

GRAYS TOWN CENTRE STUDY

for:

THURROCK COUNCIL

FINAL

September 2023

lsh.co.uk



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Signed:

A handwritten signature in black ink, appearing to read "Steve Day". The signature is written in a cursive style with a large initial 'S' and a long horizontal stroke at the end.

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For and on behalf of Lambert Smith Hampton

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1. INTRODUCTION

- 1.1 Lambert Smith Hampton (**LSH**) was commissioned by Thurrock Council (the **Council**) to provide an up-to-date evidence based study for Grays Town Centre.
- 1.2 This study will contribute and inform the preparation of future policies and strategy for Grays town centre as part of the Council's Local Plan. This study also draws on the output of the following reports undertaken on behalf of the Council:
- Grays Town Centre Regeneration Programme – Strategic Assessment (March 2023); and
 - Grays Town Centre Transport Study (June 2023).
- 1.3 Town centres across the UK continue to experience the effects of changes in shopping habits. The COVID-19 pandemic has accentuated changes and town centres across the country are facing significant challenges, such as a decline in footfall and shop closures. Grays is not immune and has not only felt the effect of the recent effects but has experienced competition and decline in recent years ever since the opening of the Lakeside Shopping centre in 1990.
- 1.4 The study also has been prepared in the context of current and emerging national and development plan policy guidance, as well as other key material considerations; principally the National Planning Policy Framework (NPPF) (updated in July 2021). Where relevant the study also draws on advice set out in the National Planning Practice Guidance (PPG), updated in July 2021. Both the Framework and PPG place significant weight on the development of positive plan-led visions and strategies to help ensure the vitality of town centres.

Scope of Work

- 1.5 The key inter-related aims and objectives of this study are to:
- analyse the factors (technological, social and economic etc.) that impact on Grays Town Centre and the key local planning policy and development opportunities that can help support sustainable growth; and
 - evaluate the context of Grays in the Council's network of centres to function effectively and to meet future local needs.
- 1.6 For ease of reference this report is structured as follows:
- **Section 2** sets out the Council's adopted and emerging Development Plans and policies that are relevant to this study, along with other material considerations: including the National Planning Policy Framework (NPPF) and the extant Thurrock Core Strategy and the Grays Town Centre Framework Refresh (2017).
 - **Section 3** highlights some of the key trends that are driving the dynamic changes in the retail sector and town centres at the national and local level, and how this has

shaped (and is likely to shape) the UK's urban townscape and the implications this has for Grays.

- **Section 4** provides a socio-demographic summary for Grays .
- **Section 5** details an NPPF compliant healthcheck assessment of Grays town centre.
- **Section 6** details comparable case studies on centres that are undergoing, or have undergone, substantial regeneration activity to draw on good practice fundamentals for the future revitalisation of Grays.
- **Section 7** draws from the previous sections to give a broad high-level advice and recommendations to help the Council to effectively plan and manage the health and performance of Grays Town Centre.

2. POLICY & STRATEGIC CONTEXT

2.1 This section provides a summary of the key national, regional and local planning policies pertaining to retail, leisure and other main town centre uses that have a bearing on Grays town centre.

National Planning Policy & Guidance

2.2 The latest update of the NPPF was published in July 2021 and sets out the Government's planning policy framework for England, to help inform both plan-making and development management decisions¹.

2.3 The NPPF states that the purpose of the planning system is to contribute to the achievement of sustainable development; defined as meeting the needs of the present without compromising the ability of future generations to meet their own needs². The Framework (paragraph 11) sets out the presumption in favour of sustainable development.

2.4 For plan-making: *"...all plans should promote a sustainable pattern of development that seeks to: meet the development needs of their area; align growth and infrastructure; improve the environment; mitigate climate change (including by making effective use of land in urban areas) and adapt to its effects"* (paragraph 11a).

2.5 Chapter 7 '**Ensuring the vitality of town centres**' provides guidance on plan-making and decision-taking for retail and other town centre uses that are most relevant to the preparation of this study. Paragraph 86 specifically sets out criteria that LPAs should consider when preparing planning policies. These include (inter alia):

- defining a network and hierarchy of town centres, and promoting their vitality and viability by allowing them to grow and diversify and accommodate a suitable mix of uses in centres (including housing) that reflects their needs and distinctive characters;
- retaining and enhancing existing markets, and/or re-introducing and creating new ones; allocating edge of centre sites where town centre sites are not available, and advise on the potential for identified needs to be met in alternative locations where no town or edge of centre sites can be identified over the plan period; and
- recognising that residential development often plays an important role in ensuring the vitality of centres.

¹ Planning law requires that applications for planning permission be determined in accordance with the development plan unless material considerations indicate otherwise. [Section 38(6) of the Planning and Compulsory Purchase Act 2004 and section 70(2) of the Town and Country Planning Act 1990]

² Resolution 42/187 of the United Nations General Assembly

Planning Practice Guidance (PPG)

- 2.6 The latest update of the Planning Practice Guidance (PPG) was issued in September 2020. It provides specific guidance on plan-making and decision-taking for retail, leisure and town centre uses, including guidance on Permitted Development Rights (PDR) and the new Use Classes Order ('UCO') that came into effect on 1st September 2020. The Guidance supports the policies and provisions of the NPPF; placing significant weight on the development of positive plan-led visions and strategies for town centres.
- 2.7 In terms of planning for the vitality and viability of town centres, the PPG states that a wide range of complementary uses can, if suitably located, help to support the vitality of town centres. These include residential, employment, office, commercial, leisure/entertainment, healthcare and educational development. Evening and night-time activities also have the potential to increase economic activity within town centres and provide additional employment opportunities.
- 2.8 The PPG (paragraph 004) sets out the importance of evidence-based strategies and visions for town centres to help establish their role and function over the plan period, the need for new retail and town centre uses, and other interventions.
- 2.9 In those cases where development cannot be accommodated in town centres, the PPG requires planning authorities to plan positively to identify the most appropriate alternative strategy for meeting the identified need, having regard to the sequential and impact tests.
- 2.10 The PPG also sets out several Key Performance Indicators (KPIs) that "...may be relevant in assessing the health of town centres, and planning for their future"³. Where possible and available these KPIs have been applied to the health check of Grays town centre.

