Lambert Smith Hampton

Centres, Retail & Commercial Leisure Needs Assessment

Volume 3: Centre Health Checks - 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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1. INTRODUCTION

1. This appendix provides the findings of qualitative and quantitative assessments of the main centres located within Thurrock:

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

2. The Health Check provides an overview of the relative health of the main centres by examining the centres' current vitality and viability based on the key performance indicators (KPIs) set out in the Planning Practice Guidance (PPG). The PPG states the following twelve KPIs may be relevant in assessing the health of the town centres and planning for the future:

- Diversity of uses
- Proportion of vacant street level property
- Commercial property indicators
- Customers' experience and behaviour
- Retailer representation and intentions to change representation
- Pedestrian flows
- Accessibility
- Perception of safety and occurrence of crime
- State of town centre environmental quality
- Balance between independent and multiple stores
- Barriers to new businesses opening and existing businesses expanding
- Extent to which there is an evening and night-time economy offer

3. The **Diversity of Uses** is informed by survey data provided by Experian Goad and examines the current number of outlets and quantum of floorspace for each commercial category. These are Convenience and Comparison Retail, Leisure Services (including food and drink outlets, games of chance venues (e.g., casinos, bingo halls, gambling arcades, and betting shops), sports and leisure facilities, night clubs, cinemas, theatres, concert halls and hotel/guesthouse accommodation), Retail Services (including health and beauty services (beauty salons, tattoo parlours etc.), post offices, dry cleaners & laundrettes, travel agents, photo processing outlets & studios, and other personal services) and Financial & Business Services. Vacancies are also discussed separately. Where Experian Goad data is not available, Council-held data has been updated based on LSH site visits and analysed.

4. **Pedestrian Flows** uses Footfall data from MSCI Property Intel who harvest data from over 10 million mobile devices. All data is fully anonymised and GDPR

compliant. Data is collected daily and MSCI Property Intel can identify footfall levels at different times of the day. The heat map included in the report also indicates concentrations of footfall, green indicating lower levels and orange/ red higher concentrations.

5. **Retailer representation** is informed by the site visit as well as the retailer requirements which are obtained from the **Requirement List** where commercial property requirements can be viewed.

6. **Commercial property indicators** are informed using a variety of sources, including PROMIS, Co-Star, and speaking to agents to gather on-the-ground information on current market trends for rents and yields.

7. For **Crime and Safety**, a postcode within each town centre is chosen as a central point with a ¼ mile radius created to gather crime data within that area for a range of crimes. The crime data, obtained from UK Crime Stats, can be compared across recent years to show any trends. A heatmap can also be generated to highlight where the occurrence of crimes in an area are concentrated.

8. The **Customer Perception** of the centres was obtained from household telephone interview surveys (THIS). The interview asked questions to gauge the respondent's perception of the centres with regards to what they like about them, what they think could be improved and what would encourage them to visit more in the evening.

9. The KPIs help to identify the critical Strengths and Weaknesses of each centre; the Opportunities for future sustainable development and any current and potential Threats to their overall vitality and vitality, summarised in the main report.

10. The findings of the health check assessments are set out in the following proformas.

2. LAKESIDE REGIONAL CENTRE HEALTH CHECK

Overview

11. 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.

12. Lakeside Shopping Centre is one of the UK's largest enclosed malls with over 250 shops. 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. There is also a strong leisure offer at Lakeside Shopping Centre, including Nickelodeon Adventure Lakeside, Flip Out Lakeside and Vue Cinema. Finally, food & beverage provision is well covered, with current operators including Nando's, Wagamama, Gourmet Burger Kitchen Prezzo and Zizzi.

13. Lakeside Retail Park is adjacent to the main Lakeside Shopping Centre and comprises large format stores for comparison goods (including B&M, Currys, Next Home and The Range), convenience goods (Lidl and Longdan (Oriental foodstore) and food & beverage (Costa, Subway and Tim Hortons).

14. Thurrock Shopping Park is another large retail park with major retailers across comparison goods (including Boots, Decathlon, Dunelm and M&S Outlet), convenience goods (The Food Warehouse) and food & beverage (Burger King and Costa). As of 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.

15. West Thurrock Retail Park has a comparison-dominated offer, with present brands including Carpetright, Evans Cycles, Furniture Village and Matalan.

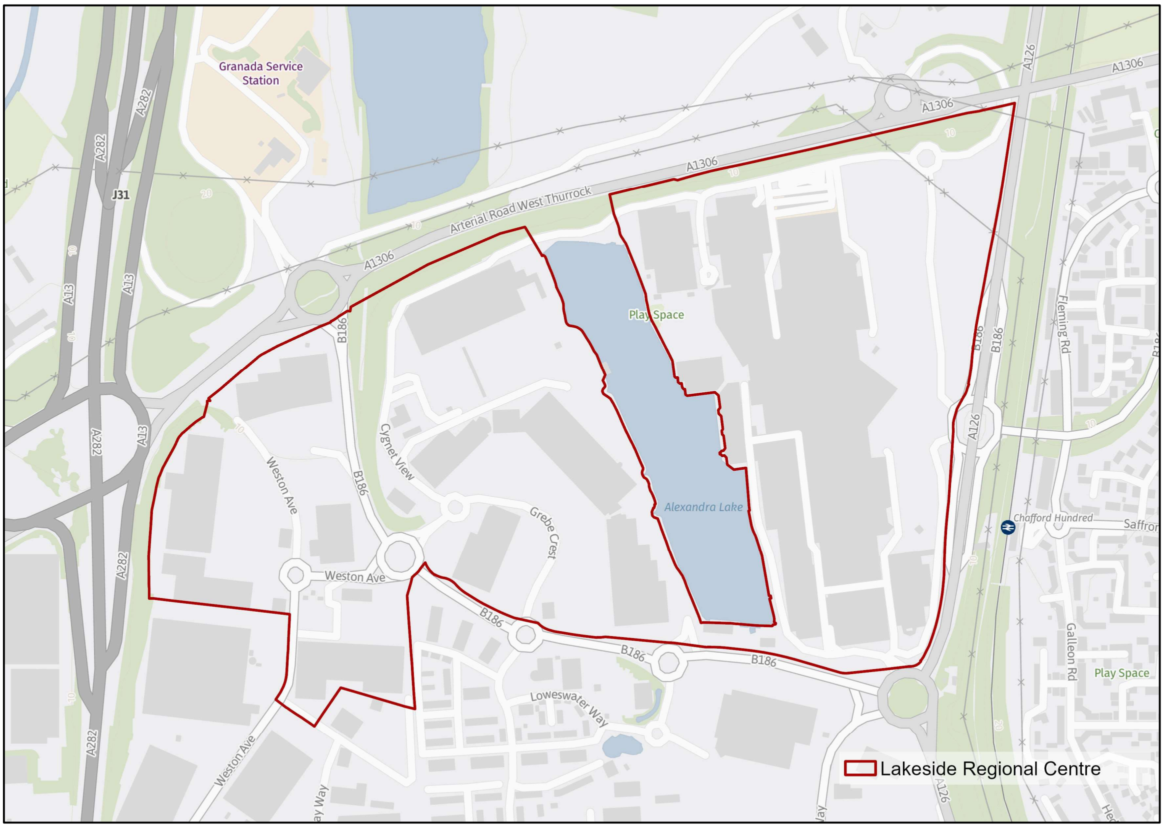
16. Whilst some convenience retail can be found across the retail parks and shopping centre, the offer at Lakeside is led by a 11,530sqm Tesco Extra store to the north of the centre.

17. 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.

18. 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.

Figure 1: Lakeside Regional Centre Boundary Map



Source: LSH

Diversity of Uses

19. Goad data from August 2024 has been used to assess Lakeside Shopping Centre's mix of uses and Goad data from December 2023 has been used to assess Lakeside Retail Parks' mix of uses. The figures below show Lakeside Shopping Centre and Lakeside Retail Parks areas covered by Goad.

Figure 2: Lakeside Shopping Centre

Source: GOAD

Figure 3: Lakeside Retail Parks

Source: GOAD

20. The table below shows that Lakeside Shopping Centre has a total of 284 units and an overall quantum of 138,120 sqm in floorspace.

Figure 4: Number of Outlets and Floorspace, Lakeside Shopping Centre

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Lakeside	UK Average		Lakeside	UK Average
Comparison Retail	132	46.5%	26.4%	75,870	54.9%	29.4%
Convenience Retail	9	3.2%	9.3%	870	0.6%	15.6%
Retail Services	20	7.0%	15.9%	2,570	1.9%	7.3%
Leisure Services	71	25.0%	25.8%	21,460	15.5%	26.7%
Financial & Business Services	5	1.8%	8.3%	1,080	0.8%	6.3%
Vacant	47	16.5%	14.1%	36,270	26.3%	14.2%
Total	**284**	**100.0%**	**100.0%**	**138,120**	**100.0%**	**100.0%**

Source: GOAD

21. The composition of outlets within Lakeside Shopping Centre demonstrates that the provision of comparison retail is high at 46.5% of total outlets and 54.9% of total floorspace. The percentage for the number of outlets is higher by 20.1 percentage points, and for floorspace, this is higher by 25.5 percentage points when comparing to the UK average.

22. The composition of comparison retail within the centre includes many national multiples, where the market positioning is mixed within the centre. There are premium brands such as Tommy Hilfiger, Lacoste and Kurt Geiger and mass brands such as Accessorise, Zara and Footasylum. There are also some value brands such as Primark and Poundland.

23. Leisure services are in line with the UK average, taking up a quarter of outlets; however remaining categories are lower than the UK averages, as comparison takes up a large proportion. Convenience retail is lower than the UK average, only representing 3.2% of total outlets.

24. Retail services represent almost half the UK average in terms of proportion of outlets.

Figure 5: Number of Food & Beverage Outlets and Floorspace, Lakeside Shopping Centre

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Lakeside	UK Average		Lakeside	UK Average
Bars & Wine Bars	5	1.8%	2.4%	1,990	1.4%	2.4%
Cafes	18	6.3%	5.2%	2,610	1.9%	2.9%
Fast Food & Take-Away	21	7.4%	6.2%	3,010	2.2%	3.1%
Public Houses	0	0.0%	2.6%	0	0.0%	3.4%
Restaurants	17	6.0%	5.5%	4,660	3.4%	4.3%
Total	**61**	**21.5%**	**21.9%**	**12,270**	**8.9%**	**16.1%**

Source: GOAD

25. Lakeside Shopping Centre has a total of 61 food & beverage outlets, which is roughly on par with the UK Average. However, the proportion of floorspace represents half of the UK average (8.9% vs 16.1%, 7.2 percentage points below).

26. Cafes, fast food & takeaways and restaurants are in line with the UK average; these consist of major retailers such as KFC, Five Guys and Costa.

27. There are no public houses, while there are five bars and wine bars, which represents a low proportion when compared to the UK average in terms of number of outlets and floorspace.

28. When comparing Thurrock Retail Study 2007 and Thurrock Retail Study Update 2012 to the current state of play, it can be concluded that:

- Comparison retail was and still is the dominant use
- Some key comparison retailers (including Debenhams, House of Fraser and BHS) have since closed down. The former Debenhams unit is now occupied by Marks & Spencer, whilst Next is moving into the former House of Fraser store in 2025
- The convenience retail offer was and still is limited
- Vacant floorspace has grown significantly, from 3% in 2007 to 26.3% in 2024. Vacant floor space will decrease once Next has upscaled into the larger unit, which was the House of Fraser.

29. The table below shows that Lakeside Retail Parks have a total of 89 units and an overall quantum of 136,130 sqm in floorspace.

Figure 6: Number of Outlets and Floorspace, Lakeside Retail Parks

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Lakeside Retail Park	UK Average		Lakeside Retail Park	UK Average
Comparison Retail	55	61.8%	26.4%	99,060	72.8%	29.4%
Convenience Retail	7	7.9%	9.3%	16,780	12.3%	15.6%
Retail Services	5	5.6%	15.9%	790	0.6%	7.3%
Leisure Services	17	19.1%	25.8%	5,840	4.3%	26.7%
Financial & Business Services	0	0.0%	8.3%	0	0.0%	6.3%
Vacant	5	5.6%	14.1%	13,660	10.0%	14.2%
Total	**89**	**100.0%**	**100.0%**	**136,130**	**100.0%**	**100.0%**

Source: GOAD

30. Comparison retail accounts for 61.8% of total outlets, compared to the UK average of 26.4%. Floorspace is also significantly higher at 72.8% compared to the UK average of 29.4%. There is a wide selection of retailers, including usual retail park operators such as B&M Home and TK Maxx, a large selection of furniture retailers, e.g. Sofology and RH Outlet, and less common brands such as RH Outlet. IKEA is present, taking a large proportion of floorspace at 16,300 sqm.

31. Convenience retail provision at Lakeside Retail Parks is below the national average figure, with 7 outlets making up 7.9% of total outlets, which compares to the UK average of 9.3%. The proportion of convenience retail floorspace also falls below the UK average. Tesco Extra takes up 11,530sqm of space, accounting for 68.7% of the convenience space at the Lakeside Retail Parks.

Figure 7: Tesco Extra, Lakeside Retail Parks

Source: LSH Site Visit

32. Retail services are significantly below UK average, at 5.6%, compared to the UK average of 15.9%. The proportion of floorspace is similarly well below the UK average (0.6% vs 7.3%).

33. There are no financial and business service occupiers at the Lakeside Retail Parks.

Figure 8: Number of Food & Beverage Outlets and Floorspace, Lakeside Retail Parks

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Lakeside Retail Park	UK Average		Lakeside Retail Park	UK Average
Bars & Wine Bars	1	1.1%	2.4%	790	0.6%	2.4%
Cafes	6	6.7%	5.2%	1,360	1.0%	2.9%
Fast Food & Take-Away	6	6.7%	6.2%	1,480	1.1%	3.1%
Public Houses	0	0.0%	2.6%	0	0.0%	3.4%
Restaurants	1	1.1%	5.5%	310	0.2%	4.3%
Total	**14**	**15.7%**	**21.9%**	**3,940**	**2.9%**	**16.1%**

Source: GOAD

34. Food & beverage at Lakeside Retail Parks has 14 outlets, occupying 15.7% of the centre and only 3,940 sqm (2.9% of floorspace).

35. Alike to Lakeside Shopping Centre, there are no public houses at Lakeside Retail Parks.

36. There is 1 restaurant (Nando's) and 1 bar & wine bar (TGI Fridays) within the retail park, resulting in a low proportion compared to the UK average. In comparison to this, Lakeside Shopping centre had 17 restaurants and 5 bars and wine bars.

Figure 9: Nando's, Lakeside Retail Park

Source: LSH Site Visit

37. The majority of food & beverage tenants are cafes and fast food & take-away units. Each category has 6 units.

38. When comparing Thurrock Retail Study 2007 and Thurrock Retail Study Update 2012 to the current state of play, it can be concluded that:

- Comparison retail was and still is the dominant use
- The convenience retail offer has grown from 1 outlet (Tesco Extra) in 2012 to 7 in 2024
- There has been minimal change in the number of vacant outlets and proportion of vacant floorspace

39. The table below shows that Lakeside Shopping Centre and Lakeside Retail Parks have a combined total of 373 units and an overall quantum of 274,250 sqm in floorspace.

Figure 10: Number of Outlets and Floorspace, Lakeside Total

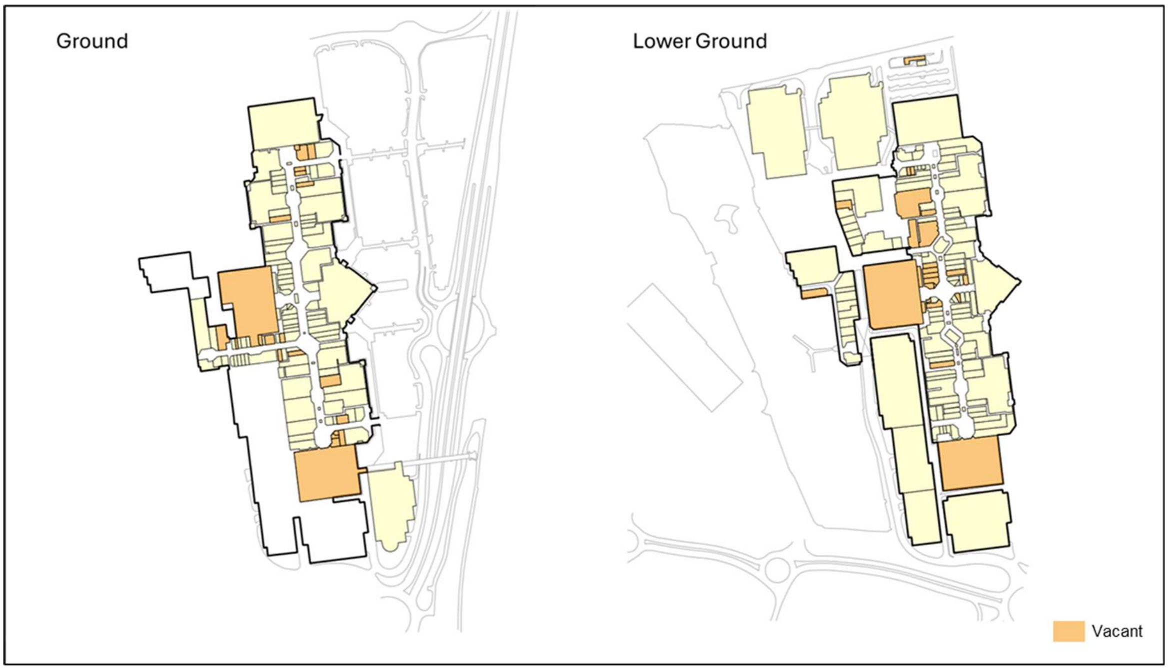
	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Lakeside Total	UK Average		Lakeside Total	UK Average
Comparison Retail	187	50.1%	26.4%	174,930	63.8%	29.4%
Convenience Retail	16	4.3%	9.3%	17,650	6.4%	15.6%
Retail Services	25	6.7%	15.9%	3,360	1.2%	7.3%
Leisure Services	88	23.6%	25.8%	27,300	10.0%	26.7%
Financial & Business Services	5	1.3%	8.3%	1,080	0.4%	6.3%
Vacant	52	13.9%	14.1%	49,930	18.2%	14.2%
Total	**373**	**100.0%**	**100.0%**	**274,250**	**100.0%**	**100.0%**

Source: GOAD

Vacancies

40. The image below illustrates where vacant units are in Lakeside Shopping Centre as of August 2024.

Figure 11: Lakeside Shopping Centre Vacancies, Ground and Lower Ground, August 2024



Source: Experian GOAD

41. There are a total of 47 vacant outlets in Lakeside Shopping Centre which represents 16.5% of the overall outlets, higher than the UK average of 14.1%. 26.3% of the floorspace is vacant, which compares unfavourably to the UK average of 14.2%. To note, once the new Next store opens in the former House of Fraser unit, this figure will decrease significantly.

42. There are 4 large vacant units, which are between 6,000 – 7,000 sqm. Vacant units are spread across the centre; however, there is a cluster in the centre of the shopping centre, particularly on the lower ground.

43. The image below illustrates where vacant units are located in Lakeside Retail Parks as of December 2023.

Figure 12: Lakeside Retail Park Vacancy Map, August 2024

Source: GOAD

44. There are a total of 5 vacant outlets in Lakeside Retail Parks, which represents 5.6% of the overall outlets, lower than the UK average of 14.1%. 5.6% of the floorspace is vacant, which compares favourably to the UK average of 14.2%.

45. 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).

Multiple and Independent Representation

46. National multiples allow a centre to draw shoppers from beyond its immediate catchment as people search for their nearest store and are willing to travel further for brands such as John Lewis and M&S. Lakeside has a large range of national multiples, including M&S, Primark and Stradivarius, as set out in the figure below.

Figure 13: National Multiples, Lakeside

Retail provision - key stores (2024 Q4)				
Dept/Var Stores	**Key Fashion Multiples**	**Key Non Fashion Multiples**	**Food Stores**	**Key Café / Restaurant Stores**
Marks & Spencer	All Saints	3 Store		Ask
Primark	Boux Avenue	Apple		Burger King
	Clarks	Beaverbrooks		Caffe Nero
	Deichmann Shoes	Boots		Costa
	Dune	Card Factory		Five Guys
	Flannels	EE		Gbk
	Foot Locker	Entertainer, The		Greggs
	Footasylum	Flying Tiger		Kfc
	Gap	Fragrance Shop, The		McDonald's
	H&M	Goldsmiths		Millies Cookies
	Hugo Boss	Jo Malone		Nando's
	J D Sports	Lakeland Limited		Pizza Express
	Kurt Geiger	Lush		Pret A Manger
	New Look	O2 Phones		Prezzo
	Next	Pandora		Starbucks Coffee
	Nike	Perfume Shop, The		Wagamama
	Office	Poundland		Zizzi
	Pull and Bear	Rituals		
	River Island	Smiggle		
	Schuh	Superdrug		
	Stradivarius	Swarovski		
	Superdry	The Body Shop		
	Victoria's Secret	Vodafone		
	Yours	Warren James		
	Zara	Waterstones		

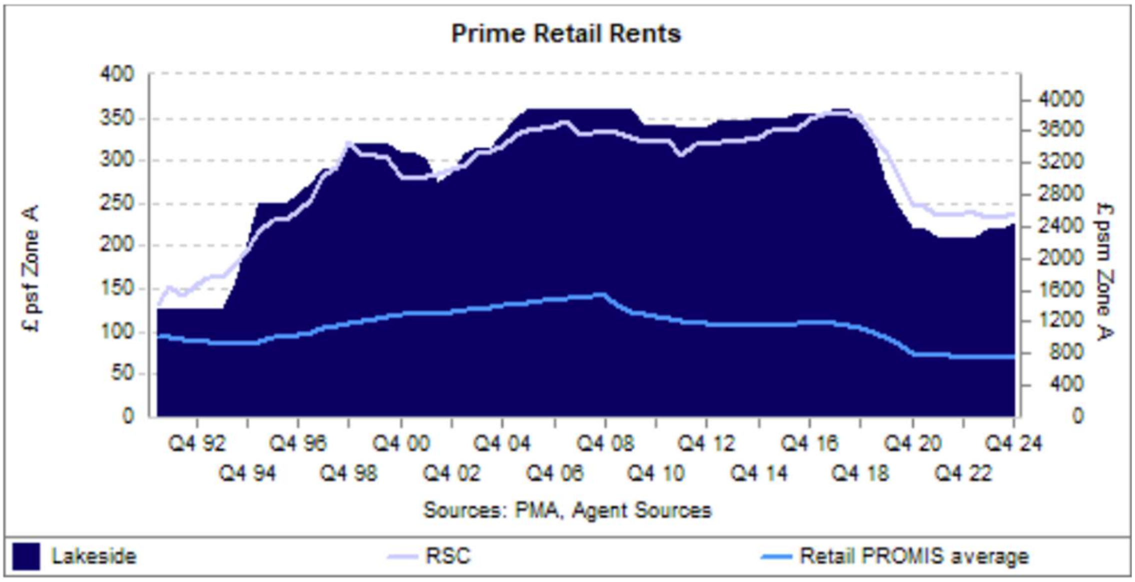
Source: PMA as of 19 May 2025

The majority of retailers at Lakeside are national multiples, making it a key regional destination for big brands. The representation of independents/ small-scale operators is therefore limited, but some examples are Babyeze (baby store), Crep (shoe store), and Novia Furniture (furniture store).

