to grow at 1.9%, while standard retail is projected to see growth of 2.1% in 2025.

VACANCY RATES

76. At the end of 2024, the GB national average 'All Vacancy Rate' (retail and leisure combined) stood at 13.8% (a decrease from 14% in 2023). The current rate is still higher than the pre-pandemic (Q4 2019) level of 12.1%, so the sector has yet to fully recover.

77. Over the past five years, retail parks and shopping centres have shown an overall decline in vacancy rates, while high streets have experienced an increase. From a vacancy high of 19.4% in the second quarter of 2021, shopping centres dropped to 17.2% by the final quarter of 2024.

78. The LSH/Revo survey has consistently identified there is too much retail floorspace in the UK. As a result, centres and locations are competing to attract limited occupier interest. There is also competition to secure public and private sector investment to help deliver critical redevelopment and regeneration projects.

USE CLASSES ORDER & PERMITTED DEVELOPMENT RIGHTS

79. The Government has issued a series of reforms to the planning system since 2020. Effectively, changes to the use classes were brought in to provide a more flexible approach to controlling commercial land uses. This saw the replacement of Use Class A1 to A5, D1 and D2 with E Class (Commercial), F1 (Learning and Non-Residential) and F2 (Local Community Uses) and the restructuring of sui generis uses (public houses, hot food takeaways, cinemas, music venues, bingo etc.).

80. The result of these changes is that what would previously be a change of use under the subsumed use classes is no longer considered development under the Planning Acts and accordingly is no longer subject to planning control. In launching the reforms, the Government announced that the regulations will give *"…greater freedom for buildings and land in our town centres to change use without planning permission and create new homes from the regeneration of vacant and redundant buildings*" (source: Prime Minister's Office Press Release (30/06/2020) 'Build, Build, Build').

81. The impact of the changes will still require the definition of a town centre boundary and a primary shopping area, or a primary 'commercial' area to be the foci for E and F Classes. Also, in most instances the former use classes can be 'translated' into the equivalent categories within the new E and F Classes. This can assist with the interpretation of policy wording and the effective use of conditions. It is worth noting that under the previous use-class system such categories as convenience, comparison (and bulky) goods fell within the A1 use-class and there is a long-established planning pedigree of reflecting these A1 retail categories effectively in planning conditions.

82. The changes have implications for primary and secondary shopping frontages, as the control of shopping and service uses is legally less enforceable in commercial areas, as a change of use between Class E does not constitute development and will therefore not require planning permission. It should be noted that the effectiveness of frontage policies was declining before the pandemic and previous changes to the UCO. However, there may still be a role to control some sui generis uses in key town centre locations, such as provision of fast-food takeaways, betting shops, payday loan shops or other uses that are justified to be subject to planning control.

83. Hence beyond 2024, town centres are likely to consolidate their retail and shopping role with more emphasis on place and non-transaction uses, this could include high activity-based land uses such as health or education being located in more central locations and stem previous trends of decentralisation.

84. The increase in city living and residential development in town centres is likely to be a growth area in the next 10 years and could be a positive regenerative mandate. We also expect more emphasis on residential upper floor living accompanying ground floor commercial uses. For example, vacant space can be repurposed to rebalance the existing mix of uses, with a greater emphasis on residential, office and leisure.

85. The introduction of Class AA and AB in August 2020 (under the Permitted Development Changes (Amendment No. 2) (2020)), allowing new residential on detached or terrace buildings in commercial or mixed-use areas could potentially lead to the loss of commercial floorspace to residential.

86. Furthermore, the Town and Country Planning (General Permitted Development etc.) (England) (Amendment) Order 2021 (Order) that came into force in August 2021 created a new class of permitted development right (Class MA) into the Town and Country Planning (General Permitted Development) Order 2015 (GPDO) authorising changes of use from Use Class E commercial uses to Use Class (C3) residential.

87. For any application submitted on or after 5 March 2024, there is now no limit to the floorspace that can be converted under Class MA and there is no requirement for the building to be vacant for three months.

88. These changes replace existing retail, light industrial and office to residential rights with rights applying to all of the relatively recent Use Class E in which those uses now sit. Exercise of the right is subject to prior approval by the local planning authority and therefore would be subject to some planning control. Details must be submitted relating to flooding, transport, contamination, noise amenity, natural light, fire safety and agent of change issues.

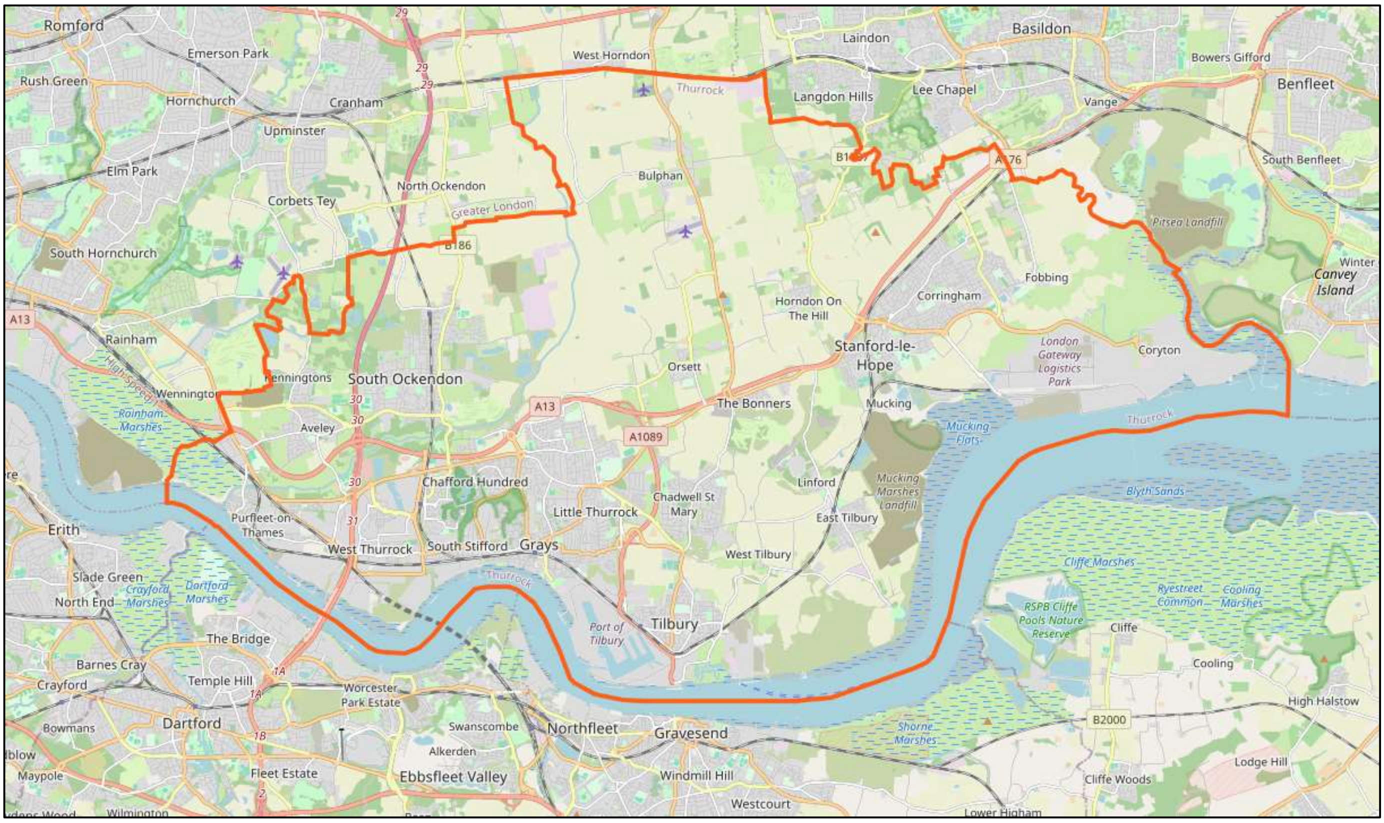
THURROCK COUNCIL IN CONTEXT

Location

89. Thurrock is located on the north bank of the River Thames immediately to the east of London. It is well connected with good transport links to London, the rest of the

UK and Europe by road – the M25 and A13 corridors in particular providing transport links to London, Essex, and Kent.

Figure 8: Thurrock Council Area in Context



Source: OpenStreetMap (2025)

90. Thurrock is 70% greenbelt, with larger towns like Grays, Tilbury, and Stanford-le-Hope and rural villages such as Bulphan, Orsett, and Horndon on the Hill.

Corporate Plan 2024-29

91. The Council's Corporate Plan has three priorities:

- An enabling Council – building strong and impactful partnership to maximise the benefits for residents and the borough;
- People – ensuring Thurrock is a place where everyone has the opportunity to reach their full potential and access the support they need; and
- Place – achieving a strong and well-connected place that enables our borough and its diverse communities and businesses to thrive and grow.

92. In relation to 'Place' the stated policy outcome is '*To achieve a strong and well-connected place that enables our borough, its diverse communities and businesses, to thrive and grow*.' This will involve, inter alia:

- stimulating local economies by investing in or influencing investment in the infrastructure, housing, transport and educational capabilities to create jobs and transform places and

- improve local infrastructure and transport connections, diversifying the role of town centres, improving the environment, sustainable housing and local services.

93. Thurrock is also home one of the largest regeneration areas in the UK. The Council's website states over the next 10 years Thurrock will transform as the result of a massive growth and regeneration programme. A £6.6bn investment will create an estimated 14,000 new homes and 31,450 jobs across a number of locations. The Council's major projects are concentrated on 6 growth hubs:

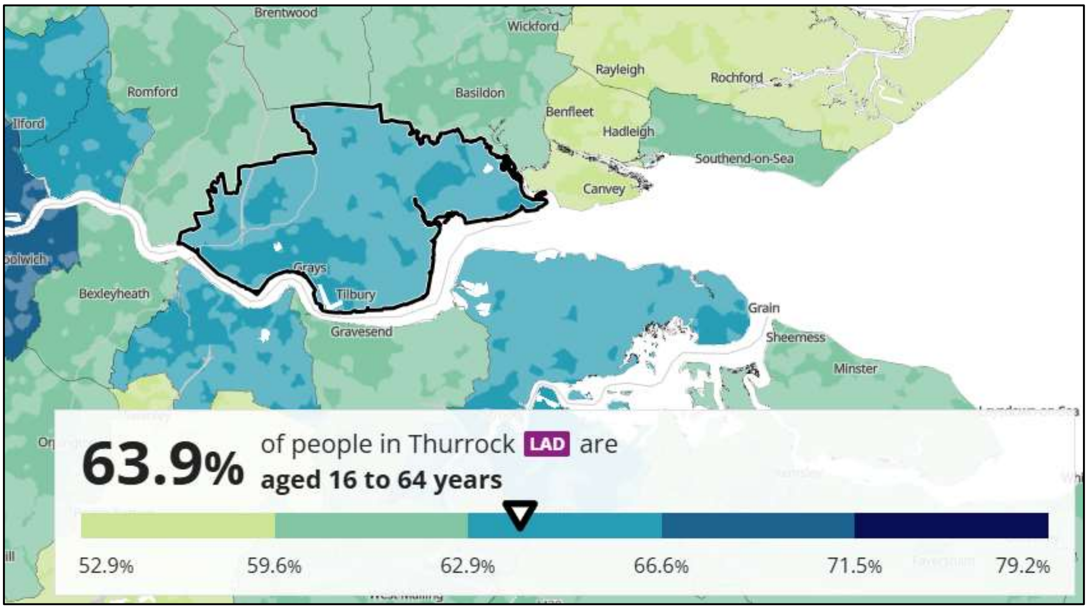
- Purfleet-on-Thames – home of High House Production Park;
- Lakeside and West Thurrock – already a major retail and leisure destination and set to expand to become a regional town centre;
- Grays – the administrative hub of Thurrock will build upon the current projects to improve economic growth and enhance the public realm;
- Tilbury – a new vision will build on the strengths of the close community and expansion of the port;
- London Gateway – home to DP World's high tech deep-sea container port and high tech logistics business park; and
- Thames Enterprise Park – creating an Environmental Technologies and Energy hub.

Demographics

94. The demographic profile of the Council area shows the following:

- It has a diverse population that is increasing.
- In 2021, the population was 176,000, up from 157,700 in 2011.
- The population profile is 49% male and 51% female.
- Thurrock has a relatively young population, with a higher proportion of residents in the traditional working age group (63.9% of the population are aged 6 to 64 years). The average age of the population is 36.9 years, compared to the England average of 40.2 years.

Figure 9: Thurrock Council Area Population Profile (2021)



Source: Office for Nationa Statistics: Census Maps

Attainment

95. According to ONS data, some 21.6% of residents aged 16 and above have no qualifications in the Council area. Of the remainder, 44% have a level 1, 2, or 3 qualifications, with 29.4% having attained a level 4 qualification and above.

Employment

96. ONS data shoes that of the people aged 16 to 64 years living in Thurrock, 78.1% were employed in the year ending December 2023; this is higher than the England average of 77.5%.

97. The largest contributors to the Council area’s employment according to Nomis (2025) are transportation and storage (25%), wholesale & retail (19.7%), construction (7.9%), education (7.9%), administrative and support services (6.6%), public administration (6.6%), human health & social work (5.9%), accommodation and food services (5.9%) and manufacturing (4.6%).all together these sectors account for over 90% of employment in the Council area.

Earnings

98. The average (median) earnings for full time workers stand at £699.40/week which is lower than the GB average of £729.60/week (source: Nomis, 2025).

Housing

99. In terms of housing, ONS Census (2021) data showed, 25.5% of households owned their dwelling outright, 37.8% owned their dwelling with a mortgage or a loan, 18.3% were private renters, and 17.7% were social renters. The delivery of more affordable homes is a key priority for the Council as stated in its ‘*Housing*

Strategy, 2022-2027'. The actions put forward in this strategy present opportunities for major estate regeneration, to:

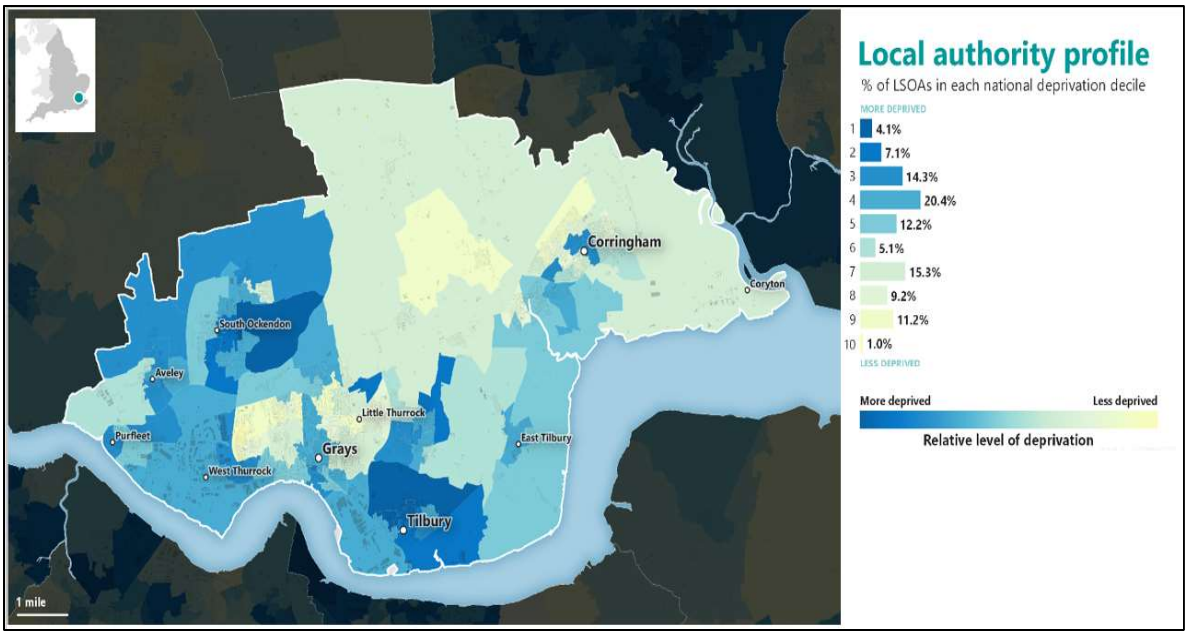
- provide more genuinely affordable council-owned homes;
- end out-of-borough placements entirely, unless for safeguarding reasons or through choice and
- work with partners on providing the things that matter to residents in their different localities.

100. The strategy also refers to the affordability of accommodation in Thurrock as being 'an ongoing challenge,' both in the private rental sector and for those aiming to purchase properties

Index of Multiple Deprivation

101. The Index of Multiple Deprivation 2019 (IMD) rankings for Thurrock indicate that while Thurrock has a lower overall deprivation level than the national average, specific areas, such as parts of Tilbury, are among the 20% most deprived in England highlighting socio-economic challenges within the Borough.

Figure 10: IMD Within Thurrock Council Area



Source: MySociety Based on MHCLG IMD Data

Visitor Economy

102. According to the *Essex County Council Destination Management Plan* 2024 – 2030 *'day visit spend'* in Thurrock is estimated at £342m a year, higher than any other Essex authority attributed to Lakeside Shopping Centre and the surrounding retail parks.

103. In addition to the shopping provision, Thurrock also has notable historic attractions including:

- Tilbury Fort: A historic fort where Queen Elizabeth I gave her speech before facing the Spanish Armada in 1588; and
- Coalhouse Fort: Another historic fort completed in 1874.

SUMMARY

104. Today, many of our traditional towns and shopping centres simply have too much retail space. The critical challenge over the short, medium and long term will be how to retain existing businesses, fill/replace the voids and attract new investment. The danger is that an increase in long-term vacancies in centres will lead to a ‘spiral of decline,’ which will further engender feelings of neglect and lack of investment confidence in town centres, and “push” more people to shop online.

105. Our towns, traditional high streets and shopping centres have been challenged for more than a decade by falling market demand, rising occupancy costs and increasing competition from online and out-of-centre shopping. As online spending has increased, the demand for physical retail demand has been impacted.

106. The Council area has a young and growing population, but challenges remain in terms of income and deprivation. Despite this it has a high concentration of retail floorspace at Lakeside which acts as a regional consumer draw. This notwithstanding it is not immune from national challenges including the aftermath of the pandemic and the cost-of-living crisis. Affordable housing is also a priority and a key issue for the future.

107. Residential provision in centres is already being encouraged, including by previous national planning changes (such as office to residential conversions through prior approval, and permitted development for two flats above a shop), and through emerging local development plan policy. As a result of the increasing drive towards more flexible planning through changes to the Use Classes Order and Permitted Development Rights, there will inevitably be more mixed-uses within centres particularly residential, and this should be encouraged and planned for through enabling planning policies.

108. It will be important to maximise intergenerational residential provision in the most sustainable locations, particularly in centres, as part of a balanced mix of uses. The LSH / REVO research mentioned previously also indicated that providing mixed tenure homes in and on the edge of centres is recognised as key to delivering more viable and resilient town centres. Therefore, consideration needs to be given to planning policies and allocations enabling the growth of other uses, such as education, leisure and recreation, within centres, which, along with residential, are particularly positive in terms of enhancing the vitality of centres.

4. CATCHMENT, COMPETITION & MARKET SHARES

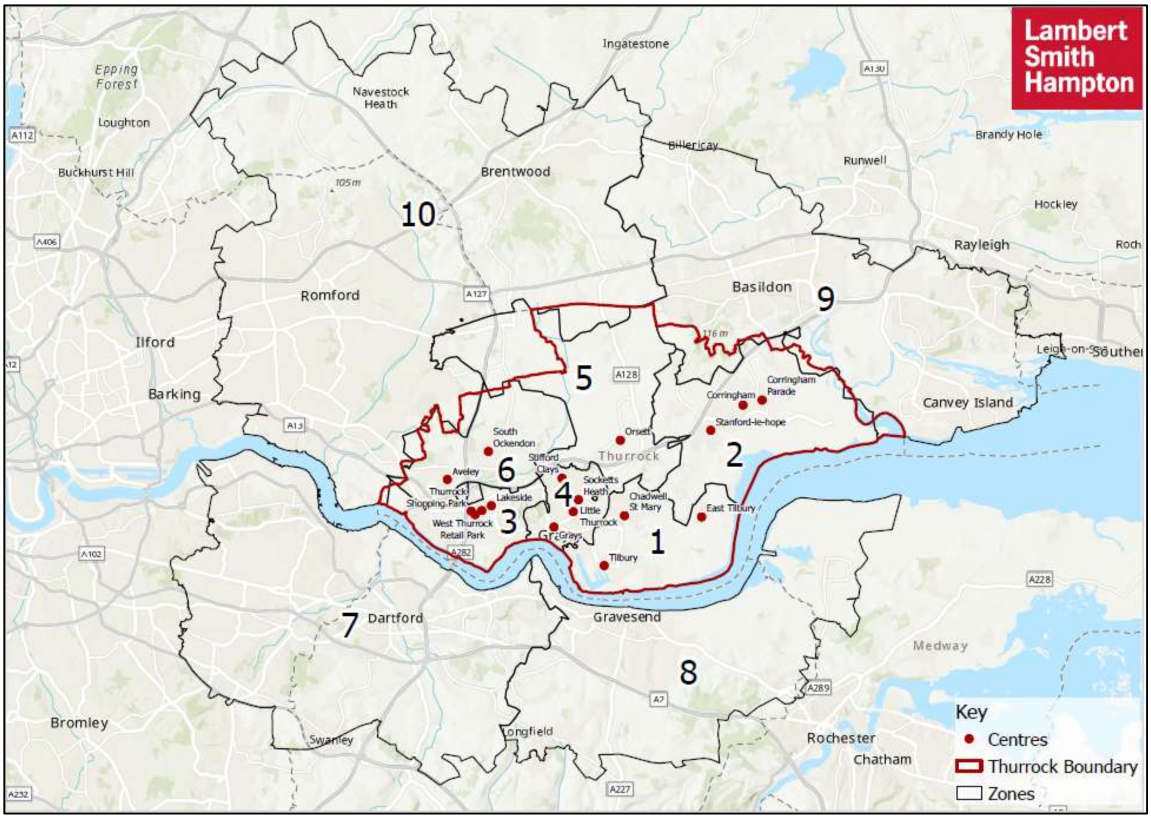
109. This section first describes the Catchment ('Study') Area that has been adopted as the framework for this study. It then sets out the headline results of the telephone interview survey, to identify where households normally shop for diverse types of convenience ('food') and comparison ('non-food') goods.

CATCHMENT (STUDY) AREA DEFINITION

110. The definition of an appropriate Catchment Area is an important starting point for retail and town centre assessments. It provides the framework for the household telephone interview survey and the retail capacity analysis.

111. The broad geography of the Catchment Area and composing zones has been informed by the South Essex Study (2017) ('2017 SES'). The Catchment Area is based on postcode geography, and it covers the entirety of the Council area in full, as well as extending into neighbouring authorities. The figure below shows the full extent of the Catchment Area and Zones (also refer to **Volume 2; Appendix 1**).

Figure 11: Catchment Area for Study



112. By way of background, NEMS Market Research (NEMS) was commissioned to carry out the household survey. The survey was conducted in May 2025. The methodology and full 'weighted' survey results are set out in **Volume 4** . Responses were weighted by the population in each zone to ensure that the

results in more sparsely or heavily populated zones were not under or over represented in terms of the market share assessment.

Table 2: Composition of the Study Area by Zones, Broad Geographic Area and Postal Sector

Zone	Broad Geography	Postal Sectors	No. of Interviews	% of Total Interviews
1	Tilbury	RM18 7, RM18 8, RM16 4	103	10%
2	Corringham	SS17 0, SS17 7, SS17 8, SS17 9,	103	10%
3	Lakeside	RM16 6, RM20 4, RM20 3, RM20 1, RM19 1, RM20 2	94	9%
4	Grays	RM17 6, RM17 5, RM16 2	103	10%
5	Orsett	RM16 3, RM14 3,	83	8%
6	Aveley	RM15 4, RM15 5, RM15 6, RM16 5	103	10%
7	Dartford	DA14 4, DA14 5, DA14 6, DA15 7, DA15 8, DA15 9, DA16 1, DA16 2, DA16 3, DA17 5, DA17 6, DA18 4, DA2 6, DA2 7, DA2 8, DA4 9, DA5 1, DA5 2, DA5 3, DA6 7, DA6 8, DA7 4, BR8 7, DA1 1, DA1 2, DA1 3, DA1 4, DA1 5, DA10 0, DA10 1, DA7 6, DA8 1, DA8 2, DA8 3, DA9 9, SE2 0, SE2 9, DA7 5, SE28 8	105	10%
8	Gravesend	DA11 0, DA11 7, DA11 8, DA11 9, DA12 1, DA12 2, DA12 3, DA12 4, DA12 5, DA13 9, DA3 7, ME3 7	104	10%
9	Basildon	CM11 2, CM12 9, SS13 1, SS13 2, SS13 3, SS14 1, SS14 2, SS14 3, SS15 4, SS15 5, SS15 6, SS16 4, SS16 5, SS16 6, SS7 1, SS7 2, SS7 3, SS7 4, SS7 5, SS8 0, SS8 7, SS8 8, SS8 9, SS9 2	107	11%
10	Brentwood	RM9 6, RM9 5, RM9 4, RM8 3, RM8 2, RM8 1, RM7 9, RM7 8, RM7 7, RM7 0, RM6 6, RM6 5, RM6 4, RM5 3, RM5 2, RM4 1, RM3 9, RM3 8, RM3 7, RM3 0, RM2 6, RM2 5, RM14 2, RM14 1, RM13 9, RM13 8, RM13 7, RM12 6, RM12 5, RM12 4, RM11 3, RM11 2, RM11 1, RM10 9, RM10 8, RM10 7, RM1 4, RM1 3, RM1 2, RM1 1, CM15 9, CM15 8, CM14 5, CM14 4, CM13 3, CM13 2, CM13 1	107	11%
		Total	1,012	100%

113. The zone-by-zone approach detailed at **Volume 2, Appendix 2-5 for convenience goods** and **Appendix 6-9 for comparison goods** enables more detailed analysis of shopping patterns, market shares and expenditure flows both within and outside the Study Area (Zones 1-10).

114. The key findings are used to inform the baseline market share analysis and the centre/store turnover estimates that underpin both the quantitative and qualitative needs ('gap') assessment, carried out in compliance with good practice.

THURROCK COUNCIL: CENTRES AND COMPETITION PROFILE

115. Thurrock is located on the north bank of the river Thames opposite Kent. The M25 motorway (junctions 30 and 31) runs through with the A13 and A1089 provide fast

east-west access across the Thames Gateway. In terms of geography, it is surrounded by the following authorities:

- To the North: by Brentwood and Basildon Council(s).
- To the East: Castle Point Council
- To the South: River Thames (beyond which lies Dartford and Gravesham in Kent)
- To the West: the London Borough of Havering

116. The council area is served by c2c rail, with direct connections to London Fenchurch Street and Southend. Key stations on this route include Grays, Tilbury Town, Chafford Hundred, Ockendon. Being on the River Thames the Port of Tilbury serves as one of the UK's major ports for freight and logistics. The Council area is also part of the broader Thames Gateway Growth Area with key industries on Logistics and distribution (especially around the Port of Tilbury and DP World London Gateway); Retail and leisure (large provision at Lakeside) as well as construction and manufacturing. On this basis the major employers include DP World London Gateway, Port of Tilbury, Amazon, Tesco, and other logistics operators. In terms of the area's natural and heritage assets this includes Coalhouse Fort and Tilbury Fort (historic riverside military sites); RSPB Rainham Marshes and the Thameside Nature Discovery Park.

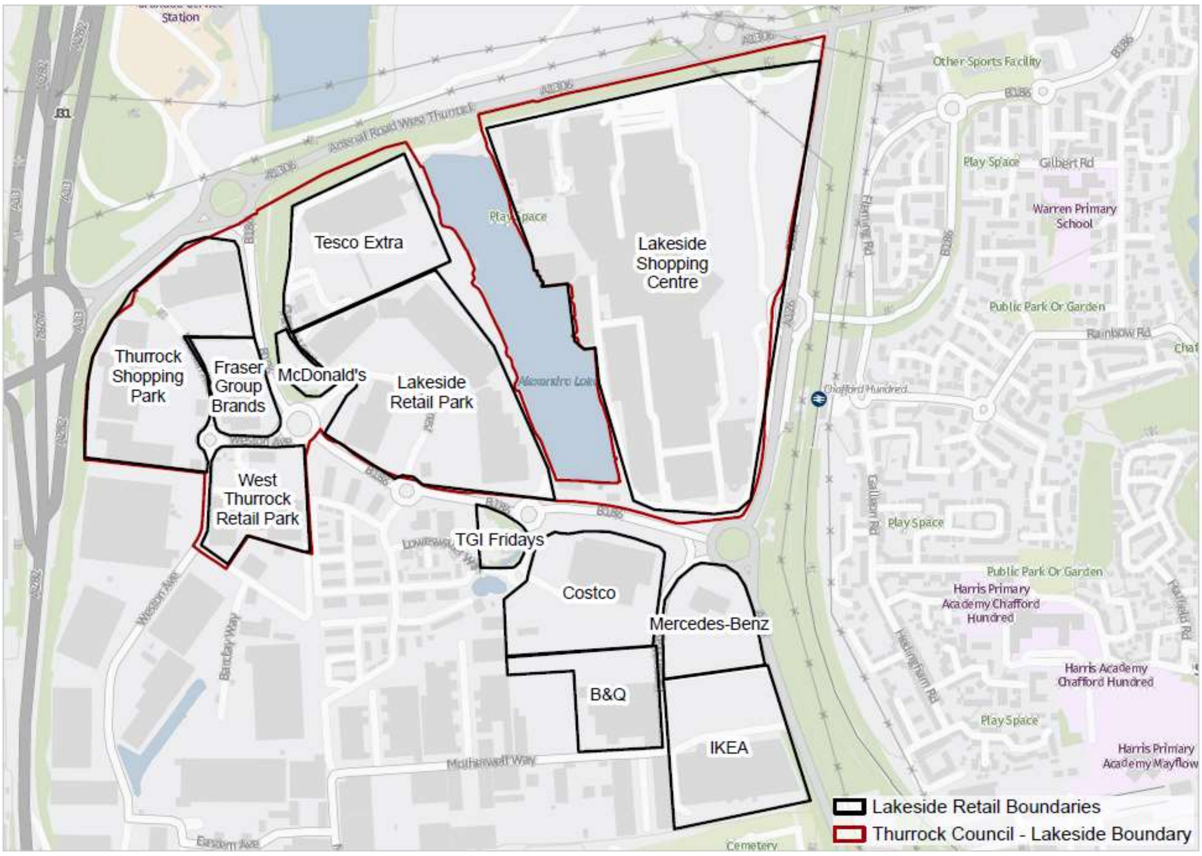
117. **Section 6** (and **Volume 3**) provide more detailed health checks for the following centres as designated in extant Policy CSTP7 (Network of Centres):

- Regional Centre: **Lakeside**
- Town Centre: **Grays**
- Existing Local Centres:
  - **Aveley**
  - **Corringham**
  - **Socketts Heath**
  - **South Ockendon**
  - **Stanford-le-Hope**
  - **Tilbury**

118. The following provides an overview of the aforementioned centre(s) (also see **Section 6**):

The designated regional centre of Lakeside is situated in West Thurrock strategically located off the M25 (Junction 30/31), making it easily accessible from London and the wider Southeast area. The area overall not only comprises a shopping centre but also retail parks, leisure hubs and large format standalone solus units forming a major regional retail cluster. The retail provision is illustrated and described below:

Figure 12: Lakeside: Retail Provision



- **Lakeside Shopping Centre (Retail)** – One of the UK's largest enclosed malls with over 250 shops, covering 148,645 sqm gross (1.6 million sq ft gross) of retail space and 12 free car parks and 11,857 parking spaces. It is owned by Global Mutual. The scheme comprises over 250 shops and restaurants with an extensive leisure offering following the launch of The Quay in 2019 (see later). Key tenants include M&S, Next, Zara, H&M, Primark and Apple. Recent openings include Nike, Stradivarius and Pull & Bear as well as upsized units for Hugo Boss, Calvin Klein, Watches of Switzerland and FootAsylum.

- **Lakeside Retail Park** – owner is GTAM Apex Lakeside Bidco following purchase from Landsec in March 2025. The 35,768 sqm (385,000 sq ft) gross retail park with 1,200 car parking spaces is adjacent to the main Lakeside Shopping Centre and comprises large format stores for:
  - Comparison Goods: B&M; Bensons for Beds; Card Factory; Currys; Designer Sofas; DFS Outlet; Dreams; Easy Bathrooms; Hobbycraft; Home Bargains; HomeSense; Natuzzi; Next Home; SCS; Sleep 8; Smyths Toys; The Range; Wren Kitchens.
  - Convenience Goods: Lidl; Longdan (Oriental Foodstore).
  - Food & Beverage: Costa; Subway; Tim Hortons.

- **Thurrock Shopping Park:** Owner – British Land with some Gross Internal Area of 26,596 sqm (286,277 sq ft) of Open A1 space with 1,646 car parking spaces. Another large retail park with the following provision as at the time of our site visit:
  - Comparison Goods: Big Clobber; Blue Inc; Boots; Decathlon; Dunelm; Go Outdoors; Halfords; M&S Outlet; Pets @ Home; Poundland; RH Outlet; TK Maxx;
  - Convenience Goods: The Food Warehouse
  - Food & Beverage: Burger King; Costa

  To note that as January 2025 a portion of the Thurrock Shopping Park is set to be demolished to make way for a new £200 million warehouse and distribution centre of some 59,830 sqm (644,000 sq ft). British Land received planning permission (planning reference no: 23/00033/FUL) for a multi-storey logistics scheme to provide occupiers with purpose-built logistics space suitable for use as a hub for last-mile deliveries and returns.

- **West Thurrock Retail Park**: owner DTZ Investors with 11,804 sqm (127,061 sq ft) and 573 car parking spaces. The provision comprises of:
  - Comparison Goods: American Golf; Bedworld Factory Shop; Carpetright; Designer Furniture Gallery; Evans Cycles; Furniture Village; Matalan; NCF Living; Nick Scali.

- **Standalone Units**: These include IKEA; B&Q Warehouse; Tesco Extra; Costco; Flannels; Sports Direct and Everlast Gym

As stated above, the retail provision as seen above includes commercial leisure elements provision including Tim Hortons, Costa Coffee, Subway, Starbucks and gyms (PureGym & Everlast). In addition to this, Lakeside Shopping Centre's retail offer is complemented by the following leisure provision:

- **Lakeside Shopping Centre (Leisure):** Located on the western side of the shopping centre, adjacent to Alexandra Lake, The Quay is a dedicated leisure zone featuring:
  - Nickelodeon Adventure Lakeside: An indoor family entertainment centre themed around popular Nickelodeon characters, offering interactive play zones and attractions.
  - Flip Out Lakeside: A trampoline and adventure park providing various activities suitable for all ages.
  - Puttshack Lakeside: A modern mini-golf experience with tech-infused gameplay.
  - Hollywood Bowl: A bowling alley offering lanes for casual and competitive play.
  - Vue Cinema: A multiplex (9 screen) cinema showcasing the latest film releases.

* Rock Up Lakeside: An indoor climbing centre featuring 26 climbing walls over 8 meters high, catering to climbers of all skill levels.