Development Plan Context: Thurrock Core Strategy

- 2.11 The **Thurrock Core Strategy** was adopted in December 2011 and updated in January 2015 following an independent examination. The Council are now in the process of preparing a new local plan which is at the early stages. Policies relevant to Grays from the extant Core Strategy include:
- **Policy CSSP1 'Sustainable Housing and Locations'** which states Thurrock is required to deliver a minimum of 18,500 dwellings between 2001 and 2021.
 - **Policy CSSP2 'Sustainable Employment Provision'** states that the Council will promote economic development in Key Strategic Economic Hubs, including Grays with its core sector being retail and main growth sectors being business services, recreation and leisure, public sector services.

³ Paragraph: 006 Reference ID: 2b-006-20190722

- **Policy CSTEP5 ‘Neighbourhood Renewal’** identifies Grays Riverside and Grays Central as a priority regeneration area which means that all development in the area should support and assist external environment improvements, promoting businesses space for new start-ups and be of high quality infrastructure and high standards of sustainable construction and design.
- **Policy CSTEP6 ‘Strategic Employment Provision’** states that the key strategic hubs identified in Policy CSSP2 will provide 445 hectares of the industrial and commercial and mixed use land between 2009 and 2026. This includes knowledge based, cultural, retail, leisure and office developments to promote vitality and viability, and drive sustainable economic growth. The Supporting text states that within Grays town centre (and other centres), good access to day-to-day facilities and services is necessary to ensure that the local community is in close proximity to those services used regularly.

- **Policy CSTEP7 sets out the ‘Network of Centres’** as follows:

Regional Centre:

- Lakeside

Town Centre

- **Grays**

Existing Local Centres

- Corringham,
- Stanford-le-Hope,
- South
- Ockendon,
- Tilbury,
- Aveley,
- Socketts Heath

New Centres

- Purfleet

Existing Neighbourhood Centres

Larger neighbourhood parades identified at:

- Chadwell St Mary,
- Stifford Clays,
- East Tilbury,
- Corringham,
- Grays, Little Thurrock,
- Chafford Hundred,
- Tilbury.

Smaller neighbourhood parades are identified at:

- South Ockendon,
- Aveley,
- Grays,
- Tilbury,
- Linford,
- Stanford-le-Hope,
- Corringham,
- Purfleet

The Council supports the transformation of the northern part of the Lakeside basin into a new regional centre. It also supports the regeneration of Grays town centre as the focus for cultural, administrative and educational functions whilst providing retail that is complementary to the Lakeside Basin. Development in Grays town centre will include:

- I. Up to 5,500-6,500 sqm of net comparison floorspace by 2026;
- II. Up to 4,000-5,000 sqm of net bulky durable floorspace by 2026;
- III. Between 1,500-2,000 sqm of net convenience floorspace by 2026;
- IV. Other cultural, administrative and education

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- **Policy CSTEP8 ‘Vitality and Viability of Existing Centres’** states that the Council will maintain and promote the retail function of existing centres. In relation to town centre uses the policy has a town centre first approach, followed by edge of town centre locations. It encourages diversification and improvement of the range and quality of facilities and seeks to improve access for public transport, pedestrians and cyclists. New development should protect and/or enhance designated centres including historic character, townscape and biodiversity. It also states that that *“where appropriate seeking to improve personal safety and contribute to crime reduction by design and other measures”*.
 - **Policy CSTEP9 ‘Wellbeing: leisure and sports’** supports the delivery of physically active, socially inclusive and healthy communities and states that the Council will review the potential for enhanced leisure facilities at Grays riverfront.
 - **Policy CSTEP14 ‘Transport in the Thurrock Urban Area’** highlights that the Council will work with partners to deliver a 10% reduction in car traffic by delivering walking and cycling routes, improving core routes and access to locations and facilities such as education, healthcare, the riverside and Grays town centre. It identifies Grays and Lakeside as priority areas to employ Smarter Choices programmes, which will also address congestion and air quality. The policy also states that *“road space will be reorganised to improve the public realm and give further priority to sustainable modes at transport interchanges, with priority at Grays rail station”*.
 - **Policy CSTEP20 ‘Open Space’** Identifies Grays in the Open Space Strategy as an area which needs to address the deficiency in open space and that new provision will be encouraged.

Grays Town Centre Framework Refresh (2017)

- 2.12 This sets out a detailed spatial framework for the physical and social regeneration of the town centre. Its purpose is to provide a spatial concept to guide development and enhancement. The framework features a variety of uses which provides a base to address the declining importance of retail and a High Street structured around civic, cultural and leisure uses.

2.13 The Vision for Grays is stated as:

“Building on its strengths as a Chartered Market Town, Grays will be an exciting, high quality destination for people to live, work, learn, shop and socialise. Reconnected to the River Thames, Grays will support growing resident, student and business communities throughout the day and entertain a diverse and vibrant population through the evening. Cafés, bars, restaurants, shops and markets will combine with culture, entertainment and events in unique venues to provide a safe and attractive place for communities to meet”.

2.14 The Framework 2017 sets out several critical projects for the long term success of Grays town centre as shown below:

Figure 2.1: Grays Town Centre Framework: Concept Plan



Source: Grays Town Centre Refresh (2017)

2.15 The projects stated include:

- **Grays gateway / transport interchange** is described as one of the most important ambitions of the framework. This should provide an underpass which brings the town centre and riverside closer together and address the segregation caused by the railway. This includes the remodelling of the built environment around the station, new public spaces and new mixed used buildings with retail floorspace.