Commercial Property Indicators

47. Based on agent sources, PMA PROMIS estimates that the top achievable prime rents in Lakeside were around £2,421 psm (£225 psf) in Zone A at the end of 2024. Since 2017, this implies a change of -37.5%, compared with the PROMIS average of -35%.

Figure 14: Prime Retail Rents, Lakeside

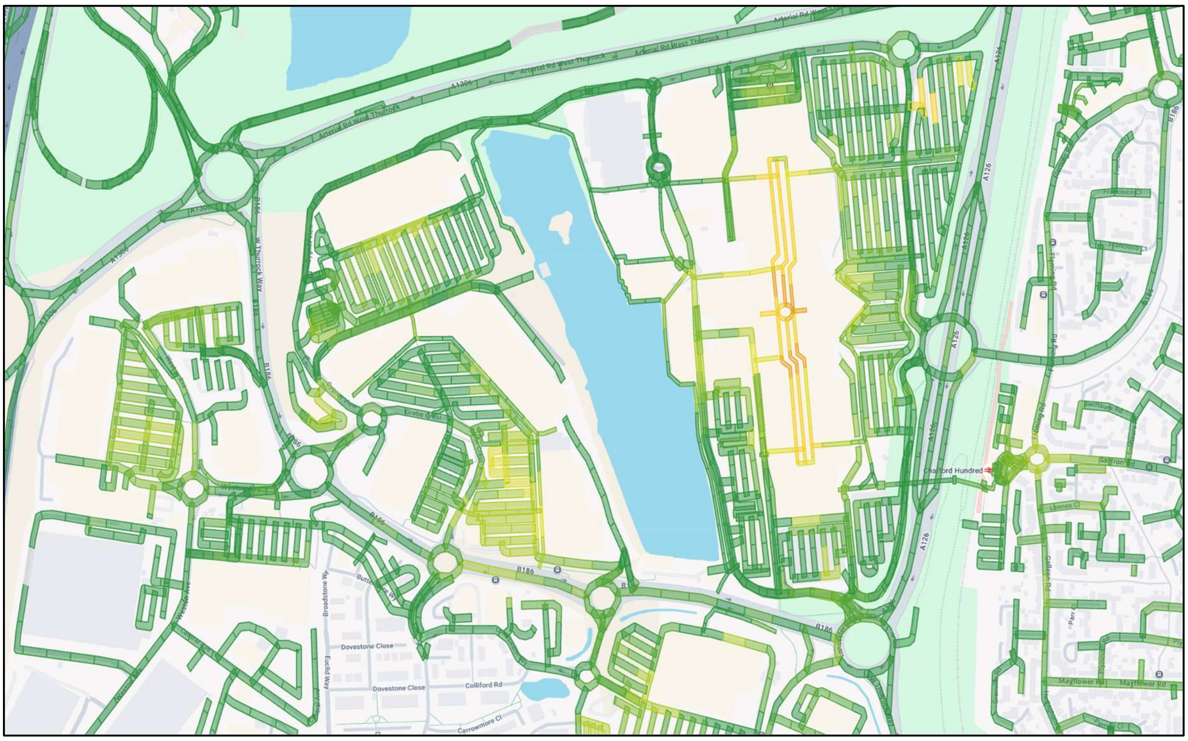


Source: PMA PROMIS Retail Report

Pedestrian Flows

48. The figure below illustrates the pedestrian flows for Lakeside in the form of a heat map showing total pedestrian movements for April 2025.

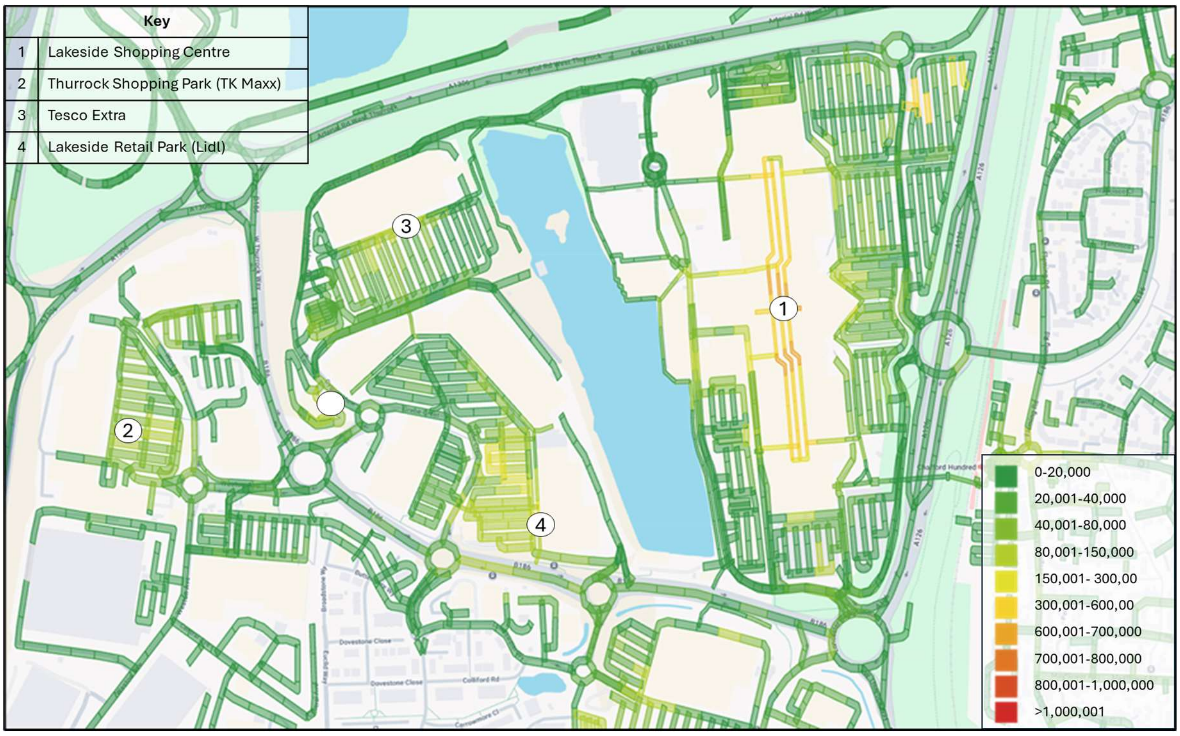
Figure 15: Lakeside Regional Centre Footfall, April 2025



Source: MSCI

49. Four busy sections of Lakeside; Lakeside Shopping Centre, Thurrock Shopping Park (by TK Maxx), Tesco Extra and Lidl were sampled to obtain information on how footfall levels have changed between January 2019 and April 2025.

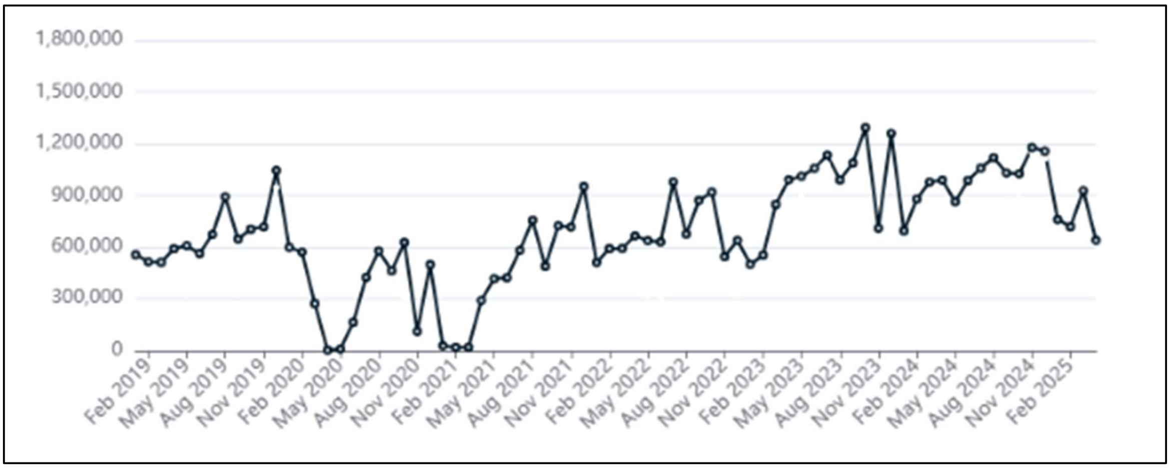
Figure 16: Lakeside Regional Centre Footfall Samples, April 2025



Source: MSCI

50. As can be seen in the figure below, at Lakeside Shopping Centre, footfall levels have bounced back following the May 2021 pandemic hit, surpassing figures seen in 2019. In 2024, figures were between 690,000 and 1,180,000 monthly movements.

Figure 17: Monthly Footfall Graph, Jan 2019 – April 2025, Lakeside Shopping Centre

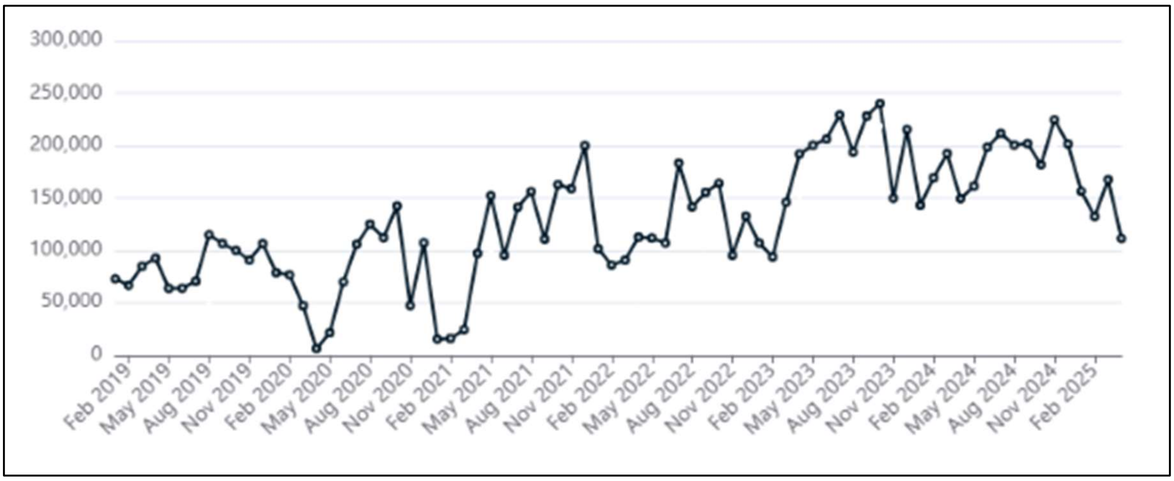


Source: MSCI

51. As can be seen in the figure below, at Thurrock Shopping Park, near TK Maxx, footfall levels have risen since the pandemic. Monthly footfall figures in 2019 were

between 65,000 and 110,000, whereas in 2024 this was between 140,000 and 220,000, with the average in 2024 being 185,000 per month.

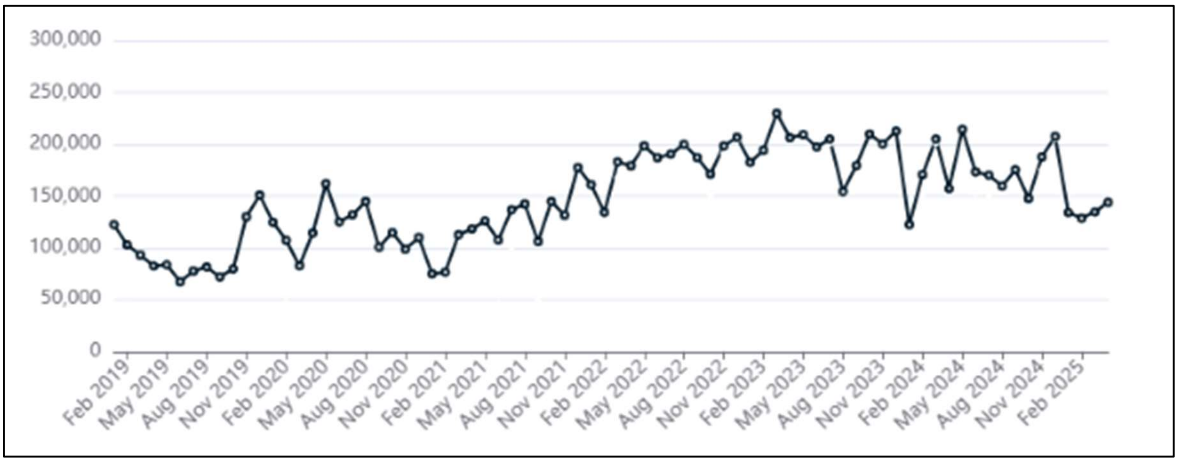
Figure 18: Monthly Footfall Graph, Jan 2019 – April 2025, Thurrock Shopping Park (TK Maxx)



Source: MSCI

52. As can be seen in the figure below, at Tesco Extra, footfall has increased since 2019. As expected, footfall did not dip significantly during the pandemic, as seen at other sites, due to convenience retail being allowed to remain open. Footfall in 2019 ranged between 67,000 and 151,000, which increased to monthly movements of between 120,000 and 215,000 in 2024.

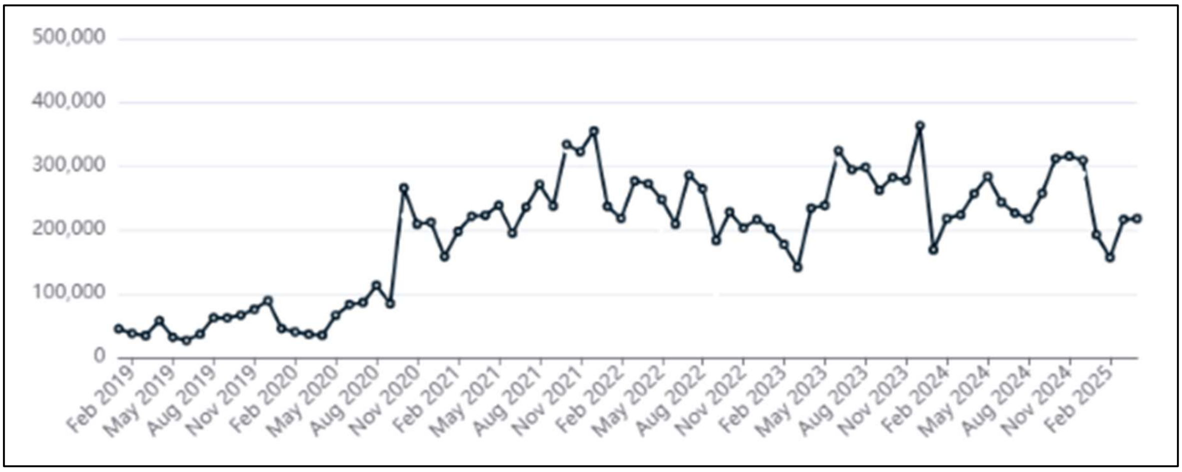
Figure 19: Monthly Footfall Graph, Jan 2019 – April 2025, Tesco Extra



Source: MSCI

53. As can be seen in the figure below, at Lakeside Retail Park, near Lidl, footfall levels have risen significantly since September 2020. Average footfall in 2019 was 51,000, with figures between 26,000 and 88,000. This had risen to 250,000 monthly movements in 2024, with regular figures between 170,000 and 320,000.

Figure 20: Monthly Footfall Graph, Jan 2019 – April 2025, Lakeside Retail Park (Lidl)



Source: MSCI

Accessibility

54. Chafford Hundred train station is located to the east of the centre, accessible via a footbridge over the A126 (a dual carriageway which acts as a barrier to truly convenient linkage). Regular train services can be picked up, connecting to Grays and Southend to the east and London to the west.

55. Lakeside bus station is located to the north of Lakeside Shopping Centre and acts as the bus service hub for the centre. Services from here provide connections to locations including Basildon, Romford, Grays and Tilbury. National Express services also operate from the station, with the route including Glastonbury Festival, Basildon and Southend-on-Sea. Further bus stations can be found across the centre.

56. Lakeside is well connected by road, both internally and externally. The B186 leads through the centre, connecting the shopping centre to the retail parks and standalone units. The A282 can be joined to the west, providing connections to Dartford and beyond to the south and the M25 to the north. The A126 to the east of Lakeside also provides access to the M25 to the north. The shopping centre has a large provision of free parking for its visitors – 11,857 spaces across 12 car parks. Each of the retail parks, along with the Tesco Extra have further associated parking provision.

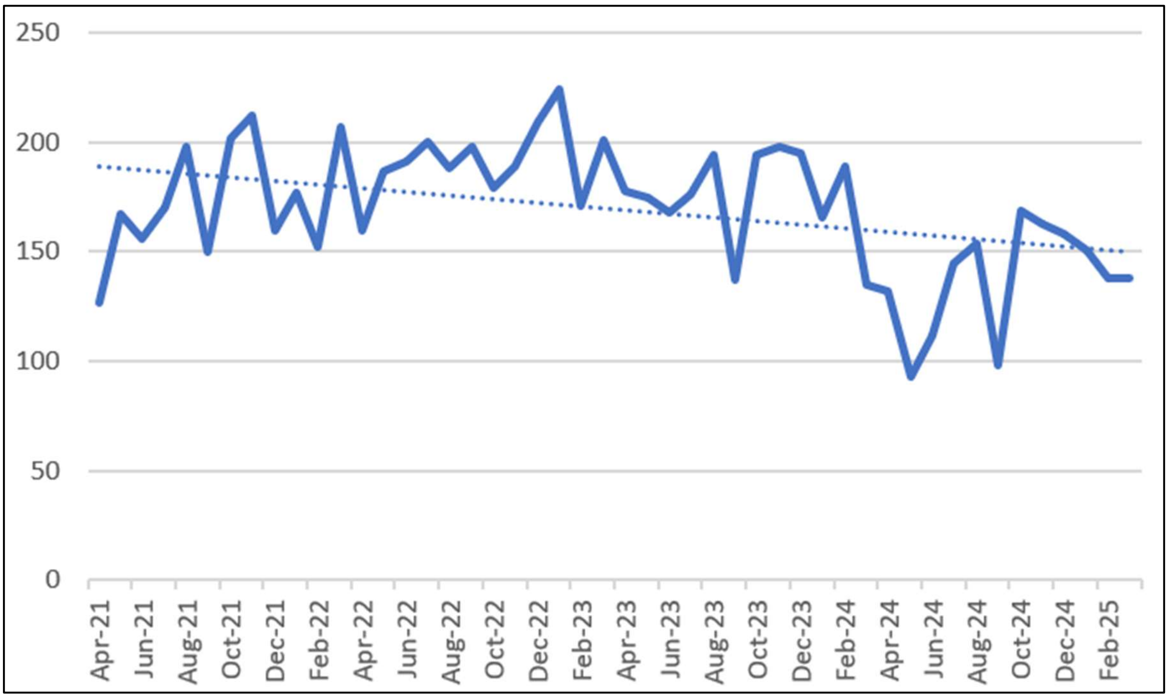
57. Whilst the separate areas of Lakeside (shopping centre and retail parks) provide good pedestrian accessibility, the interconnectivity of these areas by foot is challenging and obstructed by a vehicle-dominated environment. Likewise, the busy road networks make it difficult for those wishing to navigate the centre by bike, with a distinct lack of cycle infrastructure present (e.g., cycle lanes).

Crime and Safety

58. A central postcode within Lakeside regional centre was used to review total crime data within a ½ mile radius between April 2021 and March 2025. The figure below outlines the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.

59. As can be seen, recorded crime levels have declined during this period, with a peak seen in January 2023 (224 recorded crime) and a low in May 2024 (93 recorded crimes).

Figure 21: Recorded Crime, Lakeside, April 2021 - March 2025

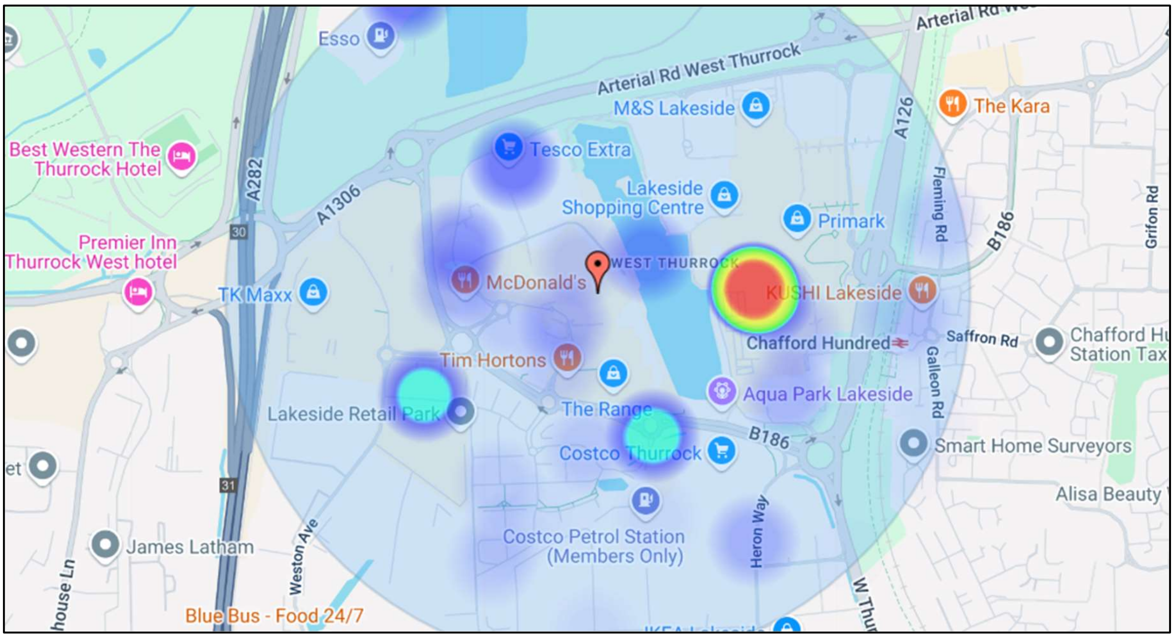


Source: UKCrimeStats

60. The figure below shows a heat map representing criminal activity within the same area (as above) for the 12-month period of April 2024 to March 2025. As can be seen, criminal activity is predominately concentrated within Lakeside Shopping Centre.

61. The top three types of crimes recorded within this area during this period are drugs (538 recorded incidences), violence and sexual offences (267 recorded incidences) and vehicle crime (249 recorded incidences).

Figure 22: Recorded Crime Heat Map, Lakeside, April 2024 - March 2025



Source: UKCrimeStats

Environmental Quality

62. The environmental quality of Lakeside Shopping Centre 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. Alexandra Lake South offers access to nature and activity space, although it feels like a missed opportunity that the lake does not act as more of a focal point for the centre as a whole. The road network detracts from the centre's environmental quality due to the volume of traffic and vehicle dominance.