- **Lakeside Shopping Centre (Food & Beverage (F&B)):** Situated along the eastern edge of Alexandra Lake, The Boardwalk and Quay aims to create a scenic dining area offering a variety of restaurants with lakeside views, including Bella Italia, Coco Asia, Nando's, ASK Italian, Wagamama, Busaba, Gourmet Burger Kitchen, Las Iguanas, Prezzo, Zizzi, Casco Lounge and Boom Battle Bar.

Lakeside is therefore not just a shopping centre but a comprehensive retail and leisure destination blending traditional shopping, outlet-style stores and a commercial offer (including leisure attractions and dining), making it a multi-generational, all-day experience. This is further reflected in day visit spend to the council area which is highest in Essex (see **Section 9** later). The offer especially strong in fashion retail; family leisure and large-format home and lifestyle stores.

In terms of future investment and growth the Council is spearheading plans for a visionary 'Place Proposition' across the Borough which includes the evolution of Lakeside from a shopping destination into a regional town centre. This transformation would include the potential addition of new leisure facilities, residential units, commercial spaces, the expansion of existing shopping amenities and infrastructure improvements, such as enhanced road links connecting the Lakeside Basin to the town centre. This is a visioning exercise and whilst there are no detailed plans at present, this Council led initiative is likely to be to be published in 2026.

- **Grays** is a defined town centre located on the north bank of the River Thames. It serves as the Council area's main administrative, commercial, and transport hub. It offers direct rail links to London via Grays Station and has good road connections through the A13 and M25. The town centre features a mix of retail (including Grays Shopping Centre and markets), hospitality, and essential services, with residential areas and new housing developments nearby. Cultural and educational facilities such as South Essex College and the Thameside Complex complement local amenities, while riverside parks and public spaces support leisure and community activities. The centre is also a key focus for regeneration in Thurrock, with major projects underway to improve its urban environment and connectivity including the town deal projects on Grays Riverfront & Beach Project (revitalising the riverside); Grays Beach Riverside Park & Kilverts Field and a Riverfront Activities Centre. The overall aim is to revitalise the riverfront & public spaces; improve connectivity & transport links and provide community & leisure facilities. Recent public realm upgrades, the new Council headquarters, and riverside enhancements are creating a more integrated town centre. In terms of other future developments that may change the form of the centre, and as previously mentioned, the owners of Grays Shopping Centre, have submitted a formal planning application that includes demolishing the existing shopping centre, multi-story car park, and Crown Road office block to construct up to 860 residential units and 7,436 square meters of commercial space.

- **Aveley** is designated local centre. It is a historic centre focused on the High Street and Stifford Road, retains a traditional village atmosphere with independent shops, cafes, a Co-op, and essential community services. The area is surrounded by established and new residential developments, and benefits from nearby green spaces such as Belhus Woods and Thames Chase. Overall, the centre complements larger nearby centres like Lakeside and South Ockendon. While it lacks a railway station, it is well-connected by road and local bus routes. The surrounding area is experiencing growth through housing expansion and the influence of regeneration in surrounding areas, particularly Purfleet and West Thurrock. Balancing its historic character with surrounding modern development, Aveley remains a key local hub serving its immediate residential hinterland.

- **Corringham** another local centre to the east of the Council area serves as a key retail and service hub for the surrounding residential community. Accessibility to Corringham is good due to its close proximity to the A13. It does not have its own railway station, the nearest being at Stanford-le-Hope. The main retail provision is centered around St. John’s Way and the pedestrianised area of Grover Walk. This comprises a mix of independent shops (e.g. butcher and baker), national chains (Savers, Card Factory, Boots, Morrisons, Iceland), cafés, restaurants, and essential services (e.g. post office). The centre has a compact, walkable layout makes it a convenient destination for everyday needs. Parking facilities are available around the main shopping area, and public realm improvements enhance pedestrian access. Corringham maintains a steady level of footfall, supported by its resident local community.

- The local centre of **Socketts Heath** is largely within a residential catchment, with the centre functioning as a focal point for everyday services and amenities. The main provision is cited along the busy Lodge Lane (A1013). This includes a Co-op foodstore, post office, beaty parlours, butchers, Lloyds pharmacy, hairdressers/barbers, professional services (estate agents, accountants), betting shops and take aways. It functions effectively as a neighbourhood hub, offering essential services within walking distance for many resident as well as those passing through on Lodge Lane.

- **South Ockendon** is a larger local centre surrounded by a sizeable residential catchment that developed after the second world war as a London overspill location. Although not industrial in itself, South Ockendon has long been influenced by nearby industrial hubs, particularly the Ford Motor Company’s Dagenham plant. The main commercial provision is located along Derry

Avenue, Derwent Parade and Daiglen Drive. The centre is served by South Ockendon railway station though it is some distance from the retail core of the centre. There is a mix of representation from national chains to independent outlets. National chains include, convenience foodstores like, Lidl, Tesco Express and Nisa Local as well as Greggs and Savers. In terms of its diverse retail offer, the centre is served by a range of independent provision from grocers, pharmacy, opticians, hairdressers/barbers, restaurants and takeaways.

- **Stanford-le-Hope** local centre is highly accessible via the A13 / Stanford-le-Hope Bypass and Stanford-le-Hope railway station. The centre's retail and leisure provision along King Street and High Street which are clustered around the prominent landmark of St Margarets church. The village type feel to the centre is served by primarily by independent provision interspersed by national convenience multiples including Tesco Express and Co-op Food. The independent provision is varied and includes a baker, restaurants, a range of take-aways, optician, jeweller, beautician, pharmacy and estate agents. Plans are underway for a major redevelopment of Stanford-le-Hope railway station. This will include better access for connecting buses and other improved travel links to and from the station. Stanford-le-Hope rail station and transport connections are considered to be vital for access to new jobs at London Gateway and the Thames Enterprise Park, as well as local housing developments.

- **Tilbury** local centre is well connected by road via the A1089, which links to the A13 and M25, facilitating access to London and the surrounding region. The centre's proximity to Tilbury Docks and the Port of London reinforces its significance to the logistics and shipping industries serving as a critical gateway for international trade. Notable heritage sites like Tilbury Fort and Coalhouse Fort emphasize the town's military and maritime history. The centre is also served by the Tilbury Town railway station, which provides regular services to London Fenchurch Street via the c2c line, offering a commute of around 40 minutes. The retail core of the centre lies in two parts along Dock Road and Calcutta Road. This comprises of mainly independent retail offer including ethnic foodstore provision, baker, off-licenses, pharmacy, newsagents and retail services (e.g. drycleaners, hairdressers/barbers, nail salon). This provision is complemented by a Boots, Tesco Express and a Tilbury Town Premier convenience store on Civic Square. Outside of the centre there is an Asda Superstore on Thurrock Way. The centre is set to benefit from regeneration funding through the £22.8m Town Deal. This focuses on improving transport, community facilities, and heritage spaces. Key projects include revamping the Tilbury Station area (the Hub), upgrading Civic Square and building a Youth Zone (the Heart), and transforming the historic Riverside Station into a cultural hub (the Heritage). The plans aim to enhance connectivity, support young people, and celebrate Tilbury's maritime heritage.

119. The following provides a brief profile of the main competing centres and shopping/leisure locations outside of the Council area:

- **Bluewater Shopping Centre** is one of the UK's premier retail and leisure destinations. Located in Greenhithe Kent it is approximately 25 minutes (5 miles, 8km) from Grays town centre. The centre is easily accessible by car from the A2, M2, M25 and M20. Greenhithe is the closest train station to Bluewater, and buses run between Bluewater and Greenhithe station The shopping centre houses over 300 stores, 50 bars, restaurants and cafes along with 13,000 free car parking spaces. Flagship stores include Marks & Spencer and John Lewis. The centre's triangular layout features three main shopping areas:
  - The Guildhall: Offers classic and high-fashion retail and lifestyle stores.
  - Rose Gallery: Showcases high-street fashion brands.
  - Thames Walk: Caters to a fashionable urban audience.

  The commercial leisure provision includes:
  - The Winter Garden area of the centre is dedicated to family dining, featuring a variety of cuisines.
  - The Plaza - Showcase Cinema de Lux (A 17-screen cinema offering an immersive movie experience), Gravity Trampoline Park, Dinotropolis (a dinosaur-themed soft play area with interactive challenges) and a wide range of bars and restaurants.

  The centre has also leveraged its 50-acre surrounding landscape to offer unique outdoor activities including:
  - Hangloose Adventure: Home to England's longest zipline, Europe's highest swing, and the UK's only outdoor skydiving machine.
  - Nature Trails & Lakes: Visitors can explore the scenic trails and lakes.

- **Basildon** is conveniently located with the two main roads from London to Southend, the A13 and A127, passing to the south and north of the town, respectively. Both are important commuter trunk roads, allowing easy access to the M25 and the rest of the motorway network. The central area is surrounded by a dual carriageway ring road and most streets within are pedestrianised. The Town Square is a wide open-air precinct in the centre of town.

  Basildon has two managed shopping centres within the centre:
  - The Eastgate Shopping Centre serves as the retail nucleus of Basildon, housing over 100 shops and restaurants within its 69,677 sqm (750,000 sq ft) space. It is anchored by multiple retailers Asda and Primark.
  - The Westgate Shopping Park is located on the western edge of Basildon town centre, just within the western ring road. Westgate comprises amongst others, Dreams, easyGym, Hobbycraft and JD Sports.

  Commercial cinema provision in the centre is located at East Square that houses the Vue Basildon and which opened in July 2024. It features 10 screens equipped with 4K laser projection and Dolby Atmos sound in select auditoriums.

MARKET SHARE ANALYSIS

120. The survey-derived market share analysis is detailed in **Volume 2** (see **Appendix 3** for convenience goods and **Appendix 7** for comparison goods. To note that the market share analysis at this stage of the assessment includes expenditure on 'Special Forms of Trading' (SFT), which comprises sales via the internet, mail order, stalls and markets, door to door and telephone sales.

Convenience Goods Market Shares

121. Convenience goods retailing is generally defined as comprising everyday essential items (including food, drinks, newspapers/magazines and confectionery), as well as an element of non-durable housing goods (such as washing up liquid, kitchen roll, bin bags, etc.).

122. The overall market share analysis (%) for all centres and stores are detailed in Table 1 (**Appendix 3**). These market shares have been derived from the assessment of the ('primary') responses as to where people normally shop for their more infrequent main ('bulk') food purchases, and for their more frequent day-to-day ('top up') convenience and grocery purchases.

123. Furthermore, in order to prevent food shopping patterns being 'skewed' by larger superstores and food stores in the Catchment Area, the survey also asked respondents where else they normally shop (if anywhere) for their 'main' and 'top up' purchases in addition to the first store identified (i.e., the 'secondary' responses). The market shares for these 'secondary' shopping purchases are set out in Table 3 ('other' main food shopping) and Table 5 ('other' top up food purchases') in **Appendix 3**.

124. The 'primary' and 'secondary' responses for the different types of food shopping have then been merged through the application of a weighting based on judgements as to the proportion of household expenditure normally accounted for by each type of convenience goods shopping. In this case we have applied a reasonable and robust weighting of 60% for main 'bulk' shopping; 15% for secondary main 'bulk' shopping; 15% for primary 'top-up' shopping; and 10% for secondary 'top-up' shopping.

125. The summary of market shares from across the Study Area (Zones 1-10) for town and out-of-centre locations for convenience goods locations in the Council area is summarised below. We have provided key headlines based on the Study Area (Zones 1-10) and where relevant across the broad representative Council area (Zones 1-6):

Table 3: Convenience Goods: Town and Out-of-Centre Market Shares: Retention (%)Sector

THURROCK COUNCIL AREA	Study Area Zones: 1-10	Council Area Zones: 1-6
REGIONAL CENTRE: LAKESIDE		
Lakeside Retail Park-B&M	0.0%	0.1%
Lakeside Retail Park-Home Bargains	0.1%	0.2%
Lakeside Retail Park-Lidl	0.7%	1.9%
Lakeside-Lakeside Retail Park-Other	0.0%	0.2%
Lakeside-Lakeside Shopping Centre-M&S	0.2%	1.9%
Lakeside Shopping Centre-Other	0.0%	0.0%
Lakeside-Tesco Extra	2.1%	7.1%
Thurrock Shopping Park-Iceland (The Food Warehouse)	0.2%	0.9%
Subtotal	3.4%	12.3%
TOWN CENTRE: GRAYS		
Farmfoods	0.3%	0.6%
Iceland	0.1%	0.7%
Morrisions	1.0%	6.6%
All Other Floorspace	0.1%	0.9%
Subtotal	1.4%	8.9%
LOCAL CENTRE: AVELEY		
Co-op	0.1%	0.5%
One Stop	0.0%	0.3%
All Other Floorspace	0.0%	0.0%
Subtotal	0.1%	0.9%
LOCAL CENTRE: CORRINGHAM		
Costcutter	0.0%	0.1%
Iceland	0.4%	3.5%
Morrisons DAILY	0.1%	0.8%
Morrisons SUPERMARKET	0.5%	4.0%
All Other Floorspace	0.1%	0.3%
Subtotal	1.1%	8.6%
LOCAL CENTRE: SOCKETTS HEATH		
Co-op	0.2%	1.6%
All Other Floorspace	0.0%	0.0%
Subtotal	0.2%	1.6%
LOCAL CENTRE: SOUTH OCKENDON		
Lidl	0.6%	4.6%
Nisa Extra	0.0%	0.1%
Tesco Express	0.1%	0.5%
All Other Floorspace	0.0%	0.1%
Subtotal	0.7%	5.3%
LOCAL CENTRE: STANFORD-LE-HOPE		
Co-op	0.1%	0.7%
Tesco Express	0.1%	1.0%
All Other Floorspace	0.0%	0.0%
Subtotal	0.2%	1.7%
LOCAL CENTRE: TILBURY		
Premier, Civic Square	0.0%	0.0%
Premier, Dock Road	0.0%	0.1%
Tesco Express	0.1%	0.4%
All Other Floorspace	0.0%	0.1%
Subtotal	0.1%	0.5%
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	1.8%	7.6%
OUT-OF-TOWN CENTRE STORES / LOCATIONS		
Aldi, London Road, Grays	1.3%	10.5%
Asda, Thurrock Park Way, Tilbury	1.1%	8.6%
Costco, West Thurrock Way	0.6%	0.7%
Sainsbury's Superstore, Howard Road, Chafford Hundred	1.2%	5.5%
Tesco Express, Lakeside Business Village, Chafford Hundred	0.2%	1.4%
Subtotal	4.3%	26.8%
THURROCK COUNCIL AREA	**13.2%**	**74.2%**

126. The main headlines from the table are summarised below:

- All the convenience goods floorspace within the Council area attains a low market share of 13.2% from across the wider Study Area (Zones 1-10). However, looking at the broad Council area (Zones 1-6), this increases substantially to 74.2% indicating the dominance of locally based shopping for convenience goods.

- Of the 74.2% market share retention in the Council area (Zones 1-6), just under two-thirds (47.4%) is retained by town centre space and over a third (26.8%) goes to out-of-centre entre floorspace. The following named stores attained the highest market shares in town centre locations, namely: Tesco Extra, Lakeside (7.1%), Morrisons, Grays (6.6%), Morrisons, Corringham (4%); Lidl, South Ockendon (4.6%).

- All out-of-town centre convenience goods floorspace attains a retention of 4.3% from across the wider Study Area (Zones 1-10) and 26.8% (Zones 1-6). Focussing on the later, this retention is dominated by the following stores: Aldi, Grays (10.5%), Asda, Tilbury 16.1% and Sainsburys, Chafford Hundred 5.5%.

127. The table below shows the market shares of centres and stores located outside the Council area. This broadly represents a proxy for the 'leakage' of shoppers and spend. However, we advise that care should be applied in interpreting these market shares and 'leakage' in particular. This is because they are dependent on how widely drawn the catchment area is and also reflects the fact that some of the stores located in neighbouring authorities will be more convenient and easily accessible to residents rather than necessarily reflecting any under-provision or latent need for new convenience floorspace.

Table 4: Convenience Goods: Market Share: Leakage (%)

OTHER CENTRES/STORES OUTSIDE THURROCK COUNCIL AREA	Study Area Zones: 1-10	Council Area Zones: 1-6
Basildon	7.1%	2.2%
Bexley	0.3%	0.0%
Bexleyheath	2.7%	0.0%
Brentwood	2.6%	0.1%
Dagenham	2.4%	0.2%
Dartford	2.4%	0.1%
Gravesend	4.5%	0.0%
Greenhithe	1.4%	0.0%
Pitsea	3.2%	2.9%
Romford	1.6%	0.1%
Sidcup	1.3%	0.0%
Thamesmead	0.5%	0.0%
All Other Centres / Stores	40.3%	5.7%
Subtotal	70.3%	11.3%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING	16.5%	14.5%
OTHER CENTRES/STORES OUTSIDE THURROCK COUNCIL AREA	**86.8%**	**25.8%**

128. The table shows:

- Collectively, and across the wider Study Area (Zones 1-10) the majority (86.8%) of the spending is going to centres/stores outside the Thurrock Council area. This is reasonable in our view given the wider spatial area of the Study Area. The competing locations from this defined spatial area include Basildon (7.1%), Gravesend (4.5%) and Pitsea (3.2%).

- However, to be noted that from the broad representative Council area (Zones 1-6), the leakage drops significantly to 25.8% with notable competing locations being Basildon (2.2%) and Pitsea (2.9%)

- **Special Forms of Trading** (SFT) is achieving a market share of 16.5% in the widely defined Study Area (Zones 1-10) and a lower 14.5% from the Council area (Zone 1-6). These figures are below the Experian national average forecast of 17.5% in 2025.

Comparison Goods - Market Share Analysis

129. Comparison goods are generally classified as items purchased less frequently and include clothing, footwear, household and recreational goods. For the following main categories of non-food expenditure, each respondent was asked where they did most of their household's shopping, and "where else" they shopped.

Table 5: Main Categories of Comparison Goods Expenditure

Household Survey Question:	Where do households normally shop for:	See Appendix 7
Q8 & Q10	Clothing and footwear (fashion) items	Table 2
Q11	Recording media (e.g., records, CDs, DVDs, etc.)	Table 3
Q12	Audio-visual, photographic and computer items & domestic electrical	Table 4
Q13	Books, Stationery and Drawing Materials	Table 5
Q14	Pet-related products, hobby items, sportswear, camping, cycling and musical instruments	Table 6
Q15	Furniture, carpets, other floor coverings and household textiles	Table 7
Q16	DIY goods, decorating supplies & garden products	Table 8
Q17	Personal care products & medical goods	Table 9
Q18	All other goods – including jewellery, watches, glassware, tableware etc.	Table 10

130. Table 1 (**Appendix 7**) sets out the total combined market shares for all comparison goods expenditure allocated to the main centres and stores. The market share analysis (%) takes account of the distribution and weight of spend (£) by households on the different comparison goods categories. This ensures that that the resultant shares are not 'skewed' by any particular comparison goods expenditure category. This is a standard approach for retail assessments. As for the analysis of convenience goods, the market shares at this stage of the analysis include expenditure on SFT.

131. The summary of market shares for town and out-of-centre locations for comparison goods locations in the Council area is shown below.

Table 6: Comparison Goods: Town and Out-of-Centre Market Shares

THURROCK COUNCIL AREA	Study Area Zones: 1-10	Council Area Zones: 1-6
REGIONAL CENTRE: LAKESIDE		
Lakeside Retail Park-B&M	0.0%	0.1%
Lakeside Retail Park-Home Bargains	0.1%	0.6%
Lakeside Retail Park-Lidl	0.1%	0.1%
Lakeside-Lakeside Retail Park-Other	3.4%	12.7%
Lakeside-Lakeside Shopping Centre-M&S	0.5%	0.4%
Lakeside Shopping Centre-Other	4.0%	12.3%
Lakeside-Tesco Extra	0.5%	1.8%
Subtotal	8.6%	27.9%
TOWN CENTRE: GRAYS	1.0%	6.7%
LOCAL CENTRE: AVELEY	0.0%	0.0%
LOCAL CENTRE: CORRINGHAM	0.3%	2.6%
LOCAL CENTRE: SOCKETTS HEATH	0.0%	0.0%
LOCAL CENTRE: SOUTH OCKENDON	0.2%	0.7%
LOCAL CENTRE: STANFORD-LE-HOPE	0.0%	0.1%
LOCAL CENTRE: TILBURY	0.1%	0.4%
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	0.2%	0.6%
OUT-OF-TOWN CENTRE STORES / LOCATIONS		
Aldi, London Road, Grays	0.0%	0.2%
Asda, Thurrock Park Way, Tilbury	0.2%	1.9%
B&Q, West Thurrock	0.5%	2.3%
Costco, West Thurrock Way	0.1%	0.3%
IKEA, West Thurrock Way	0.6%	0.6%
Sainsbury's Superstore, Howard Road, Chafford Hundred	0.1%	1.2%
Screwfix, London Road, Grays	0.0%	0.1%
Screwfix, Thurrock Business Centre	0.0%	0.1%
Toolstation, Motherwell Way	0.0%	0.0%
All Other Out-of-Centre Locations	0.2%	0.6%
Subtotal	1.8%	7.3%
THURROCK COUNCIL AREA	**12.1%**	**46.4%**

132. The market shares are set out in the table, and the main headlines are described below:

- Comparison goods floorspace within the Council area attains a low level market share of 12.1% from across the Study Area (Zones 1-10). This retention level is being driven by the provision at the Lakeside Regional centre (8.6%).

- The overall level of retention within the broader Council area (Zones 1-6) increases to 46.4%; driven by not only the provision at Lakeside regional centre (27.9%) but also Grays town centre (6.7%) and to a lesser extent Corringham (2.6%).

- In contrast, the out-of-centre floorspace collectively attains a 1.8% market share (Study Area – Zones 1-10) and 7.3% from the broader Council area (Zones 1-6). From the wider Study Area (Zones 1-10), the highest market share is attained by IKEA (0.6%). Considering the broader Council area (Zones 1-6), B&Q West Thurrock attains a market share of 2.3%; Asda, Thurrock Park Way (1.9%) and Sainsbury's, Chafford Hundred (1.2%).

133. The table below shows 'leakage' of comparison goods expenditure to other competing centres and stores located outside of the Council area.

Table 7: Comparison Goods: Market Share Leakage (%)

OTHER CENTRES/STORES OUTSIDE THURROCK COUNCIL AREA	Study Area Zones: 1-10	Council Area Zones: 1-6
Ashford Designer Outet Village	0.0%	0.0%
Basildon	6.2%	3.2%
Bexley	0.1%	0.0%
Bexleyheath	3.2%	0.0%
Bluewater Shopping Centre	5.2%	0.9%
Brentwood	2.0%	0.1%
Central London	0.9%	0.7%
Chatham	0.0%	0.0%
Chelmsford	0.2%	0.1%
Dagenham	0.6%	0.1%
Dartford	2.9%	0.0%
Gravesend	3.1%	0.1%
Greenhithe	0.1%	0.0%
Pitsea	1.3%	1.0%
Romford	8.5%	1.7%
Sidcup	0.5%	0.0%
Thamesmead	0.1%	0.0%
All Other Centres / Stores	12.8%	3.6%
Subtotal	47.9%	11.6%
SPECIAL FORMS OF TRADING/ INTERNET SHOPPING	40.0%	42.0%
OTHER CENTRES/STORES OUTSIDE THURROCK COUNCIL AREA	**87.9%**	**53.6%**

134. The key headlines from the table above are:

- There is a substantial 87.9% 'leakage' of comparison goods expenditure to other competing centres outside the Thurrock Council area from the wider Study Area (Zones 1-10) and SFT.

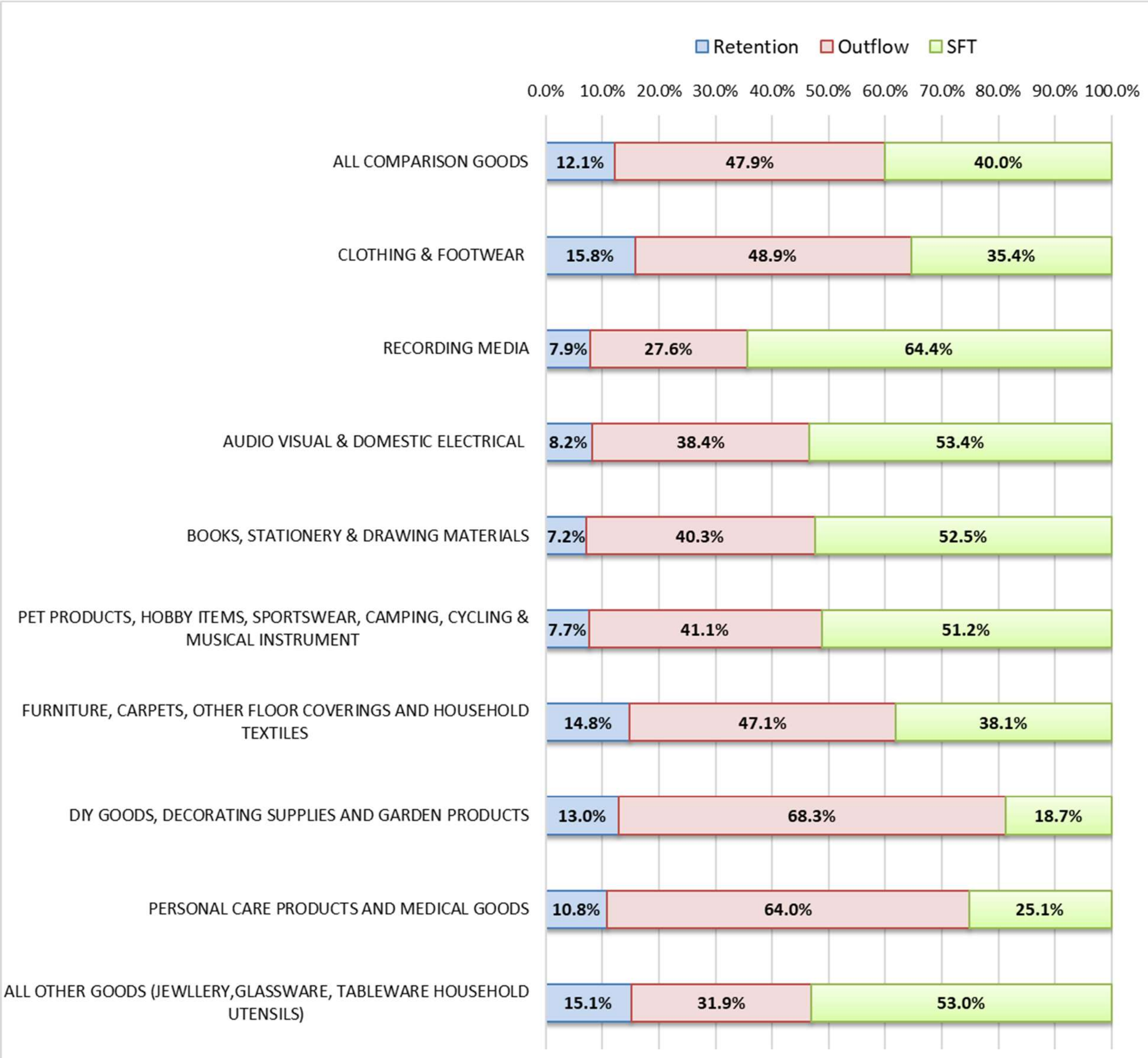
- **Special Forms of Trading** (SFT) forms a substantial contribution to the leakage achieving a very high market share of 40% from across the Study Area (Zones 1-10) and a higher 42% in the representative Council area (Zones 1-6). These market shares are higher than the national average figure forecast of 32.1% for 2025 by Experian.

- The key competing locations from across the Study Area (Zones 1-10) include Romford (8.5%), Basildon (6.2%); Bluewater Shopping Centre (5.2%); Bexleyheath (3.2%) and Gravesend (3.1%).

- Considering the representative Council area (Zones, 1-6), the leakage falls comparatively to 53.6%. The key competing locations include Basildon 3.2%, Romford 1.7% and Pitsea (1%).

135. The figure below shows the market share ('retention') of different categories of comparison goods achieved by centres/stores in the Council area from within the Study Area (Zones 1-10).

Figure 13: Comparison Goods Market Shares: Study Area (Zones 1-10)



136. The above figure shows that across the Study Area (Zones 1-10), online shopping accounts for 40% of market share and its proportion (40% and above) is highest amongst most comparison goods sub-categories except for DIY goods (18.7%);

personal care products (25.1%); furniture & floor coverings (38.1%) and clothing and footwear (35.4%). The highest market share for online shopping is in the category of recording media achieving a market share of 64.4%.

137. In terms of the overall level of retention of 12.1%, the highest (above 10%) is amongst the categories of clothing and footwear (15.8%); furniture floor and coverings (14.8%); DIY goods (13%), personal care products and medical goods (10.8%) and all other comparison goods (15.1%).

138. Outflow accounts for 47.9% of market share for all comparison goods. The highest (above 50% market share is in the categories of: DIY goods (68.3%) and personal care products (64%).

139. From the wider Study Area (Zones 1-10) the market share analysis indicates that for most categories, either consumers shop from locations outside the Council area or shop online.

140. Focussing on patterns more locally, a review of the representative Council area (Zones 1-6 and shown below) shows the retention level overall is higher at 46.4%. It is highest in the categories of DIY goods (65.1%) and personal and medical goods (62.4%). Online shopping accounts for 42% being led by spending in the category of recording media (70%).

Figure 14: Comparison Goods Market Shares: Council Area (Zones 1-6)

141. Within the Council area (Zones 1-6) the pattern of spending indicates a tendency to shop either locally (46.4%) or online (42%) for most comparison goods types. This is in contrast to the wider Study Area where centres outside the Council area dominate (47.9%) or shop online (40%).

SUMMARY

142. In summary the market share headlines for convenience goods retailing are:

- SFT has a 16.5% market share in the Study Area (Zones 1-10), and 14.5% from the broad Council area (Zone 1-6). These are below the national average forecast by Experian Business Strategies of 17.5% in 2025.

- The convenience goods floorspace within the Council area attains a low market share of 13.2% from across the wider Study Area (Zones 1-10).

- However, this increases to 74.2% when focussed on the broader Council area (Zones1-6) indicating the dominance of local shopping for convenience goods with a strong retention level (47.4%) by town centre floorspace.

- The out-of-centre category contributes to a retention of 4.3% from across the wider Study Area (Zones 1-10) and 26.8% from the broad Council area (Zones 1-6).

143. For comparison goods the key headlines are:

- SFT's market share in the Study Area (Zones 1-10) of 40% and 42% across the representative Council area (Zones 1-6). Both are higher than Experian national average of 32.1% for 2025.

- Centres and stores in the Council area are achieving a low overall retention level of 12.1% from across the Study Area (Zones 1-10) that increases to 46.4% in the broad Council area (Zones 1-6). The latter influenced not only through the provision at Lakeside regional centre (27.9%) but also provision in Grays town centre (6.7%).

- The out-of-centre floorspace collectively attains a 1.8% market share (Study Area – Zones 1-10) and 7.3% from the broader Council area (Zones 1-6).

- For comparison goods, and within the Council area (Zones 1-6), the patterns of spending indicates a tendency to shop either locally (46.4%) or online (42%) for most sub categories of comparison goods. This is in contrast to the wider Study Area (Zones 1-10) which is dominated by spending across centres outside the Council area (47.9%) or shop online (40%).

5. CENTRE HEALTH CHECKS: APPROACH & KPIs

144. **Section 6** sets out the key findings of the health check assessment of the Council's centres. These have been informed, **where possible and available**, by the following Key Performance Indicators (KPIs) outlined in the National Planning Practice Guidance (PPG) (Paragraph 006. Reference ID: 2b-006-20190722). The KPI's that are stated and that **may** be relevant in assessing the health of town centres include:

- the diversity of uses;
- proportion of vacant street level property;
- commercial yields on non-domestic property;
- customers' experience and behaviour;
- retailer representation and intentions to change representation;
- commercial rents;
- pedestrian flows;
- accessibility;
- perception of safety and occurrence of crime;
- state of town centre environmental quality;
- balance between independents and multiples;
- any evidence of barriers to new businesses opening and existing business expanding;
- opening hours/availability/extent to which there is an evening and night time economy offer (The "evening" economy generally relates to all leisure activities that are open until around 11pm. The "night-time" economy is generally defined as businesses and activities with late night licences that are open beyond 11pm, particularly at the weekend.).

145. These KPIs help to identify the critical Strengths and Weaknesses of each centre from a retail and leisure perspective; the Opportunities for new sustainable development and growth; and any current and potential future Threats to their overall vitality and viability ('SWOT' assessment).

146. The health check and SWOT assessments draw on a number of industry standard published datasets (e.g., Experian Goad, PROMIS, etc.), primary market research (including the findings of the household telephone interview survey), and LSH's own commercial market intelligence and research. This will help understand the current vitality and viability of the Borough's centres, how their health has changed over time, and their prospects over the short, medium and longer term. Our approach and some of the key performance indicators assessed are briefly described below.

DIVERSITY OF USES:

147. The health check assessments have been principally informed by the latest available Experian Goad Category reports, site visits and the Council's monitoring data where available**.** These assessments set out the number and proportion of

units and floorspace by different uses (i.e., convenience, comparison, leisure and service uses). Experian Goad define ‘services’ into three sub-categories:

- retail services - including hairdressers, beauty salons, travel agents, launderettes, opticians, etc.; (Note: Since the reform of the Use Classes Order (1 September 2020) all retail services are defined as Class E (previously Class A1). This is apart from shops not more than 280sqm “*most selling essential goods … and at least 1km from another similar shop*”, which are now covered by the new Class F2 (local community uses).
- leisure services - including cafés and restaurants, betting shops and fast food/ takeaway outlets (Note: Cafés and restaurants are now classified as Class E (previously Class A3); betting shops are ‘sui generis’; and fast food/ takeaway outlets are ‘sui generis’ (previously Class A5); and
- financial and professional services - including banks, estate agents, etc. (Note: Financial and professional services are now classified as Class E (previously Class A2)).

VACANCY LEVELS

148. The number and scale of vacancies in a centre, and the length of time properties have been vacant, represents one of the critical KPIs used to assess a centre's overall vitality and viability. For example, high vacancy levels, or a concentration of vacancies in certain areas/streets, could indicate underlying weaknesses in terms of occupier demand, and/or the fact that vacant units are not 'fit-for-purpose' to meet the needs of modern businesses (for example, there may be too small and/or have a poor layout/configuration). Notwithstanding this, vacancies can arise in even the strongest centres due to the natural 'churn' in businesses opening and closing at any point in time. This KPI must therefore be used and interpreted with caution. Where possible we have assessed the changes in vacancy levels (outlets and floorspace) over time for the four main centres based on the findings of previous evidence-based studies.

MULTIPLE AND INDEPENDENT OUTLETS

149. A multiple is defined by Experian as being part of a network of nine or more outlets. It is widely accepted that a good presence and mix of multiples in a centre, alongside a strong and diverse independent offer, helps to increase the overall attraction, diversity and performance of centres. For many centres multiples are the key anchors to their shopping and leisure offer, helping to draw visitors from wider catchments and generate more frequent shopping trips and footfall, to the benefit of other shops, businesses and facilities in terms of linked trips and expenditure, and longer dwell times.