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- **Enhancing the town centre**, the high street to the north of the railway and the side streets, to expand the retail and convenience offer in the town centre including cafes and restaurants. This would also involve redeveloping the Thameside Complex, State Cinema and shopfront improvements.
 - **Development around the civic offices particularly around Mulberry Square** which is identified as the greatest opportunity site. Other developments in the area include high quality public realm which links the wharf to the south with the town centre; new mixed use buildings with active uses and enhancing the setting of the Parish Church and other heritage assets.
 - **Orsett Road Improvements** includes making this location affordable for smaller, independent shops and businesses, reintroducing the two-way traffic system and public realm improvements.
 - **Derby Road Improvements** include public realm enhancements and bringing forward new development on opportunity sites.
 - **Improving walking and cycling routes** in relation to the residential hinterland to make access to the town centre more attractive convenient and safe.
 - **Delivering an attractive Riverside** by improving pedestrian connections from the riverfront to the town centre, to establish an attractive riverfront promenade, consolidate existing open spaces to form a single waterside park, investigate the potential of a pier and creating leisure destinations; and delivering new residential development.
 - **Enhance Seabrook Rise Estate** by considering environmental improvements and improving wayfinding and connections.
 - **Provide for Town Centre Living** includes opportunities for residential growth, including opportunity sites, infill, intensification in areas such as Hogg Lane, and Titan Pitt.

2.16 Since 2017, some of these sites have come forward and delivered including:

- **The South Essex College Grays Campus:** The Council worked with the college to construct on its land in the town centre and continues to work with the college to coordinate education and training and to identify opportunities for the college to expand.
- **Grays Magistrates Court:** The Council worked with Norfolk and Waveney Enterprise Services Ltd (NWES) to convert the vacant building as a business centre. As land owner the Council provided the bulk of the funding and a loan also from the Local Growth Fund (LGF).
- **Civic Offices** – provision of a modern, effective building in which local residents can easily access key services.

2.17 In addition to the above, and in terms of fulfilling the critical projects outlined the most up to date position is detailed in the Grays Town Centre Regeneration Programme – Strategic Assessment (March 2023) report. This states *“the Council and its partners have taken proactive steps to attract investment and opportunity to the town centre; including the £19.9m Towns Fund programme, the proposed £37m underpass scheme and embracing the Creative Estuary programme. This has resulted in the identification of seven key projects, designed initially as a programme of interventions, to collectively drive the regeneration of the town centre”* including:

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- **Station Gateway** - The project seeks to deliver two buildings on the south side of the rail line to complete the public realm around the underpass and support continuation of the High Street to other Town Fund Projects at the riverfront.
 - **Active Riverfront Connectivity** – The project seeks to enhance the public realm and improve connectivity between the town centre and the riverfront through improved pedestrian routes.
 - **Grays Riverfront & Beach** – Project seeks to create a welcoming destination with high levels of public amenity and access to the riverside foreshore including a beach, multi-use structures for events, pedestrian paths set in enhanced public spaces attracting 30,000 arts, culture and events-based visitors each year.
 - **Grays Beach Riverside Park & Kilverts Field** – This project seeks to further enhance the riverfront and connectivity with the river which includes the provision of physical events space and infrastructure, small multi-use structures, space for community-led public arts projects, and the reconfiguration of the Lightship Café to provide a multi-use food and beverage offer.
 - **Activities Centre** - This project seeks to further enhance the riverfront and connectivity with the river which includes the provision of physical events space and infrastructure.
 - **Grays Town Jetty** - This project seeks to create a new jetty to serve river bus services along the river and across to Kent, providing an alternative sustainable means of transport for both commuters and visitors.
 - **Grays Station Underpass** – Creation of a new underpass beneath the rail line at Grays rail station to provide a continuous, accessible and safe route between the town centre and high street to the north of the rail line and the council offices, College and riverfront to the south.

2.18 There is therefore continuing impetus on regeneration of the town centre from an interrelated sets of projects whose origin stem from the 2017 Framework.

Emerging Local Plan

2.19 The Core Strategy was adopted in December 2011 and updated in January 2015 following an independent examination. The Council are now in the process of preparing a new local plan which is at the early stages.

2.20 The Council's Local Development Scheme (September 2022) sets out the timetable for the emerging Local Plan as follows:

- Draft Local Plan Consultation (Regulation 18) Summer 2023.
- Pre-Submission Local Plan Consultation (Regulation 19) Summer 2024.
- Potential adoption of the new Local Plan by Council Winter 2025.

Other Material Considerations

2.21 In addition to the national and local policy documents there are also other relevant local policy documents that ensure effective strategic alignment. These are set out below together with their relevance to Grays town centre.

Thurrock Economic Growth Strategy (2016 – 2021)

- 2.22 The Thurrock Economic Growth Strategy was adopted by Thurrock Council in February 2016 and identifies Grays as one of the economic growth hubs where regeneration activity will be focused. The strategy emphasises the importance of economic growth and a range of proposals to support growth.
- 2.23 The Strategy acknowledges that increased freight movements are putting extra pressure on level crossings and these now represent a real barrier to growth, in Grays and East Tilbury.
- 2.24 Education performance is stated to have improved significantly in Thurrock and the steps to address the skills gap include action to address the lack of breadth Thurrock offered in the availability and delivery of further education and higher education, particularly through the South Essex College Thurrock campus in Grays.
- 2.25 Comment is made on the need for effective business networks and functions are vital for the growth of business and for effective working across Thurrock. Business engagement should continue to seek to be as inclusive as possible in order to avoid the same business being heard. Moreover, the Council should look at ways to ensure this is self-sustaining. For instance, the first iteration of the Town Partnership in Grays did not survive the departure of key personnel.
- 2.26 The Strategy also comments on the need for a range of office accommodation to support businesses. A Borough-wide shortage is identified but that there are a number of sites, such as The Old Courthouse (formerly Grays Magistrate's Court) and workspace at High House Production Park which have since added to the stock of quality accommodation for small businesses. Business Services is identified as an opportunity sector in which there is an *"opportunity in relation to development activity in Grays where there is an aspiration to build a strong business base"*.
- 2.27 Creative industries are identified as a further opportunity and that *"this sector can play an important role as part of place-shaping, for instance as part of the development of Grays and efforts to foster more of a night time economy there"*.
- 2.28 In terms of successful marketing the Strategy states that *"at present perceptions threaten to inhibit the development and revitalisation of town centres such as Grays, although the arrival of some national brands could help alleviate this"*.
- 2.29 Successes within Grays are cited as:
- The opening of the South Essex College Thurrock Campus building.
 - Refurbishing the Magistrate's Court building to provide a range of business units.
 - Completing the refurbishment of flats and houses in south Grays and consulting residents about next steps.