Evening and Night Time Economy

63. A strong evening and night time economy can often be a good indicator of a strong, vital and viable centre. A vibrant evening and night time economy is largely underpinned by a quality leisure offer within a centre, and so a sample of predominantly leisure outlets within Lakeside has been selected with their opening times and, more importantly, closing times recorded to get a sense of the provision of the evening offer.

64. The table below shows leisure operators in Lakeside Regional Centre. All operators except for one of the two TGI Friday's are within Lakeside Shopping Centre.

65. There are a few restaurants, bars and a cinema. The cinema is operated by Vue and has nine screens and 1,340 seats.

66. Competitive socialising venues play a key role in the leisure provision, with notable operators including the Immersive Gamebox and Boom Battle Bar. These venues operate in the evening, with Boom Battle Bar open till 2 am.

Table 1: Leisure Operator Sample, Lakeside

Retailer Name	Type	Open	Close
Las Iguanas	Restaurant / Bar	11am	10:30-11pm
Immersive Gamebox	Competitive socialising	10-11am	8pm
Hollywood Bowl	Competitive socialising	10-11am	11pm-12am
Boom Battle Bar	Competitive socialising	11am-12pm	11pm-2am
Partyman World of Play	Soft Play	9:30	4-6:30pm
Vue	Cinema	Morning	Late
Pizza Express	Restaurant	11am	5-9pm
Wagamama	Restaurant	11am	9-10pm
TGI Fridays (2)	Restaurant / Bar	11am	10-11:30pm
Flip Out	Competitive socialising	9-10am	8:30pm
Rizzoli	Restaurant	9-10am	5-9pm
Casco Lounge	Restaurant	9am	11pm-12am

Source: LSH Research

67. Footfall levels differ across different parts of the day. Footfall data in April 2024 in a central point within Lakeside Shopping Centre show footfall in an evening (5pm – 9pm) is the second busiest period on weekdays. On weekends however, footfall is highest during lunch (11am – 2pm), followed by the afternoon (2pm – 5pm), with evenings seeing noticeably lower levels of activity.

Customer Perception

68. Our assessment of customers' views and behaviours draws on the household survey conducted by NEMS Market Research (NEMS) across the 10 study zones in May 2025.

69. Apart from helping to identify shopping and leisure patterns across the defined catchment area and zones, the household survey also asked specific questions on the main activities people visit the centre for, what they like and disliked about them and what improvements (if any) could be made to make them likelier to visit more frequently in the daytime and evening time.

Lakeside Shopping Centre

70. When asked what their main activity in Lakeside Shopping Centre is, the top responses were 'non-food shopping' (50%), 'food shopping' (12%) and 'window shopping/ browsing' (11%).

71. When asked what they like about Lakeside Shopping Centre, the top six responses were 'shops – good opening hours/ open on Sundays' (15%), 'attractive environment/ nice place' (14%), 'parking – it's free' (14%), 'close to home' (13%), 'good cafes/ restaurants' (12%) and 'you can get everything you need there' (11%).

72. When asked what they dislike about Lakeside Shopping Centre, the most common responses were 'nothing' (46%) and 'traffic congestion' (10%).

73. When asked what could be improved about Lakeside Shopping Centre to make them likelier to visit more often, the top responses were 'nothing' (42%) and 'less traffic congestion/ improved access' (9%).

74. When asked what activities they do at Lakeside Shopping Centre in the evening, the most common responses were 'late night shopping' (45%), 'eating out' (42%) and 'visiting the cinema' (22%).

Retail Parks at Lakeside

75. The top three responses to what are the main activity people visit the retail parks at Lakeside for were 'non-food shopping' (38%), 'food shopping' (22%) and 'window shopping/ browsing' (9%).

76. When asked what they liked most about the retail parks at Lakeside, the most common responses were 'good range of affordable shops' (16%), 'parking spaces are easy to find' (14%), 'close to home' (12%) and 'good cafes and restaurants' (12%).

77. Conversely, when asked what they disliked about the retail parks at Lakeside, the most common responses were 'nothing' (46%) and 'traffic congestion' (12%).

78. The top responses to what would encourage more visits to the retail parks at Lakeside more often were 'nothing' (50%) and 'improved access and less traffic congestion' (13%).

Conclusion

79. Overall, the Strengths, Weaknesses, Opportunities and Threats (SWOTs) 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.

80. We therefore conclude that Lakeside continues to serve as a major regional shopping destination, functioning as a key retail and leisure hub that attracts a wide customer base throughout the day and into the evening.

81. Lakeside has a particularly strong representation of major national and international multiple retailers, which allows it to draw visitors from well-beyond its immediate catchment.

82. Both the shopping centre and the retail parks are easily accessible by road and bus services. Whilst the centre is served by a Chafford Hundred train station, linkages to the station could be improved.

83. Whilst the floorspace vacancy rate at Lakeside Shopping Centre is currently well above the UK average, it is noted that there are ongoing changes, such as Next’s upcoming occupation of the former House of Fraser unit. As shopping centres are evolving and adapting to changing shopping habits, Lakeside Shopping Centre may also need to adapt and find alternative operators and uses (such as health care and education).

84. Positive footfall trends across the centre are a good sign that Lakeside is performing well and is well-placed to build on this as it evolves and adapts in the coming years.

3. GRAYS TOWN CENTRE HEALTH CHECK

Overview

85. 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.

86. It offers direct rail links to London via Grays Station and has good road connections through the A13 and M25.

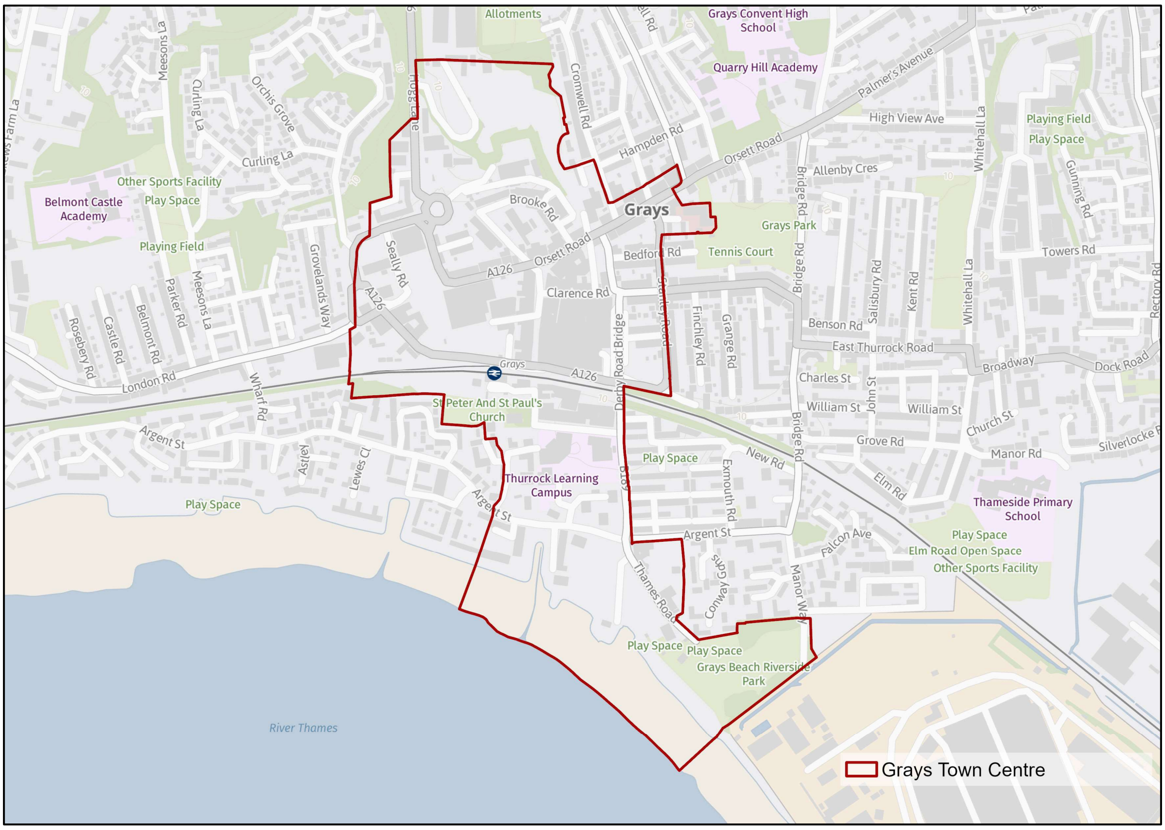
87. The town centre features a mix of retail (including Grays Shopping Centre and markets), hospitality, and essential services, with residential areas and new housing developments nearby.

88. 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.

89. 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.

90. Recent public realm upgrades (such as the new Council headquarters and the riverside enhancements) are creating a more integrated town centre. In terms of other future developments that may change the form of the centre, 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.

Figure 23: Grays Town Centre Boundary Map



Source: LSH

Diversity of Uses

91. Goad data from August 2024 has been used to assess Gray's mix of uses. The figure below shows the area covered by Goad.

Figure 24: Gray's Shopping Centre Units, August 2024

Source: GOAD

92. The table below shows that Grays has a total of 230 units and an overall quantum of 49,930 sqm in floorspace.

Figure 25: Number of Outlets and Floorspace, Grays

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Grays	UK Average		Grays	UK Average
Comparison Retail	50	21.7%	26.4%	13,030	26.1%	29.4%
Convenience Retail	34	14.8%	9.3%	12,900	25.8%	15.6%
Retail Services	38	16.5%	15.9%	3,360	6.7%	7.3%
Leisure Services	44	19.1%	25.8%	5,950	11.9%	26.7%
Financial & Business Services	29	12.6%	8.3%	4,890	9.8%	6.3%
Vacant	35	15.2%	14.1%	9,800	19.6%	14.2%
Total	**230**	**100.0%**	**100.0%**	**49,930**	**100.0%**	**100.0%**

Source: GOAD

93. There are 50 comparison retail outlets in Grays, accounting for 21.7% of outlets and 26.1% of floorspace; these are slightly below the UK averages of 26.4% and 29.4%.

94. There is a cluster of comparison retail within Grays Shopping Centre, amongst these are Poundland, Home Perfection, Mark One Clothing and Shoezone.

95. There are 34 convenience retail outlets, accounting for 14.8% of all outlets. This is above the UK average. Convenience retail floorspace occupancy for Grays is at 25.8%, which is 10.2 percentage points above the UK average.

96. Leisure services occupy 19.1% of all outlets, which is below the UK average of 25.8%.

97. The table below shows outlet floorspace and floorspace change from 2016, 2018, 2021 and 2024.

Figure 26: Grays Town Centre Floorspace 2016, 2018, 2021, 2024

Floorspace	% of Total Outlets				Change (Outlets)			% of Total Floorspace			
	2016	2018	2021	2024	2016-24	2018-24	2021-2024	2016	2018	2021	2024
Comparison Retail	69	62	55	50	-19	-12	-5	33.5%	30.5%	24.4%	26.1%
Convenience Retail	22	29	29	34	12	5	5	10.7%	14.3%	12.9%	25.8%
Services	93	89	110	111	18	22	1	45.1%	43.8%	48.9%	28.4%
Vacant	22	23	31	35	13	12	4	10.7%	11.3%	13.6%	19.6%
Total	206	203	225	230	24	27	5	100.0%	100.0%	100.0%	100.0%

Source: Experian Goad Category Report (October 2021); Experian Goad (2018); Experian Goad (2016); Experian Goad (2024)

98. When comparing Grays town centre across 2016, 2018, 2021 and 2024 it can be concluded 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 percentage point decrease 2016-2024

Figure 27: Number of Food & Beverage Outlets and Floorspace, Grays

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Grays	UK Average		Grays	UK Average
Bars & Wine Bars	1	0.4%	2.4%	160	0.3%	2.4%
Cafes	7	3.0%	5.2%	760	1.5%	2.9%
Fast Food & Take-Away	17	7.4%	6.2%	1,860	3.7%	3.1%
Public Houses	2	0.9%	2.6%	520	1.0%	3.4%
Restaurants	9	3.9%	5.5%	1,020	2.0%	4.3%
Total	**36**	**15.7%**	**21.9%**	**4,320**	**8.7%**	**16.1%**

Source: Experian Goad

99. In Grays town centre, the food & beverage offer occupies 15.7% of total outlets, which is a lower proportion than seen for the UK average (21.9%). Floorspace occupied 4,320 sqm which equates to 8.7% of the total, which is 8.1 percentage points below the UK average.

100. There are 17 fast food & take-away outlets, accounting for 7.4% of Grays outlets. These fast food & take-away units represent almost half of the food & beverage outlets in Grays. This is the only category within food & beverage that surpasses the UK average.

Figure 28: Pasha Lounge, Restaurant

Source: LSH Site Visit

Vacancies

101. There are a total of 35 vacant outlets in Grays Town Centre, which represents 15.2% of the overall outlets, higher than the UK average of 14.2%. 19.6% of the floorspace is vacant, which compares unfavourably to the UK average of 14.2%. Seven of these vacancies are within Grays shopping centre and one within Queensgate

Centre. The vacancy rate will decrease if Grays Shopping Centre planning application to be converted into residential and commercial units is successful.

Figure 29: Grays Vacancy Map, August 2024

Source: Experian Goad

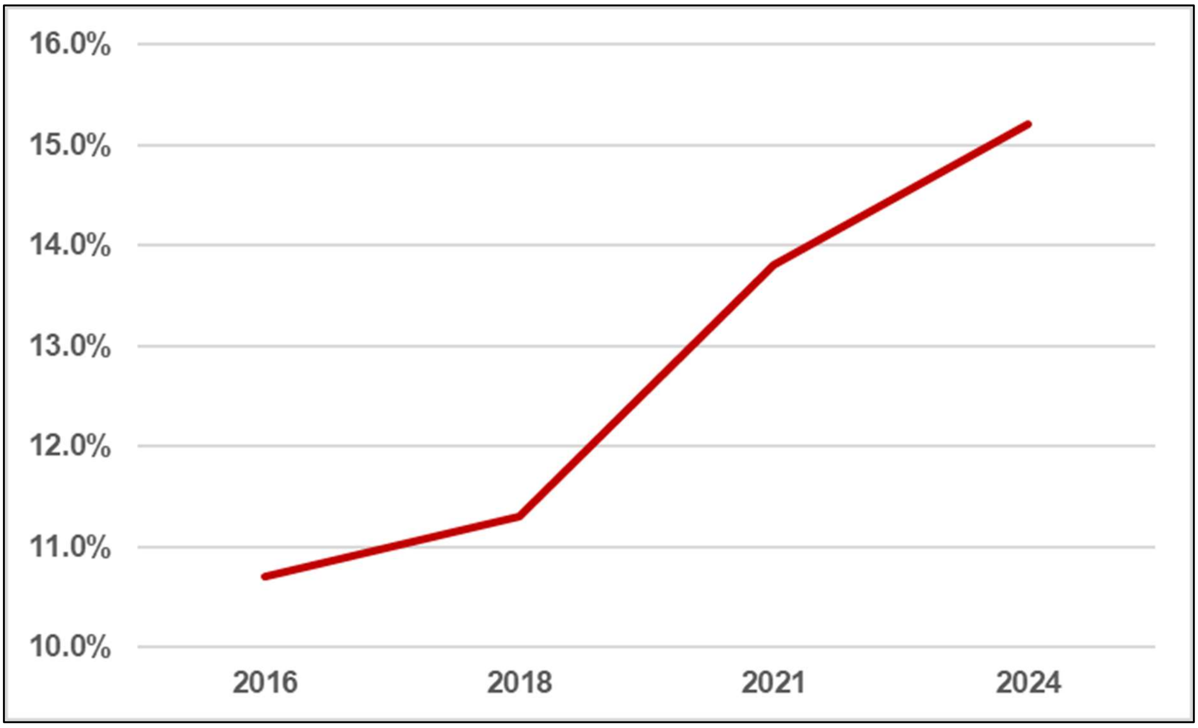
102. The figure above illustrates where vacant units are in Grays as of August 2024. As can be seen, vacant units are spread across the centre, with no clear clusters.

103. Vacancy has been rising steadily since 2016. At the time of the 2016 study, there were 22 vacant units, by 2024 this reached 35 vacant units, an overall rise of 13 units. This trend reflects the national pattern of growing vacancy levels across the UK.

Figure 30: Vacant Unit, High Street, Former Halifax Bank

Source: LSH Site Visit

Figure 31: Grays Town Centre Vacancy 2016-2024



Source: Experian Goad Category Report (October 2021); Experian Goad (2018); Experian Goad (2016); Experian Goad (2024)

Multiple and Independent Representation

104. Grays has a mix of national multiples and independents. Comparison retail national multiple brands include Boots, Card Factory, Cex, Mind, Poundland, Savers and The Works.

105. Convenience retail stores can be found throughout the centre, with national multiple representation led by Morrisons, Aldi and Iceland. There are also various independent convenience stores such as Hannah's, Yas Food & Bakery and Ronab Foods.

106. The majority of food & beverage outlets are independent, such as Memel and Roxas Gourmet, with some multiple national brands such as Costa, KFC, Burger King and Subway.

Markets

107. As noted in the NPPF, markets play an important role in supporting the vitality and viability of centres and local communities and there is policy support for the retention and enhancement of existing markets and creation of new ones.

108. Grays Market is located on the High Street and George Street. The market operates on Friday and Saturday between 9am and 4pm, selling a range of products, household goods, food and flowers.

Retailer Requirements

109. Demand from retailers and leisure operators for representation in a centre is an important indicator of a centre's overall health and viability. The latest published market demand report is set out in the table below:

Figure 32: Retailer Requirements, Grays

Recorded Date	Operator	Operator Type	Min Sqm	Max Sqm
Sep-24	Forumla One Autocentres	Car servicing	420	650
Jul-24	KFC	Fast Food Restaurant	170	230
Jun-24	CUPP	Bubble tea cafe	24	95
Apr-24	Graystone	Action Sports facility	2,800	2,800
Apr-24	Lidl	Supermarkets	1,650	2,400
		Total	**5,064**	**6,175**

Source: The Requirement List

110. As of May 2025, a review of published operator requirements identified five recorded requirements from retail and leisure operators since January 2024, seeking a combined maximum floorspace of up to 6,175 sqm.

111. It should be noted that these are not necessarily operators seeking representation within the centre itself but potentially out-of-centre locations and retail parks.

112. It is also possible that these operators are not looking for opportunities in Grays specifically, rather they are looking for opportunities in areas similar to and including Greys.

113. Independent/ smaller operators do not tend to document their desire for retail space in the same way as the larger national multiples and fast-growing organisations, and so gauging the demand for retail space from these businesses is harder.

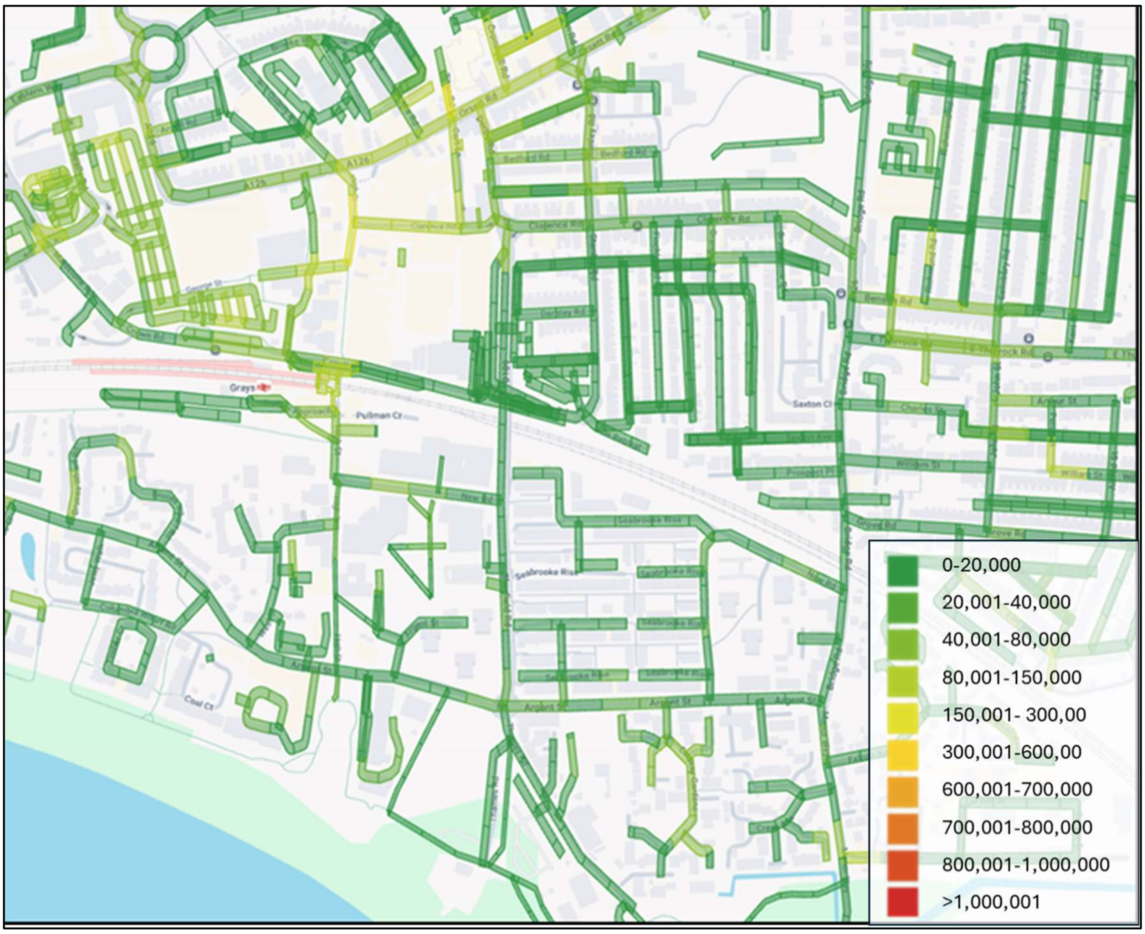
Commercial Property Indicators

114. Based on VOA figures, it is estimated that prime rents in Grays were around £377psm (£35 psf) in Zone A as April 2021. Agents in the market have confirmed this is still accurate as of June 2025, suggesting that rents are stable.

Pedestrian Flows

115. The figure below illustrates the pedestrian flows for Grays in the form of a heat map showing total pedestrian movements for April 2025.