STREET & COVERED MARKETS

150. The presence of high quality, well managed and diverse street/indoor markets and food halls in centres can have a significant positive impact on their overall vitality

and viability. This is recognised by the NPPF (paragraph 90c), which states that existing markets should be retained and enhanced and, where appropriate, new ones should be created, ensuring that markets remain attractive and competitive. It is widely accepted that successful markets in the right locations can help increase trips to centres from a wider catchment, attract a more diverse customer profile, generate benefits for the wider daytime and evening economy, and act as "seedbeds" and "incubator space" for the growth of new businesses.

MARKET DEMAND & REQUIREMENTS

151. Evidence of market demand from retail and leisure operators for representation in a town centre can provide a further indication of the overall health and attraction of centre, and investor confidence. In this case evidence was drawn from standard published sources (including the Requirements List) and, where possible, supplemented by LSH's own commercial market intelligence. However, it should be noted that the published information is not definitive, as many retailers and leisure operators prefer not to make their requirements public, as it can potentially undermine their current and future negotiating position with potential landlords. Furthermore, market demand is often opportunity-driven and often responds to the availability and marketing of new development sites and regeneration opportunities.

PRIME ZONE A RENTS & COMMERCIAL YIELDS

152. The level of rent, that businesses are prepared to pay for retail space, and the commercial yields achieved, provide a further indication of the relative strength of the centre and its prime retail pitch. However, it should be noted that Prime Zone A rents and yields are not available for all centres, particularly smaller centres where there is more limited evidence on transactions. Therefore, an assessment of Prime Zone A rents and yields is only provided where there has been significant market activity. Evidence of average commercial yield levels for centres is inherently more difficult to source, as it depends on the level and volume of transactions in any one year. In general terms though, where reported yields are low, this usually represents a particularly strong performing investment. Conversely, where the yield value is high, this generally reflects poorer performing investments.

CUSTOMER VIEWS AND BEHAVIOUR

153. Our assessment of customers' views and behaviours and shopping patterns draws on the outputs of the commissioned 1,012 household survey (undertaken in May 2025), as evidence to help inform the town centre health checks.

TOWN CENTRE ENVIRONMENTAL QUALITY

154. Assessment of a centre's overall environmental quality represents a further KPI to help assess overall attraction, vitality and viability. An assessment of environmental quality (including, for example, cleanliness and attractiveness,

security, treatment of buildings and open/green spaces) was carried out as part of our site visits and further informed by the findings of the household survey and stakeholder engagement, along with other available reports and evidence.

ACCESSIBILITY

155. The accessibility of a centre is measured by the ease and convenience of access by different modes of travel to and across the centre; including dedicated access for pedestrians, cyclists and disabled people. This assessment was informed by the survey evidence, along with information provided by the local planning authority, and observations undertaken as part of the centre audits and site visits.

PERCEPTION OF SAFETY AND OCCURRENCE OF CRIME

156. The statistics detailing crime rates for specific regions, urban areas and postcodes is based on data sourced from UKcrimestats.com. This source aggregates open police force data on crime trends for England, Wales, and Northern Ireland. It provides, in our view, the most complete catalogue of crime and safety information available. This is supplemented by the feedback from the household survey, stakeholder engagement and other research to help inform current perceptions of safety and crime for the main town centres.

OUT OF CENTRE PROVISION

157. The existing and planned out of centre retail and leisure floorspace in the Council area and neighbouring local authority areas was determined using a number of published sources, evidence provided by the local authority (where available), and the findings of the market research surveys and town centre audits.

NEW INVESTMENT & POTENTIAL DEVELOPMENT

158. The Council provided evidence of all existing, committed and planned retail/leisure investment and development in the main centres. All new retail and leisure floorspace identified by this study covers commitments and permissions (normally over 500 sqm gross).

SUMMARY

159. Health checks are important planning 'tools' for appraising and monitoring changes in the overall attraction and performance of town centres and informing the preparation of robust strategies and plans. The assessments of Key Performance Indicators (KPIs) carried out for this study are informed by the PPG and are based on different data sources and market intelligence, including published research, site visits and the household telephone interview surveys. Taken together these KPIs enable a robust assessment of each centre's SWOTs (Strengths, Weaknesses, Opportunities and Threats) and will help to identify any significant "gaps" in provision.

6. HEALTHCHECK SUMMARIES

160. This section sets out the summary findings of the town centre health checks for:

- Regional Centre: **Lakeside**
- Town Centre: **Grays**
- Existing Local Centres:
  - **Aveley**
  - **Corringham**
  - **Socketts Heath**
  - **South Ockendon**
  - **Stanford-le-Hope**
  - **Tilbury**

161. The health checks and audits are detailed further in **Volume 3**.

TOWN CENTRE HEALTH CHECKS - SUMMARY

162. As described in the previous section, and in **Volume 3**, the health checks are based on Key Performance Indicators (KPIs) set out in the PPG. The assessments are informed by different data sources and market intelligence, including published research, site visits and the Council's monitoring data. Taken together these KPIs enable a robust assessment of each centre's SWOTs (Strengths, Weaknesses, Opportunities and Threats) and help to identify any significant "gaps" in provision.

163. By way of overview the table below shows the scale of the retail, leisure and service provision across the centres analysed.

Table 8: Centre Analysis: Number of Outlets

Number of Outlets	Lakeside Shopping Centre	Lakeside Retail Parks	Lakeside Total	Grays	Aveley	Corringham	Socketts Heath	South Ockendon	Stanford-le-hope	Tilbury
Comparison Retail	132	55	187	50	2	17	5	7	12	14
Convenience Retail	9	7	16	34	3	14	4	12	9	16
Retail Services	20	5	25	38	4	11	11	8	27	12
Leisure Services	71	17	88	44	8	15	12	15	25	17
Financial & Business Services	5	0	5	29	0	2	5	6	7	0
Vacant	47	5	52	35	2	5	0	3	12	11
Total	284	89	373	230	19	64	37	51	92	70

Source: Experian GOAD & Council Monitoring Data

164. The outlet count clearly shows Lakeside and the Shopping Centre in particular as the largest and dominant centre in the Borough .

165. In terms of floorspace, the data reinforces that Lakeside Regional Centre is by far the largest and dominant centre in the Borough followed by Grays.

Table 9: Centre Analysis: Floorspace (gross sqm)

<table>
<tr><th>Floorspace</th><th>Lakeside Shopping Centre</th><th>Lakeside Retail Parks</th><th>Lakeside Total</th><th>Grays</th><th>Aveley</th><th>Corringham</th><th>Socketts Heath</th><th>South Ockendon</th><th>Stanford-le-hope</th><th>Tilbury</th></tr>
<tr><td>Comparison Retail</td><td>75,870</td><td>99,060</td><td>174,930</td><td>13,030</td><td rowspan="7">Floorspace data not available</td><td>2,300</td><td rowspan="7">Floorspace data not available</td><td>1,180</td><td rowspan="7">Floorspace data not available</td><td rowspan="7">Floorspace data not available</td></tr>
<tr><td>Convenience Retail</td><td>870</td><td>16,780</td><td>17,650</td><td>12,900</td><td>3,180</td><td>3,370</td></tr>
<tr><td>Retail Services</td><td>2,570</td><td>790</td><td>3,360</td><td>3,360</td><td>1,250</td><td>920</td></tr>
<tr><td>Leisure Services</td><td>21,460</td><td>5,840</td><td>27,300</td><td>5,950</td><td>3,380</td><td>1,980</td></tr>
<tr><td>Financial & Business Services</td><td>1,080</td><td>0</td><td>1,080</td><td>4,890</td><td>140</td><td>480</td></tr>
<tr><td>Vacant</td><td>36,270</td><td>13,660</td><td>49,930</td><td>9,800</td><td>860</td><td>620</td></tr>
<tr><td>Total</td><td>138,120</td><td>136,130</td><td>274,250</td><td>49,930</td><td>11,110</td><td>8,550</td></tr>
</table>

Source: Experian GOAD & Council Monitoring Data

166. The centres are distinct from each other in terms of their physical characteristics, catchments, and market position, which is described in detail in the health check assessments in **Volume 3**. The following tables and commentary summarise the main SWOTs (Strengths, Weaknesses, Opportunities and Threats) for each centre. The findings help to identify their relative performance in the network and hierarchy of centres, and any significant “gaps” in provision.

LAKESIDE: SWOT

167. The Lakeside basin is easily accessible from London and the wider Southeast area. It not only comprises a shopping centre but also retail parks, leisure hubs and large format standalone solus units forming a major regional retail cluster. Lakeside is therefore not just a shopping centre but a comprehensive retail and leisure destination blending traditional shopping, outlet-style stores and a commercial offer (including leisure attractions and dining).

168. The environmental quality of the area is good with the shopping centre offering a clean, bright and modern indoor space. The retail park areas of Lakeside are also clean and generally well-kept.

169. Of the 373 units across the centre, almost half 187 units (50.1%) of these are comparison retail outlets with leisure units (88 units, 23.6%) being the next dominant category. As a key shopping location, the lakeside basin overall has a high-quality comparison goods offer.

170. In terms of vacant space, Lakeside Shopping Centre and Lakeside Retail Parks together have a total of 52 vacant units, accounting for 13.9% of all outlets (lower than the UK average of 14.2%).

171. Stakeholder engagement indicates a broad level of contentment, and the key concern has been the level of traffic congestion across both the shopping centre and the retail park(s).

172. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows:

Strengths
• A high-quality comparison goods and fashion offer. • Most of the major UK retailers are represented in the centre, along with several international retailers. • Presence of anchor stores such as Marks & Spencer. • Its catchment extends across a wider area, well beyond the Borough. • It has a diverse commercial leisure offer, ranging from branded food and beverage operators, 9-screen Vue cinema and competitive socialising venues such as Hollywood Bowl and the Boom Battle Bar. • Good evening offer with late-night shopping and leisure. • Increased footfall over recent years, surpassing pre-pandemic figures. • Vacancies are below the national average.

Weaknesses
• Department store closures (House of Fraser and Debenhams) left large vacant floorplates. • Vehicle-dominated. • Traffic and congestion issues. • Not easy to navigate pedestrian and cycling access between shopping centre and retail park. • Circuitous linkage between retail provision and Chafford Hundred railway station.

Opportunities
• Promote and encourage linked trips with other centres and attractions in the Borough. • Repurposing of vacant space in Lakeside Shopping Centre through a broader mix of uses (e.g. healthcare, education). • Provide better interconnectivity of the Shopping Centre and the Retail Park for pedestrians / cyclists. • Improve linkage to Chafford Hundred Station.

Threats
• High/increasing business operating costs. • The growth in online shopping and its impact on brick-and-mortar retail outlets. • Competition from Bluewater Shopping Centre / Westfield Stratford. • Further closures of national multiple retailers.

GRAYS: SWOT

173. Grays is the Council area's main administrative, commercial, and transport hub.

174. The centre has a mix of multiple and independent retailers and over the period 2016 to 2024 it can be observed that:

- The total number of outlets has increased by 24 units, from 206 in 2016 to 230 in 2024.
- There has been a decline in comparison outlets of 19 units since 2016.
- While comparison retail provision has reduced, convenience retail and services have increased.
- Services floorspace has seen a 16.7% decrease.
- Rising level of vacancies since 2016 (22 vacant units) to 35 units by 2024.

175. The environmental quality of the centre is fair, but with areas that could be significantly improved including adding green space in the core of the centre.

176. Grays has a relatively limited evening offer, with the provision restricted to a small selection of pubs and restaurants.

177. The centre is also a key focus for regeneration in Thurrock, with major projects underway to improve its urban environment and connectivity, including the town deal projects on Grays Riverfront & Beach Project (revitalising the riverside); Grays Beach Riverside Park & Kilverts Field and a Riverfront Activities Centre. The overall aim is to revitalise the riverfront & public spaces; improve connectivity & transport links and provide community & leisure facilities.

178. The future for the centre will also be influenced by the outcome of the formal planning application for the demolition of the existing Grays Shopping Centre, multi-story car park, and Crown Road office and the scale of new residential development and the growth and improvements in infrastructure and services this may potentially bring.

179. Key concerns cited by stakeholders include 'to have less empty shops,' 'making the centre more attractive/ create a nicer environment' and 'create a better market.'

180. The centre's Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows:

Strengths

- Strategic location with good transport links.
- Large Morrisons store as key convenience anchor.
- The street market which operates twice a week.
- Good representation of independent retailers.
- Ongoing improvements to connectivity and the urban environment, particularly at Grays Riverfront.

Weaknesses

- Vacancy rate above UK average (15.2% vs 14.1%).
- Lack of good quality shops, poor retail offer.
- Lack of nighttime economy.
- Poor commercial leisure provision.
- Footfall has not recovered for the majority of the centre since the Pandemic.
- Lack of amenities for young people.
- Hard environment and public realm of varying quality.

Opportunities

- Improve the railway crossing to facilitate better pedestrian safety to the core of the town centre.
- Increase greenery across the centre.
- Encourage greater diversification of uses within the centre.
- Cohesively promote regeneration initiatives at the riverside.
- Monitor the progress and impact of any future regeneration of Grays Shopping Centre.

Threats

- High business operating costs.
- The growth in online shopping and its impact on brick-and-mortar retail outlets.
- Ongoing anti-social behaviour issues in the centre potentially deterring visitors due to safety concerns.
- Environmental quality and perception of the centre are negatively impact by the vacant and derelict outlets.
- Continued decline in footfall numbers.

AVELEY: SWOT

181. Aveley is a small local centre whose mainly independent provision is focused along the busy thoroughfare of the High Street. It has a lower than average vacancy rate of 10.5%. With passing traffic and narrow pedestrian paths in parts, this impacts on the quality of the environment. This notwithstanding there is broad level of contentment with those frequenting the centre citing the need for a bakery, hardware store or chemist.

182. The Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows:

Strengths
• Increasing level of footfall. • Low level of vacancies. • Good provision of car and cycle parking especially for passing trade. • Strong presence of independent retailers. • Co-op and One-Stop as key convenience retail anchors for the centre.

Weaknesses
• Narrow footpaths in part are a hazard for pedestrian traffic. • Average public realm and poor provision and maintenance of street furniture.

Opportunities
• Improvements to pedestrian accessibility and the public realm. • Better provision of pedestrian crossing points. • Consider greening initiatives as part of the public realm improvements for the centre.

Threats
• High business operating costs. • Competition from higher order centres

CORRINGHAM: SWOT

183. Corringham local centre represents a retail and service hub for residents to the east of the Borough area. It is a compact centre with a mixture of independents and national multiples centred around St. John's Way and the pedestrianised area of Grover Walk.

184. The centre has a higher than average proportion of convenience retail outlets with the Morrisons in the centre accounting for the majority of this floorspace. The centre's vacancy rate is lower than the national average indicating that it is a vital and viable centre.

185. Stakeholder engagement indicates a broad level of contentment and the key improvements cited were the need for better security/ safety and provision of more independent shops.

186. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows:

Strengths
• Strong convenience retail offer. • Good pedestrian accessibility. • Good car parking provision. • Low vacancy rate.

Weaknesses
• Poor evening economy and provisioning especially for families. • Hard landscape environment with limited greenery.

Opportunities
• Improved accessibility for cyclists and pedestrians. • Improvements to the public realm and greening.

Threats
• High business operating costs. • Rise in vacancies damaging the appeal and attraction of the centre.

SOCKETTS HEATH: SWOT

187. Socketts Heath local centre is located on the busy A1013 (Lodge Lane). The provision of national multiples (Co-op, Lloyds Pharmacy) and independents serves the immediate residential hinterland and passing trade. There is no vacancy across the centre providing an indication of its overall vitality.

188. Stakeholder engagement indicates key desired improvements are being more availability of parking spaces and 'more/ better range of non-food shops.

189. The environmental quality is impacted by the centre's location on the busy thoroughfare of the A1013.

190. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows:

Strengths
• No vacancies. • Strong retail and leisure services offer. • Good accessibility by all modes of travel. • Wide pavement and pedestrianised areas. • Well-kept shop frontages.

Weaknesses
• Lack of greenery and provision of street furniture. • Poor evening economy and provisioning especially for families.

Opportunities
• Improvements to the public realm and greening.

Threats
• High business operating costs. • Recent decline in footfall activity.

SOUTH OCKENDON: SWOT

191. South Ockendon is one of the larger local centres in the Borough with the main provision along Derry Avenue, Derwent Parade and Daiglen Drive.

192. The centre has a strong convenience goods provision with stores including Nisa Extra, Lidl and a Tesco Express. The centre has a low vacancy rate compared to

the national average. The centre benefits from good footfall and accessibility is assisted by the pedestrianised nature of parts of the centre.

193. Stakeholder engagement indicates key desired improvements are being more availability of parking spaces, better security/ safety and to make the centre more attractive/create a nicer environment.

194. The environmental quality of the centre is fair, but with areas that could be significantly improved through more greening.

195. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows:

Strengths
• Low vacancy rate. • Good transport links. • Market that occurs twice a week. • Strong convenience retail offer.

Weaknesses
• Hard environment with little green infrastructure. • Limited comparison goods offer.

Opportunities
• Bringing vacant units back into use, to further strengthen the centre's offer.

Threats
• High business operating costs. • Further decline in footfall activity.

STANFORD-LE-HOPE: SWOT

196. A highly accessible local centre on the A13 / Stanford-le-Hope Bypass and nearby Stanford-le-Hope railway station. The centre's retail and leisure provision is along King Street and High Street dominated by independents.

197. Retail services which dominate uses a large proportion of which are for beauty services. The environment of the centre is fair but signs of neglect in the public realm are visible including upkeep of green spaces. The centre overall has a vacancy rate that is just below the national average.

198. Stakeholder engagement indicates key desired improvements include longer opening hours for shops or for more shops to be open on Sundays; better maintained/ cleaner streets and more high-quality shops.

199. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows:

Strengths
• Highly accessible. • The train station and associated improvements. • Strong representation of independent traders. • Rising levels of footfall over recent years • Good provision of car and cycle parking

Weaknesses
• Presence of vacant units. • Neglected shop frontages impacting perception of centre.

Opportunities
• Improvements to shop frontages. • Repurposing of vacant retail space into alternative uses. • Proactive management of public realm.

Threats
• High business operating costs. • Rising vacancies.

TILBURY: SWOT

200. The local centre of Tilbury has a notable maritime history and with significant linkages to the logistics and shipping industries.

201. The retail core of the centre lies in two parts along Dock Road and Calcutta Road. This comprises of mainly independent retail offer interspersed with national multiples. This provision mainly comprises of convenience outlets. The vacancy rate across the centre is higher than the national average.

202. Stakeholder engagement indicates key desired improvements include more/ better clothes shops and more/better range of supermarkets.

203. The centre is currently benefiting from regeneration funding through the £22.8m Town Deal. This focuses on improving transport, community facilities, and heritage spaces. Key projects include revamping the Tilbury Station area (the Hub), upgrading Civic Square and building a Youth Zone (the Heart), and transforming the historic Riverside Station into a cultural hub (the Heritage).

204. Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows:

Strengths
• Good road access and public transport connection • Footfall recovering to pre-pandemic figures. • On-going transformation through Town Deal initiatives.

Weaknesses
• Low commercial leisure provision • Weak comparison offer and no financial & business services. • Low multiple retailer representation

Opportunities
• Build on historic and maritime heritage. • Instigate more greening. • Prepare heritage guide and promote centre.

Threats
• High business operating costs. • Rising vacancies.

7. RETAIL CAPACITY ASSESSMENT

205. This section sets out the results of the economic retail capacity (‘need’) assessment for new retail (comparison and convenience goods under former use class A1) floorspace in the Borough and its main centres. The capacity forecasts cover a period, from 2025 (the “base year”) and aligned with the NPPF and PPG the forecasts also take account of the lifetime of the proposed plan period (2044), and the modelling goes further to 2045. The detailed economic capacity tabulations are set out in **Volume 2**. These forecasts update and supersede the findings of the Council’s previous evidence-based study.

THE CREAT^{e} MODEL

206. The CREAT^{e} economic model has been specifically designed, developed and tested by the LSH team over more than 25 years to assess the capacity for and impact of new retail (convenience and comparison goods) floorspace development. The evidence-based model has helped to inform and guide plan-making and decision-taking at the local, sub-regional and regional level. In brief, the CREAT^{e} (Excel-based) model adopts a transparent ‘step-by-step’ approach in which all the key assumptions and forecasts can be easily tested. The model is underpinned by the findings of the household survey, which provides a robust understanding of shopping patterns, market shares and the trading/turnover performance of existing centres, shops and stores.

207. At the outset it has necessarily been assumed for the purpose of the capacity assessment that the local retail market is in ‘equilibrium’ at the base year. In other words, all existing centres/stores are broadly assumed to be trading in line with expected average (‘benchmark’) turnover levels. This is a reasonable approach in this case as it reflects the impact of the economic downturn and the significant growth in online sales on the trading levels and performance of retailers and stores across the UK. It also reflects the outputs of the health checks covering the main centres and shopping locations. The main challenge and focus over the short/medium term in response to market trends and the impact of rising cost inflation as well as the legacy of the COVID-19 pandemic will be to retain existing occupiers and to redevelop/repurpose vacant retail floorspace to attract new businesses and uses.

208. In simple terms, any residual expenditure available to support new retail floorspace over the forecast period will be generated by the difference between the forecast growth in ‘current’ (survey-derived) turnover levels and the growth in ‘benchmark’ turnovers based on applying robust year-on-year ‘productivity’ (‘turnover efficiency’) growth rates to all existing and new retail floorspace.

209. It is important to restate that medium to long term forecasts should be treated with caution, as they will be influenced by the dynamic changes in economic, demographic and market trends. As described previously (see **Section 2**), the NPPF (paragraph 90) states that local planning authorities should meet the need for retail and town centre uses "**looking at least ten years ahead**". The Planning

Practice Guidance also states that given the uncertainty in forecasting long-term retail trends and consumer behaviour, assessments "**may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed**" (PPG. Paragraph 004. Reference ID: 2b-00402019072). Therefore, whilst this study assesses retail capacity up to 2045, greater weight should be placed by the local planning authority on forecasts over the next five to ten-year period.

210. The updated capacity forecasts set out in this section provide the Council with a broad indication of the (quantitative) need for new retail (comparison and convenience goods) floorspace in the LPA area and its main centres. In turn, this will inform whether there is a need to identify and allocate additional sites (over and above any already identified) to meet any forecast need, in accordance with the advice set out in the NPPF (paragraph 90).

KEY ASSUMPTIONS & FORECASTS

211. The capacity tabulations are set out in **Volume 2** for convenience and comparison goods. The capacity forecasts are based on the population growth projections from Experian, which are derived from the Office of National Statistics'

Base Year Population Projections – Baseline Assessment

212. **Appendices 2** and **6** set out the latest base year (2025) population and projections (to 2030, 2035, 2040, 2044 and 2045) sourced from Experian's Location Analyst Geographic Information System for the Study Area. Experian's population projections show the Study Area population (Zones 1-10) is forecast to increase by +8.3% (+122,175 people) between 2025 and 2044 and by +8.3% (+128,827 people) by 2045.

Base Year Population Projections – Sensitivity Analysis

213. In addition to the population and projections under the baseline assessment, the Council has also sought to test the effect on capacity of higher population growth led by new housing development across the Borough based on a target of 1,444 dwelling units per annum to 2044 (resulting in 28,880 new homes to 2044). This higher housing led growth is to match the anticipated jobs growth from the Council's emerging Economic Needs Assessment.

214. The population projections for the Study Area (Zones 1-10) for this sensitivity testing therefore comprises two elements:

- Zones 1 to 6 – Experian Location Analyst population projections for future years that are adjusted to reflect housing supply based population projections for the Borough which were informed by the Council's Housing Needs Assessment

- Zones 7 to 10 – Unadjusted Location Analyst data (as per Baseline Assessment detailed above) based on ONS' updated estimates for sub-national population projections for future years.

215. **Appendices 10** and **14** set out the population projections based on the sensitivity analysis. This shows that based on the housing growth, the Study Area (Zones 1-10) is forecast to increase by a higher +10.4% (+152,211 people) between 2025 and 2044 and by +11% (+160,612 people) by 2045, when compared against the baseline assessment.

216. The outputs of this sensitivity testing, considering the higher dwelling forecast, is detailed later in this section when reporting the retail capacity forecasts.

Expenditure per Capita & Special Forms of Trading (SFT)

217. **Appendices 2 and 6** set out the growth forecasts for convenience goods and comparison goods retail expenditure for the wider Study Area and zones (note: total expenditure is derived by multiplying the population and average expenditure per capita levels together). The base year average expenditure figures have been derived from our in-house Experian GIS (note: all monetary and turnover values are expressed in 2023 prices). In identifying expenditure per capita, an allowance has been made for the market share of non-store retail sales (i.e., Special Forms of Trading) at the base year informed by the results of the household telephone interview survey. These SFT market shares have been 'adjusted' to take account of goods sourced from traditional ('physical') retail space based on Experian's latest Retail Planner Briefing Note 22 (March 2025) (RPBN22). The adjusted baseline SFT market shares from the household survey in 2025 are 30% for comparison goods and 4.9% for convenience goods and are forecast to increase to 36.5% and 6.9% respectively by 2045 based on the growth rates forecast by the RPBN22.

Average Expenditure Growth Forecasts

218. The growth in average expenditure per capita levels to 2045 has been informed by the forecasts set out in Experian's RPBN22 (as described in detail in **Section 3**). Experian's forecasts show a fall in convenience goods spend in 2025 (-0.8%), by -0.6% in 2026, -0.3% to 2031 and "flatlining" at around -0.2% up to 2040; this has then been applied to the forecast period to 2045. Overall, this shows a negative growth trend. For comparison goods and following the forecast growth for 2025 of a nominal +0.1% and +1.3% by 2026. Experian predict that (per capita) growth in comparison goods spend will settle at around +2.5% by 2031 and +2.6% per annum on average up to 2040; this rate of growth has been applied to the period to 2045.

Total Available Expenditure – Baseline Assessment

219. For convenience goods retailing there is a forecast increase +1.2% (+£42.3m) growth in total available expenditure between 2025 and 2044 rising to +1.4% (+£50.4m) by 2045 across the widely defined Study Area (Zones 1-10) (refer to **Table 3, Appendix 2**).

220. The forecast growth for comparison goods retailing is substantially higher than for convenience goods. The forecasts show a +57.3% (+£2,191.3m) growth in total

comparison goods expenditure by 2044 rising to +62% (+£2,373.5m) by 2045 across the Study Area (refer to **Table 3, Appendix 6**).

Market Share Analysis (excluding SFT) – Baseline Assessment

221. The capacity assessment is informed by the survey-derived market shares for all stores and centres across the widely defined Study Area. A key step in the economic capacity assessment involves allocating the baseline convenience and comparison expenditure (£ million) to the identified centres, stores and floorspace based on the market shares. This helps to establish the current trading performance of the main centres and stores within the Council area and zones based on expenditure allocated from the Study Area only.

222. For the purpose of the retail capacity assessment, and in line with standard approaches, the market shares reported in **Section 4** have been recalibrated for both convenience goods (**Table 1, Appendix 4**) and comparison goods (**Table 1, Appendix 8**) to exclude SFT. The 'baseline' (2025) turnovers are projected forward to 2030 (Table 2), 2035 (Table 3), 2040 (Table 4), 2044 (Table 5) and 2045 (Table 6) and assuming no changes in market shares (note: The ‘constant market share approach’ is standard practice for strategic retail capacity assessments). This approach does not take account of the potential impact that new retail investment and development (both within and outside the LPA area) can have on existing shopping patterns, market shares and turnover performance over time). It should be noted that no allowance is made at this stage for any potential 'inflow' (trade draw) of expenditure to centres and stores from outside the defined Study Area.

‘Inflow’ / Trade Draw

223. The assessment of the ‘inflow’ (trade draw) from outside the widely defined Study Area are based on informed judgements that consider the relative:

- scale, quality and mix of retail provision across the centres in the Thurrock Council area based on the results of the healthchecks;
- location of all other centres and stores in the Thurrock area, including out-of-centre shopping locations;
- competition from centres, stores and shopping facilities outside the study area, as informed by the results of the survey-derived market share analysis;
- the likely retail expenditure derived from people visiting the Thurrock’s shops and stores, but who live outside the Study Area (including tourist, visitor and commuter spend); and
- the assumptions and judgements set out in previous evidence-based studies and retail assessments.

224. Considering the scale of retail and leisure provision at Lakeside there will be trade from outside the defined Study Area.

225. Typically, the ‘inflow’ of convenience goods expenditure to main centres and stores from outside the wider Study Area is more limited than for comparison goods, as households generally carry out their main food shop at their more local

and convenient stores, and do not normally travel longer distances for food purchases. Notwithstanding this, a reasonable allowance should be made for inflow associated with good accessibility and transport across the Thurrock area and also to take account of visitors/tourists.

Total Forecast Turnover – Baseline Assessment

226. Based on the (survey-derived) market analysis and 'inflow' assumptions, **Table 2 (Appendix 5**) sets out the overall convenience turnover estimates for the main centres and stores in the Thurrock area and **Table 2 (Appendix 9)** details the comparison turnover estimates.

227. The table below summarises the 2025 ('base year') total turnover estimates. It shows that Lakeside is forecast to achieve the highest total turnover in the Council area of £1,087.7m in 2025, of which approximately 86% is attributed to comparison goods sales. In relation to Grays, the equivalent total is £127.6m with an almost equal split in sales between convenience goods (51%) and comparison goods (49%). Corringham achieves a turnover of £69.7m in total, with sales being driven by its strong convenience led provision (71%). The smaller local centre of Socketts Heath is dominated with a high level of convenience sales accounting for 98% of the turnover of £8.9m. For South Ockendon and Stanford-le-hope, the turnovers are £40.2m and £11.3m with convenience sales dominating and accounting for 72% and 82% of the total turnovers, respectively. Tilbury's turnover of £6.5m is higher for comparison goods (54%) than for convenience goods (46%).

228. All other local centres, shops and stores elsewhere in the Thurrock Council area also show a high level of sales with convenience goods accounting for some 88% of the total turnover of £78.1m. In relation to out-of-centre provision, convenience goods turnover accounts for the for almost 59% of the total turnover of £339m.

Table 10: Forecast Base Year (2025) Turnover of Centres/Stores (£m)

THURROCK COUNCIL AREA	Convenience Goods	Comparison Goods	Total Turnover
REGIONAL CENTRE: LAKESIDE	£155.3	£932.4	£1,087.7
TOWN CENTRE: GRAYS	£64.5	£63.1	£127.6
LOCAL CENTRE: AVELEY	£4.8	£0.2	£5.0
LOCAL CENTRE: CORRINGHAM	£49.3	£20.4	£69.7
LOCAL CENTRE: SOCKETTS HEATH	£8.7	£0.2	£8.9
LOCAL CENTRE: SOUTH OCKENDON	£29.1	£11.1	£40.2
LOCAL CENTRE: STANFORD-LE-HOPE	£9.3	£2.0	£11.3
LOCAL CENTRE: TILBURY	£3.0	£3.5	£6.5
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	£78.1	£10.4	£88.5
OUT-OF-TOWN CENTRE STORES / LOCATIONS	£199.5	£139.5	£339.0
TOTAL THURROCK COUNCIL AREA AREA	**£601.7**	**£1,182.8**	**£1,784.5**

Floorspace Productivity

229. A key input to the retail capacity assessment is the application of a year-on-year floorspace 'productivity' growth rate to all existing and new retail floorspace. As described in **Section 3**, existing retailers will need to achieve higher annual 'productivity' growth rates to cover their increasing costs (including, for example,

rising rents, business rates and wages), in order to remain profitable and viable over the short, medium and long term. This is particularly the case as the competition from online retailing increases; a trend that has been significantly accelerated by the impact of the pandemic.

230. For all existing and new retail floorspace we have tested annual average 'productivity' growth rates informed by Experian's latest Retail Planning Briefing Note (RPBN22). These are described in more detail in **Section 3**. For convenience goods a 'productivity' growth rate of 0% for 2025 and +0.1% from 2026 onwards. For comparison goods the annual productivity growth rates are +0.5% for 2025, +1.7% for 2026 and +2.5% from 2027 onwards.

Retail Commitments

231. The next step in the retail capacity assessment takes account of all the major retail (convenience/ comparison) floorspace commitments and planned development at the time of preparing this study. The assessment of pipeline floorspace and the predicted turnover of this new floorspace. All planned and pipeline floorspace commitments have been provided by the Council.

232. **Appendix 5** for convenience goods and **Appendix 9** for comparison goods sets out the floorspace commitments. The following have been identified:

- Planning Ref No. **23/01150/FUL**. Bumbles Yard, St. Chads Road, Tilbury. Planning Application by Lidl for "Demolition of existing structures and erection of Class E discount foodstore with associated car parking, landscaping, engineering and drainage works". The gross floorspace is some 1,949 sqm with a net sales area of 1,512 sqm net. This net floorspace is broken down further into 1,210 sqm net for convenience goods and the remainder 302 sqm net for comparison goods.
- Planning Ref No. **17/01668/OUT**. Development Land East Of Caspian Way And North And South Of London Road Purfleet Essex for outline planning permission to include development of up to 2,850 dwelling houses (Use Class C3), up to 11,000 sq.m (f/s) of business uses (Use Class B1), up to 8,880 sq.m (f/s) of shops (Use Class A1), up to 5,220 sq.m (f/s) of restaurants and cafes (Use Class A3), up to 900 sq.m (f/s) drinking establishments (Use Class A4), up to 20,000 sq.m (f/s) of hotel accommodation (Use Class C1), up to 18,300 sq.m (f/s) of non-residential institutions uses, comprising a primary school, secondary school and sixth form, medical and community uses (Use Class D1), up to 6,200 sq.m (f/s) of assembly and leisure uses (Use Class D2), up to 135,000 sq.m (f/s together with external backlot production space) film and television production space including ancillary workshops, offices and post production facilities and ancillary infrastructure, together with ancillary car park, provision of temporary railway station facilities, up to 1,600 sq.m (f/s) of upgraded railway station facilities and local waste and power facilities (Sui Generis).
  The gross retail floorspace is some 8,880 sqm with a net sales area of 7,104 sqm (assuming a gross to net ratio of 80%). It has been further assumed that in light of the anticipated housing growth, the retail component will be

convenience goods led. On this basis, of the 7,104 sqm net floorspace it is assumed 70% (4,973 sqm net) is for convenience goods provision and the remainder 30% (2,131sqm net) is for comparison goods. The overall quantum of proposed floorspace is extensive and on this basis, it is assumed that all the floorspace will be delivered and operational from 2035 onwards.