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- The High Street market can now be held 7 days a week, up to 210 times a year.
- 2.30 The Strategy states that Grays will be an exciting, high quality destination for people to live, work, learn, shop and socialise. It provides that there are plans to reconnect the town with the River Thames and develop a night time economy, with cafes, bars, restaurants, shops and markets. It identifies specific challenges Grays has and continues to face including:
- housing development not being delivered at the anticipated pace.
 - Grays cannot compete with Lakeside and needs its own unique role.
 - the high street needs to continually adapt
 - the concerns on traffic and congestion.
- 2.31 The Strategy also highlights the next steps for Grays, and the following continue to be relevant:
- Engage community and review proposals for the development of a new theatre and the other services in the Thameside Complex.
 - Taking forward, with Network Rail and c2c, plans for an underpass.
 - Establishing a business based town partnership to maximise the impact of the public and private sector in promoting the town centre.
 - Implementing changes to the highway network and the public realm to address traffic congestion and improve accessibility by public transport, cycling and walking.
 - reviewing how the Council's land holdings can best contribute to the regeneration of the town centre.
 - the introduction of town centre management supported by an officer task force to respond quickly to issues that affect the attractiveness of the town centre.
- 2.32 The overarching 'next steps' recommended for Thurrock which also have an implication for Grays include:
- Need to diversify the economy so it is less dependent upon a relatively narrow range of sectors.
 - Delivery of a substantially improved skills and qualifications base – significant and sustained expansion of learning structures and facilities.
 - Delivery of quality sites and premises in hub locations across Thurrock.
 - Quality housing offer that attracts and retains high skill, high income individuals and their families.
 - Significant improvement to the road and transport networks serving Thurrock.

Thurrock Council - Thurrock Transport Strategy (2013-2026)

- 2.33 Thurrock Council adopted the current Local Transport Strategy in 2013 to support the delivery of the adopted Core Strategy. Policy TTS1 supports the formation of a new Transport Zone around Grays Rail Station including an improved means of crossing the rail line. Also that the pedestrian environment will be improved, including better links between north of the railway line and the south and the riverfront.

Thurrock Council - Health and Wellbeing Strategy (2022-2026)

2.34 The Health and Wellbeing Strategy (HWBS) sets out goals and actions to help achieve the Government’s Levelling Up ambition and increasing Health Life Expectancy and reducing the gap. The Strategy recognises the following in relation to Grays:

- The more deprived areas are mainly located in and around Tilbury, with further areas in South Ockendon, Grays and areas of Corringham also suffering from higher levels of deprivation.
- Increased funding for physical activity and improvements to parks has led to improvements to parks and play sites across the borough, including Grays Beach.
- Health and care partners have continued to work on the development of the four Integrated Medical Centres (IMCs). The Centres will be located in Tilbury, Purfleet-on-Thames, Corringham and Grays – aligned with the four Primary Care Networks that operate in Thurrock. The IMC in Corringham opened in November 2022. Centres in Tilbury and Purfleet-on-Thames are expected to open in 2024. Grays is scheduled to open in 2025.

2.35 The overall emphasis of the HWBS is structured around six domains which cover the key wider determinants of health and the community's priorities for ‘*Levelling the Playing Field*’. Each Domain relates to one of the Council's key priorities of People, Place and Prosperity. All six domains are all relevant to Grays as follows:

Domain	Levelling the Playing Field Through (inter alia)
<ul style="list-style-type: none"> • Staying Healthier for Longer 	<ul style="list-style-type: none"> • tackling obesity, tobacco use, mental health, • provision of new Integrated Medical Centres (IMCs).
<ul style="list-style-type: none"> • Building Strong and Cohesive Communities 	<ul style="list-style-type: none"> • tackling digital exclusion; • establishing a Collaborative Communities Framework (CCF) Equality ambition for all to have equal opportunities to prosper in a connected community.
<ul style="list-style-type: none"> • Person-Led Health and Care 	<ul style="list-style-type: none"> • easy to access entry to care; • Dementia Commissioning Strategy; • equity of access to primary care, integrated locality networks by Primary Care Network area.
<ul style="list-style-type: none"> • Opportunity for All 	<ul style="list-style-type: none"> • delivering the Brighter Futures aspirations to improve educational attainment; • Thames Freeport Skills Plan targeting dedicated interventions to improve skills and opportunities; • Supporting local businesses to generate wealth and employment; • Supporting small and medium enterprises supply chain opportunities through Thames Freeport; • Harnessing the power of culture and creativity to improve well-being and support economic growth through delivery of a Thurrock Cultural Strategy.

<ul style="list-style-type: none"> • Housing and the Environment 	<ul style="list-style-type: none"> • using Development Management, the Housing Strategy and the Local Plan to deliver a minimum provision of 35% of new residential developments to be affordable; • The Local Plan will identify major development sites that can deliver ten or more additional homes and set targets for the mix of units in terms of type, size and tenure; • Improving the condition of housing in the public and private sector • Local Plan policies, Health Impact Assessments (HIAs) for major new developments and the Transport Strategy will consider a full range of health and wellbeing issues including for example: Active Travel and Public Transport; access to green and open spaces; air quality; the food environment. • The Local Plan will put forward a range of planning policies that support the creation of healthier, safer and greener places which will be used by developers.
<ul style="list-style-type: none"> • Community Safety 	<ul style="list-style-type: none"> • Implement a Public Health approach to youth violence and vulnerability; • Implementing the Thurrock Violence Against Women and Girls Strategic Action Plan

2.36 The HWBS also draws on and reiterates, the Thurrock Council Corporate Priority Projects 2021 that include:

- Progress the Local Plan to support place-making and guide future sustainable development.
- Deliver major regeneration and infrastructure projects contributing to growth including the government funded Towns Fund proposals.
- Redefine to create a leaner asset base to reduce costs and support long term financial sustainability.