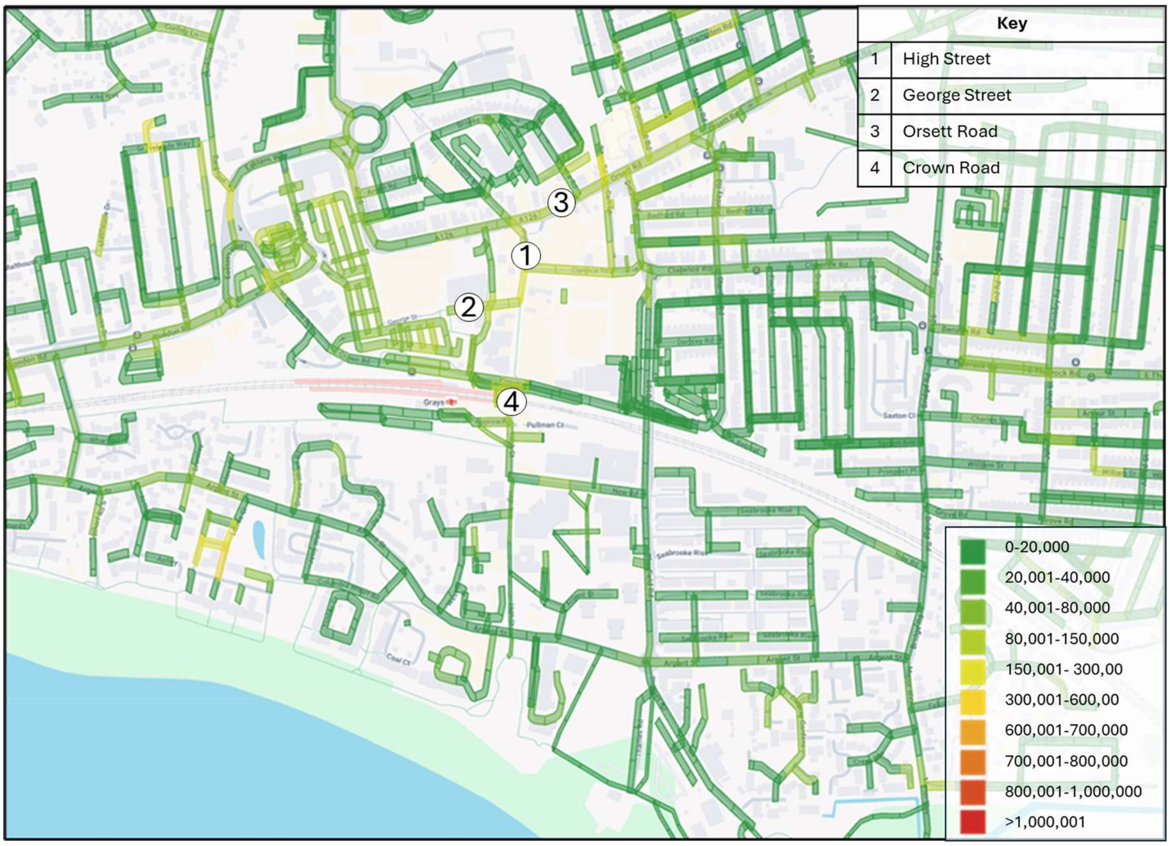
Figure 33: Grays Town Centre Footfall, April 2025



Source: MSCI

116. Four sections of Grays; High Street, George Street, Orsett Road and Crown Road was sampled to obtain information on how footfall levels have changed between Jan 2019 and April 2025.

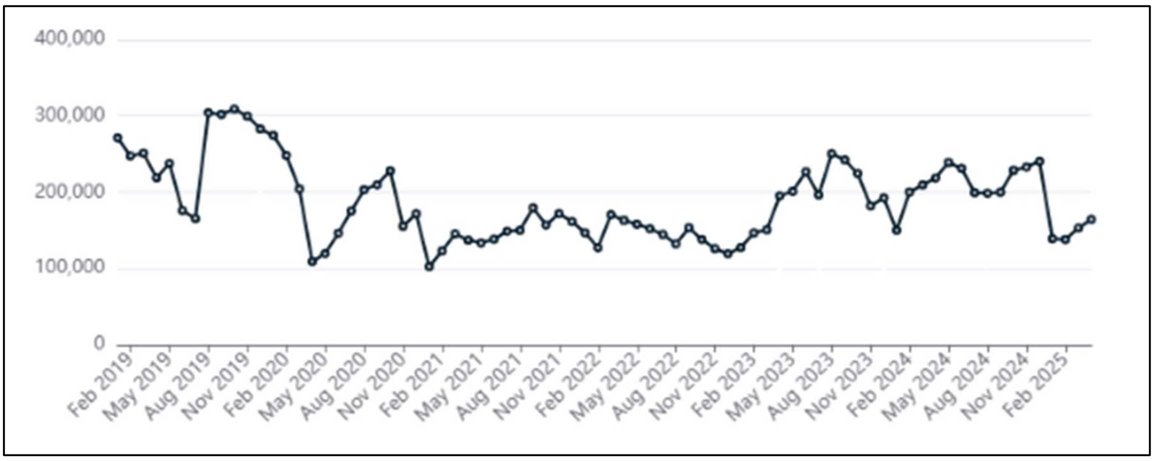
Figure 34: Grays Town Centre Footfall Samples, April 2025



Source: MSCI

117. As can be seen in the figure below, footfall levels along High Street peaked in late 2019. In 2023 and 2024 there were some positive signs of recovery from the pandemic period, there was a drop back down at the start of 2025, which has gradually been rising since.

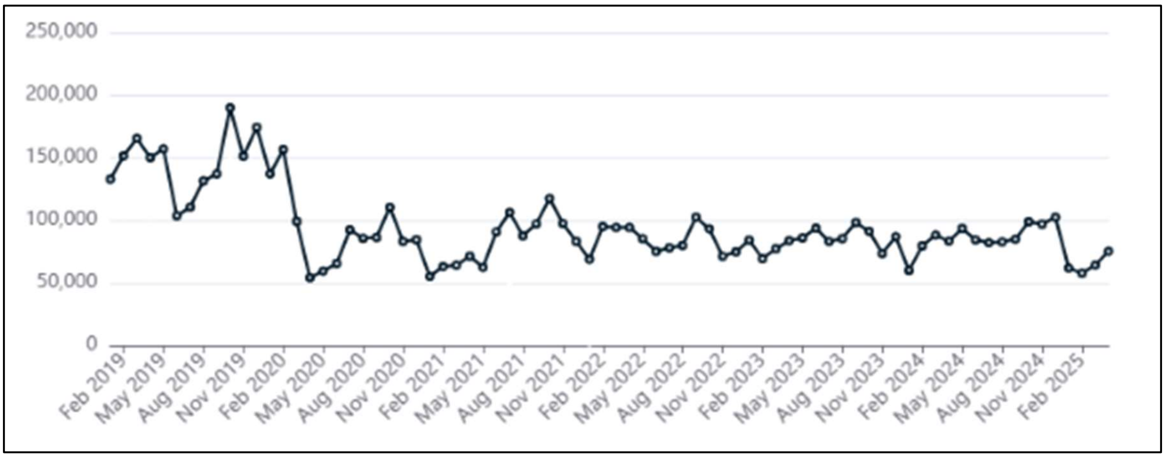
Figure 35: Monthly Footfall Graph, Jan 2019 – April 2025, High Street



Source: MSCI

118. As can be seen in the figure below, footfall levels on George Street dropped significantly in line with the beginning of the Pandemic period (early 2020) and have not recovered since.

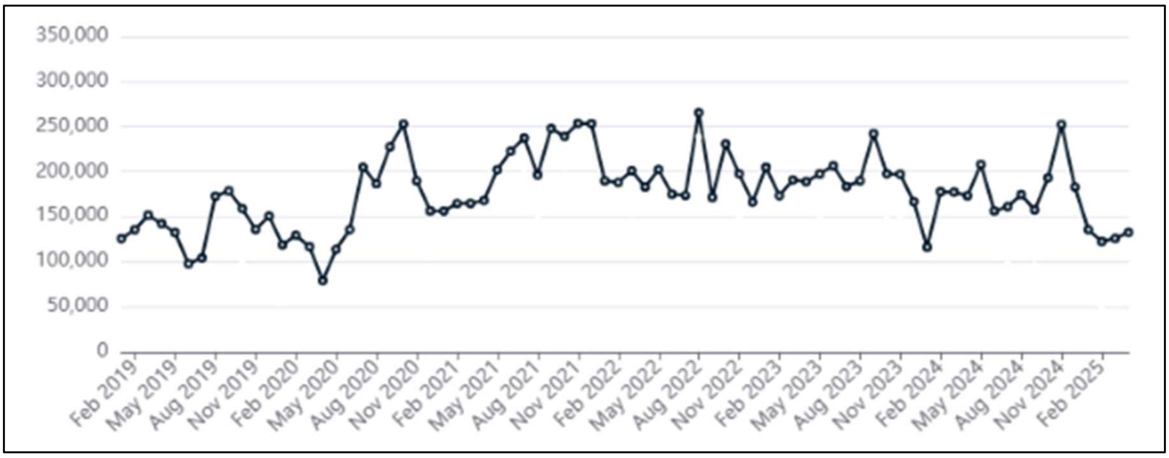
Figure 36: Monthly Footfall Graph, Jan 2019 – April 2025, George Street



Source: MSCI

119. As can be seen in the figure below, footfall levels quickly bounced back from mid-2020 and have surpassed pre-pandemic levels.

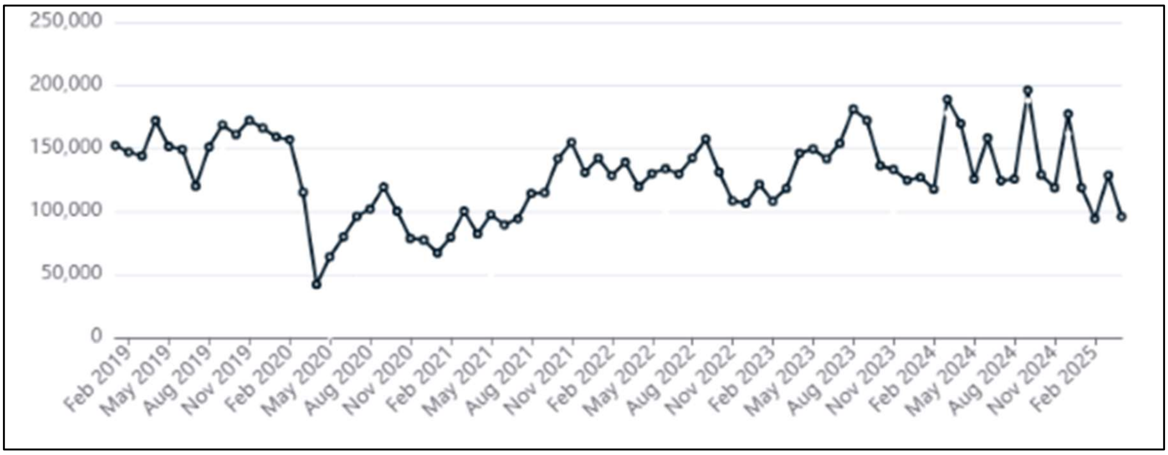
Figure 37: Monthly Footfall Graph, Jan 2019 – April 2025, Orsett Road



Source: MSCI

120. As can be seen in the figure below, footfall levels on Crown Road dropped significantly in line with the beginning of the Pandemic period. They have steadily been growing back, with some recent months surpassing figures seen in 2019. Pedestrian activity levels are more inconsistent in 2024 and early 2025 than they were pre-pandemic.

Figure 38: Monthly Footfall Graph, Jan 2019 – April 2025, Crown Road



Source: MSCI

Accessibility

121. Grays train station is located between Crown Road and Station Approach, accessible from both sides. Services run regularly from here – east to Tilbury, Stanford-le-Hope, Leigh-on-Sea and beyond and west to Purfleet, Rainham, Barking and ultimately through to London. It has an associated car park with 144 spaces available. The main bus station is located along Crown Road, by the train station, providing seamless connection between bus and rail services. Bus routes that operate from here allow for connections to Lakeside, Stanford-le-Hope, Corringham, South Ockenden, Aveley, Basildon and more.

122. The A126 feeds through the northern part of Grays town centre, providing a main route in and out from the east and west. Crown Road, which runs parallel to the railway line, provides the access point to Grays Shopping Centre Car Park (multi-storey), which is the main parking provision within the centre with 700 spaces. Morrisons also has an associated surface level car park, with 486 spaces available. Electric vehicle charging points are available within Grays town centre.

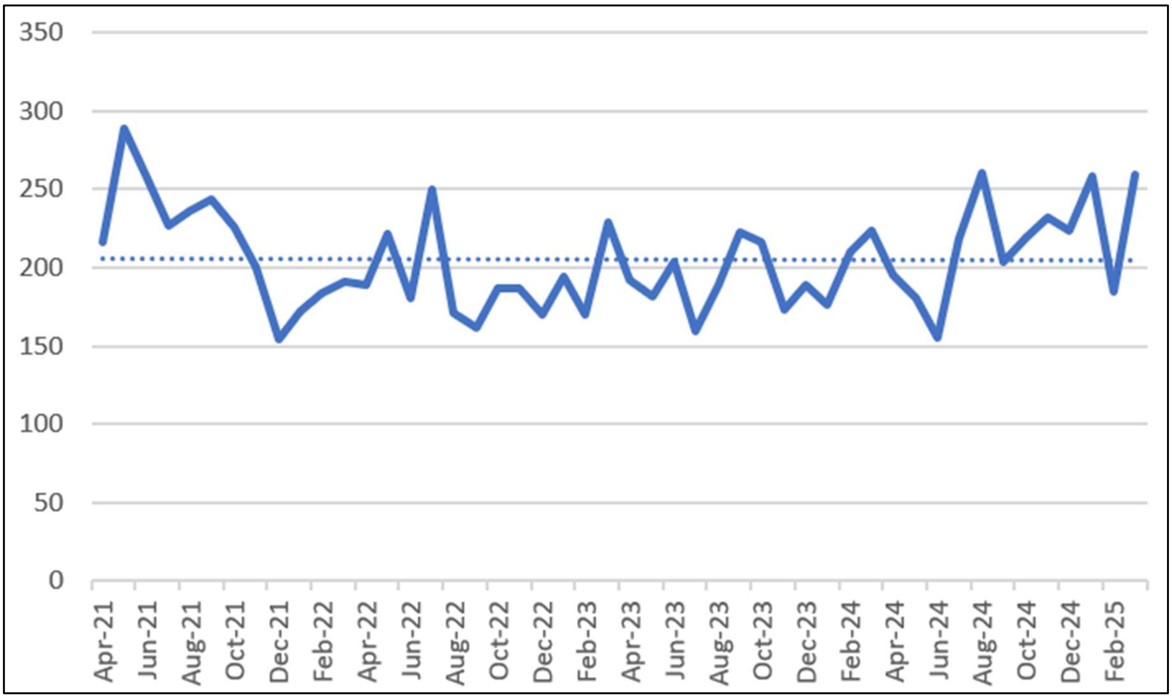
123. Cycle and pedestrian accessibility is supported by several low/ no traffic zones within the centre, the most notable being along High Street. Benches can be found across the centre, supporting those navigating by foot, whilst cycle racks are also available in key locations. The crossing of the railway line along the High Street poses an obstacle to both pedestrians and cyclists and is widely seen as a safety hazard and concern in the area.

Crime and Safety

124. A central postcode within Grays was used to review total crime data within a ½ mile radius between April 2021 and March 2025. The figure below outlines the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.

125. As can be seen, the trendline suggests that overall, criminal activity has been stable during this period.

Figure 39: Recorded Crimes, Grays, April 2021 - March 2025

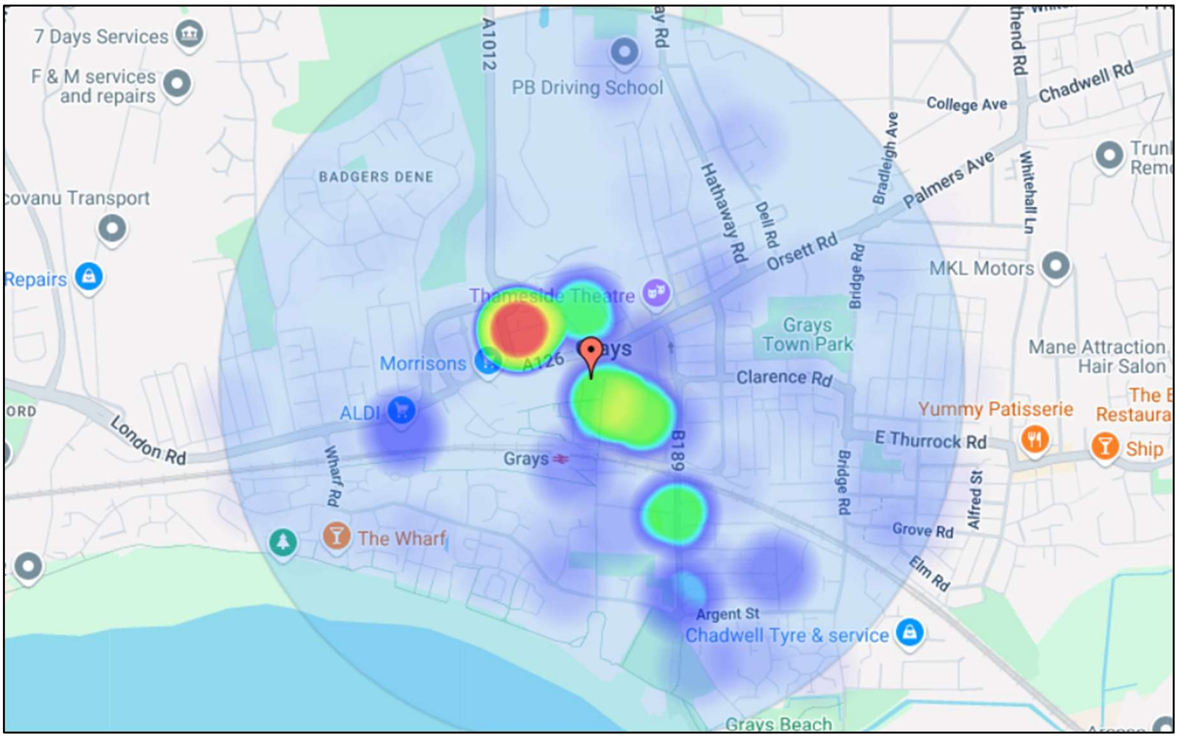


Source: UKCrimeStats

126. The figure below shows a heat map representing criminal activity within the same area (as above) for the 12-month period of April 2024 to March 2025. As can be seen, criminal activity is predominately concentrated at the heart of the centre – in the vicinity of the Morrisons store, as well as at Grays Shopping Centre.

127. The top three types of crimes recorded within this area during this period are violence and sexual offences (803 recorded incidences), drugs (632 recorded incidences) and anti-social behaviour (245 recorded incidences).

Figure 40: Crime Heat Map, Grays, April 2024 - March 2025



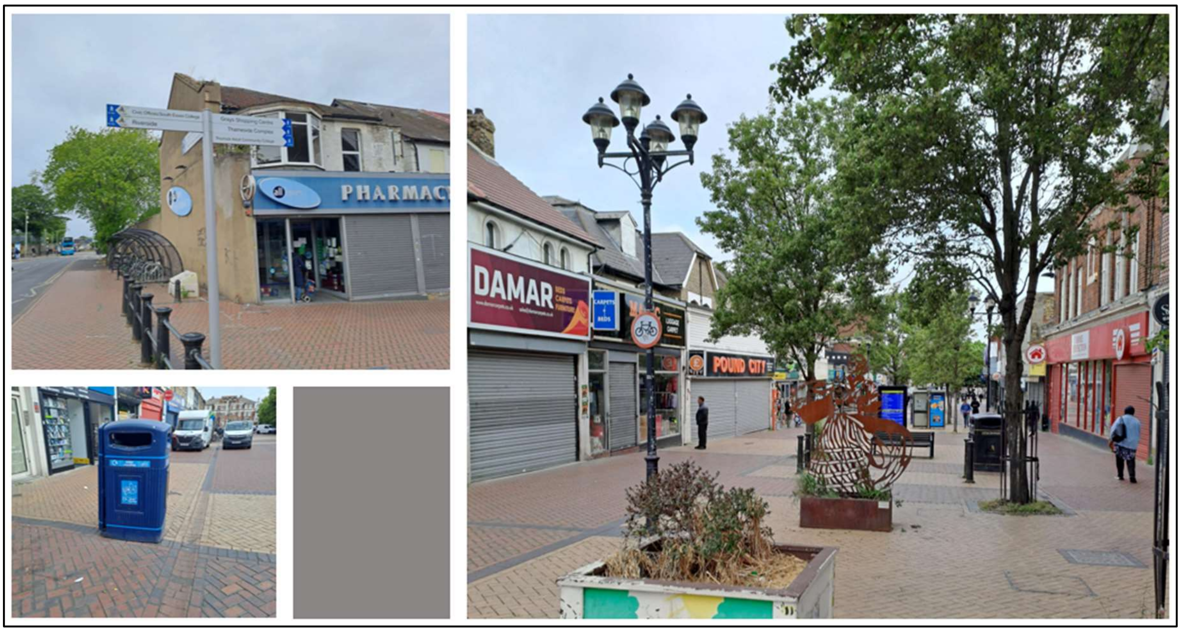
Source: UKCrimeStats

Environmental Quality

128. Elements identified in Grays that enhance the environmental quality include:

- Good provision of street furniture, including bins which results in the centre being generally clean
- Good signage
- Pedestrianised areas
- Characterful streetlights
- Access to green space (Kilverts Field and Grays Beach Riverside Park)

Figure 41: Grays – Elements That Enhance The Environmental Quality



Source: LSH Site Visit

129. Elements of the centre identified that detract from its environmental quality include:

- Vacant units
- Unkept buildings
- Lack of green space and vibrancy within the core of the centre, including unkept planters
- Generally hard environment

Figure 42: Grays - Elements That Detract From The Environmental Quality

Source: LSH Site Visit

130. Overall, the environmental quality of Grays is fair, but with areas that could be significantly improved.

Evening and Night Time Economy

131. The evening offer is somewhat limited in Grays town centre. There are 2 pubs that are open late in the evening (The Court Yard Inn, near the high street and The Theobald Arms, towards the Grays Town Wharf). There is a selection of restaurants offering a range of cuisines and a theatre. Thameside Theatre on Orsett Road sits within the Thameside complex that includes Thurrock Museum, Grays library and an exhibition area. The theatre has a range of plays, comedy acts, music and cinema shows with availability that also allows for private bookings. The theatre has 316 seats.

Table 2: Leisure Operator Sample, Grays

Retailer Name	Type	Open	Close
Izgara & Meze	Restaurant / Bar	11am	10:30-11:30pm
Thameside Theatre	Theatre	Morning	Late
The Courtyard Inn	Pub	10-11am	11pm-12am
The Theobald Arms	Pub	12pm	11pm – 12am
Mangal	Restaurant	12pm	11pm
Desi Indian Dining Club	Restaurant	12:30-5pm	10:30pm-12am
Tasty African Food	Restaurant	10:30am	10pm
Tuk Tuk Far East Kitchen	Restaurant	4pm	10-11pm

Source: LSH Research

Footfall levels differ across different parts of the day. Footfall data in April 2024 at a central point within Grays, on Clarence Road, shows that footfall in the evening (5 pm – 9 pm), falls behind morning, lunch and afternoon but remains relatively active when considering the overall daily profile. Mornings on weekdays have the highest footfall, followed by lunch on the weekend, closely followed by lunch on the weekends, eventually followed by evenings on the weekend, showing that daytime activity is much higher than activity in the evening/night.

Customer Perception

132. Our assessment of customers’ views and behaviours draws on the household survey conducted by NEMS Market Research (NEMS) across the 10 study zones in May 2025.

133. Apart from helping to identify shopping and leisure patterns across the defined catchment area and zones, the household survey also asked specific questions on their main reason for visiting each centre, what improvements (if any) could be made to make them likelier to visit more frequently in the daytime and evening time and what services were lacking in the centre.