RETAIL CAPACITY FORECASTS

233. The following sets out the convenience and comparison goods capacity forecasts for the main centres and stores over the forecast period, up to 2045. Whilst the forecasts are provided to 2045, the NPPF (paragraph 90d) is clear that local planning authorities should plan to meet the need for new retail and town centre uses by "*looking at least ten years ahead*". The PPG also states that given the uncertainty in forecasting long-term retail trends and consumer behaviour, assessments *"…may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed."*

Capacity Forecasts – Baseline Assessment

234. The detailed capacity tabulations for convenience and comparison goods are set out in **Appendices 5 and 9**. The capacity findings show the following:

Table 11: Retail Floorspace Capacity Forecasts (sqm net) – Baseline Assessment

Convenience Goods					
THURROCK COUNCIL AREA	2030	2035	2040	2044	2045
REGIONAL CENTRE: LAKESIDE	-111	-136	-152	-93	-79
TOWN CENTRE: GRAYS	-46	-56	-63	-39	-33
LOCAL CENTRE: AVELEY	-3	-4	-5	-3	-2
LOCAL CENTRE: CORRINGHAM	-35	-43	-48	-30	-25
LOCAL CENTRE: SOCKETTS HEATH	-6	-8	-8	-5	-4
LOCAL CENTRE: SOUTH OCKENDON	-21	-25	-28	-17	-15
LOCAL CENTRE: STANFORD-LE-HOPE	-7	-8	-9	-6	-5
LOCAL CENTRE: TILBURY	-2	-3	-3	-2	-2
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	-56	-5,041	-5,049	-5,020	-5,013
OUT-OF-TOWN CENTRE STORES / LOCATIONS	-1,352	-1,384	-1,405	-1,329	-1,311
TOTAL: THURROCK COUNCIL AREA	**-1,639**	**-6,709**	**-6,770**	**-6,543**	**-6,487**

Comparison Goods					
THURROCK COUNCIL AREA	2030	2035	2040	2044	2045
REGIONAL CENTRE: LAKESIDE	-2,046	-3,142	-4,128	-1,221	-489
TOWN CENTRE: GRAYS	-138	-213	-279	-83	-33
LOCAL CENTRE: AVELEY	-0	-1	-1	-0	-0
LOCAL CENTRE: CORRINGHAM	-45	-69	-90	-27	-11
LOCAL CENTRE: SOCKETTS HEATH	-0	-1	-1	-0	-0
LOCAL CENTRE: SOUTH OCKENDON	-24	-37	-49	-15	-6
LOCAL CENTRE: STANFORD-LE-HOPE	-4	-7	-9	-3	-1
LOCAL CENTRE: TILBURY	-8	-12	-15	-5	-2
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	-23	-2,166	-2,177	-2,145	-2,136
OUT-OF-TOWN CENTRE STORES / LOCATIONS	-608	-772	-920	-485	-375
TOTAL: THURROCK COUNCIL AREA	**-2,897**	**-6,419**	**-7,670**	**-3,982**	**-3,053**

Source: CREAT^{e} Retail Capacity Model (Appendix 5 and 9, Volume 2)

235. The baseline capacity outputs show:

- **Convenience Goods Capacity** - There is no identified capacity for new convenience goods retail floorspace over the broad 10-year period to 2035.
- **Comparison Goods Capacity** - As with convenience goods, there is no identified capacity for new comparison goods retail floorspace over the broad 10-year period to 2035.

236. It should also be noted that these forecasts make no allowance for existing retail units that are currently vacant.

Capacity Forecasts – Sensitivity Analysis

As previously detailed, a sensitivity analysis has also been undertaken based on new housing development across the Borough. The population component is the variable whilst other inputs remain in line with the baseline assessment. On this basis, the detailed capacity tabulations for convenience and comparison goods are set out in Appendices **13** and **17**. As the table below shows, after taking into account all known commitments, there is no identified capacity for both convenience or comparison goods over the broad 10-year period to 2035 under this scenario.

Table 12: Retail Floorspace Capacity Forecasts (sqm net) – Sensitivity Analysis

Convenience Goods					
THURROCK COUNCIL AREA	2030	2035	2040	2044	2045
REGIONAL CENTRE: LAKESIDE	-70	-42	8	133	160
TOWN CENTRE: GRAYS	-29	-17	3	55	66
LOCAL CENTRE: AVELEY	-2	-1	0	4	5
LOCAL CENTRE: CORRINGHAM	-22	-13	3	42	51
LOCAL CENTRE: SOCKETTS HEATH	-4	-2	0	7	9
LOCAL CENTRE: SOUTH OCKENDON	-13	-8	2	25	30
LOCAL CENTRE: STANFORD-LE-HOPE	-4	-3	1	8	10
LOCAL CENTRE: TILBURY	-1	-1	0	3	3
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	-35	-4,994	-4,969	-4,906	-4,893
OUT-OF-TOWN CENTRE STORES / LOCATIONS	-1,300	-1,264	-1,199	-1,040	-1,005
TOTAL: THURROCK COUNCIL AREA	**-1,481**	**-6,346**	**-6,150**	**-5,669**	**-5,565**

Comparison Goods					
THURROCK COUNCIL AREA	2030	2035	2040	2044	2045
REGIONAL CENTRE: LAKESIDE	-1,581	-2,077	-2,319	1,370	2,254
TOWN CENTRE: GRAYS	-107	-140	-157	92	152
LOCAL CENTRE: AVELEY	-0	-0	-1	0	0
LOCAL CENTRE: CORRINGHAM	-34	-45	-51	30	49
LOCAL CENTRE: SOCKETTS HEATH	-0	-0	-1	0	1
LOCAL CENTRE: SOUTH OCKENDON	-19	-25	-28	16	27
LOCAL CENTRE: STANFORD-LE-HOPE	-3	-4	-5	3	5
LOCAL CENTRE: TILBURY	-6	-8	-9	5	8
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	-18	-2,154	-2,157	-2,116	-2,106
OUT-OF-TOWN CENTRE STORES / LOCATIONS	-538	-613	-649	-97	35
TOTAL: THURROCK COUNCIL AREA	**-2,307**	**-5,067**	**-5,374**	**-695**	**426**

Source: CREAT^{e} Retail Capacity Model (Appendix 13 and 17, Volume 2)

SUMMARY

237. To reiterate, the NPPF (paragraph 90d) is clear that local planning authorities should plan to meet the need for new retail and town centre uses by "*looking at least ten years ahead*". The PPG also states that given the uncertainty in forecasting long-term retail trends and consumer behaviour, assessments "…*may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed*." Therefore, whilst greater weight should be placed on forecasts over the next five to ten-year period, we have also assessed the potential capacity for new retail floorspace over the lifetime of the plan, up to 2044, and beyond to 2045, to help inform both Council's longer-term plan-making and strategies.

238. As shown, the forecasts indicate that there is no immediate global capacity for convenience and comparison goods over the ten year period to 2035. Over the longer period to 2044/2045 again there is no capacity identified in the baseline scenario whilst under the higher growth sensitivity analysis a nominal 426 sqm net emerges, only for comparison goods, and in 2045. Overall, there is therefore no requirement for the Council to allocate any new sites for retail provision.

239. A robust policy approach should therefore be adopted, especially development management policies in accordance with the NPPF (paragraphs 90 - 95), to enable the assessment and determination of future proposals that are not in a centre and not in accordance with an up-to-date development plan. It particularly emphasises the importance of the sequential test and having robust locally set impact thresholds, in compliance with the NPPF and NPPG, to ensure that edge and/or out-of-centre proposals do not result in any significant adverse impacts on existing centres.

8. COMMERCIAL LEISURE NEEDS ASSESSMENT

240. This section focuses on the potential need for new leisure uses and facilities in the Council area over the plan period to 2044 and beyond to 2045.

241. This assessment necessarily focuses on the main leisure, entertainment and cultural uses identified by the NPPF (Annex 2). These uses are widely accepted as making a significant contribution to the overall vitality and viability of town centres and should be located in town centres first in accordance with national and local plan policy objectives.

242. This assessment focuses on the main leisure, entertainment and cultural uses identified as town centre uses in the NPPF (Annex 2) namely:

"…leisure, entertainment and more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres and bingo halls); … and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities)." (NPPF, Annex 2)

243. The Government's 2020 reform of the Use Classes Order classified the main food and beverage, commercial leisure and cultural uses as follows:

Table 13: 2020 Use Classes Order Update

Original Use Class	Revised Use Class:	Use:	Description:
Class A3	**Class E (b)**	Restaurants and cafés:	Defined as selling food and drink for consumption on the premises.
Class A4	**Sui Generis**	Drinking establishments:	Includes public houses, wine bars or other drinking establishments (but not night clubs), and drinking establishments with expanded food provision
Class A5	**Sui Generis**	Hot food takeaways:	Defined as the sale of hot food for consumption off the premises.
Class D1	**Class F.1**	Non-residential institutions:	Includes art galleries (other than for sale or hire) and museums.
Class D2	**Sui Generis**	Leisure/Recreation (indoor/outdoor)	Cinemas, music and concert halls, bingo and dance halls
Class D2	**Class E (d)**	Leisure/Recreation (indoor/outdoor)	Gymnasiums or area for indoor recreations.
Class D2	**Class F.2**	Leisure/Recreation (indoor/outdoor)	Indoor or outdoor swimming baths, skating rinks and outdoor sports/recreations.
Sui Generis	**Sui Generis**	A use on its own	Theatres, nightclubs, casinos

Source: Town and Country Planning (Use Classes) Order 1987 (as amended) and Revised Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020 (SI 2020 No.757).

244. It is important to understand at the outset that forecasting the need for new leisure uses is more problematic than for retailing, as the sector is highly complex and dynamic. For example, the demand for existing and new leisure uses and facilities is particularly sensitive to changes in economic, demographic, lifestyle and fashion trends. Consequently, the methods developed to forecast the need for new leisure uses are necessarily more flexible, qualitative and high level. In this context LSH

has developed robust and transparent approaches to assess leisure needs based on the following key inter-related workstreams:

- A review of the key trends driving expenditure growth and market demand in the leisure sector over the last decade.
- An audit of existing leisure provision to help identify any significant 'gaps' in provision.
- A review of current leisure participation rates and preferences across the Study Area based on the results of the household survey.
- The application of a robust economic/quantitative need assessment for some leisure groups based on accepted approaches.

245. This section provides a summary of the key leisure trends, current provision and participation to help identify the potential (quantitative and qualitative) need for new uses and facilities over the plan period. As with the retail capacity assessment the quantitative findings where relevant draw on both the baseline assumptions of population growth and separately the higher housing growth led population scenario. All leisure need forecasts should be treated with caution as they are subject to dynamic market and lifestyle trends and changes in the market demand and investment preferences of leisure operators.

COMMERCIAL LEISURE TRENDS

246. Following a dramatic -36.3% fall in leisure spend per head in 2020, Experian forecasts showed a return to growth in 2021 (+29.5%) but a drop to -2.9% in 2023 and – 1.6% in 2024. Thereafter there is no forecast growth for 2025 with nominal forecast growth of +0.3% in 2026 with growth averaging between +0.6% and +0.7% over the long term to 2040 and beyond. These expenditure growth trends, and forecasts, have informed the updated leisure needs assessment. Any further dampening of growth rates over the short to medium term will have implications for the viability of existing leisure businesses and the demand for new space.

247. The demand for leisure is currently dependent on broader economic conditions and prevailing consumer confidence. The key issues for commercial leisure provision encompasses a number of factors, particularly:

- macro-economic and resulting consumer sentiment (e.g. income growth, rising cost inflation, cost of living crisis, rising wage bills through increased National Insurance contributions);
- the rise in home working and benefiting local locations and businesses;
- changing consumer tastes and preferences (e.g. younger generation drinking less alcohol; prioritising experiences and prioritising spend)
- rise of home delivery; and
- the increase in the use of open spaces and pursuits.

248. Continuing uncertainty over inflation, increase in national insurance contributions, future regulation and staffing levels is said to be causing a "crisis of confidence" among business owners, which has fallen to a lower level than at any point during the pandemic. The vulnerability of the sector due to soaring energy costs, crippling

rises in the cost of goods and dampening consumer confidence is likely to affect the sector over the next few years further.

THURROCK COUNCIL AREA EVENING ECONOMY

249. The Borough's provision is heavily dominated by the commercial leisure provision at Lakeside Regional Centre, which dwarfs provision across the Borough's other centres in terms of variety and scale in offer. As previously mentioned, this encompasses a variety of restaurants (including Bella Italia, Coco Asia, Nando's, ASK Italian, Wagamama, Busaba, Gourmet Burger Kitchen, Las Iguanas, Prezzo, Zizzi, Casco Lounge and Boom Battle Bar) accompanied by the following active leisure provision:

- Nickelodeon Adventure Lakeside: An indoor family entertainment centre themed around popular Nickelodeon characters, offering interactive play zones and attractions.
- Flip Out Lakeside: A trampoline and adventure park providing various activities suitable for all ages.
- Puttshack Lakeside: A modern mini-golf experience with tech-infused gameplay.
- Hollywood Bowl: A bowling alley offering lanes for casual and competitive play.
- Vue Cinema: A multiplex (9 screen) cinema showcasing the latest film releases.
- Rock Up Lakeside: An indoor climbing centre featuring 26 climbing walls over 8 meters high, catering to climbers of all skill levels.

250. In terms of cultural provision, the Thameside Theatre and Complex in Grays (owned by the Council) represents a key creative and cultural place within the Borough. This venue has had a chequered history and its continuity as a cultural venue remains uncertain. The Council has allowed the booking of acts until the end of December 2025; hence its long-term sustainability is still under question.

251. Interestingly, data from Arts Council England as reported in the **"Thurrock Plan for Culture 2025–2029"** states that cultural engagement levels are low in Thurrock overall with 64% of local people '*not engaging frequently*'. This Plan also seeks to transform the Borough's cultural landscape by increasing access to arts funding and fostering community engagement. It is stated that "*Thurrock has the potential to elevate its events and festivals offer to meet public demand. A coherent and coordinated annual calendar will be co-planned by event organisers and producers. This will raise the profile of the breadth of public engagement activity and offer excellent opportunities for cross-promotion*." The Plan also mentions the future creation of cultural hubs to drive a cohesive cultural offer in Grays, Tilbury and Purfleet-on-Thames.

252. In terms of leisure provision within the remaining centres, this remains functional serving primarily a local catchment as detailed below:

- **Grays Town Centre** – provision is in the form of independent restaurants, takeaways and pubs. As mentioned, uncertainty surrounds the Thameside Theatre and there is a lack of an offer for families in particular within the centre. The closure of outlets in the evening also suggests that there is not much by way of an evening economy.

- **Aveley** – F&B provision comprises pubs (The Crown & Anchor) and a range of takeaways (e.g. Essex Chef, Ming Long, Taste of Aveley).

- **Corringham** – primarily dominated by F&B provision in the form of independent restaurants (e.g. Bikash Restaurant) and takeaways (e.g. Fish'n'chickn Corringham). The nearby Springhouse provides a venue for community activities as does the Corringham Hall known locally for events like "Fizzy Fridays," offering themed nights with music, food, and drinks, catering to those over the age of 21.

- **Socketts Heath** – has a modest provision comprising mainly of F&B outlets including pubs (The Oak) and takeaways (e.g. Pizza Hut). In terms of community events the nearby Civic Hall on Blackshots Lane hosts the annual 'Thurrock Beer & Cider Festival' supported by the Campaign for Real Ale (CAMRA).

- **South Ockendon** – primarily dominated by F&B provision in the form of independent restaurants (e.g. Akonor Kitchen), takeaways (e.g. China Town) and pub (Knight of Aveley).

- **Stanford-le-Hope** – dominated by restaurants (e.g. Gino's Taverna), pubs (e.g. Inn on The Green, the New Court House, The Railway Tavern) and takeaways (e.g. Golden Kitchen, Flames). The centre also has the vintage themed Old Regent Ballroom and Foyer Restaurant.

- **Tilbury** – there is a limited provision with few dining and entertainment options. Takeaways dominate and there are a number that are located on Dock Road including Orchid Garden, Tropical Treasures, Pizza Party, The Cod Father to name a few.

253. Overall, the evening and night time economy in the centres (i.e. excluding Lakeside Regional Centre) takes the form of a variety of local F&B provision. This is of a scale that is commensurate with a locally driven focus. In contrast, the offer at Lakeside is more diverse in terms of activity, national brands and a range of provision that caters for all age groups that attracts visitors from both Thurrock and a wider area.

LEISURE EXPENDITURE GROWTH

254. The leisure sector has experienced significant growth in consumer and market demand since the mid-1990s; fuelled by a buoyant economy, growing disposable income and low unemployment levels. Although the sector has been significantly impacted by the pandemic, the fact is that leisure and entertainment activities remain an important lifestyle and entertainment choice for many consumers over other areas of spending.

255. Average spend on leisure services is dominated by Food and Beverage ('F&B'), which includes cafés, restaurants and bars. F&B accounts for approximately 59.1% of all average spend per capita on leisure services in the Study Area (Zones 1-10).

Table 14: Estimates of Expenditure per Capita on Leisure Services (2025)

Zone	Accommodation	Cultural services	Games of chance	Hairdressing salons & personal grooming	Recreational & sporting services	Restaurants, cafes, etc.	Total
Zone 1	£149	£304	£133	£62	£140	£1,241	£2,028
Zone 2	£226	£416	£196	£98	£219	£1,707	£2,863
Zone 3	£250	£375	£161	£77	£196	£1,691	£2,750
Zone 4	£193	£358	£163	£80	£182	£1,550	£2,526
Zone 5	£391	£535	£193	£159	£464	£2,124	£3,867
Zone 6	£176	£342	£151	£68	£166	£1,412	£2,315
Zone 7	£246	£422	£105	£110	£321	£1,708	£2,913
Zone 8	£240	£457	£95	£101	£254	£1,561	£2,708
Zone 9	£235	£418	£201	£91	£223	£1,695	£2,863
Zone 10	£222	£389	£122	£105	£314	£1,630	£2,783
Study Area Average (£)	**£233**	**£402**	**£152**	**£95**	**£248**	**£1,632**	**£2,762**
(% of Total)	**8.4%**	**14.5%**	**5.5%**	**3.4%**	**9.0%**	**59.1%**	**100.0%**

LEISURE EXPENDITURE FORECASTS

256. The table below shows the most recent leisure spend projections by Experian Business Strategies (EBS) as set out in Retail Planner Briefing Note 22 (March 2025).

Table 15: Actual & Forecast Growth in UK Leisure Spend (% per annum)

	2019	2020	2021	2022	2023	2024	2025	2026	2027-31	2032-40
Leisure Spend Growth (%)	-0.1%	-36.3%	29.5%	20.9%	-2.9%	-1.6%	0.0%	0.3%	0.6%	0.7%

257. The base year expenditure per capita levels for leisure have been projected forward to 2045 using Experian's forecast annual growth rates above and then applied to the projected population for each Study Zone to identify the total available expenditure on leisure and recreation goods and services.

258. Based on the baseline population forecasts this results in total available leisure expenditure in 2025 of £4,104.4m in the Study Area (see table below).

Table 16: Total Forecast Growth in Commercial Leisure Expenditure: 2025 – 2045 (£m) – Baseline Assessment

Zone	2025 (£m)	2030 (£m)	2035 (£m)	2040 (£m)	2044 (£m)	2045 (£m)	Change: 2025-2044 (£m)	Change: 2025-2045 (£m)	Change: 2025-2044 (%)	Change: 2025-2045 (%)
Zone 1	64.0	68.3	72.8	77.7	81.9	83.0	17.9	19.0	27.9%	29.7%
Zone 2	99.6	104.8	110.5	116.0	120.7	122.0	21.0	22.3	21.1%	22.4%
Zone 3	85.7	92.0	99.0	106.7	113.3	115.1	27.6	29.4	32.2%	34.3%
Zone 4	113.4	120.5	127.8	135.4	141.9	143.7	28.4	30.3	25.1%	26.7%
Zone 5	46.2	48.3	50.7	53.4	55.5	56.1	9.3	9.9	20.2%	21.4%
Zone 6	79.0	83.9	89.3	95.2	100.3	101.7	21.3	22.7	27.0%	28.8%
Zone 7	1218.8	1289.0	1367.9	1452.8	1524.6	1543.4	305.9	324.6	25.1%	26.6%
Zone 8	304.5	315.9	330.4	347.1	361.1	364.5	56.6	60.0	18.6%	19.7%
Zone 9	688.1	719.4	756.9	798.6	834.1	843.0	146.0	154.9	21.2%	22.5%
Zone 10	1405.1	1468.8	1544.4	1627.8	1697.1	1714.4	292.0	309.3	20.8%	22.0%
Study Area (Zones 1-10) (£)	**4,104.4**	**4,310.8**	**4,549.9**	**4,810.7**	**5,030.5**	**5,086.8**	**926.1**	**982.4**	**22.6%**	**23.9%**

259. Applying the most recent year-on-year leisure spend growth rates sourced from Experian Business Strategies to the population projections results in an increase in total available commercial leisure expenditure across the defined Study Area (Zones 1-10) of +22.6% (+£926.1m) by 2044 and +23.9% (+£982.4m) by 2045 under the baseline assessment.

260. As with retail capacity, higher housing growth led population growth forecasts have also been tested. This shows a higher overall rate of growth over the period 2025 to 2044 of +24.7% (£1,013.7m) compared with 22.6% (+£926.1m) in the baseline assessment.

Table 17: Total Forecast Growth in Commercial Leisure Expenditure: 2025 – 2045 (£m) – Sensitivity Analysis

Zone	2025 (£m)	2030 (£m)	2035 (£m)	2040 (£m)	2044 (£m)	2045 (£m)	Change: 2025-2044 (£m)	Change: 2025-2045 (£m)	Change: 2025-2044 (%)	Change: 2025-2045 (%)
Zone 1	63.7	69.8	76.9	85.3	93.2	95.1	29.5	31.4	46.3%	49.3%
Zone 2	99.2	107.1	116.7	127.5	137.8	140.3	38.6	41.1	39.0%	41.4%
Zone 3	85.3	94.0	104.5	117.0	128.6	131.5	43.3	46.1	50.8%	54.1%
Zone 4	112.9	123.1	134.9	148.7	161.7	164.9	48.8	51.9	43.2%	46.0%
Zone 5	46.0	49.3	53.6	58.7	63.5	64.5	17.4	18.5	37.9%	40.3%
Zone 6	78.6	85.8	94.3	104.5	114.2	116.5	35.6	37.9	45.3%	48.2%
Zone 7	1218.8	1289.0	1367.9	1452.8	1524.6	1543.4	305.9	324.6	25.1%	26.6%
Zone 8	304.5	315.9	330.4	347.1	361.1	364.5	56.6	60.0	18.6%	19.7%
Zone 9	688.1	719.4	756.9	798.6	834.1	843.0	146.0	154.9	21.2%	22.5%
Zone 10	1405.1	1468.8	1544.4	1627.8	1697.1	1714.4	292.0	309.3	20.8%	22.0%
Study Area (Zones 1-10) (£)	**4,102.3**	**4,322.1**	**4,580.6**	**4,868.1**	**5,116.0**	**5,178.1**	**1013.7**	**1075.8**	**24.7%**	**26.2%**

261. The table below breaks down the growth in leisure expenditure by category. It shows that F&B expenditure between 2025 and 2044 in the Study Area (Zones 1-10) is forecast to increase by +£545.6m (accounting for 59% of the total) followed by cultural services (14%).

Table 18: Study Area: Total Forecast Growth in Commercial Leisure Expenditure: 2025 – 2045 (£m) - Baseline Assessment

	Study Area: Total Available Leisure Spend (£m)						Change: 2025-2044 (£m)	Change: 2025-2045 (£m)	Change: 2025-2044 (%)	Change: 2025-2045 (%)
	2025	2030	2035	2040	2044	2045				
Accommodation	£338.4	£355.4	£375.2	£396.7	£414.8	£419.5	£76.4	£81.0	22.6%	23.9%
Cultural services	£594.7	£624.5	£659.1	£696.8	£728.6	£736.8	£134.0	£142.1	22.5%	23.9%
Games of chance	£195.4	£205.3	£216.6	£229.0	£239.5	£242.1	£44.0	£46.7	22.5%	23.9%
Hairdressing salons & personal grooming	£148.0	£155.4	£164.0	£173.4	£181.3	£183.3	£33.3	£35.3	22.5%	23.9%
Recreational & sporting services	£412.5	£433.2	£457.1	£483.3	£505.3	£511.0	£92.8	£98.5	22.5%	23.9%
Restaurants, cafes, etc.	£2,415.4	£2,537.0	£2,677.9	£2,831.5	£2,961.0	£2,994.2	£545.6	£578.8	22.6%	24.0%
Total	**£4,104.4**	**£4,310.8**	**£4,549.9**	**£4,810.7**	**£5,030.5**	**£5,086.8**	**£926.1**	**£982.4**	**22.6%**	**23.9%**

262. Under the higher growth housing led population assessment, F&B expenditure between 2025 and 2044 in the Study Area (Zones 1-10) is forecast to increase by a higher +£598.5m.

Table 19: Study Area: Total Forecast Growth in Commercial Leisure Expenditure: 2025 – 2045 (£m) - Sensitivity Analysis

	Study Area: Total Available Leisure Spend (£m)						Change: 2025-2044 (£m)	Change: 2025-2045 (£m)	Change: 2025-2044 (%)	Change: 2025-2045 (%)
	2025	2030	2035	2040	2044	2045				
Accommodation	£338.3	£356.4	£377.7	£401.4	£421.8	£426.9	£83.5	£88.6	24.7%	26.2%
Cultural services	£594.3	£626.1	£663.5	£705.0	£740.9	£749.8	£146.5	£155.5	24.7%	26.2%
Games of chance	£195.3	£206.0	£218.6	£232.6	£244.9	£247.9	£49.5	£52.6	25.4%	26.9%
Hairdressing salons & personal grooming	£147.9	£155.8	£165.0	£175.2	£184.0	£186.2	£36.1	£38.3	24.4%	25.9%
Recreational & sporting services	£412.3	£434.0	£459.5	£487.7	£511.9	£518.0	£99.6	£105.6	24.1%	25.6%
Restaurants, cafes, etc.	£2,414.1	£2,543.9	£2,696.4	£2,866.1	£3,012.6	£3,049.2	£598.5	£635.1	24.8%	26.3%
Total	**£4,102.3**	**£4,322.1**	**£4,580.6**	**£4,868.1**	**£5,116.0**	**£5,178.1**	**£1,013.7**	**£1,075.8**	**24.7%**	**26.2%**

263. Against this background of significant forecast leisure expenditure growth over the plan period, the following assessment identifies the potential quantitative and qualitative need for new commercial leisure uses in the centres across the Council area.

EATING AND DRINKING OUT

264. The food and beverage (F&B) sector includes restaurants, cafés, bars and pubs (former Class A3-A5). These uses are integral to a town centre's wider offer and economy. A good choice and quality of F&B uses can help to complement other town centre uses, by generating trips, stretching 'dwell times' (i.e., the time people spend in centres), increasing 'linked' expenditure to other shops and businesses as part of the same trip, and strengthening both daytime and evening economies.

265. As identified previously, the F&B sector dominates average household expenditure and participation in leisure across the Study Area. Spend on F&B is also forecast to experience the greatest growth over the period to 2045. In theory, this expenditure growth should support the potential to enhance the scale, quality and choice of F&B uses across the Council area. In reality though, this growth will be determined by current and future trends in the sector and market demand.

266. Research shows that the multiple chains mainly dominated the expansion of the F&B sector up to 2017 when they accounted for almost half of all net new business openings. However, since 2017 a number of multiples in the casual dining sector have struggled against a backdrop of increased competition, rising costs and a tightening of consumer spending due to wider economic concerns. The reality is that too many F&B operators expanded too quickly into increasingly marginal locations, funded by private equity, and the market became saturated and unsustainable. However, within the context of the Borough, the growth of multiple chains is more prevalent at Lakeside than at the other centres as these are to a large extent dominated by independent local operators. The growth in the availability, convenience and speed of home deliveries driven by innovative technology and apps represents a further significant challenge to more traditional F&B operators.

267. These new challenges and pressures have resulted in a radical restructuring of businesses across the sector, resulting in the closure of many loss-making branches. It is likely that there will be an increase in business failures and closures during 2025/26 as cost of living, rising energy and wage costs impacts on sales, profit margins and increasing debts deepens. Experts predict that this further "shakeout" in the sector will leave the proactively managed multiple and independent businesses that have strong brand loyalty and/or a clear differentiated offer as the main "winners."

268. F&B operators, like retailers, will also need to understand and cater for the needs of the changing demographic and consumer market to remain relevant and viable. For example, Millennials (under 35s) make-up almost one-quarter of the UK population and research shows that they spend a substantial 13% of their disposable incomes on eating and drinking out. It is estimated that Millennials will make up over 80% of all parents in the UK over the next few years, meaning that restaurants, pubs and cafés will also need to evolve and adapt to cater for the changing needs of new 'Millennial families'. This could be driven for example, by increasing emphasis on convenience, affordability, entertainment, uniqueness and the use of technology and apps.

269. Restaurant operators will therefore, as a minimum, need to make sure that they are easy to reach online and on social media with up-to-date menus and strong images, and adapt the latest technologies to drive online booking.

270. The popularity of street food, market halls and "meanwhile"/ "pop-up" restaurants and bars is largely driven by Millennials and subsequent demographic cohorts from 1997 onwards. These more informal drinking and eating venues fulfil their desire to experiment and explore distinctive styles of drink, food and new cuisines in exciting new and more informal environments. Trialling a "pop-up" site also represents an opportunity to test a new concept, gain a following, fine-tune details and secure investment before making a long-term commitment. The pop-up concept is also attractive to landlords and property companies who are increasingly nervous about signing long leases following numerous high profile restaurant closures.

271. The household survey identified where people living in the Study Area currently chose to eat and drink (see below). This shows that across the Study Area (Zones 1-10), venues across the Council area are attaining a market share of between 9.2% (Bars, Pubs, Nightclubs) and 12.7% (Cafes and Restaurants) which is a low level of retention. This level of retention increases within the broad Council area alone (Zones 1-6) where the retention rates are between 64.8% (Cafes and Restaurants) and 69% (Bars, Pubs, Nightclubs).

272. In terms of dominant locations for both cafés and restaurants and bars, clubs and nightclubs in the Council area, these include Lakeside and Grays town centre across both the Study Area (zones 1-10) and the representative Council area (Zones 1-6).

273. In terms of competing centres especially from the wider Study Area (Zones 1-10), these include Basildon, Bluewater Shopping Centre, Bexleyheath, Central London and Romford.

Table 20: Market Shares for Eating Out Locations (%)

	Study Area: Zones 1-10		Council Area: Zones 1-6	
THURROCK COUNCIL AREA	**Cafes & Restaurants**	**Bars, Pubs, Nightclubs**	**Cafes & Restaurants**	**Bars, Pubs, Nightclubs**
Regional Centre: Lakeside	3.8%	2.4%	18.7%	3.5%
Town Centre: Grays	3.3%	1.0%	17.3%	11.2%
Local Centre: Aveley	0.2%	0.9%	1.2%	0.9%
Local Centre: Corringham	1.2%	0.6%	7.0%	6.2%
Local Centre: Sockketts Heath	0.1%	0.2%	0.9%	1.9%
Local Centre: South Ockendon	0.6%	0.8%	4.0%	8.9%
Local Centre: Stanford-Le-Hope	0.7%	0.7%	4.7%	7.9%
Local Centre: Tilbury	0.3%	0.3%	1.8%	2.9%
All Other Locations in the Council Area	2.7%	2.4%	9.2%	25.6%
THURROCK COUNCIL AREA	**12.7%**	**9.2%**	**64.8%**	**69.0%**
OTHER CENTRES/STORES OUTSIDE THURROCK COUNCIL AREA				
Basildon	9.3%	3.4%	7.9%	3.0%
Bexley	0.1%	0.2%	0.0%	0.0%
Bexleyheath	9.4%	13.6%	0.2%	0.0%
Billericay	1.0%	1.8%	0.3%	0.0%
Bluewater Shopping Centre	6.6%	2.7%	1.3%	0.0%
Brentwood	5.8%	8.9%	1.3%	1.0%
Canvey Island	1.2%	3.7%	0.0%	0.0%
Central London	7.3%	6.7%	3.7%	7.9%
Chelmsford	0.9%	0.0%	0.1%	0.4%
Dagenham	1.7%	0.4%	0.0%	1.6%
Dartford	2.3%	1.3%	0.0%	0.0%
Gravesend	3.9%	4.1%	0.6%	2.9%
Hornchurch	4.7%	4.2%	1.0%	1.1%
Ilford	1.9%	0.0%	1.6%	0.0%
Leigh-on-Sea	1.5%	0.9%	0.4%	0.6%
Pitsea	0.5%	0.8%	1.0%	0.0%
Romford	7.9%	9.3%	6.0%	0.2%
Sidcup	5.1%	5.0%	0.0%	0.0%
Southend-on-Sea	1.1%	0.2%	0.5%	2.2%
Upminster	1.2%	0.7%	5.0%	5.1%
Welling	1.8%	1.2%	0.0%	0.0%
All Other Centres/Locations	12.0%	21.4%	4.3%	5.0%
ALL OTHER LOCATIONS	**87.3%**	**90.8%**	**35.2%**	**31.0%**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**

274. Drawing on these market shares and retention levels, it is possible to carry out a high-level assessment of the potential need for new food and beverage uses over the plan period using a robust approach developed by LSH. This involves applying an F&B Study Area retention level of 12.7% to the available F&B spend of £2,415.4m 2025 (see table below). This results in a 'retained' F&B expenditure (or 'turnover') of £307.6m in 2025 which is forecast to increase to £381.3m by 2045.

Table 21: Total Leisure Spend Across Study Area (£m): 2025 to 2045 – Baseline Assessment

Study Area (Zones 1-10)	2025	2030	2035	2040	2044	2045
Available Spend on F&B:	£2,415.4	£2,537.0	£2,677.9	£2,831.5	£2,961.0	£2,994.2
Participation Levels (%)	12.7%	12.7%	12.7%	12.7%	12.7%	12.7%
Market Share (£m)	£307.6	£323.1	£341.0	£360.6	£377.1	£381.3
Benchmark Turnover (£m)	£307.6	£324.9	£343.2	£362.5	£378.7	£382.8
Net Residual F&B Spend Capacity	**£0.0**	**-£1.8**	**-£2.1**	**-£1.9**	**-£1.6**	**-£1.5**

275. Using a similar approach as for the assessment of retail capacity, we have applied robust year-on-year 'productivity' (sale 'efficiency') growth rates detailed in the Retail Planner Briefing Note 22 – Leisure (2025) to the retained turnover of £307.6m in 2025 to allow for existing businesses to cover their reasonable costs over time to remain viable. This results in a theoretical negative residual expenditure of -£2.1m up to 2035 indicating no additional growth.

276. In contrast, applying the higher growth housing led population assessment results in a nominal +£0.4m surplus to 2035.

Table 22: Total Leisure Spend Across Study Area (£m): 2025 to 2045 – Sensitivity Analysis

Study Area (Zones 1-10)	2025	2030	2035	2040	2044	2045
Available Spend on F&B:	£2,414.1	£2,543.9	£2,696.4	£2,866.1	£3,012.6	£3,049.2
Participation Levels (%)	12.7%	12.7%	12.7%	12.7%	12.7%	12.7%
Market Share (£m)	£307.4	£324.0	£343.4	£365.0	£383.7	£388.3
Benchmark Turnover (£m)	£307.4	£324.7	£343.0	£362.3	£378.5	£382.6
Net Residual F&B Spend Capacity	**£0.0**	**-£0.8**	**£0.4**	**£2.7**	**£5.2**	**£5.7**

277. As detailed previously this is a sector that has been hit hard prior to, and even more so, during the pandemic and the prevailing macro-economic position will also influence discretionary leisure spending. The sector was effectively shut down and carried high overheads. On this basis, it can be reasonably assumed that a proportion of this growth is likely to be absorbed by existing businesses to cover

the debt incurred during the pandemic and thereafter the rising operational / occupancy costs and compounding inflation.