2.37 In terms of how this will level the 'place' playing field the HWBS states:

- Improved accessibility and equity of access to education, employment, healthcare and green spaces through walking and cycling infrastructure, and improved public transport. This will be built into all new major developments including Thames Freeport and targeting use of retained business rates.
- The Local Plan and the design of new neighbourhoods will enhance community resilience and social capital, reduce anti-social behaviour, designing crime out and physical activity in. Improved physical and mental well-being will be a key consideration for new planning policies and in the determination of planning applications.
- Council procurements, capital schemes and new developments should be linked to a Social Value Framework and contain employment initiatives to provide opportunities for local people.

2.38 Furthermore, on how economic growth will level the playing field, the Strategy provides:

- Enhance access to vocational, academic and skills education for all, supporting adults experiencing barriers to learning and promoting progression into employment

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- Using the major economic growth interventions such as the Thames Freeport to create job opportunities for all, with more residents from vulnerable and deprived groups in sustained employment.
 - Supporting local business aspirations to generate wealth and employment, promoting social enterprises, and helping small business and micro-enterprises to grow.

2.39 The HWBS and stated domains are therefore influencing factors in promulgating a ‘level playing field’ in Thurrock overall. The implications for Grays as a place centre are the following:

- Supporting of culture and creativity to improve well-being and support economic growth.
- Improving housing condition and provision.
- Improving job prospects and skills.
- Major development sites to deliver a mixture of homes and tenures.
- Planning policies that support the creation of healthier, safer and greener places.
- Using the Local Plan to support effective place-making and housing.

Regional and Sub-Regional Policy Alignment

2.40 In addition to the local policy documents there are a number of regional and sub-regional documents that are relevant in relation to the Borough and Grays.

SELEP’s Economic Strategy Statement – Smarter, Faster, Together (2018)

2.41 The South East Local Enterprise Partnership (SELEP) Statement aims to deliver growth in the South East and is the pre-cursor to their Local Industrial Strategy. It identifies the Thames Estuary as one of its top priorities for growth and sets out that the Thames Estuary Production Corridor should be a key part of this. Significance is also placed on developing the creative and cultural industries across the LEP area.

Thames Estuary Production Corridor: The Case for Investment (2020)

2.42 This strategy aims to unlock and maximise the creative potential of the Thames Estuary Production Corridor. The Thames Estuary Production Corridor has the potential to double the size of the production sector across the Estuary, supporting the delivery of more than 50,000 new jobs and creating additional economic output (GVA) of over £3.7bn per annum. The report references the Thameside Theatre in Grays as a ‘local spark’ that can support Town Centre revitalisation with an increasingly visible presence of creative production.

Thames Estuary Growth Board: ‘The Green Blue’ (2020)

2.43 Thames Estuary Growth Board and its action plan “The Green Blue” sets out plans for fulfilling the potential of the region, comprising east London, north Kent, south Essex and the Thames itself. The Green Blue includes key plans to attract business and investors,

boost connectivity to and in the area, bring clarity to the housing debate, regenerate infrastructure, and create jobs. The plan is called “The Green Blue” because it signifies good, green growth using the important, blue waterway of the Thames that connects the UK with the rest of the world.

Thames Estuary TE2100 Plan (2012)

- 2.44 Produced by the Environment Agency, it provides a flood risk management plan for London and the Thames Estuary into the next century. The Plan is supportive of the concept of reconnecting Grays Town Centre to the River Thames by way of improved public access to the river; use of the river as an amenity and habitat creation as part of a complementary riverside strategy.

South Essex Economic Development Needs Assessment (EDNA) (2017)

- 2.45 The EDNA supports the existing and emerging planning policy of each of the South Essex authorities. For Thurrock Borough Council it acts as a key part of the evidence base supporting the emerging new Local Plan Sets out the aim to promote growth in South Essex. As part of this assessment Grays is identified as centre for Digital / Cultural / Creative Sector Growth.

Summary

- 2.46 The underlying objective of national, regional and local plan policy is to maintain and enhance the vitality and viability of town centres, and to promote new sustainable development and economic growth in town centre locations ‘first.
- 2.47 Analysis of the suite of policy documents highlight the following:
- The physical and social regeneration of Grays town centre is a long standing commitment.
 - Grays is in a complex planning ecosystem (SELEP, Thames Estuary etc) but where there is a strong aim on economic and social growth from which Grays can potentially benefit from over the longer term.
 - There is a need for additional and proactive momentum, potentially led by the council and relevant stakeholders, to fulfil long standing ambitions to reposition Grays town centre for the future.