134. The top four responses to what the main purpose of their visit to Grays town centre were ‘food shopping’ (34%), ‘non-food shopping’ (19%), ‘visiting family/ friends who live there’ (8%) and ‘study there’ (8%).

135. When asked about how Grays town centre could be improved, the most common responses were ‘less empty shops’ (20%), ‘make the centre more attractive/ create a nicer environment’ (16%) and ‘create a better market’ (15%).

136. When asked what shops or local services were considered to be missing in Grays town centre, the most common responses were ‘none’ (47%), ‘don’t know’ (18%) and ‘GP surgeries’ (14%).

Conclusion

137. Overall, the Strengths, Weaknesses, Opportunities and Threats (SWOTs) 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.

138. We therefore conclude that whilst Grays continues to have its challenges, it does remain a significant centre within the area when it comes to its retail and leisure offer. Accessibility is good across the range of transport modes, which gives the centre a good platform from which to build on.

139. Declining footfall at the core of the centre and rising vacancy rates are a clear indication of the challenges that the town centre faces. It is hoped that any future regeneration of Grays Shopping Centre can be the catalyst for investment, regeneration and growth for the centre.

140. There is a lack of greenery and vibrancy across in the core areas of the town centre which is likely limiting visitor numbers and dwell times. While investment is set to go into improvements to the south of the centre, there is a need for these efforts to be matched at the heart of Grays.

4. AVELEY LOCAL CENTRE HEALTH CHECK

Overview

141. Aveley is designated local centre. It is a historic centre focused on the High Street, and retains a traditional village atmosphere with independent shops, cafes, a Co-op Food, and essential community services.

142. The area is surrounded by established and new residential developments, and benefits from nearby green spaces such as Belhus Woods and Aveley Recreation Park.

143. Overall, the centre complements larger nearby centres like Lakeside and South Ockendon.

144. While it lacks a railway station, it is well-connected by road and local bus routes.

145. The surrounding area is experiencing growth through housing expansion and the influence of regeneration in surrounding areas, particularly Purfleet and West Thurrock.

146. Balancing its historic character with surrounding modern development, Aveley remains a key local hub serving its immediate residential hinterland.

Figure 43: Aveley Local Centre Boundary Map

Diversity of Uses

147. Council-held data provided to LSH has been updated based on a site visit conducted in May 2025. This has been used to assess Aveley's mix of uses. The figure below shows the area covered in the assessment.

148. Note that the areas depicted below do not correlate to the outlet footprints.

Figure 44: Aveley Local Centre Units, May 2025

149. The table below shows that Aveley has a total of 19 units.

Figure 45: Number of Outlets and Floorspace, Aveley

	No. of Outlets	% of Total Outlets	
		Aveley	UK Average
Comparison Retail	2	10.5%	26.4%
Convenience Retail	3	15.8%	9.3%
Retail Services	4	21.1%	15.9%
Leisure Services	8	42.1%	25.8%
Financial & Business Services	0	0.0%	8.3%
Vacant	2	10.5%	14.1%
Total	**19**	**100.0%**	**100.0%**

Source: Council provided data updated by LSH site visit (May 2025)

150. Leisure services are the most common use, accounting for 42.1% of outlets. There is a hotel (The Old Clock Hotel) and a betting office (William Hill) present in Aveley.

The remaining uses are food & beverage outlets, accounting for 75% of leisure services.

Figure 46: Number of Outlets, Aveley

	No. of Outlets	% of Total Outlets	
		Aveley	UK Average
Bars & Wine Bars	0	0.0%	2.4%
Cafes	1	5.3%	5.2%
Fast Food & Take-Away	2	10.5%	6.2%
Public Houses	1	5.3%	2.6%
Restaurants	2	10.5%	5.5%
Total	**6**	**31.6%**	**21.9%**

Source: Council provided data updated by LSH site visit

Fast food & takeaway and restaurants are the most common food & beverage types, with two outlets each. There is one pub and one café, but no bars & wine bars present

Figure 47: Aveley Takeaways

Source: LSH Site Visit

151. There is an additional pub, The Old Ship Inn, that falls outside the town centre boundary, located towards the East of Ship Lane, therefore has not been included in the analysis. Further along, there are an additional 4 other units (West & Coe Funeral Directors, Hair by Wilson's Essex Chef and OMHS Pharmacy) along with the Aveley Community Hub and library south of centre.

Figure 48: Aveley Community Hub

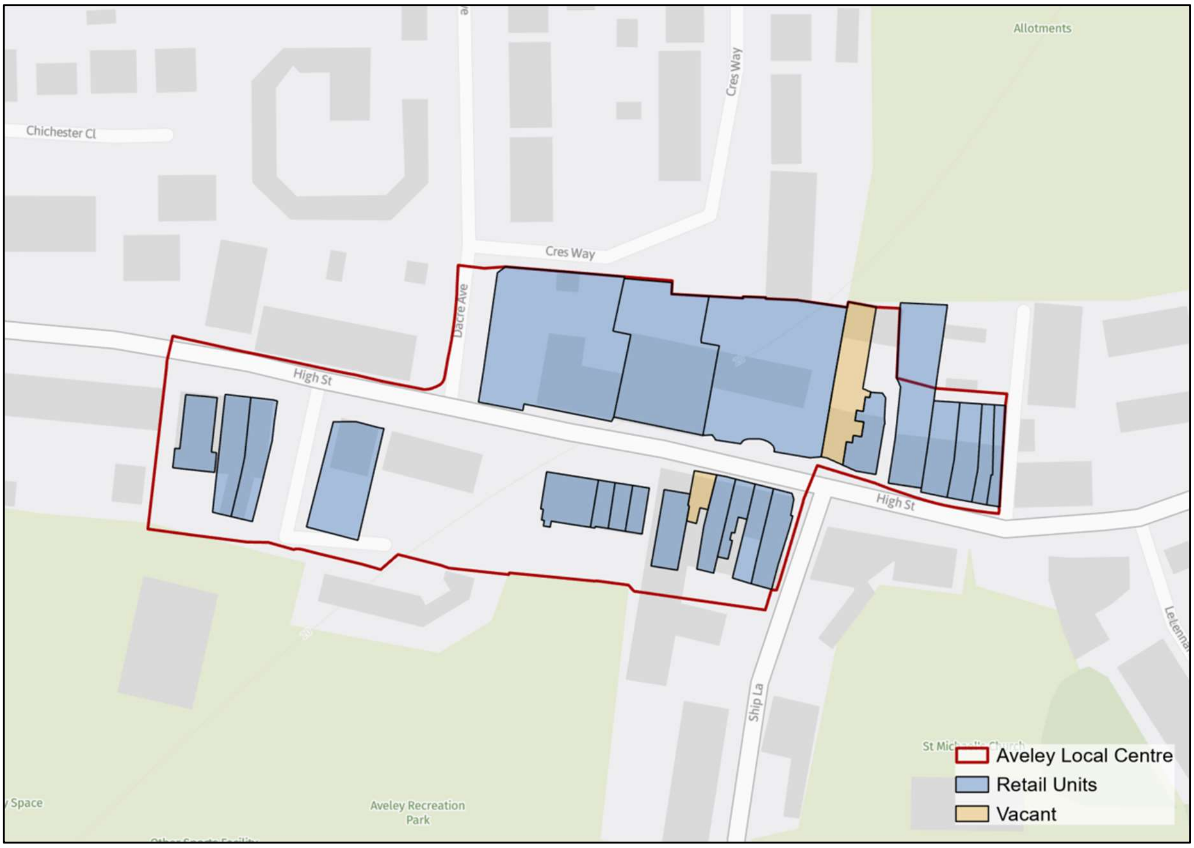
Source: LSH Site Visit

Vacancies

152. There are a total of two vacant outlets in Aveley, which represents 10.5% of the overall outlets, lower than the UK average of 14.1%.

153. The image below illustrates where vacant units are located in Aveley as of May 2025.

Figure 49: Aveley Local Centre Vacant Unit, May 2025

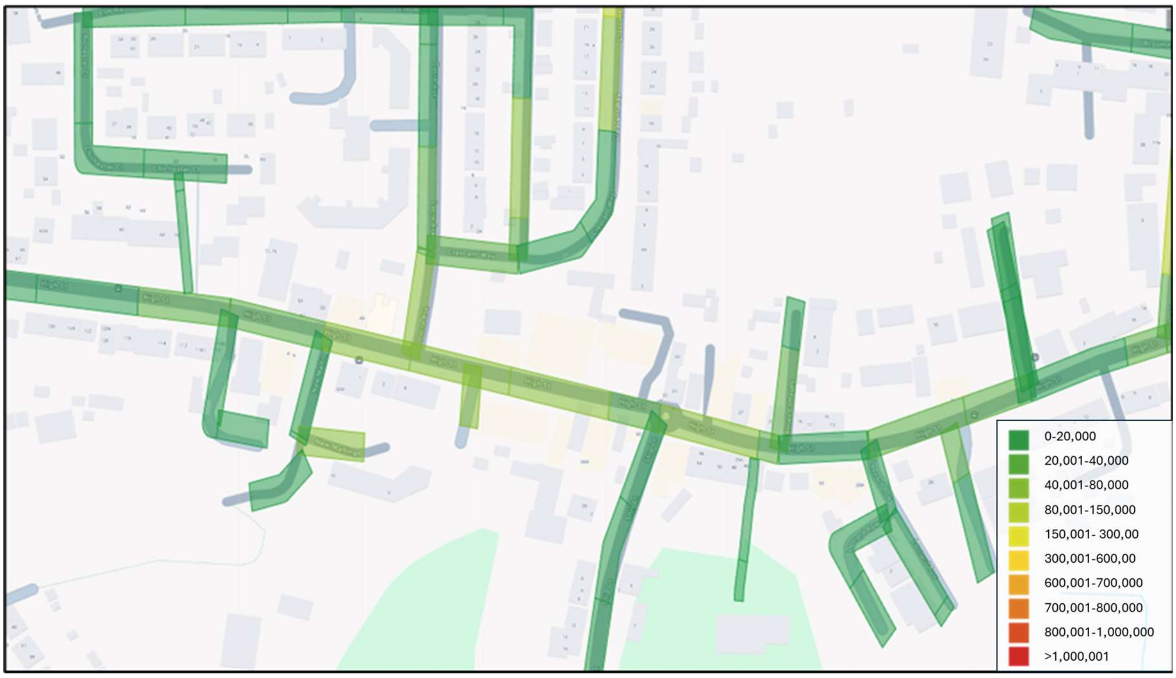


Source: Council provided data updated by LSH site visit (May 2025)

Pedestrian Flows

154. The figure below illustrates the pedestrian flows for Aveley in the form of a heat map showing total pedestrian movements for April 2025. As can be seen, footfall is generally low across the area.

Figure 50: Aveley Local Centre Footfall, April 2025

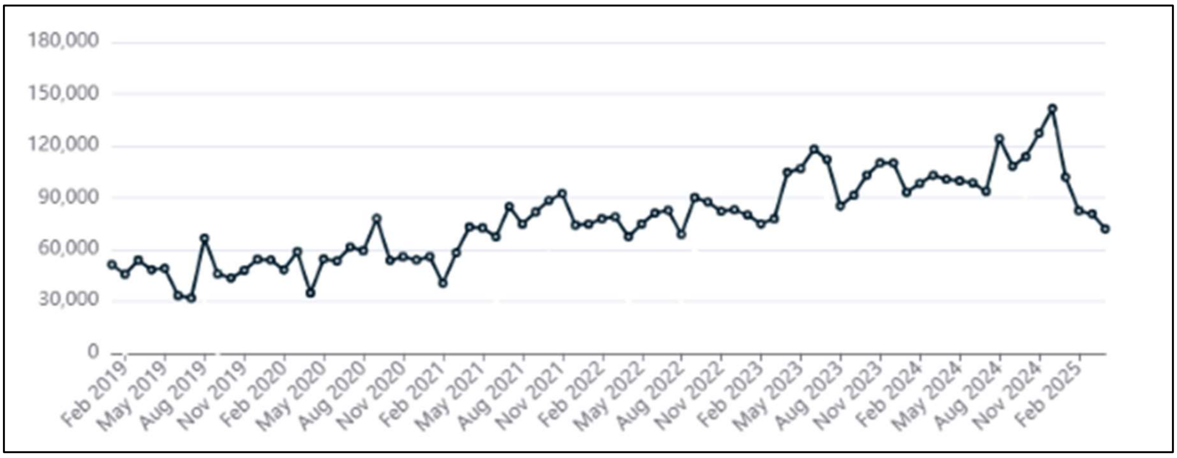


Source: MSCI

155. A central section of Aveley, located along the High Street, near Co-op and One Stop, was sampled to obtain information on how footfall levels have changed between January 2019 and April 2025.

156. As can be seen in the figure below, footfall levels have steadily increased since 2019. Footfall in January 2024 was at 93,000 and gradually increased to 141,000 in December later that year. There has been a notable drop off thus far in 2025 however.

Figure 51: Monthly Footfall Graph, Jan 2019 – April 2025, High Street



Source: MSCI

Accessibility

157. The 22 bus route serves Aveley, providing connections to the residential areas to the north, as well as eastwards, to South Ockenden, Lakeside and Grays.

158. High Street feeds through Aveley from east to west, with parking available along New Maltings and at Aveley Library, including electric vehicle charging bays.

159. Whilst the pavements are narrow in parts, zebra crossings are present to support with pedestrian navigation. Cycle parking can also be found within the centre.

Customer Perception

160. Our assessment of customers' views and behaviours draws on the household survey conducted by NEMS Market Research (NEMS) across the 10 study zones in May 2025.

161. Apart from helping to identify shopping and leisure patterns across the defined catchment area and zones, the household survey also asked specific questions on their main reason for visiting each centre, what improvements (if any) could be made to make them likelier to visit more frequently in the daytime and evening time and what services were lacking in the centre.

162. When asked the main purpose for visiting Aveley local centre, the most common responses were for 'visiting family/ friends who live there' (60%), 'food shopping' (19%) and 'don't know/ varies' (8%).

163. The top responses to how Aveley local centre could be improved were 'nothing' (83%) and 'don't know' (7%).

164. When asked what shops or local services were missing in Aveley local centre, the most common responses were 'none' (84%), 'bakeries' (5%), 'don't know' (5%), 'DIY/ hardware stores' (4%) and 'chemists' (4%).

Conclusion

165. Overall, the Strengths, Weaknesses, Opportunities and Threats (SWOTs) 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.

166. We therefore conclude that Aveley is a vital and viable local centre that meets the needs of its local catchment mainly through its convenience retail and services offer. Positive footfall trends and low vacancy figures indicate that the centre is performing well.

5. CORRINGHAM LOCAL CENTRE HEALTH CHECK

Overview

168. Corringham is designated as a local centre which is situated to the east of the Council area serving as a key retail and service hub for the surrounding residential community.

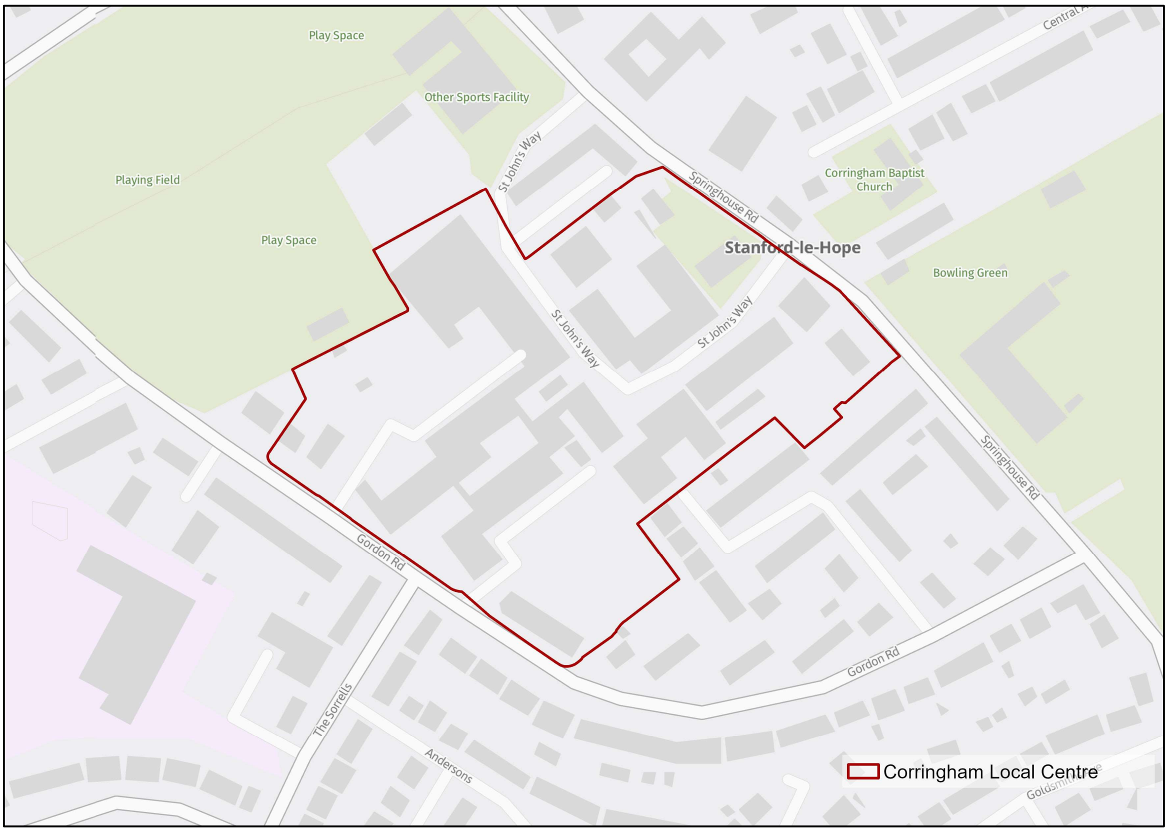
169. Accessibility to Corringham is good due to its close proximity to the A13. It does not have its own railway station, the nearest being at Stanford-le-Hope.

170. 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).

171. The centre has a compact, walkable layout making it a convenient destination for everyday needs. Parking facilities are available around the main shopping area, and public realm improvements enhance pedestrian access.

172. Corringham maintains a steady level of footfall, supported by its resident local community.

Figure 52: Corringham Local Centre Boundary Map



Diversity of Uses

173. Goad data from June 2024 has been used to assess Corringham's mix of uses. The figure below shows the area covered by Goad.

Figure 53: Corringham Town Centre Units

Source: GOAD

174. The table below shows that Corringham has a total of 64 units and an overall quantum of 11,110 sqm in floorspace.

Figure 54: Number of Outlets and Floorspace, Corringham

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Corringham	UK Average		Corringham	UK Average
Comparison Retail	17	26.6%	26.4%	2,300	20.7%	29.4%
Convenience Retail	14	21.9%	9.3%	3,180	28.6%	15.6%
Retail Services	11	17.2%	15.9%	1,250	11.3%	7.3%
Leisure Services	15	23.4%	25.8%	3,380	30.4%	26.7%
Financial & Business Services	2	3.1%	8.3%	140	1.3%	6.3%
Vacant	5	7.8%	14.1%	860	7.7%	14.2%
Total	**64**	**100.0%**	**100.0%**	**11,110**	**100.0%**	**100.0%**

Source: GOAD

175. The proportion of convenience retail outlets and floorspace at Corringham is significantly above the UK average (12.6 percentage points higher for outlets and 13 percentage points higher for floorspace).

176. Morrisons is the key convenience anchor at 1,650 sqm, accounting for half of all convenience retail space. Other convenience stores present include independent

operators such as Paulette's and Reeds Family Butcher and multiple representations like Iceland and Costcutter.

Figure 55: Morrisons Store

Source: LSH Site Visit

Figure 56: Number of Food & Beverage Outlets and Floorspace, Corringham

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Corringham	UK Average		Corringham	UK Average
Bars & Wine Bars	0	0.0%	2.4%	0	0.0%	2.4%
Cafes	3	4.7%	5.2%	400	3.6%	2.9%
Fast Food & Take-Away	5	7.8%	6.2%	510	4.6%	3.1%
Public Houses	0	0.0%	2.6%	0	0.0%	3.4%
Restaurants	2	3.1%	5.5%	270	2.4%	4.3%
Total	**10**	**15.6%**	**21.9%**	**1,180**	**10.6%**	**16.1%**

Source: GOAD

177. In Corringham, the food & beverage offer occupies 10 units, accounting for 15.6% of total outlets, which is below the UK average by 6.3 percentage points.

178. There are no public houses, bars or wine bars, and only two restaurants, which indicates that the town centre is not oriented towards evenings.

179. Fast food and take-away are marginally above the average with five units, which includes a Domino's, two fish, chip shops and a chicken quick service restaurant.

Vacancies

180. There are a total of five vacant outlets in Corringham, which represents 7.8% of the overall outlets, significantly lower than the UK average of 14.1%. 7.7% of the floorspace is vacant, which also compares favourably to the UK average of 14.2%.

181. The image below illustrates where vacant units are located in Corringham as of May 2024. There are no obvious clusters of vacancies present in the centre.

Figure 57: Corringham Vacancy Map, June 2024

Source: Experian GOAD

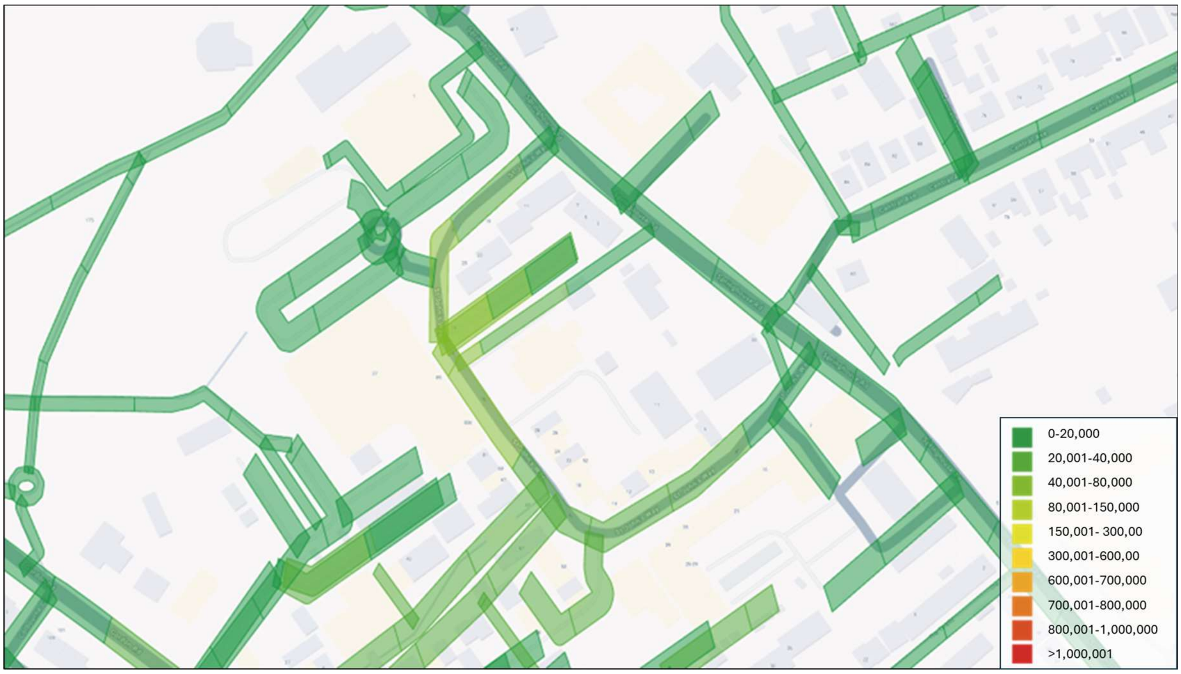
Figure 58: Vacant Unit

Source: LSH Site Visit

Pedestrian Flows

182. The figure below illustrates the pedestrian flows for Corringham in the form of a heat map showing total pedestrian movements for April 2025. As can be seen, footfall is highest around West of St John's Way, between Boots and Morrisons.