278. It should be emphasised that the growth to sustain new cafés, restaurants and bars will be very much subject to market demand. Focusing new uses in the main town centres will help increase competition and consumer choice, and to underpin both daytime and evening economies. Any market demand from operators is likely to be satisfied by the take-up of suitable vacant units in existing centres, the repurposing of floorspace and/or as part of mixed-use developments.

279. This is further confirmed by the responses to the household survey which do not show a significant demand. In response to the question on what improvements could be made to the Thurrock Council area's leisure offer that would make respondents visit / partake in leisure activities more often (Question 53), the responses suggest a general level of contentment with the offer. Only 2.1% stated 'more / better cafes / coffee shops;' 0.2% stated 'more / better pubs / bars;' and 0.2% suggested 'more family-friendly pubs / restaurants.'

CINEMAS

280. The UK cinema sector has evolved dramatically since the 1990s when it was largely dominated by a handful of national multiples. Today the sectors offer ranges from larger multiplexes (any cinema with five screens or more, though some of the largest multiplex sites have as many as 12 or 16 screens), to smaller independent operators and 'pop up' venues.

281. Although year-on-year admissions and box-office takings are notoriously volatile - driven by the appeal of individual films and Hollywood 'blockbusters' - the long-term trend since the mid-1980s has been upward and has principally been driven by the development of new cinemas. The growth in the cinema sector over the last 10-20 years is even more impressive when one considers that this has occurred against the increase in new and sophisticated in-home entertainment, driven by innovative technology, choice and flexibility (including online streaming platforms , for example, Sky, Netflix and Amazon Prime, Apple TV and Disney+ platforms).

282. There has also been a growth in smaller cinemas serving smaller catchment areas. These cinemas are more flexible and less "space-hungry," as they do not require large auditoriums. There are therefore opportunities to provide a modern cinema offer in existing (repurposed) buildings and shopping centres, or as part of a mixed use offering. Other trends in the sector include the growth of 'pop-up' cinemas. Although there appears to be no dependable or recent data on the UK 'pop-up' cinema market.

283. The pandemic hit the cinema industry hard, particularly for the major chains. As previously mentioned, smaller nimble operators have found novel ways to show films. A temporary or mobile cinema (referred to as a pop-up cinema) and the UK's smaller independent chains, Curzon, Picture House (which is owned by Cineworld) and Everyman fared much better during the pandemic. They showed a more diverse selection of films, and with high-quality food offering, fully stocked bars

and high-end seating, attracting more visitors during periods in which restrictions have eased.

284. The future growth in the sector is dependent on the levels of available discretionary spending. Cinema trips will remain a significant and popular leisure activity for all age groups. Notwithstanding this, the competition from home entertainment and alternative at-home film channels will intensify and cinema operators will have to keep updating and adapting their offer to respond to consumer needs.

285. The current commercial cinema provision within the Borough comprises of the 9 screen Vue Cinema at Lakeside.

286. The table below shows the market share of cinemas in the Borough and the wider Study Area (Zones 1 – 10) based on the household survey:

Table 23: Popular Cinema Venues Based on Survey-derived Market Shares (%)

	Study Area Zones: 1-10	Council Area Zones: 1-6
THURROCK COUNCIL AREA		
Vue Cinema, Lakeside Shopping Centre	12.9%	75.7%
THURROCK COUNCIL AREA	**12.9%**	**75.7%**
OTHER VENUES OUTSIDE THURROCK COUNCIL AREA		
Basildon-Cineworld, Festival Way, Festival Leisure Pa	9.3%	7.6%
Basildon-Vue Cinema, East Square, Basildon	5.4%	4.1%
Bexleyheath-Cineworld, Broadway, Bexleyheath	8.0%	0.0%
Bluewater-Showcase, Bluewater Parkway	17.4%	0.7%
Canvey Island-Movie Starr, Eastern Esplanade	2.6%	0.2%
Central London / West End / South Bank	3.1%	1.2%
Chelmsford-Everyman Chelmsford, Bond Street	0.4%	0.0%
Dagenham-Vue Cinema, Dagenham Leisure Park	1.4%	0.0%
Eltham-Vue Cinema, Eltham High Street	2.7%	0.0%
Greenwich, Odeon, Bugsby's Way, Greenwich	3.4%	0.0%
Maidstone, Odeon, Lockmeadow, Barker Road	1.3%	0.0%
Rochester-Cineworld, Medway Valley Leisure Park, C	1.5%	0.0%
Romford-Lumiere Cinema, The Mercury Shopping Cer	1.2%	0.0%
Romford-Vue Cinema, The Brewery	20.1%	9.0%
Sidcup-Sidcup Storyteller, High Street	1.7%	0.0%
Southend-on-Sea-Odeon, The Broadway	1.3%	0.0%
All Other Venues Elsewhere	6.3%	1.5%
ALL OTHER VENUES	**87.1%**	**24.3%**
TOTAL	**100.0%**	**100.0%**

287. In summary, the key headlines are as follows:

- The key cinema venue in the Council area is the Vue Cinema at Lakeside. This is attaining a 12.9% market share from the Study Area (Zones 1-10) and a high retention rate of 75.7% from the broad Council area (Zone 1-6).

- Outside of the Council area, the main competing venues are collectively achieving a market share of 87.1% from the wider Study Area (Zones 1-10). This market share is dominated by the Vue cinema in Romford (20.1%), Bluewater – Showcase Cinema (17.4%), Cineworld at Festival Park Basildon (9.3%) and Cineworld, Bexleyheath (8%).
- In terms of the representative Council area (Zones 1-6) the main competition is from the Vue cinema in Romford (9%), Cineworld, Festival Park, Basildon (7.6%) and the Vue cinema in Basildon Town centre (4.1%).

288. The high-level assessment of the potential need for new commercial cinema provision in the Council area is based on standard approaches that draw on published national and regional 'screen density' averages (i.e., the number of screens per 100,000 population). According to the latest available research (from Dodona Research, Office for National Statistics (ONS) and British Film Institute (BFI)), the current UK average is 6.9 screens per 100,000 people, which represents an increase from 6.1 screens in 2014. The equivalent average figure for the East of England region is lower, at 6 screens per 100,000 people.

289. The table below shows the potential quantitative need for additional cinema screens to 2045 based on the baseline population projections previously described.

Table 24: Potential Capacity for New Cinema Screens – Baseline Assessment

	2025	2030	2035	2040	2044	2045
Potential Cinema Catchment Population (Zones 1-10)	189,328	193,586	197,524	201,700	205,122	205,981
Cinema Screen Density (screens per 100,000 persons) based on average for East of England Region	6.0	6.0	6.0	6.0	6.0	6.0
Cinema Screen Potential	11	12	12	12	12	12
Existing: Screen Numbers	9	9	9	9	9	9
Proposed: Screen Numbers	0	0	0	0	0	0
Net Screen Potential	**2**	**3**	**3**	**3**	**3**	**3**

290. The key steps in the assessment of cinema capacity involve applying the market share ('retention level') for cinema trips (12.9%) to the total population at the base year (some 1,464,594 persons). This produces the total "cinema-going population" (some 189,328 persons in 2025). Applying the average screen density of 6 to this population, the forecasts show that there is capacity for up to three cinema screens based on existing provision in 2035 and beyond to 2044/5.

291. Applying the higher growth housing led population assessment still results in a capacity for up to three cinema screens based on existing provision to 2035 and up to four screens beyond to 2044/5.

Table 25: Potential Capacity for New Cinema Screens – Sensitivity Analysis

	2025	2030	2035	2040	2044	2045
Potential Cinema Catchment Population (Zones 1-10)	189,222	194,137	198,968	204,307	208,899	209,985
Cinema Screen Density (screens per 100,000 persons) based on average for East of England Region	6.0	6.0	6.0	6.0	6.0	6.0
Cinema Screen Potential	11	12	12	12	13	13
Existing: Screen Numbers	9	9	9	9	9	9
Proposed: Screen Numbers	0	0	0	0	0	0
Net Screen Potential	**2**	**3**	**3**	**3**	**4**	**4**

292. In response to the question on what improvements could be made to Thurrock Council area's leisure offer that would make respondents visit / partake in leisure activities more often (Question 53), only 2.1% of respondents in the Study Area identified the need for "a multi-screen cinema" and 0.4% for an 'art house cinema'.

293. In summary, there does not appear to be any significant capacity or demand for new cinema provision in the Council area. Any market interest and demand from cinema operators seeking representation in the area should be directed to the town centres first, to further help diversity daytime and evening economies. This also does not preclude any improvements to the existing offer.

HEALTH AND FITNESS FACILITIES

294. The health and fitness (H&F) sector as a whole was badly hit by the pandemic, with lockdowns forcing the closure of facilities. It is undeniable that the pandemic reinforced the need for outdoor activity particularly to support mental health and wellbeing. Furthermore, alternative means of exercise increased during the series of lockdowns in 2020 and 2021, including at-home workouts, digital workouts, outdoor exercise and classes, and the purchase of home gym equipment. Whilst this was an accelerated reaction to the pandemic, the long-term impact on the sector and gym memberships remains unclear.

295. The growth of the budget gym operators has also 'squeezed' the memberships and viability of some of the established mid-market chains, such as LA Fitness and Fitness First. This has resulted in the increasing polarisation of the gym sector between the budget operators at the value end of the spectrum, and the more exclusive health and fitness centres at the higher, more expensive end. As a result, analysts predict that those mid-market gym operators that are neither very cheap, nor particularly exclusive will struggle to maintain market share in the competitive marketplace unless they revise their business models.

296. In terms of fitness/health activity participation rates H&F facilities in the Council area:

- Facilities within the Council area are achieving a market of 11.7% share from the wider Study Area (Zones 1-10) and higher market share of 53.6% from the representative Council area (Zones 1-6).
- Significant market shares from the wider Study Area (Zones 1-10) is attained by the Bannatyne Health Club at Lakeside (3.9%) .
- 'Leakage' to other H&F facilities from the Study Area (Zones 1-10) is primarily to facilities in Romford, Bexleyheath, Basildon, Dartford and Central London.

Table 26: Study Area: Health and Fitness Market Share

	Study Area Zones: 1-10	Council Area Zones: 1-6
THURROCK COUNCIL AREA		
Regional Centre: Lakeside		
>Ab Salute Gym, J31 Park	0.0%	0.0%
>Bannatyne Health Club and Spa, Howard Road	3.9%	0.0%
>Everlast Gyms, Thurrock Shopping Park, Weston Avenue,	0.4%	15.8%
>PureGym, Thurrock Shopping Park	0.7%	3.4%
Town Centre: Grays	0.3%	0.0%
Local Centre: Aveley	0.1%	2.3%
Local Centre: Corringham	0.6%	0.9%
Local Centre: Socketts Heath	0.0%	5.8%
Local Centre: South Ockendon	0.4%	0.0%
Local Centre: Stanford-Le-Hope	2.2%	4.0%
Local Centre: Tilbury	0.2%	20.0%
All Other Locations in the Council Area	2.9%	1.4%
THURROCK COUNCIL AREA	**11.7%**	**53.6%**
OTHER VENUES OUTSIDE THURROCK COUNCIL AREA		
Basildon	8.0%	0.0%
Bexleyheath	11.3%	4.5%
Brentwood	2.7%	0.0%
Canvey Island	1.5%	0.0%
Central London	6.8%	0.0%
Chelmsford	0.5%	0.0%
Dartford	6.9%	0.7%
Gravesend	3.7%	0.0%
Hornchurch	2.8%	0.0%
Pitsea	0.2%	0.9%
Romford	17.3%	0.0%
Sidcup	1.0%	1.1%
Welling	2.1%	0.0%
All Other Centres/Locations	23.6%	0.0%
OTHER VENUES OUTSIDE THURROCK COUNCIL AREA	**88.3%**	**7.1%**
TOTAL	**100.0%**	**60.7%**

297. The household survey also asked a specific question on what improvements could be made to the authority area's leisure offer that would make respondents visit / partake in leisure activities more often (Question 53). The top response was from the wider Study Area was 'more local sports & recreation' (1.2%).

Table 27: Gyms /Leisure Facilities: Suggested Improvements (%)

Gyms /Leisure Facilities: Suggested Improvements	Study Area (Zones 1-10) Market Shares
More local sports & recreation facilities (e.g. football pitches, tennis courts)	1.2%
Leisure / sports centre	0.5%
Swimming pool - indoor	0.4%
Swimming pool - outdoor	0.1%
Outdoor gyms	0.1%
Aqua aerobics sessions in the evenings	0.1%

298. In terms of the need for new health club/gym facilities, the population growth projected for the Study Area (Zones 1-10) under the baseline assessment is +63,399 by 2035, +122,175 by 2044 and +128,827 by 2045. By applying the survey-derived area participation rate for H&F activities of 11.7% within the Study Area results in the potential for new gym/H&F members. These are some +7,420 by 2035, +14,299 by 2044 and +15,078 by 2045.

299. Based on average membership levels for key premium gym operators (average 2,900 members per club) or a budget gym (average 3,450 members), the baseline population projection increases will support up to three additional premium gyms or two budget gyms by 2035; up to five premium or four budget gyms by 2044/45.

300. Applying the higher growth housing led population projections results in a marginal increase. The increased population supporting up to three additional premium gyms or budget gyms by 2035; up to six premium or five budget gyms by 2044/45.

301. As with other commercial leisure sectors, the take-up of any forecast need based on population growth will be dependent on market interest and the demand from gym operators for representation.

302. Translating demand for new gyms to actual floorspace will also depend on the type of gym. For example, smaller boutique and specialist independent gyms generally require smaller units of between 300-700 sqm, and budget operators generally have requirements for unit sizes of up to circa 3,700 sqm (Anytime Fitness is an example of a smaller independent gym, with a floorspace requirement generally ranging from 350sqm to 650 sqm. Budget operators Pure Gym and The Gym have requirements for up to 1,850 sqm; and NRG is acquiring units of up to 3,700sqm). Enhancement of existing facilities and promotion of the provision of new gym and fitness facilities is recommended within town centres to help maintain and enhance their overall diversity and attraction, and/or focussed on transport hubs. Town centre locations also represent the most sustainable and accessible locations for the majority of the population. Meeting needs over the plan period will also have to take account of the changes in the local demographic profile and lifestyle trends. For example, facilities, clubs and classes will need to cater for a wide range of demographics including the elderly.

GAMBLING VENUES

303. Gambling represents a significant component of the leisure industry. The main sectors comprise 'games of chance' (namely bingo clubs, casinos, betting shops and amusement arcades). The latest research from the Gambling Commission Industry Statistics (published November 2024) indicates that the gambling industry in Great Britain generated a Total Gross Gambling Yield (GGY) for the year end to March 2024 of £15.6bn. This represented a +3.5% increase from the previous year (£15.1bn). Remote (online) gambling accounted for £4.4bn of total GGY. The total GGY for 'Remote Casino,' 'Betting and Bingo Sector' was some £6.9bn whilst for 'non-remote' (land based i.e. Arcades, Betting, Bingo and Casino) it comprised some £4.6bn.

304. The following assesses the main trends in this sector, current provision and the potential need/demand for new uses and facilities.

- **Bingo Halls** - in response to falling admissions bingo operators are increasingly taking advantage of the online market and embracing smart-phone technology through new 'app' development. This forms part of a wider trend and has fuelled the growth in 'remote/online' gambling (which includes gambling activities through the internet, telephone, radio, etc.). Bingo operators are also increasingly looking to diversify their customer profile, and are marketing their clubs at a younger, predominantly female audience. As a result, there has been an increase in the number of younger and more affluent bingo players over recent years, particularly as deregulation has enabled clubs to offer bigger (national) prizes. At the opposite end of the scale, research shows that 55-64 age group has generated the biggest growth in online gambling as more mature bingo players' switch to online bingo sites, as they grow in confidence with the modern technology. These trends have resulted in the closure of many bingo halls in centres across the UK over the last decade, and the prospects for new openings are limited. There is no commercial bingo operator in the Council area and the former Mecca Bingo Hall in Grays closed in 2015.

- **Casinos** - the latest figures published by the Gambling Commission show that non–remote casinos sector (i.e., not online) saw a £69.6 million increase of 17.2% in GGY to £865.8 million (casino games at £645.4million & casino machines at £220.3 million) over the period April 2023 to March 2024. The casino sector is dominated by two companies: the Rank Group with 67 venues has a 44% market share and Genting UK has 44 venues and a 29% market share. There has been some consolidation of the sector in the past few years, such as Rank Group's purchase of Gala Coral Casinos.

- **Betting Shops** – According to the Gambling Commission latest data there were some 5,931 in the UK in March 2024. This is a decrease from the 6,219 in March 2022, 8,320 in March 2019 and also down from 9,111 in 2014. The decrease has been due to regulatory changes introduced in 2015 which led to a fall in revenue and profit. As gambling activities continue their shift to online channels, so the demand for physical outlets will inevitably dampen in the future and more betting shops will inevitably close. The presence of betting shops in high streets is also a contentious issue due to the perceived social, economic and health/wellbeing impacts on individuals and households. The Government recognised that betting shops have specific impacts and in 2016 reclassified their use from Class A2 to 'Sui Generis'. This was also translated in the of the Use Classes Order came into effect on 1st September 2020. This reclassification means any change of use to a betting shop requires an application to the local planning authority for planning permission.

305. The survey-derived market shares for visits to bingo halls, casinos and bookmakers show that venues in the Council area attain a low level retention of 3.8% from the Study Area (Zones 1-0). Across the representative Council area (Zones 1-6) this increases to 36.4% with venues in Grays attaining (8.9%) and Stanford-Le-Hope (6.7%) attaining a high proportion.

306. The main competing locations outside of the Council area from across the wider Study Area (Zones 1-10) include a large proportion stating 'Abroad'; some further afield to Blackpool (7.7% as well as to closer locations such as Stratford (10.3%) and Bexleyheath (9.9%).

Table 28: Bingo Halls, Casinos and Bookmakers - Market Shares (%)

	Study Area Zones: 1-10	Council Area Zones: 1-6
THURROCK COUNCIL AREA		
Regional Centre: Lakeside	0.0%	0.0%
Town Centre: Grays	0.9%	8.9%
Local Centre: Aveley	0.0%	0.0%
Local Centre: Corringham	0.0%	0.0%
Local Centre: Socketts Heath	0.2%	2.0%
Local Centre: South Ockendon	0.2%	2.3%
Local Centre: Stanford-Le-Hope	0.7%	6.7%
Local Centre: Tilbury	0.2%	1.5%
All Other Locations in the Council Area	1.6%	15.1%
THURROCK COUNCIL AREA	**3.8%**	**36.4%**
OTHER VENUES OUTSIDE THURROCK COUNCIL AREA		
Basildon	2.6%	2.8%
Bexleyheath	9.9%	0.0%
Blackpool	7.7%	0.0%
Dagenham	2.7%	25.4%
Gravesend	0.6%	0.0%
Rochester	2.0%	0.0%
Southend-on-Sea	2.3%	10.9%
Stratford Town Centre	10.3%	8.6%
All Other Centres/Locations - Abroad	56.9%	3.5%
All Other Centres/Locations	1.3%	12.4%
OTHER VENUES OUTSIDE THURROCK COUNCIL AREA	**96.2%**	**63.6%**
TOTAL	**100.0%**	**100.0%**

307. Based on current provision, market and consumer demand, there appears to be no demonstrable need to enhance existing provision to help improve competitive position and the choice of venues in the Council area. In response to the question on what improvements could be made to the Thurrock Council area's leisure offer that would make respondents visit / partake in leisure activities more often (Question 53), only 1.7% suggested a 'bingo venue' and 0.7% stated 'casino'.

OTHER COMMERCIAL LEISURE

308. Other commercial leisure facilities can be grouped together under 'family entertainment venues' (FEVs), which include paid activities that appeal to adults and children (such as, for example, tenpin bowling, BMX biking, roller skating, ice skating, and similar uses).

- **Tenpin bowling** – is possibly the most popular activity in the 'family entertainment' sector. After a period of decline in the 1970s, there are currently some 320 venues in the UK according to Mintel figures. A number of the successful bowling facilities opened over the last 15-20 years (e.g., Hollywood Bowl and Ten Entertainment) tend to form part of larger leisure complexes that include multi-screen cinemas, restaurants and nightclubs. The critical mass of leisure uses "under one roof" help to underpin the viability of tenpin bowling centres, as they tend to struggle as standalone destinations. The sector is evolving from old-style bowling alleys, to modern, multi-generational entertainment centres where bowling is blended with other forms of activity alongside an enhanced dining offer. This is balanced by the growth of smaller independent specialist bowling facilities. Within the Council area commercial provision is seen at Lakeside in the form of the Hollywood Bowl.

- **Trampoline Parks** - over recent years there has also been growth in other more specialist commercial leisure attractions, such as trampoline parks. Since the opening of the first indoor parks in the UK in 2014, trampolining has become one of the UK's fastest growing sport and leisure trends. It is estimated that there were some 150 parks in the UK in 2017/18, with the potential capacity for between 250-300 parks before saturation is potentially reached. This mirrors the growth in the United States and Australia, where parks first emerged in the early to mid-2000s. The main operators in this sector include Oxygen Freejumping, Ryze, and Gravity Active Entertainment. The public sector is also investing in trampoline parks, including Eastbourne Borough Council, Waltham Forest Council and Tameside Metropolitan Borough Council. In response to the broad range of "jumpers," trampoline parks are also offering a range of activities and experiences that cater to the needs of a broader demographic, including rock-climbing, ninja courses, laser tag and other social events. Again, within the Council area commercial provision is seen at Lakeside in the form of the Flip Out Lakeside.

309. The table below summarises the findings of the survey-derived market shares for trips to FEVs. The results show that venues within the Council area are achieving

a low market share of 22.7% from within the Study Area (Zones 1-10). Of this, Lakeside Shopping Centre and its leisure offer dominate as the principal location (21.9%). The market share for the representative Council area (Zones 1-6) shows an increased market share of 81.7% again dominated by the provision at Lakeside (75.7%) with very nominal market shares for other centres including Grays (2.2%).

310. The key competing locations/venues from within the Study Area (Zones 1-10) include Romford (14.8%), Festival Leisure Park, Basildon (12.6%), Bexleyheath (4.9%) and Central London (3.8%).

Table 29: Family Entertainment Venues – Market Shares (%)

	Study Area Zones: 1-10	Council Area Zones: 1-6
THURROCK COUNCIL AREA		
Regional Centre: Lakeside		
>Regional Centre: Lakeside Shopping Centre	21.9%	75.6%
Town Centre: Grays	0.3%	2.2%
Local Centre: Aveley	0.0%	0.0%
Local Centre: Corringham	0.0%	0.0%
Local Centre: Socketts Heath	0.2%	1.2%
Local Centre: South Ockendon	0.0%	0.0%
Local Centre: Stanford-Le-Hope	0.0%	0.0%
Local Centre: Tilbury	0.0%	0.0%
All Other Locations in the Council Area	0.2%	1.5%
Lakeside Karting, Arterial Road, Purfleet	0.2%	1.2%
THURROCK COUNCIL AREA	**22.7%**	**81.7%**
OTHER VENUES OUTSIDE THURROCK COUNCIL AREA		
Basildon	3.2%	1.7%
Basildon-Festival Leisure Park	12.6%	6.7%
Basildon-Monkey Madness	2.5%	0.0%
Bexley	2.2%	0.0%
Bexleyheath	4.9%	0.0%
Bexleyheath-Tenpin Bexleyheath, Albion Road	3.6%	0.0%
Bluewater Shopping Centre	2.2%	0.0%
Brentwood	0.4%	0.0%
Central London	3.8%	2.0%
Chelmsford	0.2%	0.0%
Chessington World of Adventures Resort	1.0%	0.0%
Colchester City Centre	0.4%	0.0%
Dagenham	2.5%	0.0%
Dartford	3.0%	0.0%
Gravesend	0.5%	0.0%
Hornchurch	1.6%	0.6%
Medway Valley Leisure Park,	2.4%	0.0%
Romford	14.8%	2.0%
All Other Centres/Locations - Abroad	9.5%	0.0%
All Other Centres/Locations	5.8%	5.3%
OTHER VENUES OUTSIDE THURROCK COUNCIL AREA	**77.3%**	**18.3%**
TOTAL	**100.0%**	**100.0%**

311. In response to the question on what improvements could be made to the local authority area's leisure offer that would make respondents visit / partake in leisure activities more often (Question 53), 2.4% suggested 'ice rink', 2% 'crazy golf' and

1.2% for more leisure facilities and activities for families. Collectively, the notable responses to suggested improvements to FEV's were as follows:

Table 30: Family Entertainment Venues (FEV's): Suggested Improvements (%)

FEV's Suggested Improvements	Study Area (Zones 1-10) Market Shares
Ice rink	2.4%
Crazy golf	2.0%
More leisure facilities / activities for families	1.2%
Trampoline park	0.8%
More leisure facilities / activities for teenagers	0.7%
Indoor soft play areas	0.7%
More live music venues	0.6%
Ten-pin bowling	0.6%
More leisure facilities / activities for the elderly	0.4%

THEATRE AND CULTURAL ACTIVITIES

312. Cultural activities include a broad range of activities that are focused on the arts and historic attractions. This assessment is concerned with the provision and potential need for theatres and museums. As previously mentioned, the current provision is in the form of the Thameside Theatre whose future remains uncertain. This notwithstanding, the "Thurrock Plan for Culture 2025–2029" seeks to transform the Borough's cultural landscape by increasing access to arts funding and fostering community engagement; and on that basis this component remains a work in progress.

313. The household survey shows that trips to the theatre and/or music from across the Study Area (Zones 1-10), to venues in the Council area results in a relatively low market share of 3.4%. Within the representative Council area (Zones 1-6) the market share rises to 25.6%. Across both spatial areas the dominant venue in the Council area for this type of activity is the Thameside Theatre; other locations / venues do not register any notable market share.

314. Other theatre and music venues outside the Council area attain a substantial market share from the Study Area (Zones 1-10) of 96.6% and from the broad representative Council area (Zones 1-6) of some 74.4%. From the broad Study Area (zones 1-10), the majority is attributed to Central London (56.2%); The O2 Arena some 8.2%. More locally, and from within the representative Council area Zones 1-6) Central London also retains a high market share of 41.9%, followed by Basildon 12.1%, Southend-on-Sea (6.2%) Westcliff on Sea Pavillion (5.4%) and Hornchurch Queens Theatre (4.7%).

Table 31: Theatre and Music Venues – Market Shares (%)

	Study Area Zones: 1-10	Council Area Zones: 1-6
THURROCK COUNCIL AREA		
Regional Centre: Lakeside	0.2%	3.5%
Town Centre: Grays	0.4%	3.3%
>Grays-Thameside Theatre	2.4%	12.9%
>Grays-Thurrock Museum	0.2%	3.6%
Local Centre: Aveley	0.0%	0.0%
Local Centre: Corringham	0.0%	0.0%
Local Centre: Socketts Heath	0.0%	0.0%
Local Centre: South Ockendon	0.0%	0.0%
Local Centre: Stanford-Le-Hope	0.1%	1.6%
Local Centre: Tilbury	0.0%	0.4%
All Other Locations in the Council Area	0.0%	0.2%
THURROCK COUNCIL AREA	**3.4%**	**25.6%**
OTHER VENUES OUTSIDE THURROCK COUNCIL AREA		
Basildon	2.5%	12.1%
Blackheath	1.1%	0.0%
Brentwood	0.3%	0.0%
Canterbury	1.5%	0.0%
Central London	56.2%	41.9%
London-Alexandra Palace	1.5%	0.0%
London Docklands-London Museum	1.8%	0.0%
London-Natural History Museum	2.1%	0.0%
Dartford	0.6%	0.2%
Dartford-The Geoffrey Whitworth Theatre	0.2%	0.0%
Dartford-The Orchard Theatre	2.6%	0.4%
Greenwich-The O2, Peninsula Square	8.2%	1.5%
Hornchurch-Queens Theatre	3.5%	4.7%
Romford	2.1%	0.0%
Southend-on-Sea	3.2%	6.2%
Westcliff-on-Sea-Cliffs Pavilion	2.6%	5.4%
Westcliff-on-Sea-Palace Theatre	0.3%	0.0%
All Other Centres/Locations - Abroad	4.6%	0.0%
All Other Centres/Locations	1.7%	1.9%
OTHER VENUES OUTSIDE THURROCK COUNCIL	**96.6%**	**74.4%**
TOTAL	**100.0%**	**100.0%**

315. In response to the question on what improvements could be made to the Thurrock Council area's leisure offer that would make respondents visit / partake in leisure activities more often (Question 53), only 0.9% suggested 'theatres'.

316. For trips to cultural venues from across the Study Area (Zones 1-10) venues in the Council area attain a very low market share of 2.6% which increases to 11.8% when considering the representative Council area (Zones 1-6).

317. Other historic and cultural venues outside the Council area attain a substantial higher market share from the Study Area (Zones 1-10) of 97.4% and 88.2% from the broad representative Council area (Zones 1-6). This is dominated again by the

provision in Central London including specific named venues including the Natural History Museum and Science Museum.

Table 32: Historic and Cultural Venues – Market Shares (%)

	Study Area Zones: 1-10	Council Area Zones: 1-6
THURROCK COUNCIL AREA		
Regional Centre: Lakeside	0.1%	2.3%
Town Centre: Grays	0.0%	0.3%
>Grays-Thameside Theatre	0.3%	5.4%
>Grays-Thurrock Museum	0.0%	0.0%
Local Centre: Aveley	0.0%	0.0%
Local Centre: Corringham	0.0%	0.0%
Local Centre: Socketts Heath	0.0%	0.0%
Local Centre: South Ockendon	0.0%	0.0%
Local Centre: Stanford-Le-Hope	0.0%	0.0%
Local Centre: Tilbury	0.0%	0.0%
All Other Locations in the Council Area	2.1%	3.8%
THURROCK COUNCIL AREA	**2.6%**	**11.8%**
OTHER VENUES OUTSIDE THURROCK COUNCIL AREA		
Canterbury	0.0%	0.4%
Central London	64.3%	50.9%
London Docklands-London Museum	0.2%	3.3%
London-Natural History Museum	6.0%	5.2%
London-Science Museum	2.3%	2.5%
London-Tate Britain, Millbank	1.5%	3.0%
London-Tate Modern, Bankside	2.2%	0.0%
London-The National Gallery	1.9%	0.0%
London-Victoria and Albert Museum	0.7%	0.7%
London-South Bank	1.4%	0.0%
Chadwell Heath	2.2%	0.0%
Dagenham	1.6%	0.0%
Southend-on-Sea	2.2%	0.0%
Westcliff-on-Sea-Cliffs Pavilion	0.6%	0.0%
All Other Centres/Locations - Abroad	6.4%	3.3%
All Other Centres/Locations	3.6%	18.8%
OTHER VENUES OUTSIDE THURROCK COUNCIL ARE	**97.4%**	**88.2%**
TOTAL	**100.0%**	**100.0%**

318. In response to the question on what improvements could be made to the local authority area’s leisure offer that would make respondents visit / partake in leisure activities more often (Question 53), only 1.1% suggested ‘more/better cultural facilities’ or ‘museums’.

SUMMARY

319. This section has shown that the commercial leisure industry faces considerable challenges and pressures. It is clear that consumers are becoming increasingly selective in terms of where and how they spend their discretionary leisure expenditure. There will also be a continued increase in at-home activities due to the advances in technology such as the use of virtual reality headsets. More immediately this will be compounded by the current macro-economic challenges including rising operating costs and rising costs of living that has an impact on consumer finances. The challenge for town centres and leisure operators in the future will be how to attract customers away from their homes.

320. In summary, the leisure needs assessment needs to be viewed in the context of the wider spatial area associated with the Study Area and the access and proximity to Central London. On this basis, and based on the participation derived from the household survey, the current provision shows the following:

- Food and Beverage – under the baseline there is no theoretical spend potential for additional new cafés, restaurants and bars floorspace by 2045 based on projected population and expenditure growth. However, under the higher housing led growth sensitivity analysis there is a nominal +£0.4m residual. In terms of improvements, responses suggest a general level of contentment with the offer.
- Cinemas – the existing Vue Cinema at Lakeside shows a good level of participation from both the Study Area (12.9%) and Council Area (75.7%). The forecasts show that there is some limited capacity of up to three cinema screens based on existing provision in 2035 under both the baseline assessment and sensitivity analysis. Over the period to 2044/5, under the baseline assessment the screen capacity remains at three but increases to four screens under the sensitivity analysis. The survey responses indicate that only 2.4% of respondents in the Study Area identified the need for “a multi-screen cinema” and 0.4% for an ‘art house cinema.’
- Gyms / Health and Fitness facilities – current venues show a 11.7% share retention from the wider Study Area (Zones 1-10) and higher market share of 53.6% from the representative Council area (Zones 1-6). ‘Leakage’ to other H&F facilities from the Study Area (Zones 1-10) is primarily to facilities in Romford, Bexleyheath, Basildon, Dartford and Central London. In terms of suggested improvements, there is a wide set of responses dominated by the need for more local sports & recreation facilities. The growth in population and retention to the levels to the facilities in the Borough indicates that under the baseline assessment this will support up to three additional premium gyms or two budget gyms by 2035 and up to five premium or four budget gyms by 2044 and 2045. Under the higher growth housing led population projections, this increases to three additional premium gyms or budget gyms by 2035 and up to six premium or five budget gyms by 2044/45.
- Family Entertainment Venues – venues within the Council area are achieving a low market share of 22.7% from within the Study Area (Zones 1-10). Of this,

Lakeside Shopping Centre and its leisure offer dominate as the principal location. The suggested improvements to the family entertainment venues include ice rink,' 'crazy golf' and more leisure facilities and activities for families. The main competition is from venues in Basildon (Festival Leisure Park), Romford, Bexleyheath and Central London.

321. Responses from the household survey indicate that the centres and venues in the Council area are not achieving a good market share of trips and activities focused on theatre (3.4%) and cultural attractions (2.6%). This is due to access to, and level of provision, in Central London. In terms of improvements to provision, only 0.9% suggested 'theatres' and 1.1% suggested 'more/better cultural facilities' or 'museums.'

322. In terms of the main competition for the Council area, this varies by type of activity but in terms of principal competing location this would include Basildon, Romford, Bexleyheath and Central London. Meeting needs over the plan period will also have to take account of the changes in the local demographic profile and lifestyle trends.

323. Importantly, and in all cases, the potential for new commercial leisure venues, facilities and attractions will be subject to dynamic economic, market and consumer trends over time. Where demand from operators does arise for representation, this should be directed to town centres first, aligned with national and local plan policy objectives.

9. HOTELS ASSESSMENT

324. This section provides an overview of key national, international and broad hotel market sector trends that are of significance to the Council area. As with the retail and leisure sectors, recent years have seen many challenges in the tourism and hospitality sectors, some due to general changes in the sector and others as a direct result of the impact of the COVID-19 pandemic. Moving forward it is necessary to have a good understanding of how tourism and hospitality is changing to inform the Council's future policy making in this area.

Essex in Context

325. There is no contemporary hotel or tourism data available in relation to the Thurrock Council area. Historic data on tourism (Economic impact of tourism – Thurrock District (2016)) detailed that:

- the total number of trips (day trips and overnight) was estimated at 2.5m generating some £177.5m in tourism value.
- this translated to some 3,897 tourism related jobs, accounting for 6.4% of total employment.