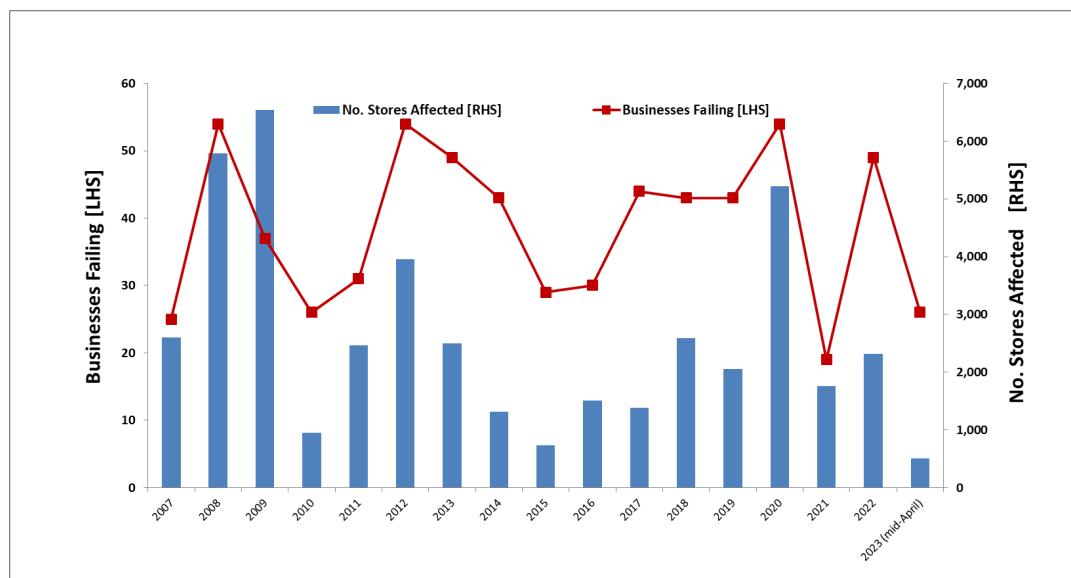
3. TOWN CENTRE TRENDS

3.1 This section summarises some of the key economic, consumer and property market trends that have driven the changes in the retail and leisure sectors over the last decade.

3.2 Although Covid pressures on the economy may be easing, the challenges facing consumers, businesses and town centres continue to intensify. The end of the Government’s furlough scheme, and the removal of the majority of relief packages, aligned with recruitment and supply issues, left many businesses exposed. The latest industry research shows:

- Over 2,000 closed stores in 2022 due to administration, with almost 35,000 jobs lost. This compared with 5,200 store closures in 2020, and over 109,000 job losses⁴.

Figure 3.1: Major Retail Failures (2007 – 2023 (mid-January))



Source: Centre for Retail Research (January 2023)

- Average vacancy rates for all retail space stood at a record high of 15.7% in 2021⁵.
- Shopping centres had the highest average vacancy rates (19.1%)⁶.
- Average vacancy rates were lower for high streets (14.4%), and retail parks (11.3%)⁷.

UK Economic Outlook

3.3 The UK economy continues to face significant headwinds in the form of surging inflation, high energy costs and supply chain disruptions. Consumer Price Inflation (CPI) peaked at

⁴ Centre for Retail Research (January 2023)

⁵ Local Data Company (March 2022)

⁶ Local Data Company (March 2022)

⁷ Local Data Company (March 2022)

a 40-year high of 11.1% in October 2022⁸ (well above the Bank of England target rate of 2%). Twelve-month CPI inflation fell from 10.5% in December 2022 to 10.1% in January 2023 but then rose to 10.4% in February 2023 before falling again to 8.7% in May 2023⁹.

- 3.4 Hence there are macroeconomic shifts unfolding. A ‘cost of living crisis’ has emerged, hitting the least affluent households the hardest, sparking recessionary behaviours, weaker spending and softer confidence. Real household disposable income (RHDl) per person – a measure of real living standards – is expected to fall by a cumulative 5.7% over the two financial years 2022-23 and 2023-24. This would be the largest two-year fall since records began in 1956-57¹⁰.
- 3.5 The fall in RHDl per person reflects the rise in the price of energy and other tradeable goods of which the UK is a net importer, resulting in inflation being above nominal wage growth. The squeeze on real household incomes is anticipated to drag down consumption in 2023/2024.

The Rise of Online Shopping

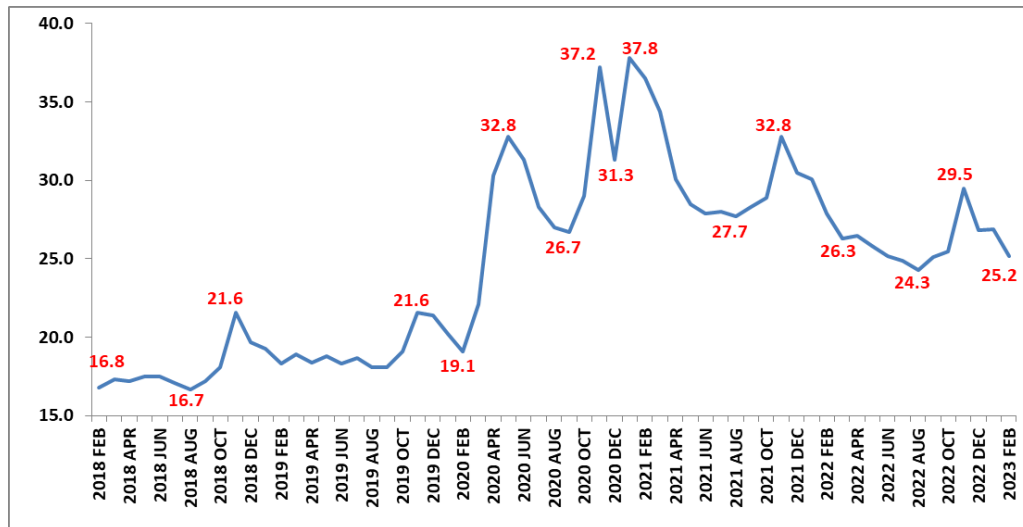
- 3.6 The growth in non-store retail sales has undoubtedly had the most significant impact on consumer spend and behaviour over the last decade, and on our High Streets and traditional shops.
- 3.7 ONS figures show that as a percentage of total sales, online retail sales accounted for up to 25.2% of sales in February 2023 compared with a peak of 37.8% in January 2021. The graph also shows the steep increase from 21.6% in October 2019 (pre-pandemic) to 32.8% in November 2021 and falling to 25.2% by February 2023. The overall trend suggests that online accounts for between quarter to a third of the amount spent on retail goods.