Figure 59: Corringham Local Centre Footfall, April 2025

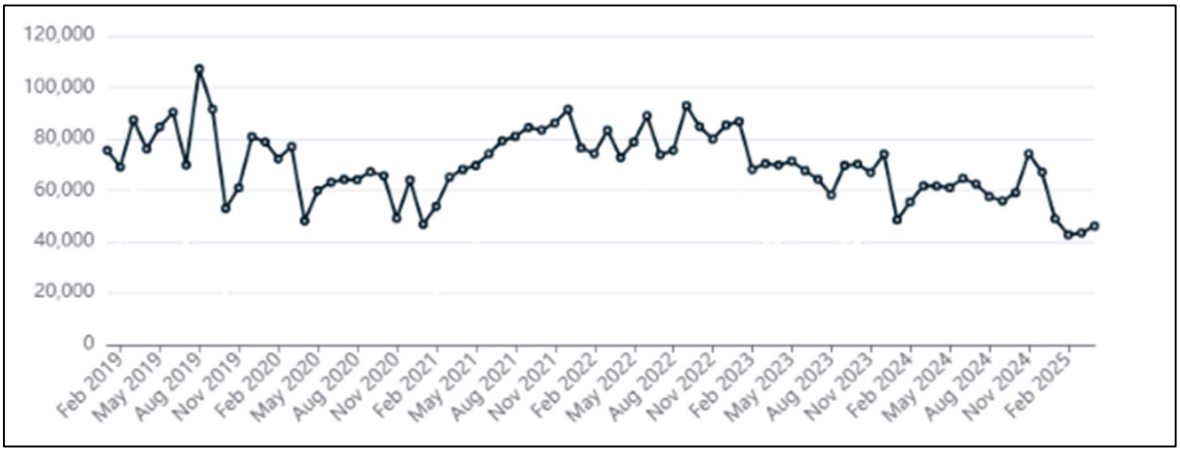


Source: MSCI

183. A busy section of Corringham, located along St John's Way, near Boots was sampled to obtain information on how footfall levels have changed between January 2019 and April 2025.

184. The monthly footfall average has fallen from 78,700 in 2019 to 61,000 in 2024.

Figure 60: Monthly Footfall Graph, Jan 2019 – April 2025, St John's Way



Source: MSCI

Accessibility

185. Bus routes that service the centre provide connections to and from Lakeside, Grays and Basildon amongst other key, local locations.

186. The centre is sandwiched by Springhouse Road and Gordon Road which provide vehicle access to Corringham. St John's Way feeds through the north of the centre, with convenient, on-street parking available along this road. Morrisons has an associated car park for customers, whilst parking can also be found at Grover Walk car park (which also has electric vehicle charging stations).

187. Pedestrian accessibility within the centre is good, with large parts of the centre being pedestrian areas only, whilst St John's Way has relatively low levels of traffic travelling at low speeds on a one-way system. A pedestrian crossing is also present here to support.

Customer Perception

188. Our assessment of customers' views and behaviours draws on the household survey conducted by NEMS Market Research (NEMS) across the 10 study zones in May 2025.

189. Apart from helping to identify shopping and leisure patterns across the defined catchment area and zones, the household survey also asked specific questions on their main reason for visiting each centre, what improvements (if any) could be made to make them likelier to visit more frequently in the daytime and evening time and what services were lacking in the centre.

190. The top four responses for the main purpose of visiting Corringham local centre were 'food shopping' (36%), 'health services' (18%), 'non-food shopping' (15%) and 'daytime eating' (11%).

191. When asked how Corringham local centre could be improved, the most common responses were 'nothing' (49%), 'better security/ safety (8%) and 'more independent shops' (8%).

192. The top four responses to what types of shops or local services were considered as missing in Corringham local centre were 'none' (33%), 'don't know' (28%), 'banks/ building societies' (24%) and 'clothes retailers' (14%).

Conclusion

193. Overall, the Strengths, Weaknesses, Opportunities and Threats (SWOTs) 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.

194. We therefore conclude that Corringham is a vital and viable centre that meets the needs of its catchment, particularly through its strong convenience retail offer. Whilst financial and business services are underrepresented within the centre, there is otherwise a good mix of uses. The low vacancy rate is a positive sign that the centre is operating well and providing a good environment for businesses to thrive.

6. SOCKETTS HEATH LOCAL CENTRE HEALTH CHECK

Overview

195. 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.

196. The main provision is cited along the busy Lodge Lane (A1013). This includes a Co-op food store, post office, beauty parlours, butchers, Lloyds pharmacy, hairdressers/barbers, professional services (estate agents, accountants), betting shops and take aways.

197. It functions effectively as a neighbourhood hub, offering essential services within walking distance for many residents as well as those passing through on Lodge Lane.

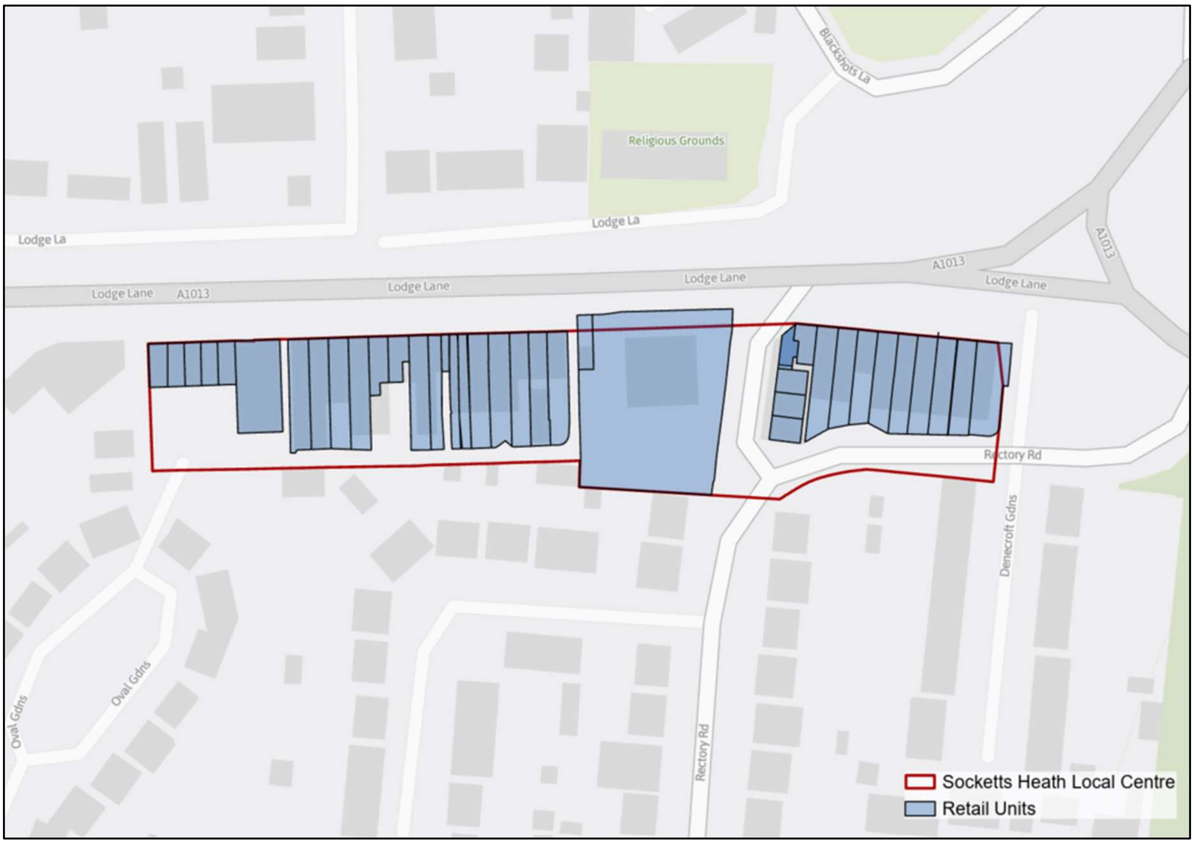
Figure 61: Socketts Heath Local Centre Boundary Map

Diversity of Uses

198. Council-held data provided to LSH, has been updated based on a site visit conducted in May 2025. This has been used to assess Socketts Heath mix of uses. The figure below shows the area covered in the assessment.

199. Note that the areas depicted below do not correlate to the outlet footprints.

Figure 62: Socketts Heath Local Centre Retail Units, May 2025



200. The table below shows that Socketts Heath has a total of 37 units.

Figure 63: Number of Outlets, Socketts Heath

	No. of Outlets	% of Total Outlets	
		Socketts Heath	UK Average
Comparison Retail	5	13.5%	26.4%
Convenience Retail	4	10.8%	9.3%
Retail Services	11	29.7%	15.9%
Leisure Services	12	32.4%	25.8%
Financial & Business Services	5	13.5%	8.3%
Vacant	0	0.0%	14.1%
Total	**37**	**100.0%**	**100.0%**

Source: Council provided data updated by LSH site visit (May 2025)

201. Leisure services are the most common use at Socketts Heath, with 12 outlets accounting for 32.4% of total outlets.

202. This is closely followed by retail services, with 11 outlets accounting for 29.7% of the total. Eight of these outlets are operating as beauty salons such as The Cut Inn and Simply Beautiful.

203. A key convenience anchor in the centre is Co-op, whilst two bakers and one butcher are also present.

Figure 64: Number of Food & Beverage Outlets, Socketts Heath

	No. of Outlets	% of Total Outlets	
		Socketts Heath	UK Average
Bars & Wine Bars	0	0.0%	2.4%
Cafes	2	5.4%	5.2%
Fast Food & Take-Away	5	13.5%	6.2%
Public Houses	1	2.7%	2.6%
Restaurants	2	5.4%	5.5%
Total	**10**	**27.0%**	**21.9%**

Source: Council provided data updated by LSH site visit

204. Fast food & take-away outlets make up half of the food & beverage provision in Socketts Heath – they account for 13.5% of all outlets in the centre. Two cafes, two restaurants and a pub are also present, making up the remainder of the food & beverage offer.

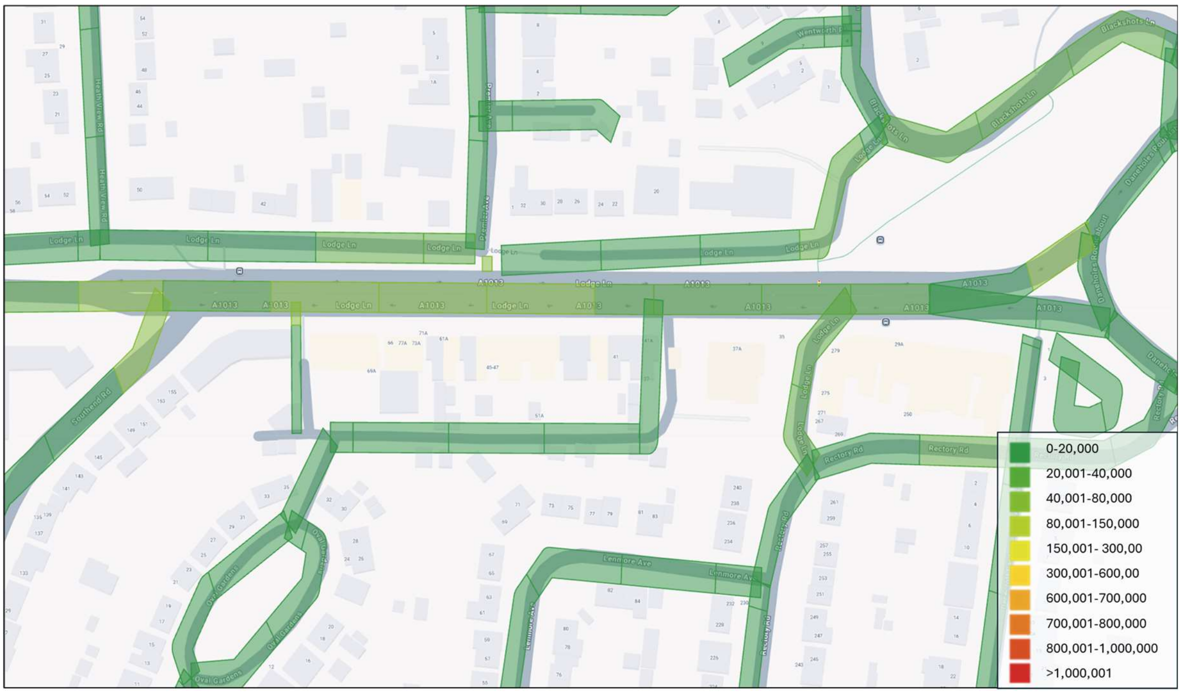
Vacancies

205. There are no vacant outlets in Socketts Heath local centre.

Pedestrian Flows

206. The figure below illustrates the pedestrian flows for Socketts Heath in the form of a heat map showing total pedestrian movements for April 2025. As can be seen, footfall levels are low across the area.

Figure 65: Socketts Heath Footfall, April 2025

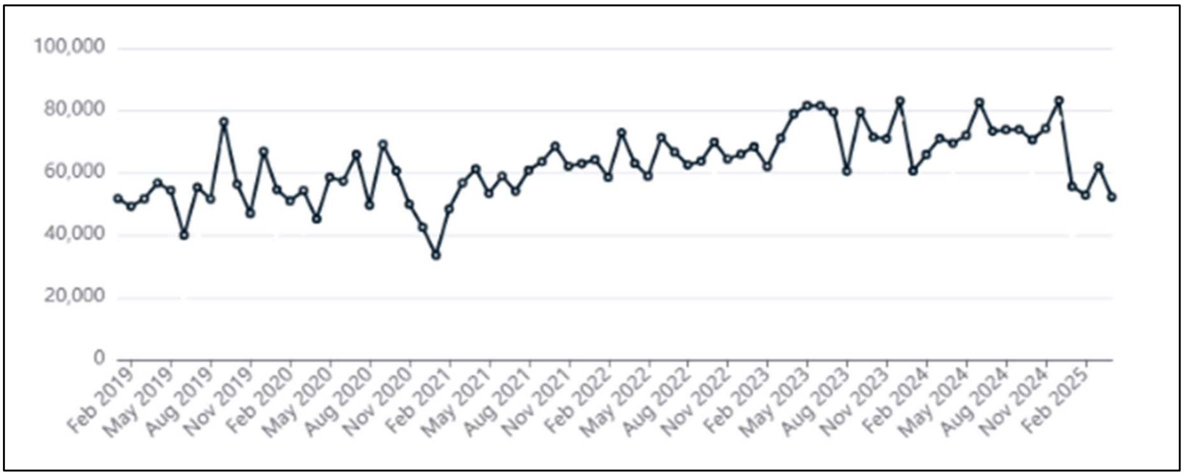


Source: MSCI

207. A section of Socketts Heath, located along Lodge Lane, by the Co-op store was sampled to obtain information on how footfall levels have changed between January 2019 and April 2025.

208. As can be seen in the figure below, footfall levels have gradually increased since 2019, with the yearly average in 2019 of 55,000 rising to 72,000 in 2024 (a 17,000 increase). This has dipped in the first four months of 2025, however, where footfall was between 52,000 and 62,000.

Figure 66: Monthly Movements, Jan 2019 – April 2025, Lodge Lane



Source: MSCI

Accessibility

209. Bus routes that service the centre provide connections to and from Lakeside, Grays and Basildon amongst other key, local locations. A pedestrian crossing is present to support those using the east bound services.

210. Socketts Heath sits along the A1013, which is a busy dual carriage way which provides connections to Lakeside to the west and to the A13 in both directions. Convenient on-street parking spaces can be accessed along A1013, with a car park also available via Denecroft Gardens (38 spaces) to the east of the centre.

211. Whilst the presence of the A1013 poses some obstacles to pedestrians and cyclists accessing the centre, Socketts Heath itself sits exclusively to the south of the dual carriageway, and so navigation within the centre is safe and convenient.

Customer Perception

212. Our assessment of customers' views and behaviours draws on the household survey conducted by NEMS Market Research (NEMS) across the 10 study zones in May 2025.

213. Apart from helping to identify shopping and leisure patterns across the defined catchment area and zones, the household survey also asked specific questions on their main reason for visiting each centre, what improvements (if any) could be made to make them likelier to visit more frequently in the daytime and evening time and what services were lacking in the centre.

214. When asked the main purposes for visiting Socketts Heath local centre, the most common responses were 'food shopping' (45%), 'post office' (30%), 'night-time eating' (7%) and 'non-food shopping' (6%).

215. The top three responses to how Socketts Heath local centre could be improved were 'more availability of parking spaces' (40%), 'more/ better range of non-food shops' (27%) and 'nothing' (26%).

216. The common responses to what types of shops or local services were considered missing from Socketts Heath local centre were 'none' (38%), 'more security' (22%) and 'banks/building societies' (18%).

Conclusion

217. Overall, the Strengths, Weaknesses, Opportunities and Threats (SWOTs) 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.

218. We therefore conclude that Socketts Heath is a healthy local centre which serves its immediate catchment as well as those travelling along the A1013 who are able to pull in and quickly visit the centre. The centre shows strong performance, with full occupancy and rising footfall figures post-pandemic.

7. SOUTH OCKENDON LOCAL CENTRE HEALTH CHECK

Overview

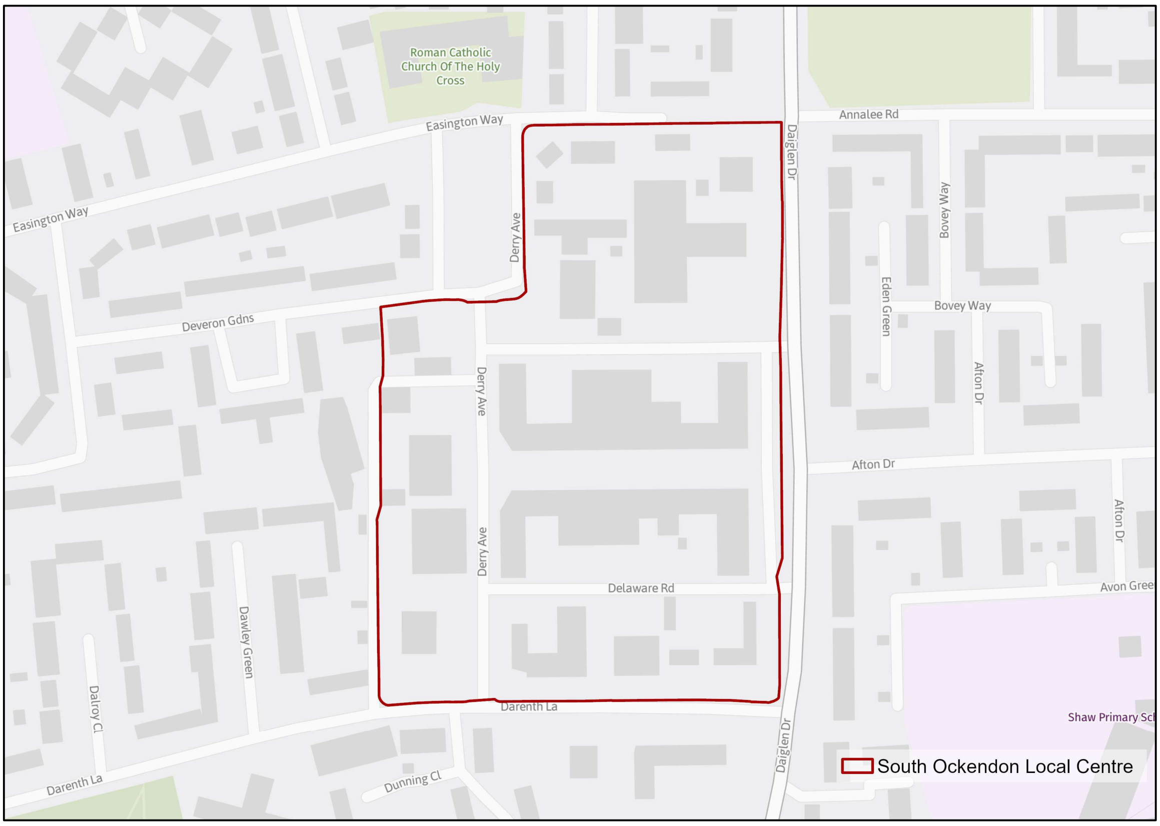
219. South Ockendon is a larger local centre surrounded by a sizeable residential catchment that has developed since it acted as a London overspill area after the second world war. Although not industrial in itself, South Ockendon has long been influenced by nearby industrial hubs, particularly the Ford Motor Company's Dagenham plant.

220. The main commercial provision is located along Derry Avenue, Derwent Parade and Daiglen Drive.

221. The centre is served by South Ockendon railway station, though it is some distance from the retail core of the centre.

222. There is a mix of representation from national chains to independent outlets. National chains include convenience food stores like Lidl, Tesco Express and Nisa Local. 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.

Figure 67: South Ockendon Centre Boundary Map



Diversity of Uses

223. Goad data from August 2024 has been used to assess South Ockendon's mix of uses. The figure below shows the area covered by Goad.

Figure 68: South Ockendon Centre

Source: GOAD

224. The table below shows that South Ockendon has a total of 51 units and an overall quantum of 8,550 sqm in floorspace.

Figure 69: Number of Outlets and Floorspace, South Ockendon

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		South Ockendon	UK Average		South Ockendon	UK Average
Comparison Retail	7	13.7%	26.4%	1,180	13.8%	29.4%
Convenience Retail	12	23.5%	9.3%	3,370	39.4%	15.6%
Retail Services	8	15.7%	15.9%	920	10.8%	7.3%
Leisure Services	15	29.4%	25.8%	1,980	23.2%	26.7%
Financial & Business Services	6	11.8%	8.3%	480	5.6%	6.3%
Vacant	3	5.9%	14.1%	620	7.3%	14.2%
Total	**51**	**100.0%**	**100.0%**	**8,550**	**100.0%**	**100.0%**

Source: GOAD

225. The comparison retail offer is limited when comparing the proportion of units and floorspace to the UK averages.

226. Convenience retail occupies 23.5% of total outlets, which is significantly higher than the UK average of 9.3%. Stores include Nisa Extra, Lidl, Greggs and Tesco Express, whilst a variety of independent shops are also present. Lidl is by far the largest of these outlets, occupying 1,140 sqm. This use accounts for almost 40% of total floorspace in South Ockendon.