326. Current data is only available at the county level through Visit Essex (the tourism organisation marketing the whole of the county to the visitor market). Its website (www.visitessex.com) states that in 2023:

- Essex welcomed 54.2 million visitors, marking a notable increase from previous years;
- the tourism industry generated £3.5 billion for the county's economy;
- overnight stays rose by 11%, and day trips increased by 5% compared to the previous year.
- tourism accounts for approximately 10% of employment across Essex, surpassing sectors like construction, manufacturing, and financial services.

327. It should be mentioned that Visit Essex achieved 'Local Visitor Economy Partnership (LVEP)' accreditation from Visit England in 2023 to support and grow the visitor economy in Essex and as a result has initiated the planning process for a 'Destination Management Plan' in collaboration with stakeholders.

328. Separately, research indicates that Essex County Council has produced a county-wide '*Destination Plan (2024-2030)*' that states that in 2022, Essex received 85,000 overseas staying visits, with visitors spending £231m. These figures were on par with 2018 levels but remain about 15% below the 2019 (pre-pandemic) spending levels. Additionally, that Colchester and Chelmsford receive a high proportion of Essex's domestic day visits, followed by Thurrock, Southend-on-Sea, Basildon, Braintree and Tendring (in order of volume). As previously mentioned, day visit spend in Thurrock is £342m a year, higher than any other local authority in Essex, due to Lakeside.

329. Overall, and at present, there is no specific information available on the Thurrock Council area including hotels or bed spaces or tourism. This notwithstanding, we encourage future collaboration with Visit Essex as part of the LVEP and Destination Plan process. This has the potential to boost the profile of tourism in the Council area and could potentially provide a significant role in place shaping and economic development, generating better outcomes for visitors, the environment, local communities and businesses, through building beneficial relationships with the Council.

National Visitation Trends

330. The most recent Great Britain Tourism Survey (GBTS) (published March 2025) covering the period April to December 2021 and January to December 2022 details the following key findings.

- **Overall,** a decline in visits in 2024 although an increase in spend (as cost of overnight trips increased).
- **Volume**: In 2024, Britain residents took 90 million overnight trips in England and 106 million in Britain; both declined by 10% on 2023.
- **Value**: Total spend when adjusted for inflation increased by 2% in England and 3% in Britain. Spend per trip increased (in England from £262 to £305 and in Britain from £266 to £312). To note that price increases in tourism-related categories outpaced general inflation in 2024.
- **Trip purpose**: 'Business' saw the largest year-on-year increases in spend in 2024. 'UK stay as part of outbound' was the only trip type to record an increase in trip volume, with spend also increasing.
- **Season**: Q1 and Q4 2024 saw the sharpest declines in trip numbers vs 2023.
- **Region:** The decrease in volume was broadly consistent across English regions, with the smallest decrease in **East of England (-1%), where the spend increased by 18%** (see below).

Table 33: Domestic Overnight Trips by England Region: Spend (£m)

Spend (£ million)	2023	2024	% change 2023/24	Share of England spend
London	£4,724	£5,456	15%	20%
North East	£931	£869	-7%	3%
North West	£3,896	£4,290	10%	16%
Yorkshire	£2,291	£2,445	7%	9%
West Midlands	£2,157	£1,879	-13%	7%
East Midlands	£1,688	£1,838	9%	7%
East of England	**£2,085**	**£2,467**	**18%**	**9%**
South West	£4,538	£4,500	-1%	16%
South East	£3,534	£3,363	-5%	12%

- **Destination type:** The decline in trips is visible in all types; however, seaside and small towns decreased most (-14%).

331. Furthermore, the most recent Visit Britain report on visitor trends (*Visitor Attraction Trends in England 2023 (published July 2024))* provides the following findings:

- Attractions in England reported an 11% increase in the volume of total visits from 2022 to 2023, however this is still 28% below 2019 levels.
- Museums / Art Galleries and Places of Worship received the highest increase in visits year on year (20%) and (19%) respectively.
- In 2023, the sector grew due to an increase in overseas visits to attractions (+80% on 2022) and an increase in school trips in 2023. Overall, sites reported a 2% decline in domestic visits.
- The British Museum was the most visited free attraction in 2023, attracting 5.8m visitors, up 42% on 2022.
- The Tower of London was the most visited paid for attraction in 2023, attracting 2.8m visitors, up 38% on 2021.
- As with the retail sector, the impact of rising supplier and energy costs were having an impact with sites finding int increasingly difficult to absorb these and therefore passing it on to visitors.

International Visitation and Future Trends

332. International visitors represent an important sector of the UK tourism and hospitality market. Provisional data from Visit Britain (based on the *International Passenger Survey Q3 2024*) shows:

- from April to June 2024 (Q2), there were 10.8m inbound visits to Great Britain, up 4% vs Q2 2019 and up 9% vs Q2 2023. A slight slowdown in growth can be seen in Q2 vs Q1 when comparing to 2023 (9% vs 14%). Estimates for the first half of 2024 (Jan-Jun) shows visits at 19.5m, up 4% vs 2019 and up 11% vs 2023.
- Visitors spent £7.9bn in Q2, up 15% vs Q2 2019 and level with Q2 2023. Over the first 6 months of the year, visitors spent £13.4bn, up 15% vs 2019 and down 1% vs 2023.
- Nights totalled at 134.8m over the first half of the year (with a Q2 record), up 12% vs 2019 and up 5% vs 2023.

333. The *"MIDAS: A Global Report - Motivations, Influences, Decisions and Sustainability in a Post-Pandemic Era,' December 2022*" by VisitBritain was an extensive study that examined international tourism motivations, influences, decisions, and sustainability in a post-pandemic era. It provided insights into the current and future landscape of international tourism, focusing on post-pandemic travel trends and the perceptions of Britain as a destination.

334. In terms of Britain's offer, there are strong and consistent perceptions of Britain as being a place where history meets modernity and a range of sites and ('must-see') experiences are offered within easy access. The key negative is that the country is not seen as offering good value for money.

335. The report provides three key themes as 'Emergent Drivers' in global tourism, namely, Wellbeing, Sustainability and Accessibility & Inclusion. It concludes that;

- Wellbeing - is of emerging importance amongst global tourists and presents an activation opportunity for Britain that requires further exploration and understanding;
- Sustainability - is an emerging driver of importance in destination selection for international tourists, most relevant to Experience Seekers and younger travellers but requires clarity, signalling and impact reinforcement; and
- Accessibility & Inclusiveness - One in four tourists or their immediate travelling companion(s) will have accessibility needs, but this is not a barrier in wanting to visit Britain.

336. The overall conclusions are that:

- Demand is back for global tourism and Britain remains a priority destination, even for those who have recently visited.
- Value for money has become the dominant driver and remains a ‘perceptual’ weakness for Britain. It is anticipated that ‘value’ will continue to increase in importance and tourists are looking for ways to mitigate financial risk.
- Britain’s strength as a destination choice lies in its (iconic) diversity of history and modernity in one, easy to navigate place. A brand framework is derived from the study, including identification of important ‘regional flexes.’
- Visitors to Britain discover it to be easier, more affordable and more welcoming than perhaps expected.
- Emerging themes of wellbeing, sustainability and inclusivity are becoming a stronger priority, but each needs more work in terms of truly understanding what they could and should mean for British tourism.
- Within a wide array of inter-personal and digital sources remain a key source of inspiration, information and trust throughout the stages of the tourism journey and package bookings remain particularly strong for some of our largest inbound markets.

337. These trends have a bearing locally for the Council area in terms of curating the mix of experiences that could potentially be promoted as part of any future destination plan. The outdoors, participation, culture and beverage opportunities are experiences that could be promoted within the Council area especially in light of the regeneration initiatives such as revitalising the riverside in Grays as part of the Towns Fund Deal.

Hotel Market Trends & Regional Occupancy Levels

338. The UK hotel market in 2024 showed strong recovery signs, with increased occupancy and investment activities. According to CoStar, the UK hotel market has fully recovered from the effects of the pandemic. Room demand has increased annually, leading to occupancy returning to levels experienced five years ago with the twelve-month occupancy for UK hotels is around 78% in the year to January 2025. This is one of the highest occupancies across the European hotel market, indexing just ahead of data from 2020.

339. The growth in the UK hotel sector overall is being driven by budget (e.g. Premier Inn and Travelodge) and midscale chains (e.g. Holiday Inn, Novotel, and Comfort Inn), particularly in regional hubs. City centres are seeing a surge in large-scale developments, boosting bedspace supply in hotspots like London and Manchester. Converting existing buildings into hotels is gaining traction. There is a growth in boutique and lifestyle brands (e.g., Moxy Hotels, Locke Apart-Hotels, Zedwell Hotels) blending hotel, co-working, and social spaces. Meanwhile, sustainability is climbing the agenda, with greener builds and Environmental, Social, and Governance (ESG) efforts becoming key to attracting eco-conscious travellers and businesses alike.

340. According to Visit England's latest '*Occupancy Survey (published March 2025)':*

- room occupancy for February 2025 was at 73%, on par with February 2024.
- weekend occupancy for February 2025 was at 74%, now ahead of weekday occupancy (73%).

341. Average Daily Rates (ADR - this is a measure of the average rate paid for rooms sold, calculated by dividing room revenue by rooms sold; it excludes VAT and other revenue such as breakfast and dinner) decreased 3% in February 2025 to £137, with Revenue per Available Room (RevPAR is calculated from the total room revenue divided by the total number of available rooms) following the same pattern (-3% to £101).

342. From the hospitality industry's point of view there have been a number of factors that have and continue to affect the sector:

- **Rising base rates**: Directly influence business costs and consumer behaviour and an overall high base rate discourages consumer spending.
- **Rising operational costs**: this includes the increases to employer National Insurance contributions and rising business rates especially as Retail, hospitality and leisure (RHL) relief will be extended into 2025/2026 but at 40% with a cap of £110,000 per business. This is a reduction from 75% which means that any business currently in receipt of RHL relief on a single premises will see a substantial increases in rates payable.

343. London remains a key destination, bolstered by business travel, events, and international visitors. The average ADR and RevPAR for England was £137 and £101, respectively. In comparison, the East of England had a lower ADR of £93 and RevPAR of £66.

344. Regionally, the Northeast saw an increase of 6% in occupancy in February 2025 and the Northwest an increase of 4%. Both regions also experienced an increase in ADR and RevPAR. London's occupancy in February 2025 was 1% lower than 2024, with a 4% decline in ADR and 6% drop in RevPAR.

Table 34: ADR and RevPAR by Region (February 2025)

ADR	2023	2024	2025	% change 2024-25
East Midlands	£83	£88	£91	3%
East of England	£93	£92	£93	0%
Greater London	£185	£186	£179	-4%
Northeast England	£82	£85	£87	3%
Northwest England	£99	£95	£96	1%
Southeast England	£92	£92	£93	0%
Southwest England	£92	£94	£93	0%
West Midlands	£98	£98	£98	0%
Yorkshire & Humberside	£86	£88	£87	0%
TOTAL ENGLAND	£140	£142	£137	-3%
RevPAR	**2023**	**2024**	**2025**	**% change 2024-25**
East Midlands	£55	£66	£66	0%
East of England	£66	£67	£66	0%
Greater London	£128	£139	£131	-6%
Northeast England	£59	£63	£70	11%
Northwest England	£69	£66	£72	8%
Southeast England	£63	£66	£68	2%
Southwest England	£63	£64	£65	1%
West Midlands	£67	£69	£70	2%
Yorkshire & Humberside	£63	£69	£69	1%
TOTAL ENGLAND	£97	£104	£101	-3%

Source: Visit Britain's England Occupancy Survey (February 2025)

345. Whilst inbound tourism rebounded strongly following from the pandemic, for example, Heathrow Airport reporting passenger numbers surpassing 2019 levels, an uncertain macroeconomic climate and geopolitical tensions pose a potential downside to travel and affecting the hotel sector. Rising operational costs and economic pressures may lead to consolidation within the sector, with larger operators potentially acquiring smaller establishments to achieve economies of scale.

Current Provision & Distribution

346. In relation to the current supply of bedspaces, our analysis has been informed through hotels listed on a variety of Online Travel Agents (OTAs) such as Booking.com, Expedia.com, Hotels.com and Tripadvisor.com.

347. Our evaluation of current provision shows that within the Council area there are currently 10 hotels with an estimated total of **878 bedrooms**. A detailed breakdown of current hotels is provided in the table below (see also map overleaf):

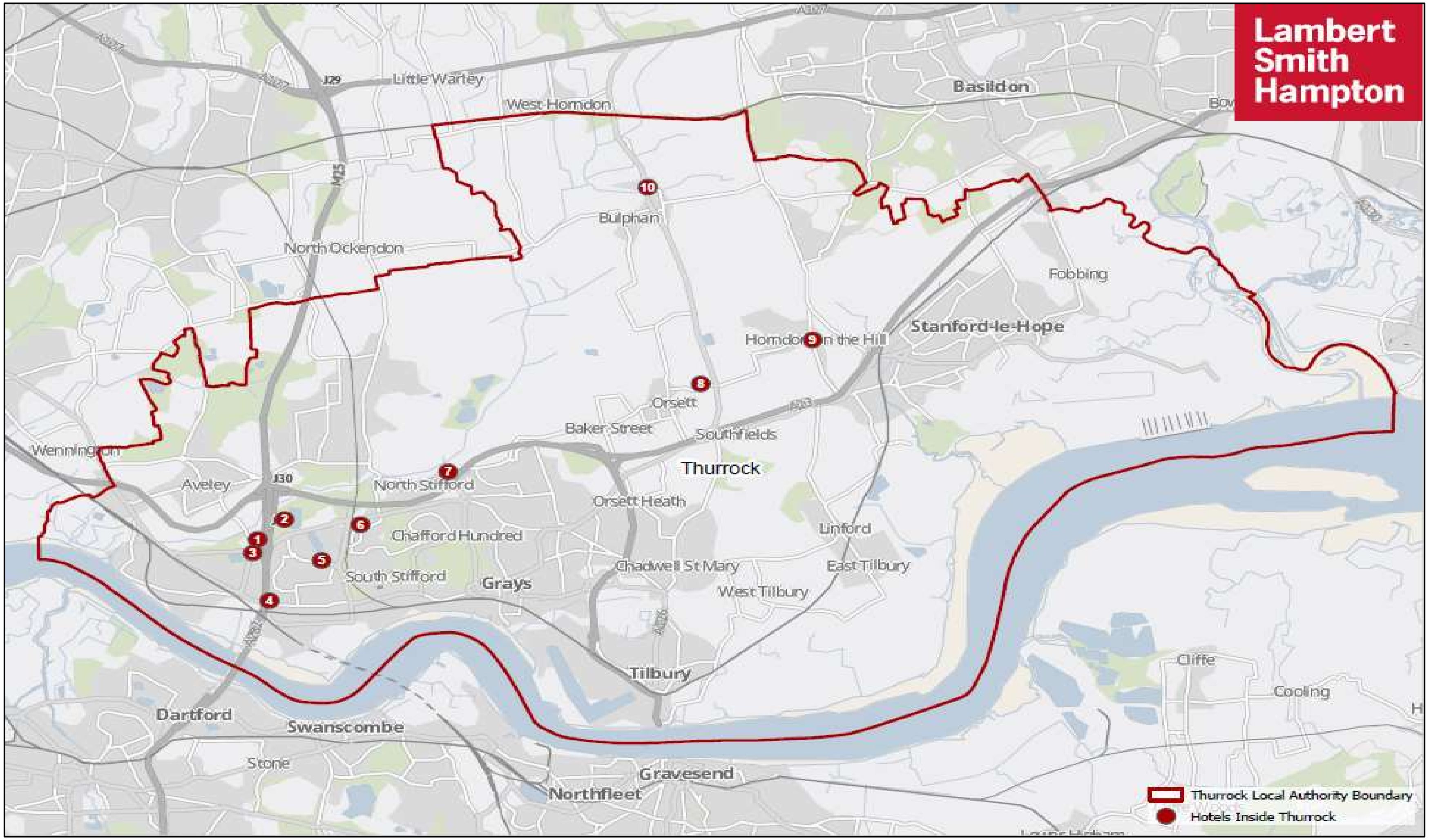
Table 35: Thurrock Council Area: Hotel Provision (Bedspaces / Gradings)

Ref	Hotel Name	Address	Bed Spaces	Grade / Rating
1	Best Western The Thurrock Hotel	Ship Ln, Aveley, Purfleet-on-Thames, Purfleet , RM19 1YN	65	3 STAR HOTEL
2	ibis budget West Thurrock	Moto Service Area Off A1306, Arterial Road, Grays, RM16 3BG	48	BUDGET
3	Premier Inn Thurrock West	Stonehouse Lane, West Thurrock, RM19 1NS	193	BUDGET
4	ibis London Thurrock M25	Weston Avenue West Thurrock Essex, London, RM20 3JQ	168	3 STAR HOTEL
5	Travelodge Thurrock Lakeside	Lakeside Shopping Centre, Thurrock Way, RM20 2AB	74	BUDGET
6	Premier Inn Thurrock East	Fleming Road, Unicorn Estate, Chafford Hundred, Grays, RM16 6YJ	83	BUDGET
7	Mercure Thurrock Stifford Hall	High Road, North Stifford, Grays, RM16 5UE	97	3 STAR HOTEL
8	Orsett Hall Hotel	Prince Charles Ave, , RM16 3HS	56	4 STAR HOTEL
9	The Bell Inn	Horndon on the Hill, High Rd, Stanford-le-Hope, SS17 8LD	26	4 STAR HOTEL
10	Ye Olde Plough House	Brentwood Road , Bulphan, RM14 3SR	68	3 STAR HOTEL
		TOTAL ROOMS	**878**	

348. The current supply comprises a broad mix of provision with an even split in terms of bedrooms between Budget hotels accounting for c.45% of the stock and 3-Star hotels some 45%. The remainder is composed of 4-Star provision. The provision comprises both national chains (e.g. Premier Inn, Travelodge, Mercure) and independent provision (e.g. Orsett Hall Hotel, The Bell Inn).

349. As the map below shows, within the Council area there is a cluster around the M25 and particularly around Lakeside / Purfleet reflective of its ease of accessibility by potential travellers. However, it is also noted that there is no provision across the main town centres including Grays or Tilbury.

Figure 15: Thurrock Council Area: Distribution of Hotels



350. In terms of the wider provision across surrounding local authorities is as follows:

Figure 16: Distribution of Hotels in Surrounding Local Authorities

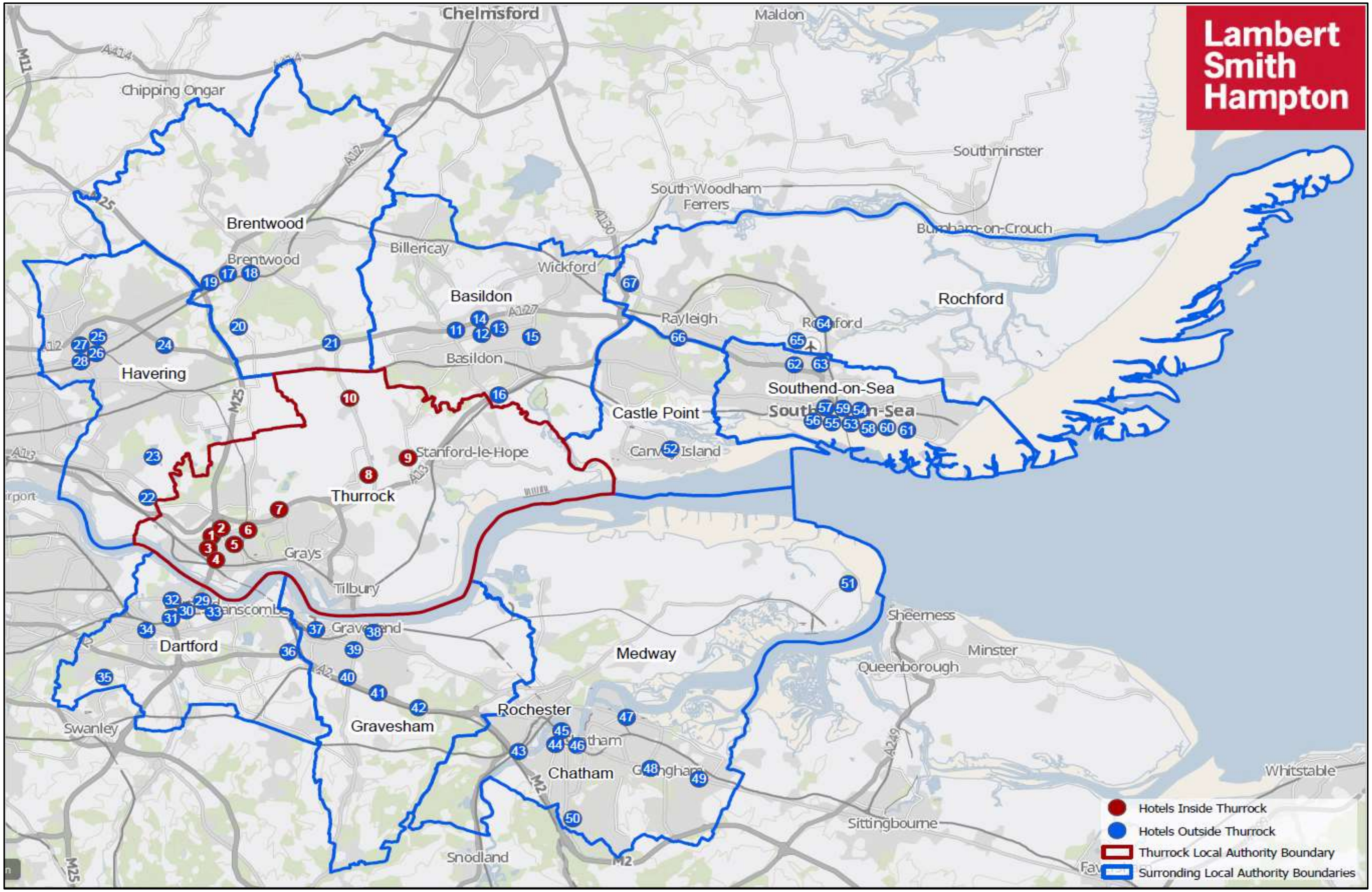


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Table 36: Hotel Provision in Surrounding Authorities (Bedspaces / Gradings)

Ref	Hotel Name	Address	Bed Spaces	Grade / Rating
BASILDON BOROUGH COUNCIL AREA				
11	Campanile Basildon - East Of London	A127 Pipps Hill, Southend Arterial Road, Basildon, SS14 3AE	97	2 STAR HOTEL
12	Holiday Inn Basildon	Cranes Farm Road, Waterfront Walk, Festival Leisure Park, Basildon, SS14 3DG	148	3 STAR HOTEL
13	Travelodge Hotel - Basildon	Festival Leisure Park, Basildon, SS14 3WB	60	BUDGET
14	Premier Inn Basildon Festival Park	Festival Leisure Park, Pipps Hill Road, Basildon, SS14 3WB	82	BUDGET
15	Premier Inn Basildon (East Mayne) hotel	Felmores, East Mayne, Basildon, SS13 1BW	56	BUDGET
16	Premier Inn Basildon South	High Road, Fobbing, Stanford le Hope, SS17 9NR	61	BUDGET
BRENTWOOD BOROUGH COUNCIL AREA				
17	Marygreen Manor Hotel	London Rd, Brentwood, CM14 4NR	44	4 STAR HOTEL
18	Premier Inn Brentwood	169 Kings Road, Brentwood, CM14 4EG	122	BUDGET
19	Holiday Inn Brentwood M25 Jct.28	Brook Street, Brentwood, CM14 5NF	150	3 STAR HOTEL
20	De Rougemont Manor	Great Warley St, Brentwood, CM13 3JP	76	5 STAR HOTEL
21	Travelodge Hotel - Brentwood East Horndon	Arterial Road, East Horndon , Brentwood, CM13 3LL	45	BUDGET
LONDON BOROUGH OF HAVERING				
22	Premier Inn Rainham	New Rd, , RM13 9ED	61	BUDGET
23	The Berwick Manor Hotel	Berwick Pond Rd, , RM13 9EL	15	2 STAR HOTEL
24	Palms Hotel	Southend Arterial Rd, , RM11 3UJ	140	2 STAR HOTEL
25	Harefield Manor Hotel	48 Main Road, Romford, RM1 3DL	60	2 STAR HOTEL
26	Premier Inn Romford Central	Mercury Gardens, Romford, RM1 3EN	102	BUDGET
27	Travelodge Hotel - London Romford	St Edwards Way Market Place, Romford, RM1 3AB	80	BUDGET
28	Travelodge London Romford The Quadrant	The Quadrant, Market Pl, RM1 3ER	65	BUDGET
DARTFORD BOROUGH COUNCIL AREA				
29	Campanile Hotel Dartford Bridge M25	1 Clipper Boulevard West, Crossways Business Park, Dartford, DA2 6QN	125	2 STAR HOTEL
30	DoubleTree by Hilton Dartford Bridge	Masthead Close, Crossways Business Park, Dartford, DA2 6QF	185	4 STAR HOTEL
31	Holiday Inn Express London	University Way, Dartford, DA1 5PA	126	BUDGET
32	Premier Inn Dartford	The Bridge Business Park, Halcrow Avenue, Dartford, DA1 5FX	60	BUDGET
33	Travelodge Hotel - Dartford	Charles Street, London, DA9 9AP	65	BUDGET

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Ref	Hotel Name	Address	Bed Spaces	Grade / Rating
34	The Royal Victoria and Bull	1 High Street, Dartford, DA1 1DU	24	2 STAR HOTEL
35	Rowhill Grange Spa and Hotel	Top Dartford Road, Dartford, DA2 7QH	38	4 STAR HOTEL
36	Spring River Ebbsfleet by Marston's Inns	Talbot Ln, Ebbsfleet Valley, , Swanscombe, DA10 1AZ	104	3 STAR HOTEL
GRAVESHAM BOROUGH COUNCIL AREA				
37	Granby Hotel	1 The Hill, Gravesend, DA11 9ES	36	2 STAR HOTEL
38	Shamrock Guest House	118 Milton Road, Gravesend, DA12 2	20	1 STAR HOTEL
39	Premier Inn Gravesend Central	Wrotham Rd, Gravesend, DA11 7LF	55	BUDGET
40	Travelodge Gravesend hotel	Coldharbour Rd, , DA11 8AB	61	BUDGET
41	Best Western Manor Hotel and Suites	1 Hever Court Road, , DA12 5UQ	63	3 STAR HOTEL
42	Inn on the Lake Hotel	Watling St, Shorne, Gravesend, DA123HB	80	2 STAR HOTEL
MEDWAY COUNCIL AREA				
43	Premier Inn Rochester	Medway Valley Leisure Park, Chariot Way, Rochester, ME2 2SS	161	BUDGET
44	Holiday Inn Rochester - Chatham	Maidstone Road, Rochester, ME5 9SF	150	3 STAR HOTEL
45	Travelodge Rochester	11 Cory's Road, , ME1 1GR	81	BUDGET
46	St George Hotel	7 New Road Avenue, Chatham, ME4 6BB	47	2 STAR HOTEL
47	Premier Inn Chatham/Gillingham Victory Pier	Blake Avenue, Gillingham, ME7 1GB	80	BUDGET
48	Premier Inn Gillingham Business Park	Will Adams Way, Gillingham, ME8 6BY	76	BUDGET
49	Premier Inn Gillingham Rainham	High Street, Rainham, Gillingham, ME8 7JE	26	BUDGET
50	Bridgewood Manor Chatham Kent	Near Bluebell Hill, Walderslade Woods, Chatham, ME5 9AX	100	3 STAR HOTEL
51	The Lodge Guest House	Chapel Road, , ME3 0BZ	16	1 STAR HOTEL
CASTLE POINT BOROUGH COUNCIL AREA				
52	The Oysterfleet Hotel	21 Knightswick Rd, Canvey Island, Castle Point, SS8 9PA	40	2 STAR HOTEL
SOUTHEND-ON-SEA CITY COUNCIL AREA				
53	The Hope Hotel	34 Marine Parade, Southend-on-Sea, SS1 2EJ	30	1 STAR HOTEL
54	Park Inn by Radisson Palace, Southend-on-Sea	Church Road, Southend-On-Sea, SS1 2AL	137	3 STAR HOTEL
55	Seven Hotel	7 Clifton Terrace, Southend-on-Sea, SS1 1	37	2 STAR HOTEL
56	Muthu Westcliff Hotel	18-20 Westcliff Parade, Westcliff-on-Sea, SS0 7	55	2 STAR HOTEL
57	Southend Central Hotel	11 Park Road, Westcliff-on-Sea, SS0 7PQ	18	1 STAR HOTEL

Ref	Hotel Name	Address	Bed Spaces	Grade / Rating
58	Premier Inn Southend On Sea (Eastern Esplanade) Hotel	Eastern Esplanade, Southend-On-Sea, SS99 1YY	81	BUDGET
59	Travelodge Hotel - Southend on Sea	33 Chichester Road, Southend-on-Sea, SS1 2JP	56	BUDGET
60	Premier Inn Southend-On-Sea Thorpe Bay	213 Eastern Esplanade, Southend-on-Sea, SS1 3AD	43	BUDGET
61	Roslin Beach Hotel, Southend	Thorpe Esplanade | Thorpe Bay | Essex | SS1 3BG , London Southend-on-Sea, SS1 3BG	62	3 STAR HOTEL
62	Premier Inn Southend Airport	Thanet Grange, Princes Avenue, Southend-on-Sea, SS2 6GB	80	BUDGET
63	Holiday Inn Southend, an IHG Hotel	51 Eastwoodbury Crescent, Southend-on-Sea, SS2 6	129	3 STAR HOTEL
ROCHFORD DISTRICT COUNCIL AREA				
64	The Rochford Hotel	Bradley Way, Rochford, SS4 1BU	20	2 STAR HOTEL
65	Skylark Hotel	Aviation Way, SS2 6UN	76	2 STAR HOTEL
66	Premier Inn Basildon Rayleigh	Rayleigh Weir, Arterial Road (A127), Basildon Rayleigh, SS6 7SP	50	BUDGET
67	The Chichester Hotel	Old London Rd, Wickford, SS11 8UE	36	3 STAR HOTEL
TOTAL ROOMS ACROSS SURROUNDING LOCAL AUTHORITIES			**4,193**	

Source: LSH Research

351. From the table and map, it can be seen that the pattern of distribution in the surrounding local authorities is as follows:

- Basildon Borough Council (504 bedrooms) – clustered around along the Southend Arterial Road and close to Pipps Hill Industrial Estate;
- Brentwood Borough Council (437 bedrooms) – provision around the centre of Brentwood which is the principal town centre for the Borough;
- Castle Point Borough Council (40 bedrooms) – one hotel located on Canvey Island, therefore very limited provision;
- Southend-on-Sea City Council (728 bedrooms) – being a seaside resort, the main concentration provision is unsurprising clustered along the promenade of the City;
- Rochford District Council (182 bedrooms) – comparatively lower level of provision focussed on the vicinity of Rochford and Rayleigh;
- London Borough of Havering (523 bedrooms) – provision is centered around Romford;
- Dartford Borough Council (727 bedrooms) – as with the Thurrock Council area, there is a particular concentration along the M25 (Junction 1a) with the remainder interspersed across the Council area;
- Gravesham Borough Council (315 bedrooms) – the provision is mainly around the Gravesend built-up area; and
- Medway Council (737 bedrooms) – provision is along the built up areas of Chatham, Gillingham and Rochester.

352. In terms of the hotels in the surrounding authorities, there are an estimated 4,193 total bedrooms representing a broad average of 466 bedrooms across the surrounding authorities. In this context, the provision in the Thurrock Council area of some 878 bedrooms is above this average and represents the largest in comparison to the surrounding authorities. Furthermore, this provision is composed a mix of budget to four star provision providing visitor choice from business travellers to families.

353. In response to the question on what improvements could be made to the Thurrock Council area's leisure offer that would make respondents visit / partake in leisure activities more often (Question 53), only 0.5% from the Study Area (Zones 1-10) suggested 'cheaper hotels'.

Future Outlook

354. Thurrock's ongoing economic development, infrastructure projects, and its role as a transport hub, suggest that demand for hotel accommodation will remain strong. Future drivers for demand are likely to be influenced by the following factors:

- **Strategic location** - Thurrock's proximity to the major transport artery of the M25 makes it a convenient stopover for travellers heading to London, the south coast, or the Port of Tilbury. This accessibility supports consistent demand from both leisure and business travellers. Furthermore, under the future plans for Purfleet (Planning Ref: 17/01668/OUT) a potential 20,000 sqm hotel is also proposed, which if delivered will add to the current stock.
- **Retail provision** - Lakeside overall draws visitors from surrounding regions. Events, shopping trips, and leisure activities contribute to the need for nearby accommodations.
- **Industrial activity** – As the council area is home to significant industrial and logistics hubs. This is likely to attract business travellers and contractors requiring short-term accommodation.

Summary

355. The analysis on hotel provision has shown the following:

- While specific data for Thurrock is limited, national trends indicate a gradual increase in bedspace occupancy, suggesting a positive outlook for hotel utilisation.
- Within Essex as a whole, overnight stays rose by 11%, and day trips increased by 5% compared to the previous year. It is notable that day visit spend in Thurrock is £342m a year, higher than any other local authority in Essex, attributed to Lakeside.
- The provision in the Thurrock Council area of some 878 bedrooms is the largest and above the average in comparison to the surrounding authorities.
- The current provision is good and comprises of a mix of provision from budget to four star hotels providing visitor choice from business travellers to families.

- Location is key factor with the cluster around the M25 particularly Lakeside / Purfleet reflective of its ease of accessibility by potential travellers.
- There is no notable current town centre provision which should be encouraged by the Council.
- As hotel accommodation forms part of the commercial leisure offer and as such needs to be promoted to help build greater resilience into the daytime and evening economies of the Council area's centres. The Council has the opportunity to proactively engage and collaborate with Visit Essex as part of the LVEP and Destination Plan process and raise the tourism profile of its centres and provision. The Council has the potential to curate a mix of experiences within the Council area that could potentially be promoted as part of any future destination plan to retain and increase dwell time for visitors and convert day trips to overnight stays and spend in its town centres.

356. In the short term however, an uncertain macroeconomic climate and geopolitical tensions may impact travel and affect the hotel sector. Together with rising operational costs and domestic economic pressures this may lead to lower patronage and consolidation within the sector.

357. Finally, any investment in the hotel sector will be very much subject to market demand which should be encouraged and directed to town centres first in accordance with national and local plan policy objectives to build resilience within centres.

10. KEY FINDINGS & RECOMMENDATIONS

358. This concluding section provides high-level advice and recommendations to help the Council effectively plan and manage the vitality and viability of its centres. The National Planning Policy Framework (NPPF) specifically states that planning policies and decisions should support the role that town centres play “at the heart of local communities” and should promote the long term vitality and viability of centres “*by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters*” (paragraph 90a).

359. Aligned with the NPPF and National Planning Practice Guidance (PPG), our advice takes account of the lifetime of the emerging plan period to 2044 (and the quantitative modelling goes further to 2045) but specifically focuses on the next five-to-ten-year period. We have robustly assessed both the quantitative and qualitative need for new retail (comparison and convenience goods) floorspace and commercial leisure uses over the forecast period. These assessments have been informed by a comprehensive review and update of the dynamic economic and market trends that are impacting on the retail and leisure sectors. This includes the resulting impact of the pandemic and the implications of recent high levels of inflation and the cost of living crisis.