⁸ Office for Budget Responsibility - Economic and Fiscal Outlook (March 2023)

⁹ Bank of England: Monetary Policy Summary and minutes of the Monetary Policy Committee meeting ending on 22 March 2023 and Monetary Policy Summary and minutes of the Monetary Policy Committee meeting ending on 21 June 2023

¹⁰ Office for Budget Responsibility - Economic and Fiscal Outlook (Ibid)

Figure 3.2: Internet Sales as a Percentage of Total Sales (%)



Source: ONS: Retail sales, Great Britain: February 2023

Retailer Business Models and Requirements

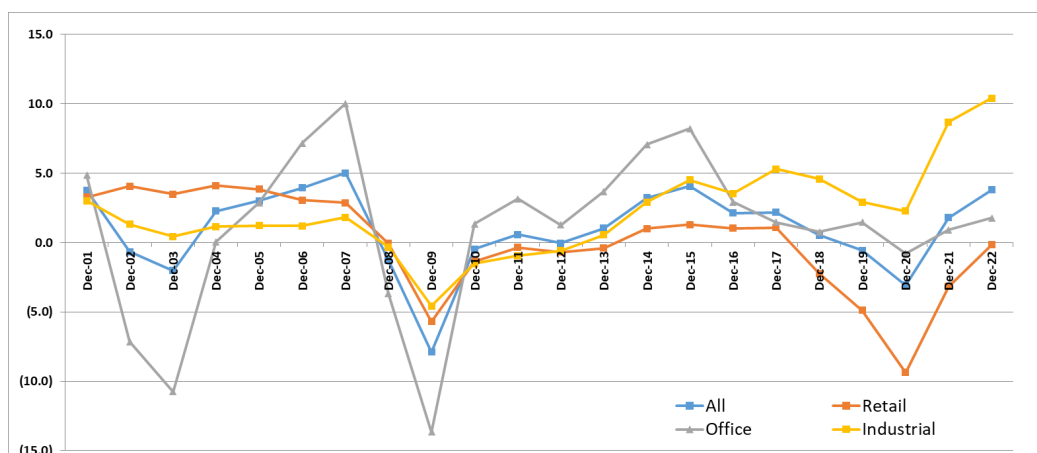
- 3.8 The challenging economic conditions and growth in online sales have had a significant and permanent impact on consumer shopping and spending behaviour. Retailers have faced challenges across the supply chain, inflationary pricing, economic uncertainty and geopolitical factors.
- 3.9 This has created significant challenges for traditional “bricks-and-mortar” retailing and the high street. Consequently national multiple retailers are having to constantly review and rapidly adapt their business strategies, requirements and store formats to keep pace with the dynamic changes in the sector and consumer demand. As retailers adjust to “new normal”, a seamless experience and hybrid shopping are shaping the future of retail; the key trends that will impact the industry include:
- Hybrid or ‘Phygital’ (physical and digital) shopping – Retailers want to deliver a seamless experience across all shopping methods, including online, in-store, mobile devices, social media, and live streaming; and
 - Social media sentiment monitoring is collecting and analysing information about a retailer or brand on social media. Actively engaged on social media, retailers are able to better understand data about their customers’ sentiments, preferences, and attitudes toward their company and its competitors.
- 3.10 National retailers with extensive high street store portfolios are struggling to maintain market shares and remain profitable in the increasingly competitive environment. The higher costs of trading from high streets compared with online and out-of-centre retailing, also means that it is not a “level playing field”. This is a further contributing factor to the significant number of store closures that have occurred over recent years.

3.11 In summary, although some retailers are better positioned to cope with the growth in online shopping and the shifts in consumer behaviour and preferences, many are struggling to position themselves quickly enough to absorb rising costs and engineer the vital transition to a more technology-focussed business model.

Retail & Shopping Centre Investment

3.12 Demand for retail space in centres across the UK has fallen dramatically since 2007 and is currently at an all-time low. In turn this fall in demand is impacting on property values and rents. For example, LSH research conducted before the pandemic showed that the retail sector recorded a 4.9% year-on-year fall in rents in December 2019; fell further in December 2020 by 9.4%; by 3.2% in December 2021 and by 0.2% by December 2022¹¹. As shown below the retail sector has performed poorly compared with the other property sectors with its origins back to the economic crisis in 2007/08. This trend has been further exacerbated by the pandemic and current cost of living crisis.

Figure 3.3: Property: Average Rental Growth (2001-2023) (%)



Source: MSCI UK Quarterly Property Index (April 2023)

3.13 Many centres and shopping locations across the UK simply have too much retail floorspace stock, or they have the “wrong type” of retail floorspace that does not meet the needs of modern national retailers for larger format shop units. Some analysts indicate that as there may be as much as 30% too much physical space in the retail sector. Our recent research together with REVO¹² indicated that the oversupply of retail floorspace has

¹¹ LSH Research (2023) using MSCI data

¹² LSH / REVO Survey 2023

overtaken business rates as the main challenge identified by our survey respondents. It was mentioned by 42.7%, up from 36.1% in 2022.

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

Out-of-Centre Retailing

- 3.15 The development and take-up of food and non-food out-of-centre space has also slowed over recent years, in line with the trends impacting on high streets and town centres.
- 3.16 This notwithstanding, most out-of-centre shopping locations retain their significant competitive advantages over town centres and high streets in terms of their supply of larger format modern outlets, ease of access, their lower occupancy costs, extensive free parking as well as their ability to serve as last-mile delivery hubs.