Figure 70: Nisa Extra

Source: LSH Site Visit

227. Leisure services are the highest performing category when it comes to outlets (15). These leisure services are dominated by food & beverage outlets (12 of 15 outlets).

Figure 71: Number of Food & Beverage Outlets and Floorspace, South Ockendon

	No. of Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		South Ockendon	UK Average		South Ockendon	UK Average
Bars & Wine Bars	0	0.0%	2.4%	0	0.0%	2.4%
Cafes	3	5.9%	5.2%	250	2.9%	2.9%
Fast Food & Take-Away	6	11.8%	6.2%	490	5.7%	3.1%
Public Houses	1	2.0%	2.6%	320	3.7%	3.4%
Restaurants	2	3.9%	5.5%	150	1.8%	4.3%
Total	**12**	**23.5%**	**21.9%**	**1,210**	**14.2%**	**16.1%**

Source: GOAD

228. Food & beverage outlets occupy 23.5% of South Ockendon, which is broadly in line with the UK average, outperforming by only 1.6 percentage points. This is led by fast food & take-away, with six outlets.

Figure 72: Knight of Aveley, Pub

Source: LSH Site Visit

Vacancies

229. There are a total of three vacant outlets in South Ockendon, representing 5.9% of the overall outlets (much lower than the UK average of 14.1%). 620 sqm, which represents 7.3% of the total floorspace, is vacant, which compares favourably to the UK average of 14.2%.

230. The figure below illustrates where vacant units are located in South Ockendon as of August 2024.

Figure 73: South Ockendon Vacancy Map, August 2024

Source: GOAD

Markets

231. South Ockendon Market is located between Derwent Parade and Derry Avenue, dating back 100s of years. The market operates on Tuesday and Saturday every week from the hours 9am to 5pm, selling a range of products, household goods, food and flowers.

Pedestrian Flows

232. The figure below illustrates the pedestrian flows for South Ockendon in the form of a heat map showing total pedestrian movements for April 2025. As can be seen, there is a concentration of footfall on Derwent Parade, along Daiglen Drive and at the car park of Lidl.

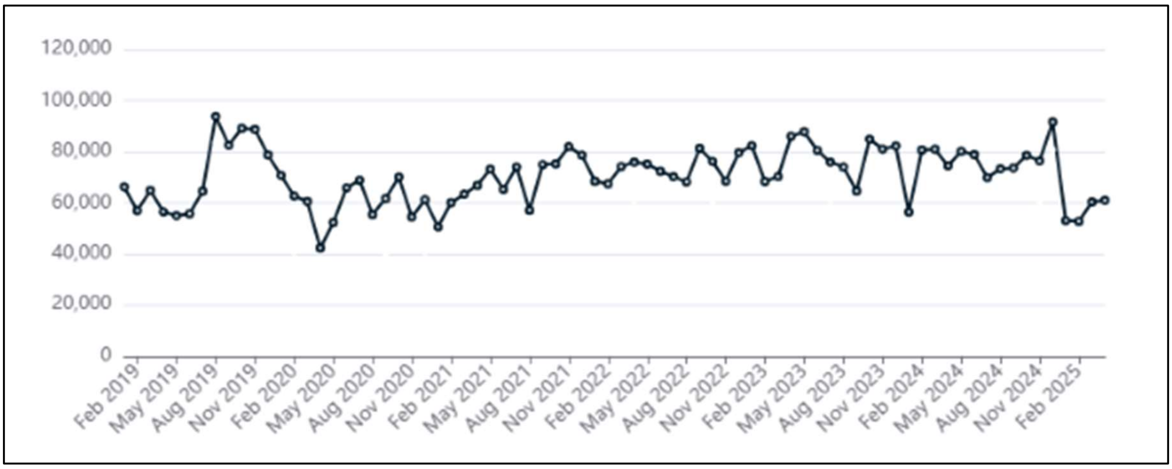
Figure 74: South Ockendon Footfall, April 2025

Source: MSCI

233. A busy section of South Ockendon, located along Derwent Parade, was sampled to obtain information on how footfall levels have changed between January 2019 and April 2025.

234. As can be seen in the figure below, footfall levels have been relatively stable during this period. Average monthly footfall in 2019 were 71,000, whilst 2024 shows a slight increase to 76,000.

Figure 75: Monthly Footfall, Jan 2019 – April 2025



Source: MSCI

Accessibility

235. Bus routes that service the centre provide connections to and from Lakeside, Grays, Purfleet and Aveley, amongst other key, local locations.

236. Daiglen Drive is the main access road for South Ockendon local centre, which runs along the centre's eastern border. Derry Avenue runs parallel to Daiglen Drive, with Darenth Lane and a one-way road network connecting the two. Parking can be found at the Lidl store (for customers), along the parade of units that front Daiglen Drive and along Derry Avenue. Electric vehicle charging points are present within the centre.

237. Pedestrian accessibility is good due to the key pedestrianised areas of the centre. There are no major roads to navigate when moving around the centre on foot. Cycle parking can be found at several locations within the centre, supporting those accessing South Ockendon local centre by bike.

Customer Perception

238. Our assessment of customers' views and behaviours draws on the household survey conducted by NEMS Market Research (NEMS) across the 10 study zones in May 2025.

239. Apart from helping to identify shopping and leisure patterns across the defined catchment area and zones, the household survey also asked specific questions on their main reason for visiting each centre, what improvements (if any) could be made to make them likelier to visit more frequently in the daytime and evening time and what services were lacking in the centre.

240. When asked the main purposes for visiting South Ockendon local centre, the most common responses were 'food shopping' (38%), 'accessing transport' (21%), 'window shopping/ browsing' (18%) and 'non-food shopping' (9%).

241. When asked what could be improved in South Ockendon local centre, the top four responses were ‘more parking spaces to be available’ (27%), ‘better security/ safety’ (24%), ‘don’t know’ (21%) and ‘make the centre more attractive/ create a nicer environment’ (19%).

242. The most common responses to what shops or local service were considered to be missing in South Ockendon local centre were ‘none’ (45%), ‘don’t know’ (24%), ‘butchers’ (22%) and ‘bakeries’ (19%).

Conclusion

243. Overall, the Strengths, Weaknesses, Opportunities and Threats (SWOTs) 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.

244. We therefore conclude that South Ockendon continues to serve what is quite a closed catchment. The Lidl store acts as a key anchor for the centre, with the supplementary convenience retail offer also strong. Stable footfall levels and low vacancy rates indicate that the centre is vital and viable. Whilst accessibility is good, particularly when it comes to the pedestrianised spaces within the centre, the overall environment is harsh, with a distinct lack of greenery and vibrancy.

8. STANFORD-LE-HOPE LOCAL CENTRE HEALTH CHECK

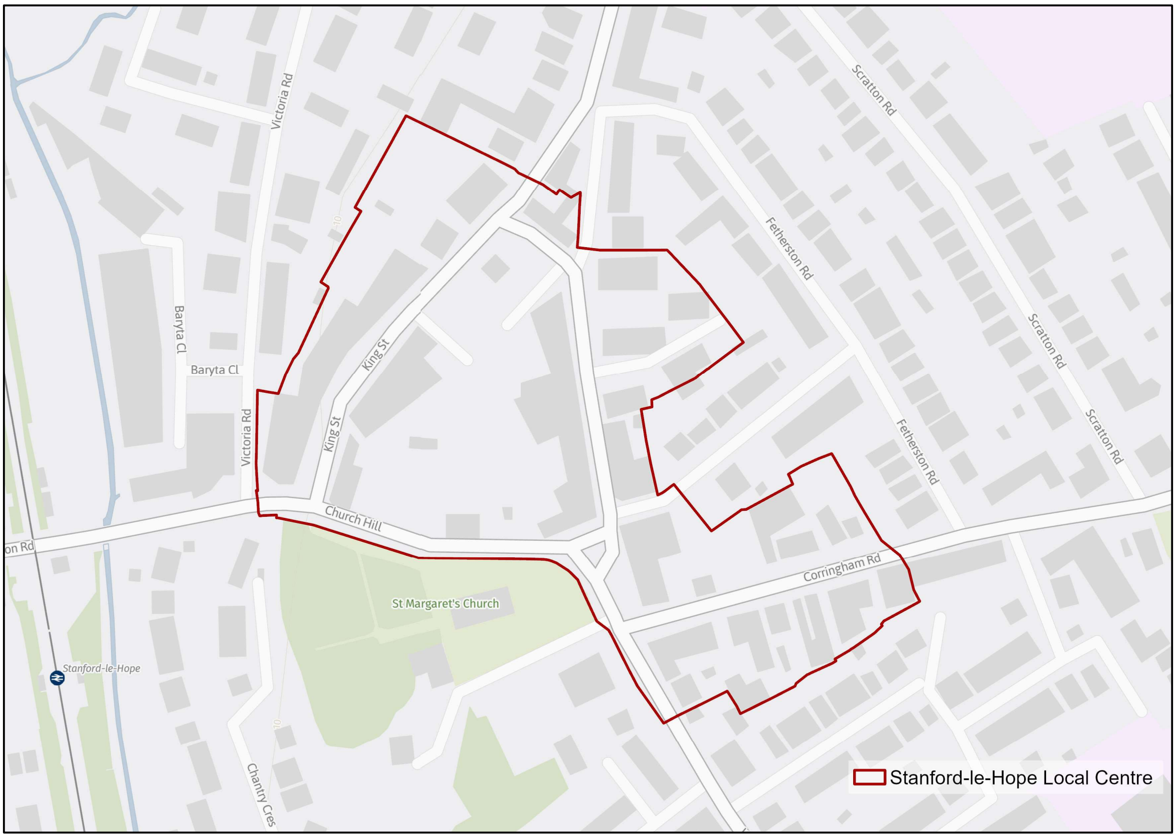
Overview

245. Stanford-le-Hope local centre is highly accessible via the A13 / Stanford-le-Hope Bypass and Stanford-le-Hope railway station.

246. The centre's retail and leisure provision is along King Street and High Street. The village type feel to the centre is served primarily by independent provision interspersed with 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.

247. 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.

Figure 76: Stanford-le-Hope Local Centre Boundary Map

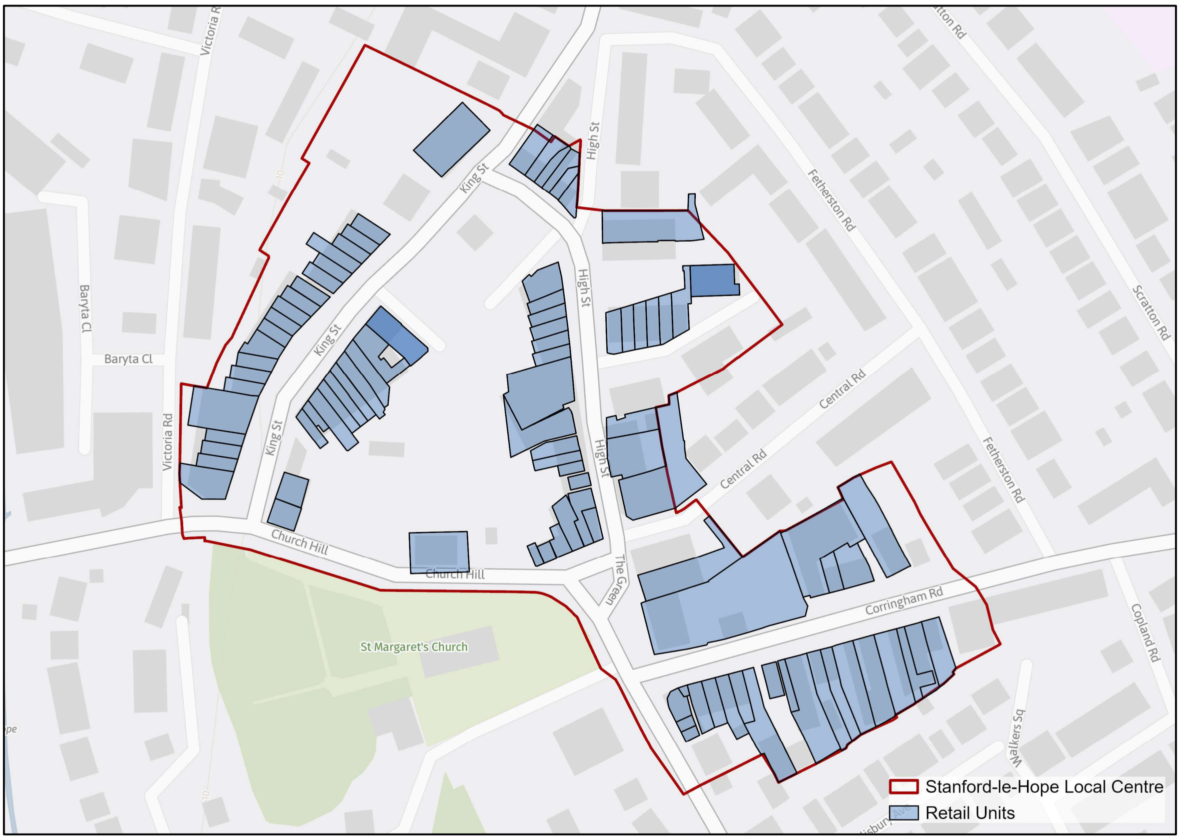


Diversity of Uses

248. Council-held data provided to LSH, has been updated based on a site visit conducted in May 2025. This has been used to assess Stanford-le-Hope's mix of uses. The figure below shows the area covered in the assessment.

249. Note that the areas depicted below do not correlate to the outlet footprints.

Figure 77: Stanford-le-Hope Local Centre Units, May 2025



250. The table below shows that Stanford-le-Hope has a total of 92 outlets.

Figure 78: Number of Outlets, Stanford-le-Hope

	No. of Outlets	% of Total Outlets	
		Stanford-le-hope	UK Average
Comparison Retail	12	13.0%	26.4%
Convenience Retail	9	9.8%	9.3%
Retail Services	27	29.3%	15.9%
Leisure Services	25	27.2%	25.8%
Financial & Business Services	7	7.6%	8.3%
Vacant	12	13.0%	14.1%
Total	**92**	**100.0%**	**100.0%**

Source: Council provided data updated by LSH site visit (May 2025)

251. Convenience retail makes up 9.8% of outlets in the centre, with this offer led by national multiples Co-op and Tesco Express.

252. Retail services are the dominant use within the centre, occupying 29.3%. A large proportion of these are beauty, with 16 units, such as Mr Snips, Yumi Nails and Essex Lash Supplies.

253. Financial & business services make up 7.6% of outlets in Stanford-le-Hope. There are no banking services within the centre.

254. Leisure services on offer include a gym, a betting office and an event venue (The Old Regent Ball Room, allowing private hire).

255. Comparison retail offer is behind the UK average by 13.4 percentage points. This consists of stores for home fixtures and furnishings such as Florists (Swallows Florist), hardware stores (On Site Tools), housing retailers/supplier stores (Essex Curtain & Blinds, R G Cole, Ultimate Choice Bathrooms).

Figure 79: Number of Food & Beverage Outlets, Stanford-le-Hope

	No. of Outlets	% of Total Outlets	
		Stanford-le-hope	UK Average
Bars & Wine Bars	0	0.0%	2.4%
Cafes	2	2.2%	5.2%
Fast Food & Take-Away	13	14.1%	6.2%
Public Houses	4	4.3%	2.6%
Restaurants	3	3.3%	5.5%
Total	**22**	**23.9%**	**21.9%**

Source: Council provided data updated by LSH site visit (May 2025)

256. There are 22 food & beverage outlets in Stanford-le-Hope, accounting for 23.9% of all outlets in Stanford-le-Hope. This is above the UK average of 21.9%.

257. The majority of the food & beverages are fast food & take-away outlets (13 outlets, which represents 59.1% of all food & beverage outlets). All operators are independent except for Papa John Pizza.

Figure 80: The New Courthouse, Pub

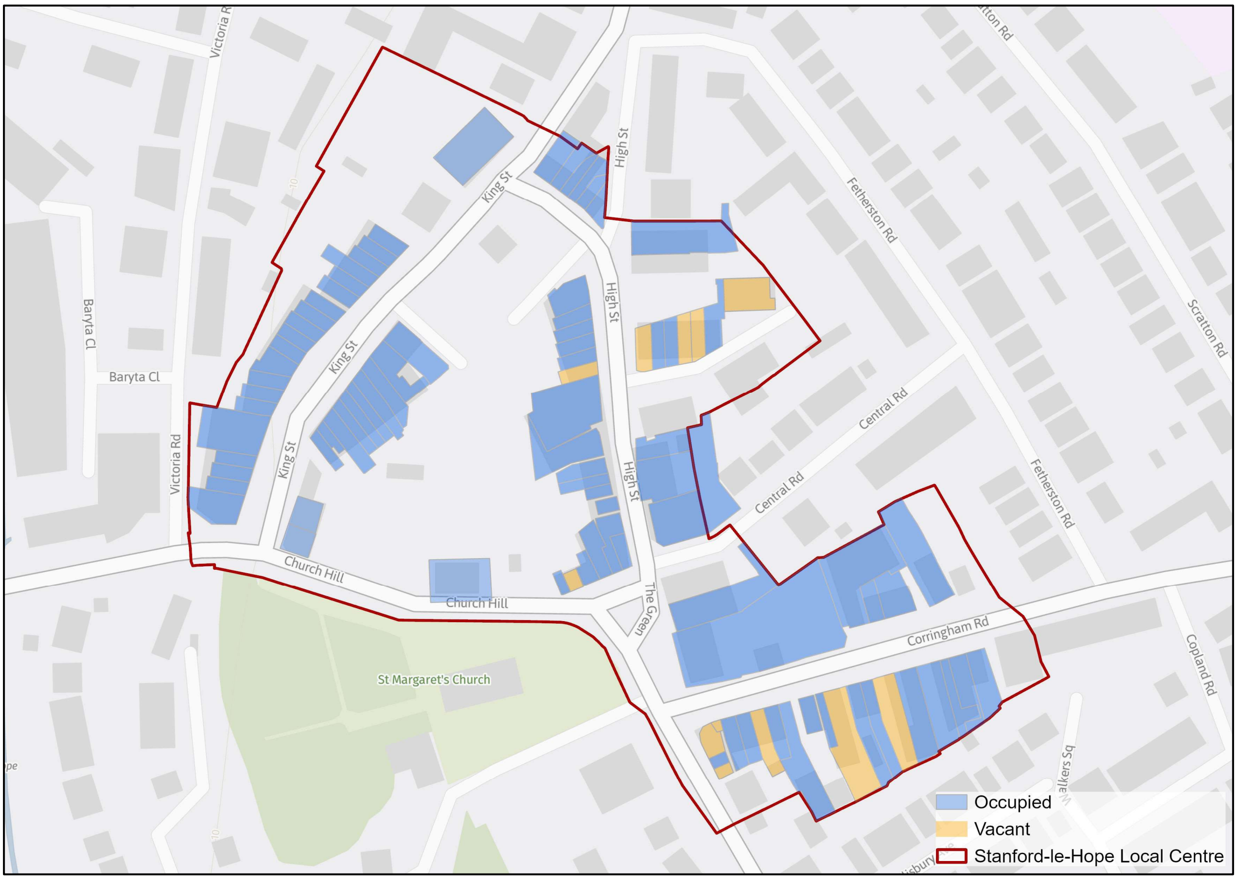
Source: LSH Site Visit

Vacancies

258. There are a total of 12 vacant outlets in Stanford-le-Hope, which represents 13.0% of the overall outlets (slightly below the UK average of 14.1%).

259. The image below illustrates where vacant units are located in Stanford-le-Hope as of May 2025. As can be seen, there is a concentration of vacancies along Corringham Road with six units vacant, and on The Precinct with four units vacant.

Figure 81: Stanford-le-Hope Local Centre Vacancy Map, May 2025



Source: Council provided data updated by LSH site visit (May 2025)

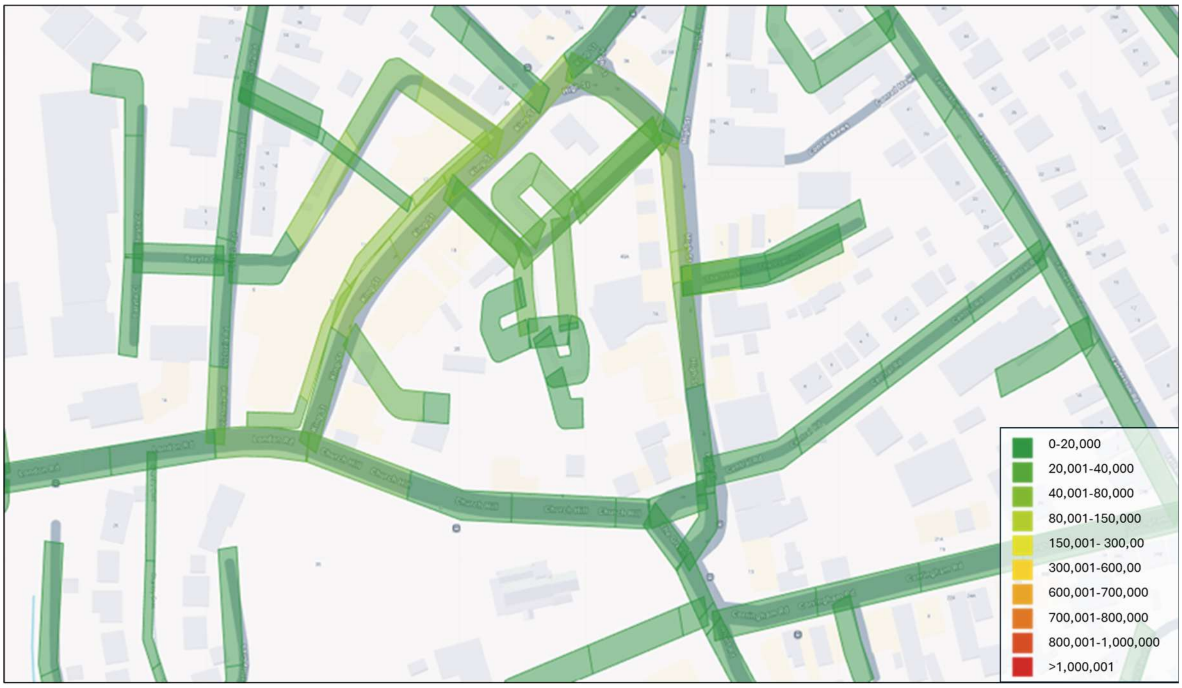
Figure 82: Vacant Unit

Source: LSH Site Visit

Pedestrian Flows

260. The figure below illustrates the pedestrian flows for Stanford-le-Hope in the form of a heat map showing total pedestrian movements for April 2025. As can be seen, activity is highest along King Street.