360. This assessment draws on a robust evidence base informed by the 1,000 household surveys conducted in May 2025. It also draws on updated health check assessments for the Council’s centres highlighted in **Volume 3**. These health checks are based on a series of Key Performance Indicators (KPIs), informed by the NPPG, that help identify the vitality and viability of centres, their SWOTs, and their relative role and function in the network and hierarchy of centres.

361. This study also takes account of the series of reforms to the planning system issued by the Government that were made into law through the amended Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020 that came into effect from 1st September 2020.

362. It is against this background, including current economic challenges that we provide the Council with our robust recommendations to help inform plan-making and decision-making over the next 5-10 years, and over the period to 2045. Our advice covers:

- the need (‘capacity’) for new retail (convenience and comparison goods) floorspace and other main leisure and town centre uses.
- the requirement to allocate a range of suitable sites to meet the scale and type of any forecast need identified, looking at least ten years ahead (NPPF, paragraph 90d).
- the current definition of the network and hierarchy of centres, and whether this reflects existing and future shopping and leisure trends, planned investment and regeneration strategies, and future housing growth.

- the need to update and change the definition of town centre boundaries and Primary Shopping Areas in light of the key findings and evidence, and recent planning reforms.
- the setting of a local impact assessment threshold to inform the assessment and determination of applications for new retail and leisure developments proposed outside of town centres (NPPF, paragraph 90).

REFORM OF USE CLASSES ORDER & PERMITTED DEVELOPMENT RIGHTS

363. As previously mentioned, the Government has issued a series of reforms to the planning system. These reforms principally relate to Permitted Development Rights (PDR); the Use Classes Order (UCO) and more recently the Levelling-up and Regeneration Act 2023.

364. The impact of the changes will still require the definition of a town centre boundary and a primary shopping area, or a primary 'commercial' area to be the foci for E and F Classes. Also, in most instances the former use classes can be 'translated' into the equivalent categories within the new E and F Classes. This can assist with the interpretation of policy wording and the effective use of conditions.

365. The changes have implications for the former designations of primary and secondary shopping frontages, as the control of shopping and service uses is legally less enforceable in commercial areas, as a change of use between Class E does not constitute development and will therefore not require planning permission. It should be noted that the effectiveness of frontage policies was declining before the pandemic and previous changes to the UCO.

366. Hence beyond 2025, town centres are likely to consolidate their retail and shopping role with more emphasis on place and non-transactional uses, this could include high activity-based land uses such as health and education being located in more central locations and stem previous trends of decentralisation.

367. Permitted Development Changes (Amendment No. 2) (2020) released in August 2020 (under The Town and Country Planning (General Permitted Development) (England) (Amendment) (No. 2) Order 2020), introduced Class AA and AB that allows new residential on detached or terrace buildings in commercial or mixed-use areas (but not in conservation areas). This could potentially lead to the loss of commercial floorspace to residential.

368. Furthermore, the Town and Country Planning (General Permitted Development etc.) (England) (Amendment) Order 2021 (Order) that came into force in August 2021 created a new class of permitted development right (Class MA) into the Town and Country Planning (General Permitted Development) Order 2015 (GPDO) authorising changes of use from Use Class E commercial uses to Use Class (C3) residential.

369. For any application submitted on or after 5 March 2024, there is now no limit to the floorspace that can be converted under Class MA and there is no requirement for the building to be vacant for three months.

370. These changes replace existing retail, light industrial and office to residential rights with rights applying to all of the relatively recent Use Class E in which those uses now sit. Exercise of the right is subject to prior approval by the local planning authority and therefore would be subject to some planning control. Details must be submitted relating to flooding, transport, contamination, noise amenity, natural light, fire safety and agent of change issues.

371. Research conducted by LSH and REVO (Shaping Tomorrows Places – June 2025) provides a broad indication of impact of these changes and shows that both have proved controversial and have divided opinion. On the one hand they are viewed positively by some as helping to revitalise and repurpose high streets and boost housing delivery, by making it easier to change the use of buildings and respond more flexibly to dynamic market trends and demand. On the other hand, it is argued that the reforms seriously undermine the plan-led approach to town centre regeneration and place-making. Almost half of respondents from the private sector believe that reform has had or will have a positive impact (45%), compared with the public sector (36%).

372. In response, several Councils have turned to Article 4 Directions (A4Ds) to try to remove PDRs. Where correctly applied, they can help prevent "*wholly unacceptable adverse impacts*" (National Planning Policy Framework; paragraph 54) on the vitality and viability of centres through the potential loss of their primary shopping areas.

373. The implications arising from these changes both locally and nationally result in more flexibility and are likely to be focussed on the peripheral parts of existing town centres, reflecting the influence of land values, but the outcomes are unclear, particularly the likely scale of increased residential and loss of commercial space and this should be investigated and monitored further. In strategic terms, and especially for the future of town centres, the PDR deregulation is likely to add to the already high levels of uncertainty surrounding their future composition.

ARTICLE 4 DIRECTIONS

374. The latest revision to the NPPF has tightened the rules and restricts the ability of local authorities to secure Article 4 directions (A4Ds). The revised version of the NPPF (paragraph 54) tightens this scope in relation to changes of use from commercial to residential, stating that such directions should be used where they are "*necessary to avoid wholly unacceptable adverse impacts".* These impacts *"could include loss of the essential core of a primary shopping area*", thereby "*seriously undermining its vitality and viability*". However, the paragraph contains the caveat that such a direction would be "*very unlikely to extend to the whole of a town centre*".

375. The Council should be mindful of the following in considering the use of A4Ds:

- it will be difficult to restrict the use of PD rights using A4Ds;
- restriction is likely to be more difficult for residential PD rights than non-residential, but in all cases "*robust evidence*" will be needed to justify their use;

- there is a high bar, and the scope of any A4D which is used must be limited geographically to the smallest area possible as opposed to an entire area being covered by an A4D; and
- in terms of this area, the Council will need to be clear with targeted evidence to show why PD rights need to be restricted e.g., loss of employment space; preserving community uses or protecting a historic area / amenity.

376. Policy for permitted development was changed in March 2024 (The Town and Country Planning (General Permitted Development) (England) (Amendment) Order 2024 that came into force on 5th March 2024 (under Statutory Instruments 2024 No.141) to remove the cap on conversion sizes (previously up to 1,500 sqm) and the need for assets to be vacant (previously needed to be vacant for a continuous period of at least 3 months immediately prior to the date of the application). The changes to PDR – allowing offices of unlimited size to be converted without planning permission or the need for affordable housing – has provided an alternative use for surplus stock. As a result, it is reported that some authorities are hastening to block office-to-residential conversions and are consulting on A4Ds to limit the number of conversions.

377. In terms of retail and leisure uses our assessment of the centres within the Borough has not yielded any threat to commercial integrity of a retail/leisure area or particular commercial building or ground floor use that warrants this protection.

LEVELLING-UP AND REGENERATION ACT 2023

378. The Levelling-up and Regeneration Bill received Royal Assent at the end of October 2023 and officially became the Levelling-up and Regeneration Act 2023 (LURA 2023). The government proclaimed that LURA 2023 will "*speed up the planning system, hold developers to account, cut bureaucracy, and encourage more councils to put in place plans to enable the building of new homes*.'

379. In relation to town centres specifically, the Act enables "*local authorities powers to instigate auctions to rent vacant commercial properties in town centres and on high streets, for leases from one to five years to attract new tenants*." These rules "*can be exercised at the discretion of local authorities, based on their local context and need, but only on properties which have been vacant for over 12 months*". These 'High Street Rental Auctions' (HSRAs) became effective from December 2024. They have been designed to bring persistently vacant premises back into use, particularly where the premises is part of wider regeneration plans and/or the landlord is being uncooperative.

380. The rules apply to commercial premises (other than premises last used as a warehouse, which are specifically exempt) and which satisfy the following criteria:

- situated in an area which a local authority has designated as being a high street or town centre. These will be areas with a high concentration of premises with high street uses. These uses include "traditional" uses associated with a high street, like shops, restaurants and pubs, as well as offices and public entertainment spaces, communal halls. Manufacturing processes are even included in high street uses as long as they are carried on near to, and compatible with, other high street uses. A local authority is required to maintain and make available to the public a list describing, and a map showing, any designations that are in force in its area.

- unoccupied for the last year or for 366 days in the last two years,
- suitable for high street use and
- considered by the local authority to benefit the local economy, society or environment if occupied for high street use.

381. To execute the HSRA, the local authority is responsible for both designating their high street or town centre and identifying the suitable vacant premises. They will then issue an initial notice of intent to the landlord, followed by an 8-week grace period. If still unlet, the local authority can serve a final notice and the premises is then subject to the auction process.

382. In the context of Thurrock reference has been made to a long term vacancies, namely the former State Cinema in Grays. This is a site that conforms to the above criteria and therefore could be subject to the above as part of a wider regeneration strategy for the centre.

383. To note, the general consensus is that LURA, and HSRAs specifically, provide the potential to redefine our high streets and town centres through a collaborative process in which both the local authority and property owners will need to work together especially where premises have remained unoccupied for a specified duration and in combating long-term vacancies. It remains to be seen whether Local Authorities have the resources to execute the powers given and the extent to which they will be utilised and whether they are successful in revitalising high streets and town centres. At the time of authoring this report only one local authority, namely Broxtowe Borough Council, had formally served a HSRA notice resulting in a successful re-occupation of a vacant unit in the town of Stapleford. Overall, this initiative should be part of a mix of initiatives to revitalise high streets and town centres.

RETAIL NEEDS

384. The NPPF (paragraph 90d) is clear that local planning authorities should plan to meet the need for new retail and town centre uses by "*looking at least ten years ahead*". The PPG also states that given the uncertainty in forecasting long-term retail trends and consumer behaviour, assessments "…*may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed*." Therefore, greater weight should be placed on forecasts over the next five to ten-year period.

385. The headline retail capacity forecasts from both the baseline assessment and the additional sensitivity analysis are reproduced in the table(s) below. Both show no immediate capacity for both convenience and comparison goods over the ten year period to 2035. Over the longer period to 2044/2045 again there is no capacity identified in the baseline scenario whilst under the higher growth sensitivity analysis a nominal 426 sqm net is identified, only for comparison goods, and in

2045. Overall, there is therefore no requirement for the Council to allocate any new sites for retail provision.

Table 37: Retail Floorspace Capacity Forecasts (sqm net) - Baseline

Convenience Goods					
THURROCK COUNCIL AREA	2030	2035	2040	2044	2045
REGIONAL CENTRE: LAKESIDE	-111	-136	-152	-93	-79
TOWN CENTRE: GRAYS	-46	-56	-63	-39	-33
LOCAL CENTRE: AVELEY	-3	-4	-5	-3	-2
LOCAL CENTRE: CORRINGHAM	-35	-43	-48	-30	-25
LOCAL CENTRE: SOCKETTS HEATH	-6	-8	-8	-5	-4
LOCAL CENTRE: SOUTH OCKENDON	-21	-25	-28	-17	-15
LOCAL CENTRE: STANFORD-LE-HOPE	-7	-8	-9	-6	-5
LOCAL CENTRE: TILBURY	-2	-3	-3	-2	-2
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	-56	-5,041	-5,049	-5,020	-5,013
OUT-OF-TOWN CENTRE STORES / LOCATIONS	-1,352	-1,384	-1,405	-1,329	-1,311
TOTAL: THURROCK COUNCIL AREA	**-1,639**	**-6,709**	**-6,770**	**-6,543**	**-6,487**

Comparison Goods					
THURROCK COUNCIL AREA	2030	2035	2040	2044	2045
REGIONAL CENTRE: LAKESIDE	-2,046	-3,142	-4,128	-1,221	-489
TOWN CENTRE: GRAYS	-138	-213	-279	-83	-33
LOCAL CENTRE: AVELEY	-0	-1	-1	-0	-0
LOCAL CENTRE: CORRINGHAM	-45	-69	-90	-27	-11
LOCAL CENTRE: SOCKETTS HEATH	-0	-1	-1	-0	-0
LOCAL CENTRE: SOUTH OCKENDON	-24	-37	-49	-15	-6
LOCAL CENTRE: STANFORD-LE-HOPE	-4	-7	-9	-3	-1
LOCAL CENTRE: TILBURY	-8	-12	-15	-5	-2
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	-23	-2,166	-2,177	-2,145	-2,136
OUT-OF-TOWN CENTRE STORES / LOCATIONS	-608	-772	-920	-485	-375
TOTAL: THURROCK COUNCIL AREA	**-2,897**	**-6,419**	**-7,670**	**-3,982**	**-3,053**

Source: CREAT^e Retail Capacity Model (Appendix 5 and 9, Volume 2)

Table 38: Retail Floorspace Capacity Forecasts (sqm net) – Sensitivity

Convenience Goods					
THURROCK COUNCIL AREA	2030	2035	2040	2044	2045
REGIONAL CENTRE: LAKESIDE	-70	-42	8	133	160
TOWN CENTRE: GRAYS	-29	-17	3	55	66
LOCAL CENTRE: AVELEY	-2	-1	0	4	5
LOCAL CENTRE: CORRINGHAM	-22	-13	3	42	51
LOCAL CENTRE: SOCKETTS HEATH	-4	-2	0	7	9
LOCAL CENTRE: SOUTH OCKENDON	-13	-8	2	25	30
LOCAL CENTRE: STANFORD-LE-HOPE	-4	-3	1	8	10
LOCAL CENTRE: TILBURY	-1	-1	0	3	3
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	-35	-4,994	-4,969	-4,906	-4,893
OUT-OF-TOWN CENTRE STORES / LOCATIONS	-1,300	-1,264	-1,199	-1,040	-1,005
TOTAL: THURROCK COUNCIL AREA	**-1,481**	**-6,346**	**-6,150**	**-5,669**	**-5,565**

Comparison Goods					
THURROCK COUNCIL AREA	2030	2035	2040	2044	2045
REGIONAL CENTRE: LAKESIDE	-1,581	-2,077	-2,319	1,370	2,254
TOWN CENTRE: GRAYS	-107	-140	-157	92	152
LOCAL CENTRE: AVELEY	-0	-0	-1	0	0
LOCAL CENTRE: CORRINGHAM	-34	-45	-51	30	49
LOCAL CENTRE: SOCKETTS HEATH	-0	-0	-1	0	1
LOCAL CENTRE: SOUTH OCKENDON	-19	-25	-28	16	27
LOCAL CENTRE: STANFORD-LE-HOPE	-3	-4	-5	3	5
LOCAL CENTRE: TILBURY	-6	-8	-9	5	8
ALL LOCAL CENTRES / ALL OTHER SHOPS / STORES ELSEWHERE	-18	-2,154	-2,157	-2,116	-2,106
OUT-OF-TOWN CENTRE STORES / LOCATIONS	-538	-613	-649	-97	35
TOTAL: THURROCK COUNCIL AREA	**-2,307**	**-5,067**	**-5,374**	**-695**	**426**

Source: CREATe Retail Capacity Model (Appendix 13 and 17, Volume 2)

386. Any capacity findings for individual centres must be seen in the context of the global capacity. However, this does not preclude facilitating any further investment or improvements to existing centres. Similarly, it should also not preclude the provision of local retail as part of strategic housing sites where local retail provision (e.g. small convenience stores, services etc) will be required to support communities where residents are able to access daily needs within a short walk, or cycle, to reduce car dependency.

LEISURE NEEDS

387. A high-level assessment has been provided of the potential need for new commercial leisure uses and facilities over the next 5-10 years, and over the lifetime of the plan. Even under normal circumstance it is difficult to predict the need and demand for new leisure uses, as the sector is very diverse and highly influenced by market, lifestyle and consumer trends. Predictions as to likely future need, even over the short term (i.e. the next 2-3 years), have been further complicated by the impact of the pandemic, rising inflation and the cost of living crisis. These will have an impact on leisure expenditure trends and growth, consumer preferences and business viability.

388. Notwithstanding these caveats, commercial leisure uses are a critical part of the overall offer and attraction of centres. They make a significant contribution to their overall diversity, vitality and viability of centres, and to their daytime, evening and night-time economies (the “evening” economy generally relates to all leisure activities that are open until around 11pm. The “night-time” economy is generally defined as businesses and activities with late night licences that are open beyond 11pm, particularly at the weekend).

389. As part of their future adaptation and growth, it is therefore important that the Council maintains and promotes diverse and flexible leisure uses, venues and events catering for a wide demographic in the main centres over the period to 2035 and beyond.

390. From a planning policy perspective therefore the key to meeting future, as yet unknown needs, will be the development of policies that can accommodate the changing needs of the sector and ones that can operate in the real world. This includes recognising that for many leisure uses the cost for entering a new market will be relatively high and, unlike retail outlets where store size can vary significantly, incremental development is unlikely if only small increases in market growth are identified.

391. It is also the case that the recent changes to the Use Classes Order mean that the main commercial leisure sector in terms of spend is Food and Beverage which encompasses both Class E and Sui Generis uses. As a result, any changing demand for restaurant and café uses is likely to be met by changing uses within the existing or committed town centre floorspace.

392. The headlines from the leisure needs assessment show:

- Eating out in **cafés and restaurants** to venues within the Council area is limited from the wider Study Area (Zones 1-10) and dominated by the provision in Lakeside and to a lesser extent to Grays. Within the representative council area (Zones 1-6) this increases, albeit dominated by venues at Lakeside and Grays. Based on expenditure growth, and after allocating a proportion of this growth to existing businesses to help support their viability (against a backdrop of rising costs), our high-level forecasts indicate no residual expenditure capacity up to 2035 under the baseline assessment and a nominal +£0.4m under the higher population growth scenario. To note, the growth to sustain new cafés, restaurants and bars will be very much subject to market demand. Focusing new uses in town centres will help increase competition and consumer choice, and to underpin both daytime and evening economies.

- In relation to **cinemas**, the existing Vue Cinema at Lakeside attains a good level of participation from both the Study Area (12.9%) and Council Area (75.7%). The high-level forecasts show that there is some limited capacity of up to three cinema screens based on existing provision in 2035 under both the baseline assessment and sensitivity analysis. Over the period to 2044/5, under the baseline assessment the screen capacity remains at three but increases to four screens under the sensitivity analysis.

- On **Gyms / Health and Fitness facilities** The growth in population and retention to the levels to the facilities in the Borough indicates this will support up to three additional premium gyms or two budget gym by 2035; up to five premium or four budget gyms by 2044/45 under the baseline assessment. Under the higher growth housing led population projections, this increases to three additional premium gyms or budget gyms by 2035 and up to six premium or five budget gyms by 2044/45.

- Regarding other commercial leisure uses, there is currently no identified need for **gambling venues** (e.g., bingo halls and casinos). The presence of physical gambling activities such as betting shops in high streets is also a contentious issue due to the perceived social, economic and health/wellbeing impacts on individuals and households.

- The commercial provision of **tenpin bowling, trampoline park** at Lakeside attains a good level of market share and any future provision will be subject to market demand which should be directed to town centres.

- In terms of **theatres** and **music venues**, there is a low level of market share with strong competition from venues in Central London.

- **Historic** and **cultural** attractions also attain a low market share from across the Study Area. The principal competing venues are yet again in Central London.

393. In relation to the market share of trips and activities focused on theatre, music, cultural and historic attractions the responses from the household survey indicate the centres and venues in the Council area are facing substantial competition from Central London and therefore are not necessarily achieving a good level of retention. This requires more place promotion local to the resident community to market the centres and also visitors to enable the continued vitality of the centres and venues.

394. Hotel accommodation forms part of the commercial leisure offer. The Council area has a particularly high level of hotel bedroom provision – the highest amongst surrounding authorities. The current provision is good and comprises of a mix of provision from budget to four star hotels providing visitor choice from business travellers to families. The demand for hotel accommodation is anticipated to remain strong in the Council area due its strategic location as an industrial and retail location – both of which attracting different types of hotel customers. The Council has the potential to curate a mix of experiences that could potentially be promoted as part of any future destination plan to retain and increase dwell time for visitors and convert day trips to overnight stays and spend particularly in its town centres.

395. In all cases, the forecast need for any new commercial leisure uses will be subject to wider economic, consumer and market trends, and will depend on the demand from leisure operators for representation. Where demand does exist, new uses and activities should be focussed across the Borough's main centres first, in compliance with national and local plan policy objectives to maintain and enhance their overall vitality and viability.

ACCOMMODATING RETAIL AND LEISURE NEEDS

396. The NPPF (paragraph 90d) states that planning policies should *"…allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead*". Aligned with the NPPF, the PPG (Paragraph 004, Reference ID:2b-004-20190722) identifies that town centre strategies should establish the potential for "*…development or the redevelopment of under-utilised space*" to accommodate the scale of assessed need, and the more effective and efficient use of land (for example, the scope to group particular uses such as retail, restaurant and leisure activities into hubs, or for converting airspace above shops). In turn, this will help to establish the need for centre "expansion," "consolidation" and/or "restructuring."

397. It is to be recognised that the capacity forecasts do not take account of current (or future) vacant retail floorspace in the main centres and shopping locations. Some of this vacant space (particularly in prime shopping locations) will be available and suitable for re-occupation, re-purposing and/or redevelopment both now and in the future. We therefore advise that any forecast capacity and/or market demand for new retail and commercial leisure floorspace could either be accommodated in suitable vacant units, or by the mixed-use development of vacant sites/buildings (i.e., ground floor commercial uses, with residential above).

398. As the headline retail capacity forecasts have shown there is no capacity for both convenience and comparison goods and there is no requirement for the Council to allocate any new sites for retail provision to the period to 2035.

TOWN CENTRE FUTURES

399. The NPPF requires that: *"…planning policies and decisions should support the role that town centres play at the heart of communities, by taking a positive approach to their growth, management and adaptation*" (paragraph 90). Both the NPPF and the extant plan policies support the need to maintain and enhance the long-term vitality and viability of town centres first, as the most appropriate and sustainable locations for new investment and development.

ISSUES, CHALLENGES AND OPPORTUNITIES

400. It is apparent that centres within the Borough (like other centres across the UK) are facing a myriad of issues and challenges to their vitality and viability from the dynamic changes in the retail and leisure sectors. The challenges have been further accelerated and compounded by the legacy impact of the pandemic and current inflationary macro-economic position, and include:

- the growth of online shopping and home-based leisure activities (from watching movies to eating at home);
- the increase in retail failures and closures;
- a dramatic fall in market demand for space;
- a rise in vacancies and fall in footfall; and
- limited forecast need or market demand for new retail floorspace.

401. In the context of the issues and challenges, although retail will remain a key part of town centres overall offer, vitality and viability - helping to generate trips, footfall and spend – it is critical that the policies and strategies developed for each centre help to promote greater flexibility and diversity, so that they can respond more effectively and rapidly to future trends. This flexibility and diversity will, in turn, help to create more resilient, attractive and successful town centres. It will also help to strengthen their respective roles in the network and hierarchy of centres as places to live, work, shop, study, play and visit for a wide range of uses and activities.

402. **The tables** below summarise some of the key opportunities and initiatives identified for the centres analysed based on the research and evidence. In summary the key suggestions are as follows:

- **Lakeside Regional Centre** is at the apex of the hierarchy for larger scale commercial, community, leisure and cultural development. It comprises of;
  - Lakeside Shopping Centre (Retail) – One of the UK's largest enclosed malls with over 250 shops, covering 148,645 sqm gross (1.6 million sq ft gross)
  - Lakeside Retail Park – 35,768 sqm (385,000 sq ft) gross retail park with 1,200 car parking spaces adjacent to the main Lakeside Shopping Centre.

- Thurrock Shopping Park: 26,596 sqm (286,277 sq ft) of Open A1 space with 1,646 car parking spaces
- West Thurrock Retail Park: 11,804 sqm (127,061 sq ft) and 573 car parking spaces.
- Standalone Units: including IKEA; B&Q Warehouse; Tesco Extra; Costco; Flannels; Sports Direct and Everlast Gym

- The economic need assessment has confirmed that there is no forecast capacity for new retail floorspace over and above existing commitments. In the context of current trends, it is unlikely that there will be any need and/or significant market demand for new retail floorspace space over the plan period.

- The Council's proposed visionary 'Place Proposition' may also lead to Lakeside evolving further from a shopping destination into a regional town centre. An indication of the evolving nature of the place, as well as the state of the retail economy, is seen in the recent granting of planning permission at Thurrock Shopping Park where a portion of the retail provision is set to be demolished to make way for a multi-storey logistics scheme to provide occupiers with purpose-built logistics space suitable for use as a hub for last-mile deliveries and returns.

Table 39: Lakeside: Opportunities for Growth and Transformation

Regional Centre: Lakeside
Adaptation to changing trends by encouraging mixed-use development incorporating retail, community, and social spaces.
Support flexible retail spaces and service-based growth for diverse demographics.
Opportunity to promote and encourage linked trips with centres and other attractions in the Borough.
Improve and promote greening as part of a placemaking strategy.
Combine placemaking with improved promotion.
Promote specialist retail and leisure activities that offer unique experiences.
Improve safe and accessible pedestrian and cycle routes.
Continue to promote the evening economy.
Develop event spaces within the public realm to support day and evening/night time activities and tourism.

- **Grays** is defined as a town centre and it is the Council area's main administrative, commercial, and transport hub. The town centre is at the heart of the Borough and its proximity to London and good road/rail links mean that it has the potential to be an attractive strategic location for new investment. The centre is also a key focus for regeneration in Thurrock, with major projects underway to improve its urban environment and connectivity including the town deal projects on Grays Riverfront & Beach Project (revitalising the riverside); Grays Beach Riverside Park & Kilverts Field and a Riverfront Activities Centre. Additionally, NewRiver Reit, the owners of Grays Shopping Centre, have submitted a formal planning application that includes demolishing the existing shopping centre, multi-story car park, and Crown Road office block to construct up to 860 residential units and 7,436 square meters of commercial space. Whilst Grays at present remains broadly functional and lacks identity any revitalisation will be influenced in significant part by the potential future transformation of Grays Shopping Centre. The perceptions from the household survey reinforce the fact that better placemaking and provision for leisure and the youth is desired.

Table 40: Grays Town Centre: Opportunities for Growth and Transformation

Grays Town Centre
Encourage and support the mix and diversity of town centre uses.
Encourage investment in the leisure / entertainment offer to enhance the evening economy.
Provision of facilities for the youth and intra-generational community spaces.
Improvements to public realm and encourage greening.
Develop a rolling programme of place promotion including fairs / festivals in the centre to encourage civic pride.
Develop safe and active travel and legible pedestrian and cycle routes in to, and across the town centre.
Improve on the perception of safety across the centre to encourage an evening / night time.
Encourage family oriented evening economy across the centre.
Vacant former State Cinema building is an opportunity site for alternative uses within the town centre.
Create new landmarks (such as part of Town Deal work at the Riverside) or celebrate existing ones

- **Aveley** is a small local centre within the hierarchy of centres. The emerging local plan consultation refers to desire for a wider variety of shops and the opportunity to enhance sports and recreation at Belhus Park. Considering the size of the centre the key focus should be on placemaking and ensuring that the centre remains vibrant.

Table 41: Aveley Local Centre: Opportunities for Growth and Transformation

Aveley Local Centre
Improve pedestrian safety and traffic calming measures.
Develop a cohesive place-making and promotion strategy.

Aveley Local Centre
Invest in the public realm.
Enhance pedestrian and cycling paths and routes.
Encourage amenities and events for all age groups.

- **Corringham** is one of the larger local centres with a compact and walkable layout. With a low vacancy rate future opportunities are underpinned by the encouraging more footfall to the centre, particularly in the evenings.

Table 42: Corringham Local Centre: Opportunities for Growth and Transformation

Corringham Local Centre
Invest in public realm, greenery, street furniture and public spaces.
Activate vacant spaces / areas with events and pop-ups.
Encourage family-friendly evening activities.
Develop a cohesive place-making and promotion strategy.
Enhance traffic calming, pedestrian and cycling routes.

- **Socketts Heath** is a local centre that lies along the busy A1013 (Lodge Lane). It is a vibrant centre with no vacancies that benefits patronage from the surrounding residential catchment and passing trade. The centre is therefore compact and readily walkable. Future opportunities are underpinned by better public realm provision and greening.

Table 43: Socketts Heath Local Centre: Opportunities for Growth and Transformation

Socketts Heath Local Centre
Invest in public realm, greenery and street furniture.
Enhance traffic calming, pedestrian and cycling routes.
In terms of place promotion, to highlight proximity to the annual Thurrock Beer & Cider Festival.

- **South Ockendon** is a larger local centre that serves the sizeable surrounding residential catchment. It has a low vacancy rate and its vibrancy centres on maintaining the current level of patronage. Future opportunities principally rely on placemaking and public realm improvements.

Table 44: South Ockendon Local Centre: Opportunities for Growth and Transformation

South Ockendon Local Centre
Improve environmental quality and invest in public realm, greenery and street furniture.

South Ockendon Local Centre
Enhance traffic calming, pedestrian and cycling routes.
Consider refurbishments of frontages.

- **Stanford-le-Hope** is a larger local centre that is also served by a sizeable surrounding residential catchment. It is a primarily independent led centre and the provision is reflective of this. Future opportunities principally rely on placemaking and public realm improvements.

Table 45: Stanford-le-Hope Local Centre: Opportunities for Growth and Transformation

Stanford-le-Hope Local Centre
Improve environmental quality and introduce traffic calming measures.
Centre will benefit from more greening within the core retail area.
Enhance pedestrian and cycling routes.
Consider refurbishments of frontages.
More provision for family oriented evening economy.

- **Tilbury** is another larger local centre that stretches across the central spine of Dock Road and Calcutta Road. The provision along the spine is not contiguous and the area is interspersed mainly with residential. The provision varies in terms of quality and is supported by the surrounding residential catchment and the substantial working population in the logistics and shipping industry. The investment gained through the Towns Deal funding is set to improve transport, community facilities, and heritage spaces. Key projects include revamping the Tilbury Station area (the Hub), upgrading Civic Square and building a Youth Zone (the Heart), and transforming the historic Riverside Station into a cultural hub (the Heritage). Works are already underway and future opportunities centre on building on these investments.

Table 46: Tilbury Local Centre: Opportunities for Growth and Transformation

Tilbury Local Centre
Enhance pedestrian and cycling routes.
Consider refurbishments of frontages.
More provision for family oriented evening economy.
Promote active placemaking encouraging walking connections and active frontages.
Consider more activity based pursuits and space around the Civic Square.
Capitalise and promote greening as part of a place making and promotion strategy for the centre.

Tilbury Local Centre
Continued improvement to the public realm will strengthen perceptions of the town as a place to invest and work.
Promote sustainable forms of movement and provide more/new electric vehicle charging (EVC) points across car parking areas in the centre.
Develop initiatives showcasing Tilbury's maritime past and history.

NETWORK AND HIERARCHY OF CENTRES

403. We have reviewed the Council's existing network and hierarchy of main centres in accordance with the advice set out in the NPPF (paragraph 90a) and PPG (References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in the development plan, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres).

404. As noted in **Section 2**, under extant **Policy CSTP7** on the '**Network of Centres'** details the hierarchy of the centres in the Borough. From our assessment we have reviewed the categorisation and provided recommendation for change as set out below.

405. Considering Lakeside Basin specifically, we are of the view that its current definition and role as a "Regional Centre" in the Borough's network and hierarchy of centres (**Policy CSTP7**) is appropriate in policy terms and should be maintained. However, it is also acknowledged that the provision present needs to remain competitive in the face of current market trends and the growth in online shopping as well as competition from other major regional shopping centres (such as Bluewater and beyond from Westfield Stratford). It is critical that the provision within the basin retains its distinct role, complementing the offer in other town centres, and thereby avoiding any potentially significant adverse impacts on investment, trade/turnover and the overall vitality and viability of existing centres. It is therefore important that current policies pertaining to the assessment of the impact of new retail, leisure and town centres uses are maintained and worded in compliance with paragraph 90 of the NPPF. Furthermore, we advise that the sequential test encouraging the town centre first principal as detailed under extant **Policy CSTP8 on the 'Vitality and Viability of Existing Centres'** remains. This is necessary as it will enable the Council to effectively monitor and manage the evolution of the basin over the plan period, and to mitigate any potential risks to the vitality and viability of existing and / or planned centres.

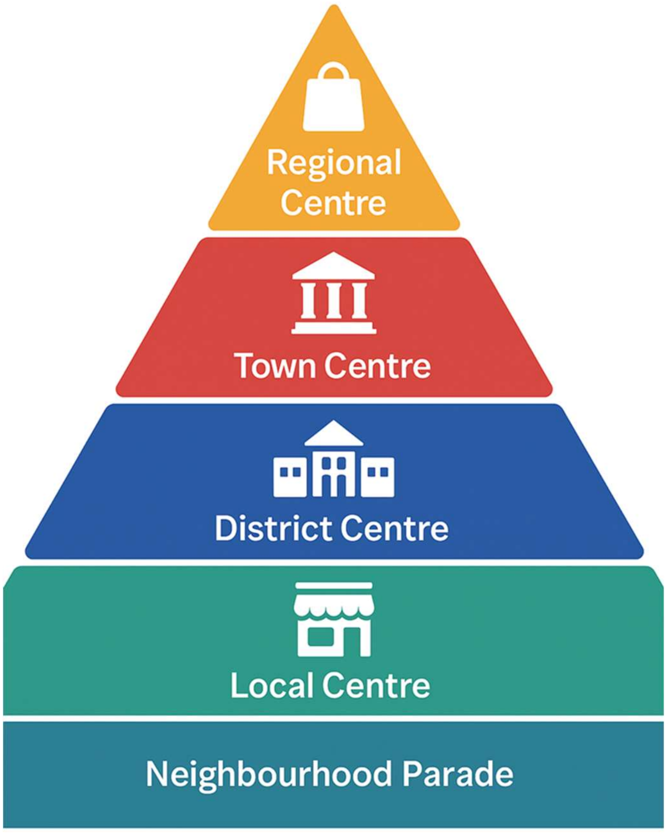
406. In terms of the overall hierarchy of centres we suggest that there is scope to reclassify the designations of some of the centres as follows:

Table 47: Hierarchy Review Summary

Centre	Current Designation	Proposed Designation	Influencing Factors
Lakeside	Regional Centre	No Change	Remains a centre with a regional draw beyond the Borough boundary.
Grays	Town Centre	No Change	Remains the principal centre for the Borough and provides a wide range of facilities and services.
Aveley	Local Centre	No Change	Provision is limited to small shops (19 units in total) with good convenience provision (3 units) that serve the surrounding residential catchment and those visiting the community hub and library (just beyond centre boundary).
Corringham	Local Centre	**District Centre**	Some 64 retail units of varying provision and unit sizes served by large foodstores including Morrisons and Iceland. Local public facilities includes a library.
Socketts Heath	Local Centre	No Change	Parade that continues to serve the immediate residential hinterland and passing trade.
South Ockendon	Local Centre	**District Centre**	Some 51 retail units of varying provision and unit sizes served by large foodstores including Lidl and Nisa Extra. Local public facilities includes a library and a community centre.
Stanford-le-hope	Local Centre	**District Centre**	Comprises 92 diverse retail units whose range is beyond that of a local centre. Local public facilities includes a library (just beyond centre boundary).
Tilbury	Local Centre	**District Centre**	Comprises 70 retail units of various sizes whose range is beyond that of a local centre. Local public facilities includes a library, community hub and the planned Thurrock Youth Zone.