Figure 83: Stanford-le-Hope Footfall, April 2025

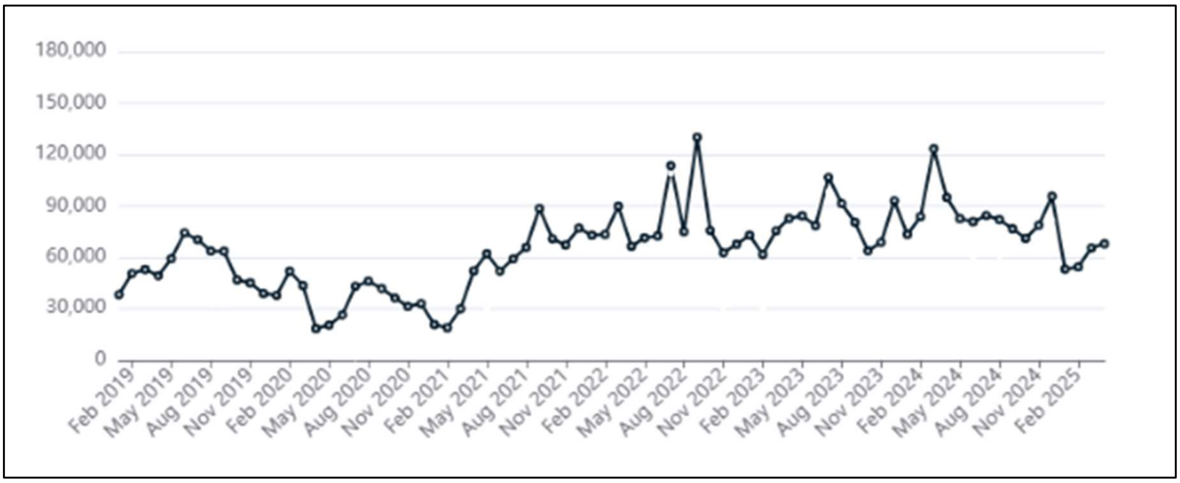


Source: MSCI

261. A busy section of Stanford-le-Hope, located along King Street, was sampled to obtain information on how footfall levels have changed between January 2019 and April 2025.

262. As can be seen in the figure below, footfall levels have recovered well from the Pandemic period, with monthly figures from late 2021 onwards regularly above 2019 figures. The monthly footfall average in 2024 was 85,500, compared to 54,000 in 2019, which represents a 58.3% increase.

Figure 84: Monthly Movements Graph, Jan 2019 – April 2025, King Street



Source: MSCI

Accessibility

263. Bus routes that service the centre provide connections to and from Lakeside, Grays and Basildon, amongst other key, local locations. Stanford-le-Hope train station is located within walking distance of the centre, to the west, with services running east to Leigh-on-Sea and Southend and west to Tilbury, Grays, Barking and London (Fenchurch Street).

264. There is a strong provision of car parking within the centre, with convenient, on-street parking available along King Street, High Street and Corringham Road as well as King Street car park (100 spaces) and further car parking at The Precinct.

265. Whilst the consistent flow of vehicles passing through the centre at peak times can cause challenges for pedestrian navigation and safety, vehicles are generally travelling at low speeds. There is a pedestrian crossing along King Street and Corringham Road, but not along High Street. Cycle parking can be found within the centre, supporting those travelling to and from Stanford-le-Hope by bike.

Customer Perception

266. Our assessment of customers' views and behaviours draws on the household survey conducted by NEMS Market Research (NEMS) across the 10 study zones in May 2025.

267. Apart from helping to identify shopping and leisure patterns across the defined catchment area and zones, the household survey also asked specific questions on their main reason for visiting each centre, what improvements (if any) could be made to make them likelier to visit more frequently in the daytime and evening time and what services were lacking in the centre.

268. The four most common responses to what the main purpose for visiting Sanford-le Hope local centre were 'visiting parks/ green spaces' (38%), 'visiting cafes/ coffee

shops' (28%), 'food shopping' (16%) and 'visiting family/ friends who lived there' (7%).

269. When asked about how Stanford le-Hope local centre could be improved, the top four responses were 'longer opening hours for shops/ for more shops to be open on Sundays' (38%), 'easier to get to by train' (38%), 'better maintained/ cleaner streets' (38%) and 'more high-quality shops' (29%).

270. The top three responses to what shops or local services were considered to be missing in Stanford-le-Hope local centre were 'butchers' (38%), 'libraries' (38%) and 'electrical stores' (28%).

Conclusion

271. Overall, the Strengths, Weaknesses, Opportunities and Threats (SWOTs) 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.

272. We therefore conclude that Stanford-le-Hope is a vital and viable that serves its catchment with a good mix of retail and services and benefits from good transport infrastructure and accessibility. Footfall figures have bounced back post-Pandemic and have since reached new highs. Whilst the latest vacancy rate of 13.6% is not particularly concerning, it is higher than most of the other local centres within Thurrock. This presents an opportunity for new operators and/ or uses to enter the centre to further strengthen its offer, capitalising on the strong footfall and accessibility.

9. TILBURY LOCAL CENTRE HEALTH CHECK

Overview

273. 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.

274. 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 emphasize the town's military and maritime history.

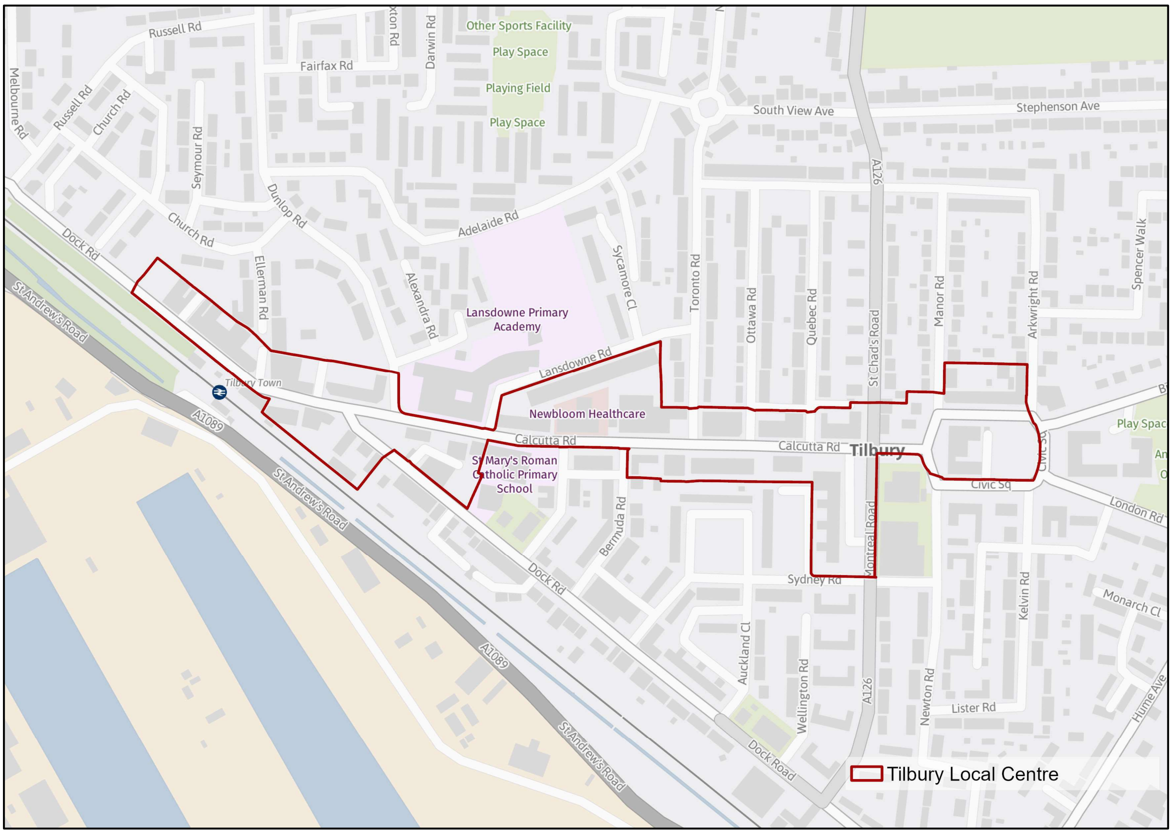
275. The centre is also served by the Tilbury Town railway station, which provides regular services to London Fenchurch Street via the c2c line, offering a commute of around 40 minutes.

276. 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 Tesco Express on Calcutta Road and a Tilbury Town Premier convenience store on Civic Square. Outside of the centre there is an Asda Superstore on Thurrock Way.

277. 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). The plans aim to enhance connectivity, support young people, and celebrate Tilbury's maritime heritage. To date, improvements have been made to the road and footpath at Tilbury Civic Square, whilst new flowerbeds and green areas have been added on the north side of the square. The next phase of work will see further improvements including new roads, footpaths, streetlights and landscaping.

Lambert Smith Hampton

Figure 85: Tilbury Local Centre Boundary Map

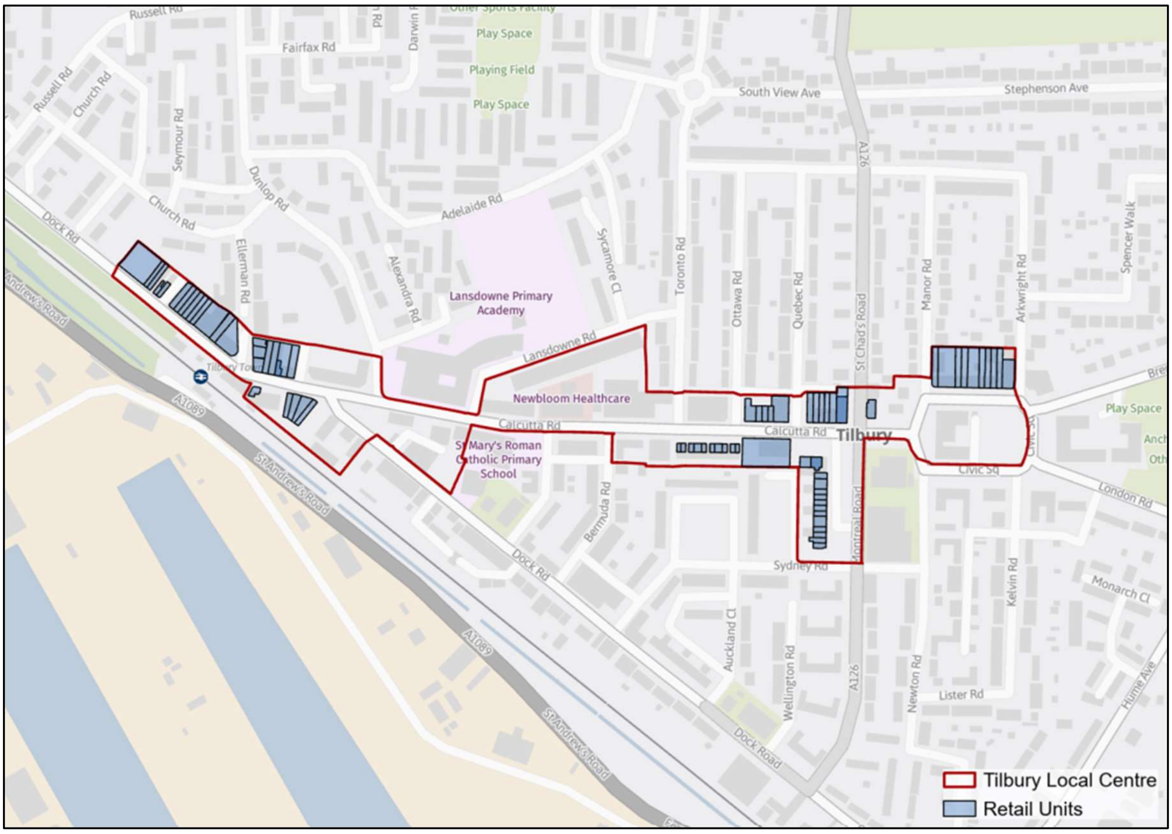


Diversity of Uses

278. Council-held data provided to LSH, has been updated based on a site visit conducted in May 2025. This has been used to assess Tilbury's mix of uses. The figure below shows the area covered in the assessment.

279. Note that the areas depicted below do not correlate to the outlet footprints.

Figure 86: Tilbury Local Centre Units, May 2025



280. The table below shows that Tilbury has a total of 70 units.

Figure 87: Number of Outlets, Tilbury

	No. of Outlets	% of Total Outlets	
		Tilbury	UK Average
Comparison Retail	14	20.0%	26.4%
Convenience Retail	16	22.9%	9.3%
Retail Services	12	17.1%	15.9%
Leisure Services	17	24.3%	25.8%
Financial & Business Services	0	0.0%	8.3%
Vacant	11	15.7%	14.1%
Total	**70**	**100.0%**	**100.0%**

Source: Council provided data updated by LSH site visit (May 2025)

281. There is a notable absence of financial and business services in Tilbury.

282. Convenience retail has 16 outlets, accounting for 22.9% of the total (13.6 percentage points higher than the UK average). This consists of 10 independent food stores, two multiple stores (Tesco Express and Premier Express), a baker and two vape stores.

283. The leading use is leisure services (17 outlets), which is predominantly made up of food & beverage outlets (see below).

Figure 88: Number of Food & Beverage Outlets, Tilbury

	No. of Outlets	% of Total Outlets	
		Tilbury	UK Average
Bars & Wine Bars	1	1.4%	2.4%
Cafes	1	1.4%	5.2%
Fast Food & Take-Away	9	12.9%	6.2%
Public Houses	0	0.0%	2.6%
Restaurants	4	5.7%	5.5%
Total	**15**	**21.4%**	**21.9%**

Source: Council provided data updated by LSH site visit

284. The food & beverage offer is dominated by fast food & takeaways (nine outlets), whilst a small variety of restaurants are also present (four outlets).

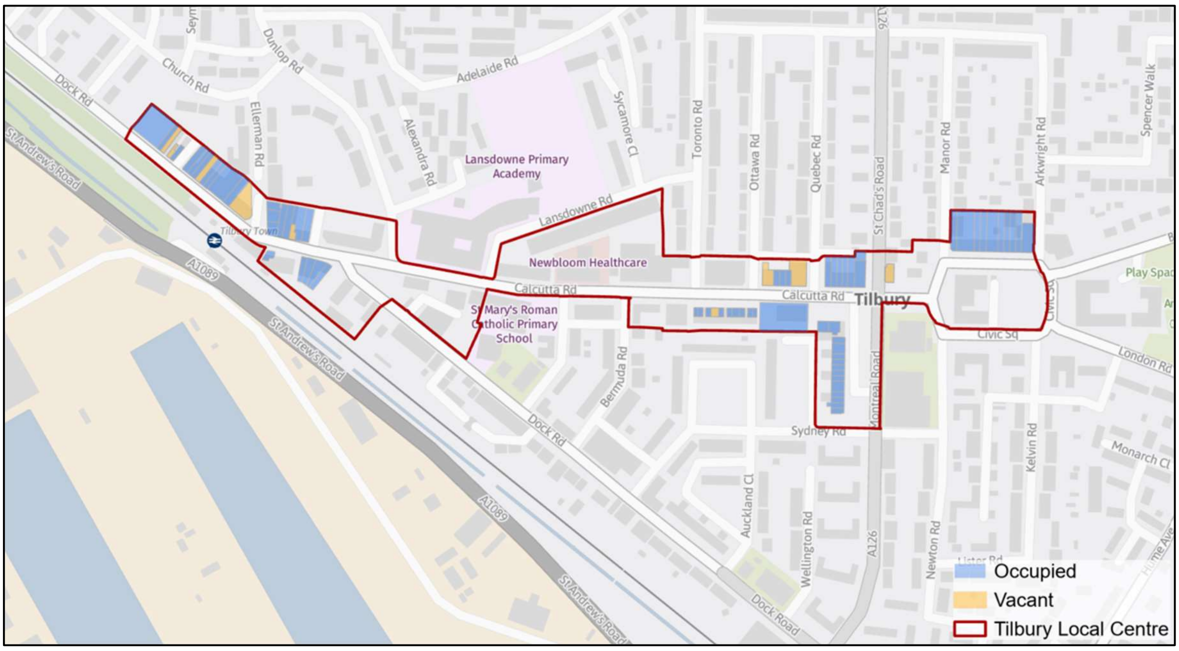
Vacancies

285. There are a total of 15 vacant outlets in Tilbury, which represents 15.7% of the overall outlets (above the UK average of 14.1%).

286. The recent closure of the Co-op store has added to this vacancy rate (particularly vacant floorspace). However, five vacant units counted by the Council in October 2024 have since become occupied. The operators of these are two vape shops, one food and wine store, a hardware store and a boutique.

287. The image below illustrates where vacant units are located in Tilbury as of May 2025.

Figure 89: Tilbury Local Centre Vacant Unit, May 2025



Source: Council provided data updated by LSH site visit

Figure 90: Vacant Unit

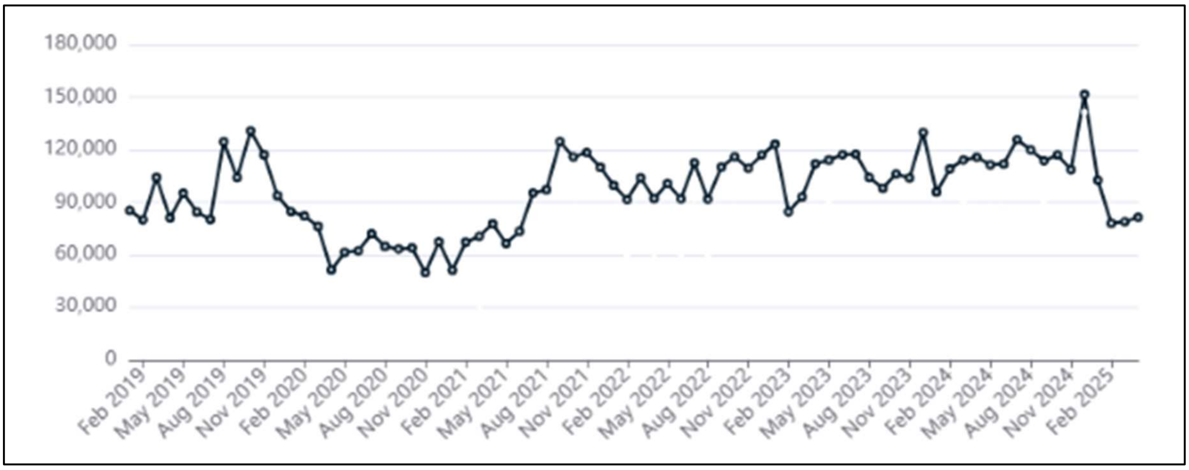
Source: LSH

Pedestrian Flows

288. Two sections of Tilbury local centre have been sampled for footfall activity between January 2019 and April 2024 – Calcutta Road (by Tesco Express) and Dock Road (by the train station).

289. As can be seen in the figure below, footfall levels on Calcutta Road (by Tesco Express) have recovered from the Pandemic period dip. Footfall has stayed fairly stable since late 2021, footfall in 2024, although a sharp drop has been seen thus far in 2025.

Figure 91: Monthly Movements, Jan 2019 – April 2025, Calcutta Road

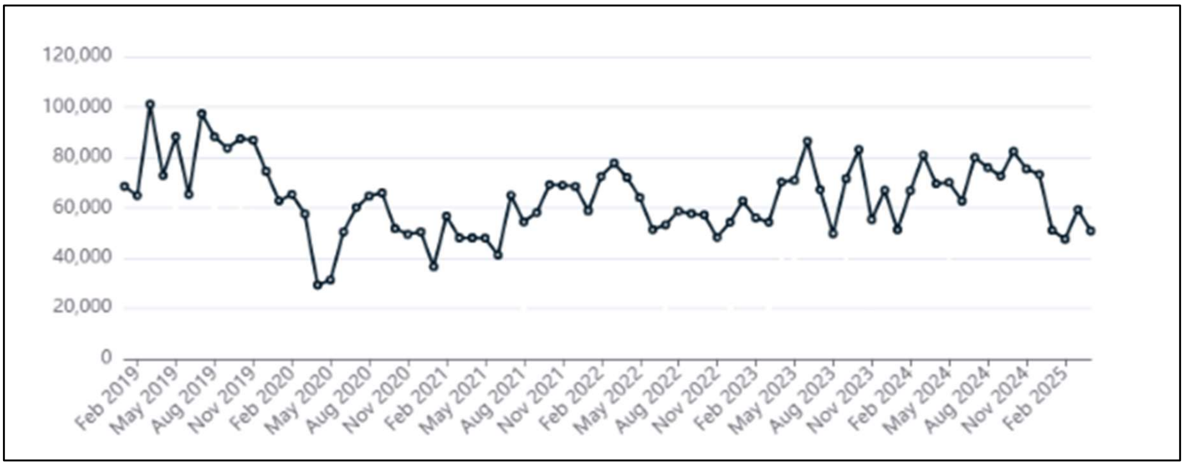


Source: MSCI

290. As can be seen in the figure below, footfall levels on Dock Road (by the train station) peaked in 2019 and just under 100,000 monthly counts, which has not been

matched since. Restrictions on movement and travel during the pandemic period led to a significant drop in activity in early 2020. While there has been a gradual recovery since, footfall has yet to return to pre-pandemic levels. In 2019, the monthly average footfall stood at 81,000, which fell to 53,000 in 2020, before rising to 72,000 in 2024.

Figure 92: Monthly Movements, Jan 2019 – April 2025, Dock Road



Source: MSCI

Accessibility

291. Bus routes that service the centre provide connections to and from Grays, Stanford-le-Hope, Corringham and Basildon amongst other key, local locations. Tilbury train station is located within the western side of the centre, with services running east to Stanford-le-Hope, Leigh-on-Sea and Southend and west to Tilbury, Grays, Barking and London (Fenchurch Street).

292. Dock Road and Calcutta Road feed through the centre from east to west. Parking is available at several locations across the centre, including Broadway (on-street), Calcutta Road (car park and on-street) and Civic Square (on-street).

293. Pedestrian crossings are strategically located along Dock Road and Calcutta Road to support with pedestrian accessibility - by Tilbury train station on the western side and by Tesco Express on the eastern side.

Customer Perception

294. Our assessment of customers' views and behaviours draws on the household survey conducted by NEMS Market Research (NEMS) across the 10 study zones in May 2025.

295. Apart from helping to identify shopping and leisure patterns across the defined catchment area and zones, the household survey also asked specific questions on their main reason for visiting each centre, what improvements (if any) could be made to make them likelier to visit more frequently in the daytime and evening time and what services were lacking in the centre.

296. The most common response to the main purpose for visiting Tilbury local centre were ‘non-food shopping’ (26%), ‘meeting family and friends to socialise’ (17%), ‘food shopping’ (14%) and ‘visiting family/ friends who lived there’ (13%).

297. When asked what could be improved in Tilbury local centre, the top three responses were ‘don’t know’ (34%), ‘more/ better clothes shops’ (18%), ‘more/ better range of supermarkets’ (17%).

298. The top four responses to what shops or local services were considered to be missing in Tilbury local centre were ‘none’ (49%), ‘don’t know’ (29%), ‘supermarkets’ (7%) and ‘banks/ building societies’ (6%).

Conclusion

299. Overall, the Strengths, Weaknesses, Opportunities and Threats (SWOTs) 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.

300. We therefore conclude that Tilbury is a functioning local centre that serves its catchment as well as those passing through it. It is somewhat disjointed, with a vacuum of town centre uses existing at its centre. The above UK average vacancy rate poses a threat to the future prosperity of the centre. Investment in the east (Civic Square) and west (Tilbury Station) of Tilbury local centre (improvements to the public realm and accessibility) are hoped to be a catalyst for further investment and growth.