407. Considering the above and as the Borough also has a number of villages and rural settlements with more localised provision the suggested hierarchy can be summarised as follows:

Figure 17: Suggested Hierarchy of Centres



408. This hierarchy provides the Council flexibility to categorise both existing and potentially emerging centres. Consequently, future strategic urban extensions are expected to include an appropriate level of provision that will determine the emerging centre's eventual position in the hierarchy. Initially, it will most likely be a local or district centre.

409. Relating to this, the Council has also asked to provide a tentative designation for the proposed centre at Purfleet (Planning Reference: 17/01668/OUT). Our view is that in light of the scale of provision proposed and potential emerging surrounding residential catchment, it is likely to be a District Centre. This is based on the current understanding that if the proposed floorspace is delivered, the centre is likely to have diverse composition of shops with a supermarket (some 8,880 sqm gross) and a range of non-retail services, such as restaurants & cafes (up to 5,220 sqm gross), drinking establishments (900 sqm gross) offices, cinema, hotel (20,000 sqm gross), gyms and studios.

TOWN CENTRE BOUNDARIES AND PRIMARY SHOPPING AREA DEFINITIONS

410. The NPPF states that planning policies should *"…define the extent of town centres and primary shopping areas and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre*" (paragraph 90b). Furthermore, Annex 2 to the NPPF:

- defines the **Primary Shopping Area** (PSA) as an "…area where retail development is concentrated;"
- defines **Edge of centre** (for retail purposes) as a location that is *"…well connected to, and up to 300 metres from, the primary shopping area*" (our emphasis underlined); and
- for all other main town centre uses edge of centre is a location *"…within 300 metres of a town centre boundary*" (our emphasis underlined).

411. The NPPF explains that the **town centre** is an area defined on the local authority's policies map, and includes the PSA and areas predominantly occupied by main town centre uses within or adjacent to the PSA.

412. There is no policy requirement under the NPPF to define primary and/or secondary shopping frontages. The revised NPPF (December 2024) has removed the requirement for local authorities to identify shopping frontages.

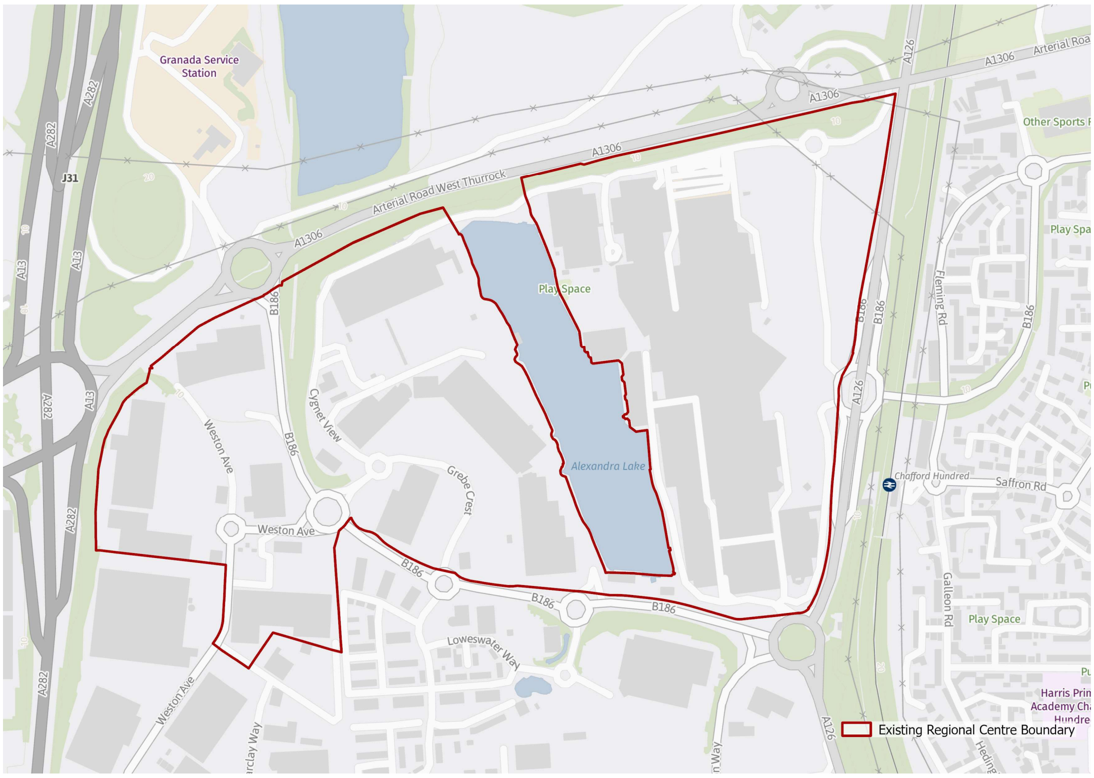
413. Given the scrapping of the previous Class A uses (including shops) and the introduction of a much wider Class E use (which incorporates Class A1-A3, B1, D1(a), D1(b) and D2(e)), the definition of a PSA (i.e., an area where retail development is concentrated) is more problematic.

414. The policies pertaining to plan-making and decision taking for retail, leisure and town centre uses in the NPPF do still refer to the need to define a PSA. The definition of a PSA is critical, for example, to the application of both the sequential and impact tests (paragraphs 91-95). As a result, we have necessarily reviewed the current PSA boundaries, and where necessary redefined these boundaries so that they are aligned with the current NPPF.

415. Drawing on the evidence and key findings of this study, the following sets out our judgements and advice on the definition of appropriate and robust PSAs for the Borough's centres.

- **Regional centre: Lakeside** represents a large-scale retail development that collectively serves a regional catchment anchored by a sizable number of national multiples for both retail and leisure uses with significant parking provision. At this stage, the boundary defined as per extant **Policy CSTP7 (Network of Centres)** remains adequate. However, we would recommend that the Council monitor this element and adjust it in line with its proposed 'Place Proposition' strategy and thereafter the associated planning collateral (e.g. masterplan and delivery or specific policy), which may lead to the evolution of Lakeside from a shopping destination into a regional town centre. This will potentially dictate the different and wider types of town centre uses and the potential adjustment including the definition of a PSA. At this stage, a recommendation for a PSA is not appropriate as the town centre boundary covers the broad spectrum of retail provision.

Figure 18: Lakeside: Existing Centre Boundary



416. **Town Centre: Grays** We propose no change to the town centre boundary. A suggested PSA is provided which is based on the concentration of retail uses as defined in the NPPF.

Figure 19: Grays: Existing Town Centre Boundary & Suggested PSA

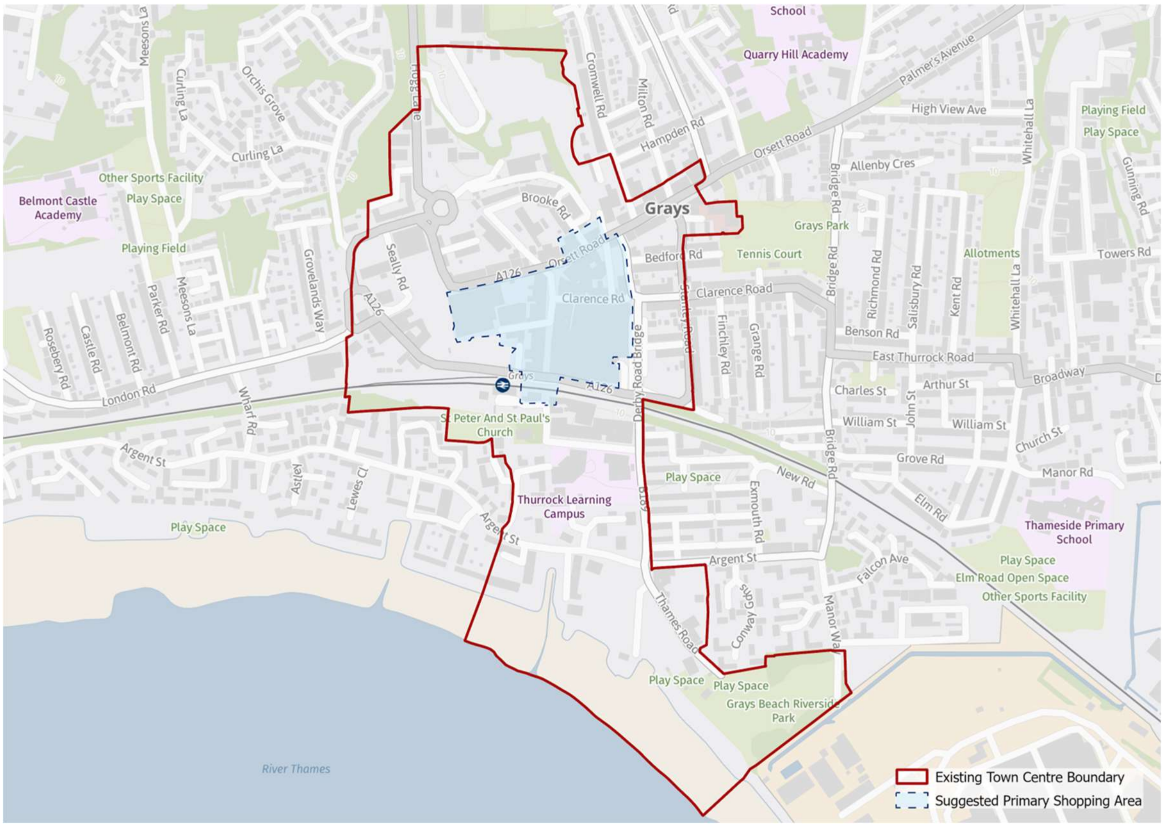
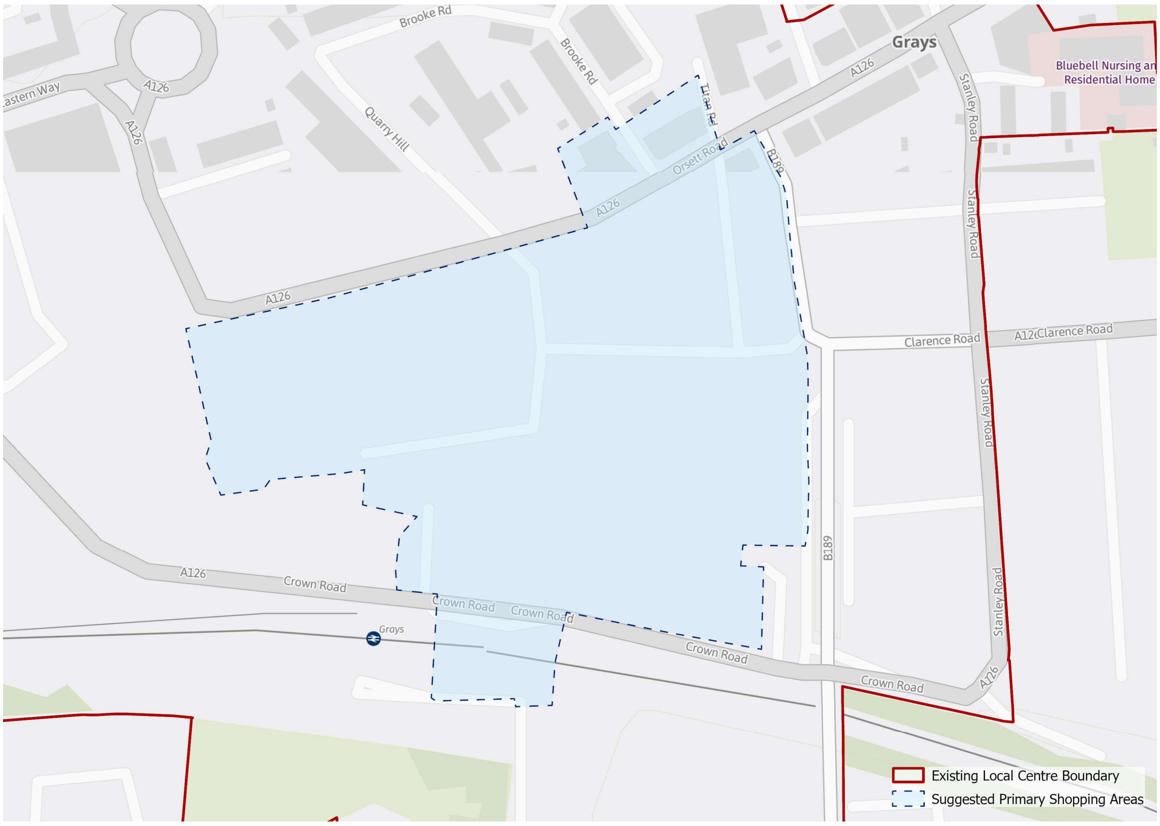


Figure 20: Figure 18: Grays: Suggested PSA (Zoomed-in)



- **Local Centre: Aveley**: No proposed change to the town centre boundary. A suggested PSA is provided which is based on the concentration of retail uses as per the NPPF.

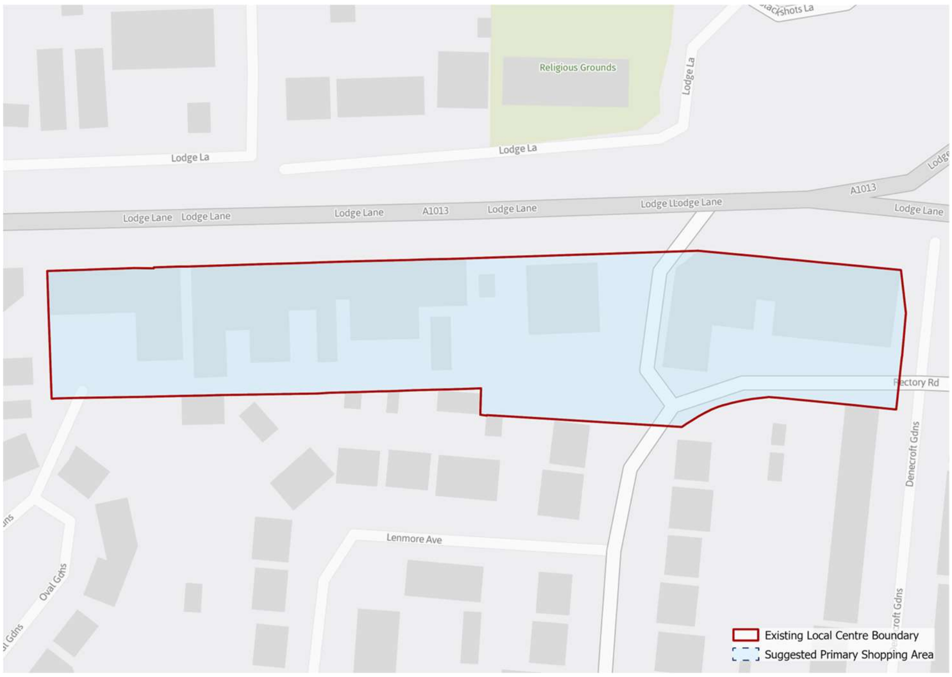
Figure 21: Aveley: Existing Local Centre Boundary & Suggested PSA

- **Local Centre: Corringham**: No proposed change to the town centre boundary. A suggested PSA is provided which is based on the concentration of retail uses as per the NPPF.

Figure 22: Corringham: Existing Local Centre Boundary & Suggested PSA

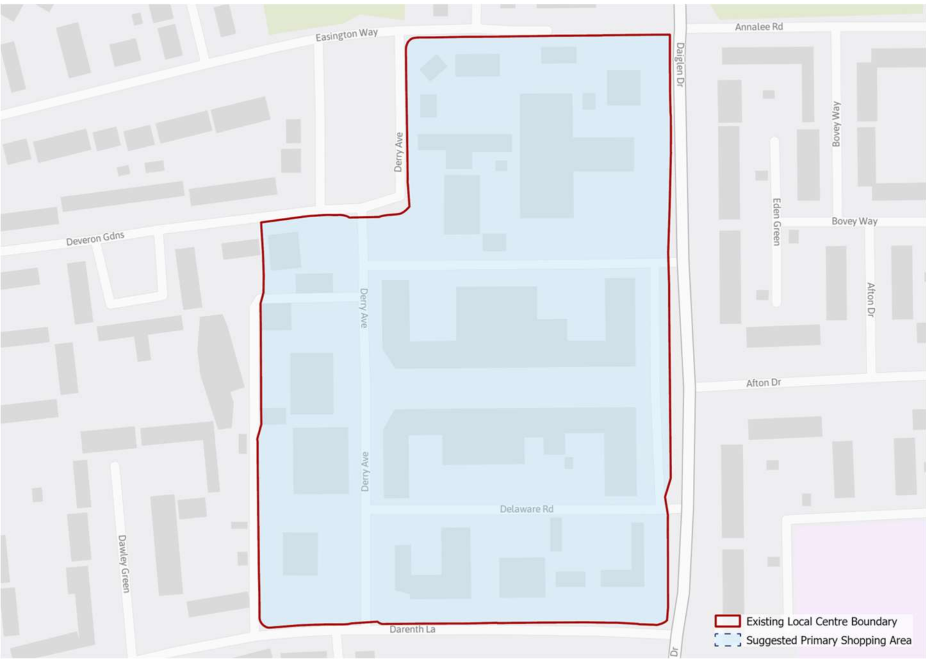
- **Local Centre: Socketts Heath:** No proposed change to the town centre boundary which also broadly covers the provision of retail uses. On this basis the suggested PSA effectively covers the town centre boundary area.

Figure 23: Socketts Heath: Existing Local Centre Boundary & Suggested PSA



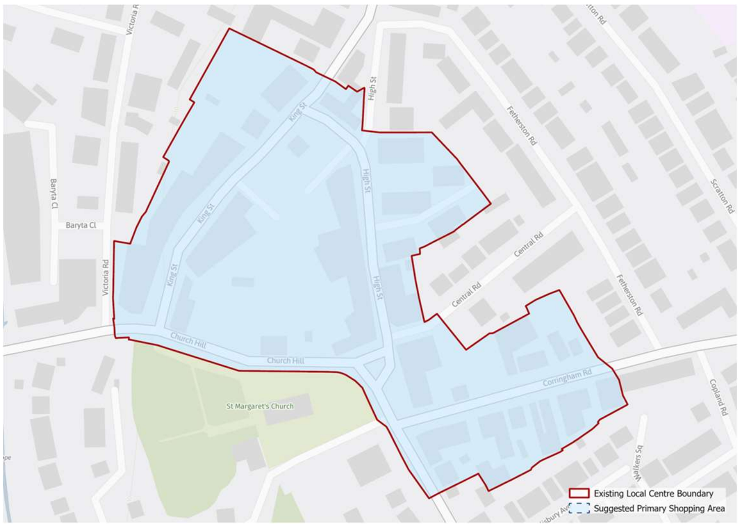
- **Local Centre: South Ockendon:** No proposed change to the town centre boundary which also broadly covers the provision of retail uses. On this basis the suggested PSA effectively covers the town centre boundary area.

Figure 24: South Ockendon Existing Local Centre Boundary & Suggested PSA



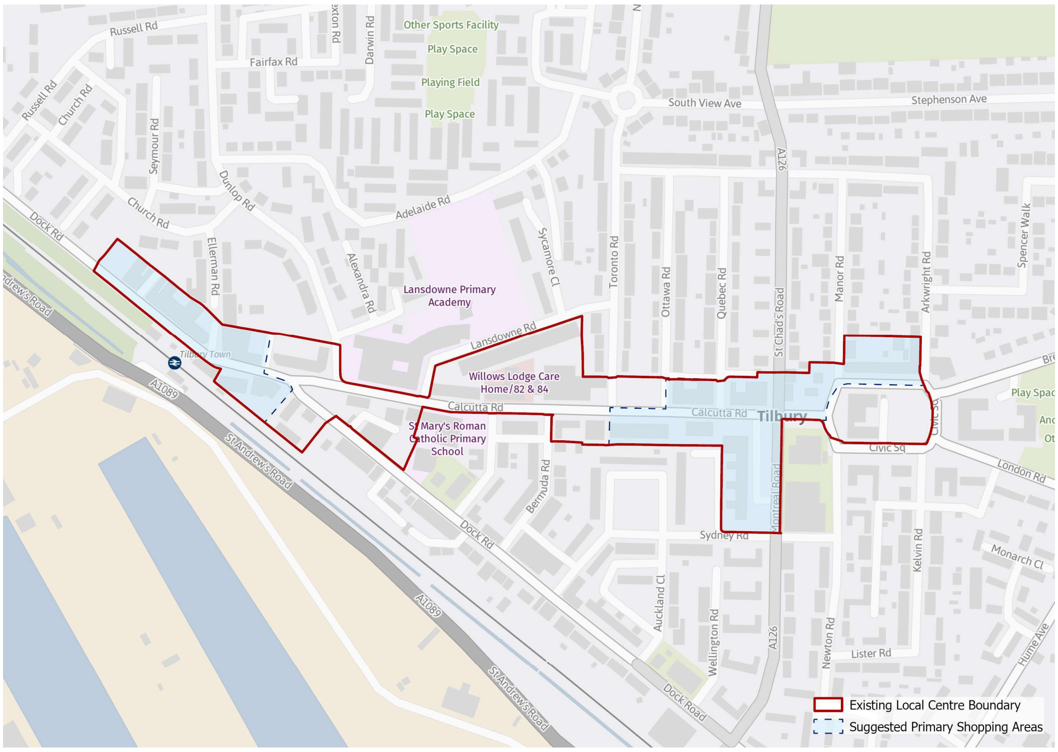
- **Local Centre: Stanford-le-Hope:** No proposed change to the town centre boundary which also broadly covers the provision of retail uses. On this basis the suggested PSA effectively covers the town centre boundary area.

Figure 25: Stanford-le-Hope: Existing Local Centre Boundary & Suggested PSA



- **Local Centre: Tilbury:** No proposed change to the town centre boundary. In relation to the PSA, a suggested area is defined based on the concentration of retail provision. To note that this is in two parts and is not contiguous as there is a substantial number of other uses (e.g. residential, education) in between the two areas of retail concentration.

Figure 26: Tilbury: Existing Local Centre Boundary & Suggested PSA



LOCAL FLOORSPACE IMPACT THRESHOLD

417. The NPPF requires an impact assessment to be undertaken for *"retail, leisure and office development outside of town centres, which are not in accordance with an up-to-date Local Plan*" (paragraph 90). Local planning authorities should require an impact assessment if the development is over a proportionate, locally set floorspace threshold, but if there is no local threshold, then the NPPF default threshold (2,500 sqm gross) should be applied. To help inform the setting of an appropriate impact threshold, the PPG (Paragraph: 015. Reference ID: 2b-015-20190722) also states that it will be important to consider the following:

- scale of proposals relative to town centres;
- the existing viability and vitality of town centres;
- cumulative effects of recent developments;
- whether local town centres are vulnerable;
- likely effects of development on any town centre strategy; and
- impact on any other planned investment.

418. At present there is no defined local impact threshold for the Borough. The default threshold for applications for retail or leisure developments for significant proposals where they are not in a centre or in accordance with a local or neighbourhood development plan is the national floorspace of over 2,500 square metres.

419. We advise an impact threshold of **280 sqm net** (**circa. 350 sqm gross**) is most appropriate and robust for assessing the impacts of any proposed retail/leisure developments outside of defined centres in accordance with paragraph 94 of the NPPF. The justification and evidence to support this lower impact threshold is set out in the paragraphs below.

420. As reported in **Section 3**, the growth in internet shopping is having a significant impact on the way households choose to buy food and non-food goods, which in turn is impacting upon retailer business and operating models. This should be considered alongside the long-term impacts of out-of-centre stores, shopping and leisure facilities on town centres. These impacts are probably best illustrated by the changes in the grocery sector over the last decade. Following a sustained period of growth over almost 20 years up to 2010, principally driven by new larger format superstore openings, the main grocery operators (i.e. Tesco, Sainsbury's, Asda, Waitrose and Morrisons) have effectively scrapped their superstore expansion programmes to focus on growing their market shares via online sales and opening smaller convenience stores (i.e. Sainsbury's Local, Tesco Express, Little Waitrose, etc.). Although sizes vary from location-to-location, the main grocers are promoting smaller convenience stores with a minimum gross floorspace of between 280 sqm and 372 sqm (circa 3,000 - 4,000 sq ft).

421. The 280 sqm net floorspace figure is also significant, as stores below this threshold are exempt from Sunday trading restrictions. In brief, the Sunday Trading Act defines a 'large shop' as generally being over 280 sqm net. It is the Government's intention through this Act to protect smaller, independent stores

which are perceived to be financially weaker and therefore require protection from unfair competition from the major supermarket operators. In general terms therefore it follows that proposals for retail floorspace over 280 sqm net are unlikely to be a purely local facility and will have the ability to draw trade from outside of their immediate local catchment with potential consequent impacts on existing stores and centres. For example, in circumstances where convenience stores are proposed on the edge or outside of centres, often as part of petrol filling stations or conversions of public houses, they can have a significant adverse impact on the trading performance, vitality and viability of smaller local centres nearby. This will particularly be the case where these existing centres are dependent on smaller supermarkets and/or convenience stores to anchor their retail offer, and to generate footfall and linked trips/expenditure to the benefit of other shops, services and facilities. In some cases, post office counters can also form an integral part of the convenience store offer and attraction in smaller centres, and their future operation could therefore also be jeopardised by new convenience stores opening outside of centres.

422. The Government's overarching aim to protect the role, function and integrity of local shops selling essential goods and comprising essential services (e.g. post-office counters) is further demonstrated by the reforms to the UCO and the introduction of the new Class F2, which covers local community uses. Within this category, Class F2(a) specifically pertains to a shop (previously classified as A1) selling mostly "essential goods", including food, to visiting members of the public where the shop's premises cover an area of no more than 280 sqm and there is "*no such facility within 1,000 metre radius of the shop's location*". This new use class is intended to ensure that uses which are important to local communities have some protection through the planning system, because the scope to change use without planning permission is more limited.

423. At the same time, the market demand from operators seeking representation and space in town centres is falling significantly as the space available in centres is often of the wrong size and configuration, and in the wrong location to meet today's retailer requirements. For example, modern multiple retailers selling a range of comparison goods (including, for example, fashion, home store and 'bulky' goods) generally have requirements for larger format modern premises with a minimum size of circa 465 sqm gross (5,000 sqft), and usually 929 sqm (10,000 sqft) and above. This minimum floorspace provides operators with the necessary 'critical mass' of sales needed to display their full range of goods in-store and attract customers from a wider catchment area, particularly where they are co-located alongside similar stores in town centre and out-of-centre locations. These minimum floorspace requirements also fall significantly below the NPPF-default threshold of 2,500 sqm gross.

424. The health checks for the town centres have also identified that smaller independent stores and services make a significant and vital contribution especially to the town and local centre(s) diverse offer, attraction and viability. The table below shows the average size of comparison and convenience units for centres for which there is Experian Goad data available.

Table 48: Average Size of Outlets by Centre & Category (sqm gross)

	Comparison Retail			Convenience Retail			Total Retail, Leisure & Services		
	Total Outlets	Total Floorspace (sqm)	Average Outlet Size (sqm)	Total Outlets	Total Floorspace (sqm)	Average Outlet Size (sqm)	Total Outlets	Total Floorspace (sqm)	Average Outlet Size (sqm)
Lakeside Shopping Centre	132	75,870	575	9	870	97	284	138,120	486
Lakeside Retail Parks	55	99,060	1,801	7	16,780	2,397	89	136,130	1,530
Lakeside Total	187	174,930	935	16	17,650	1,103	373	274,250	735
Grays	50	13,030	261	34	12,900	379	230	49,930	217
Aveley	2	Floorspace data not available		3	Floorspace data not available		19	Floorspace data not available	
Corringham	17	2,300	135	14	3,180	227	64	11,110	174
Socketts Heath	5	Floorspace data not available		4	Floorspace data not available		37	Floorspace data not available	
South Ockendon	7	1,180	169	12	3,370	281	51	8,550	168
Stanford-le-hope	12	Floorspace data not available		9	Floorspace data not available		92	Floorspace data not available	
Tilbury	14	Floorspace data not available		16	Floorspace data not available		70	Floorspace data not available	

425. As the table shows the average size of comparison goods units (excluding Lakeside) range from 135 sqm (Corringham) to 261 sqm (Grays). For convenience goods the average unit size (excluding Lakeside) is higher ranging from 227 sqm (Corringham) to 379 sqm (Grays). This is explained by the fact that the convenience offer in a larger centre is generally anchored by at least one larger format foodstore (e.g.in the case of Grays, Morrisons). Furthermore, the average unit size for all retail, leisure and service businesses (excluding Lakeside) in the Borough's centres ranges from 168 sqm to 217 sqm gross.

426. We have also had regard to the Borough-wide capacity assessment for new retail (convenience and comparison goods) floorspace, focussing on the next five to ten years in accordance with the advice set out in the NPPF and PPG, but also taking the lifetime of the plan into account. In this case the capacity forecasts show no capacity for new retail floorspace over the ten-year period, or over the lifetime of the plan to 2044 (after allowing for all known commitments). Where potential floorspace capacity exists, it will support new commercial floorspace in the Borough's centres or planned as part of housing allocations. It is critical that the investment in and delivery of this new floorspace is not harmed by proposals for new floorspace of varying scale and use outside these areas and existing centres.

427. In conclusion, we consider that the above evidence provides robust support and justification for the setting of a lower floorspace threshold of 280 sqm net. This will provide the Council with greater flexibility to robustly assess the individual ('solus') and cumulative impacts of any smaller commercial floorspace (including convenience stores) proposed outside of existing centres that could compete 'like-against-like' with existing, planned and proposed investment in its main centres. We also advise that this threshold should be applied, where relevant, to change of use applications and applications seeking variations of conditions. It should be noted that whilst the proposed threshold applies to net additional floorspace, where a proposal is for the redevelopment of existing retail floorspace, the threshold should apply to the total floor area proposed (i.e. existing and net additional).

428. By way of additional clarification, the Council will be aware that the locally set impact threshold does not determine whether an application should be allowed or refused, only whether an application should be subject to an impact assessment.

Furthermore, the PPG advocates that the level of information pertaining to the impact test (and the sequential test) provided in support of any application should be proportionate and considered in a locally appropriate way. We therefore advise the Council that they should pro-actively engage with any applicant at an early stage in the pre-application process to scope and agree the detail of any assessment and the evidence required in support of an application on a case-by-case basis.

11. GLOSSARY OF TERMS

Term	Definition
Town Centres	Town are the principal centre or centres in a local authority's area. When planning the future of town centres, local planning authorities should consider the function of various parts of the centre and how these contribute to its overall vitality and viability.
District Centres	District centres will 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. These centres generally contain between 10,000-50,000sqm of retail, leisure and service floorspace; and provide a higher proportion of convenience over comparison goods.
Local Centres	Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office, a pharmacy or a launderette.
Town Centre Uses	As defined in the NPPF, main town centre uses are retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, cultural and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).
Neighbourhood Centres	Normally comprise all parades of shops that are of purely local significance.
Town Centre Boundary	Defined area, including the primary shopping area and areas of predominantly leisure, business and other main town centre uses within or adjacent to the primary shopping area. The extent of the town centre should be defined in Local Plans and on the policies map.
Primary Shopping Area	Defined area where retail development is concentrated.

Term	Definition
Edge-of-Centre	As defined in the NPPF, for retail purposes a location that is well connected up to 300 metres from the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge-of-centre, account should be taken of local circumstances.
Out-of-Centre	A location which is not in or on the edge of a town centre. Out-of-centre locations are at the bottom of the retail hierarchy and any application for retail development in an out-of-centre location must fully assess impacts and rule out potential for locating in a more sequentially preferable location.
Convenience Retailing	Convenience retailing is the provision of everyday essential items, including food, drinks, newspapers/magazines and confectionery.
Comparison Retailing	Comparison retailing is the provision of items not obtained on a frequent basis. These include clothing, footwear, household and recreational goods.
Supermarkets	Stores selling mainly food, with a trading floorspace less than 2,500 square metres, often with car parking.
Superstores	Stores selling mainly food, or food and non-food goods, usually with more than 2,500 square metres trading floorspace, with supporting car parking.

Term	Definition
Regional Centre	The current NPPF (December 2024) does not provide a specific definition for a regional centre. The term ‘regional centre’ is typically used contextually within local plans and hierarchies to describe a centre that serves a wide catchment area beyond its immediate locality. In the historic ‘Planning Policy Statement 6 (PPS6) (2005): Planning for Town Centres, (Annex A),’ the term "regional centre” is described within the typologies of centres and in particular when describing a City centre as follows: “*In terms of hierarchies, they will often be a regional centre and will serve a wide catchment. The centre may be very large, embracing a wide range of activities and may be distinguished by areas which may perform different main functions*.”
Retail Warehouses	Large stores specialising in the sale of household goods (such as carpets, furniture and electrical goods), DIY items and other ranges of goods, catering mainly for car-borne customers.
Retail Parks	An agglomeration of at least 3 retail warehouses.
Warehouse Clubs	Large businesses specialising in volume sales of reduced priced goods. The operator may limit access to businesses, organisations or classes of individual.
Factory Outlet Centres	Groups of shops specialising in selling seconds and end-of-line goods at discounted prices.
Leisure Parks	Leisure parks often feature a mix of leisure facilities, such as a multi-screen cinema, indoor bowling centres, night club, restaurants, bars and fast-food outlets, with car parking.
Convenience Goods Expenditure	Expenditure (including VAT as applicable) on goods in COICOP (Classification of individual consumption by purpose categories): Food and non-alcoholic beverages, Tobacco, Alcoholic beverages (off-trade), Newspapers and periodicals, Non-durable household goods.

Term	Definition
Comparison Goods Expenditure	Expenditure (including VAT as applicable) on goods in COICOP Categories: Clothing materials & garments, Shoes & other footwear, Materials for maintenance & repair of dwellings, Furniture & furnishings; carpets & other floor coverings, Household textiles, Major household appliances, whether electric or not, Small electric household appliances, Tools & miscellaneous accessories, Glassware, tableware & household utensils, Medical goods & other pharmaceutical products, Therapeutic appliances & equipment, Bicycles, Recording media, Games, toys & hobbies; sport & camping equipment; musical instruments, Gardens, plants & flowers, Pets & related products, Books & stationery, Audio-visual, photographic and information processing equipment, Appliances for personal care, Jewellery, watches & clocks, Other personal effects.
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 Ground Floor Footprint Floorspace	The area shown on the Ordnance Survey map or other plans as being occupied by buildings and covered areas measured externally.
Gross Retail Floorspace	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 sales area within a building (i.e., all internal areas accessible to the customer), but excluding checkouts, lobbies, concessions, restaurants, customer toilets and walkways behind the checkouts.
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.

Term	Definition
Quantitative Need	Is conventionally measured as expenditure capacity (i.e., the balance between the turnover capacity of existing facilities and available expenditure in any given area). Expenditure capacity, or ‘quantitative need’ can arise as a result of forecast expenditure growth (either through population growth or increase in spending), or by identification of an imbalance between the existing facilities and current level of expenditure available in an area.
Qualitative Need	Includes more subjective measures such as, for example, consumer choice; the appropriate distribution of facilities; and the needs of those living in deprived areas. ‘Over trading’ is also identified as a measure of qualitative need, although evidence of significant over-crowding, etc., may also be an indicator of quantitative need.