Leisure Trends

- 3.17 Following a dramatic -37.9% fall in leisure spend per head in 2020, Experian forecasts showed a return to growth in 2022 (+27.7%) but a drop to -5% in 2023 and -0.2% in 2024. Thereafter the growth averages between 0.9% and 1% over the long term to 2040. This growth in leisure spend is higher than the long term trend of -2.4% per annum over the period 1997-2021
- 3.18 The pandemic posed the most significant challenge to the commercial leisure industry in recent years. Never before was the sector unable to operate in its entirety. With restriction on movement which was essential for commercial leisure pursuits including eating and drinking out or going to the cinema or gym. All of these sectors suffered as a result and lockdown resulted in a more home focused consumer.
- 3.19 It is anticipated that the post-pandemic demand for leisure is unlikely to decline but will be dependent on broader economic conditions and prevailing consumer confidence. The anticipated focus on more working from home will result in local areas benefiting from any uptake in leisure provision. This is likely to benefit independents.
- 3.20 The key issues for commercial leisure provision in a post pandemic world will encompass a number of factors, particularly:
- macro-economic and resulting consumer sentiment (e.g. income growth, rising cost inflation, cost of living crisis);
 - the rise in home working and benefiting local locations and businesses;
 - rise of home delivery; and
 - the increase in the use of open spaces and pursuits.

-
- 3.21 However, according to survey released in November 2022 by UK Hospitality, the British Beer and Pub Association, the British Institute of Innkeeping and Hospitality ; this found that 96% of hospitality businesses were being hit by higher energy costs and 93% faced higher food prices. Continuing uncertainty over soaring inflation, future regulation and staffing levels is said to be causing a “crisis of confidence” among business owners, which has fallen to a lower level than at any point during the pandemic. The vulnerability of the sector due to soaring energy costs, crippling rises in the cost of goods and dampening consumer confidence is likely to affect the sector over the next few years further.
- 3.22 **Food and Beverage** consumers are now seeking more clarity and transparency to inform their decision, for example in the UK, 48% of consumers believe buying British produce is important; or brands that are more climate-friendly and ethical. Consumers now want more novel experiences that amplify the flavours, colours, textures, aromas and interactivity that food and drink can provide. Flexible spaces are becoming more popular with restaurants creating multifunctional and meaningful spaces, imaginatively using food, drink and foodservice venues as places where consumers can spend time, express themselves and meet new people.
- 3.23 The **cinema** sector was hit particularly hard during the pandemic as a result of multiple lockdowns. This increased the number of people watching films via online streaming services. In broad terms the cinema market will continue to compete with streaming services as the optimum place to see films. Overall cinema attendance is now returning to pre-pandemic levels and there are now signs of renewed confidence in cinemagoing and the sectors growing recovery.
- 3.24 Regarding the **Health and Fitness** market commercial gyms were forced to close in 2020 and early 2021. The pandemic has left a legacy with shifts to alternative workout routines, and the role of technology. The industry is expected to recover, benefiting from more health consciousness along with government initiatives targeted at encouraging physical activity. Consumers are taking better care of their own wellbeing and they are expected to maintain and even increase their levels of exercise. Like other sectors, further growth and trends relate to technologically connected equipment, inclusive fitness, and mind-body programs and practices.
- 3.25 Overall the commercial leisure industry faces considerable challenges and pressures. It is clear that consumers are becoming increasingly selective in terms of where and how they spend their discretionary leisure expenditure. There will also be a continued increase in at-home activities due to the advances in computers, tablets, television, gaming, and audio technology. More immediately this will be further compounded by the current ‘cost of living crisis.’ The challenge for town centres and leisure operators in the future will be how to attract customers away from their homes.

Vacancy Rates

- 3.26 At the end of 2022, the GB average 'All Vacancy Rate' (retail and leisure combined) according to the Local Data Company (LDC) stood at 13.8%. The current rate is still higher than the pre-pandemic (H2 2019) level of 12.1%, so the sector has yet to fully recover. LDC estimate that by the end of 2024 the retail vacancy rate reaching 14.9%; leisure 10.2%; with the combined rate falling to 13.4%.

Use Classes Order & Permitted Development Rights

- 3.27 The Government issued a series of reforms to the planning system since 2020. Effectively, changes to the use classes were brought in to provide a more flexible approach to controlling commercial land uses. This saw the replacement of Use Class A1 to A5, D1 and D2 replaced with E Classes (Commercial), F1 (Learning and Non-Residential) and F2 (Local Community Uses) and the restructuring of sui generis uses (public houses, hot food takeaways, cinemas, music venues, bingo etc.).
- 3.28 The result of these changes is that what would previously be a change of use under the subsumed use classes is no longer considered development under the Planning Acts, and accordingly is no longer subject to planning control.
- 3.29 The impact of the changes will still require the definition of a town centre boundary and a primary shopping area, or a primary 'commercial' area to be the foci for E and F Classes. Also, in most instances the former use classes can be 'translated' into the equivalent categories within the new E and F Classes.
- 3.30 The changes have implications for primary and secondary shopping frontages, as the control of shopping and service uses is legally less enforceable in commercial areas.
- 3.31 Beyond 2023, town centres are likely to consolidate their retail and shopping role with more emphasis on place and non-transaction uses, this could include high activity based land uses such as health, education being located in more central locations and stem previous trends of decentralisation
- 3.32 The increase in city living and residential development in town centres is likely to be a growth area in the next 10 years and could be a positive regenerative mandate. We also expect more emphasis on residential upper floor living accompanying ground floor commercial uses.

Levelling Up & Regeneration Bill

- 3.33 The Government's draft Levelling-up and Regeneration Bill (the Bill) published in May 2022 aims to reverse geographical disparities between different parts of the UK by spreading

opportunity more equally. This wide-ranging Bill has at its heart planning reform. It seeks to change the way powers can be devolved to local authorities and introduces reform to the planning system in England. Many of the provisions in the Bill take forward the proposals set out in the 2020 Planning White Paper. Alongside the Bill, and to assist with the “levelling up” agenda, it proposes more devolved powers, changes to the National Planning Policy Framework and additional housebuilding schemes.

- 3.34 The implications arising from these changes result in more flexibility and are likely to be focussed on the peripheral parts of existing town centres, reflecting the influence of land values, but the outcomes are unclear, particularly the likely scale of increased residential and loss of commercial space and this should be monitored further. In addition, these use-class and permitted development rights changes have added complexity to the types of uses that are supported in centres – particularly how the new use classes link with the current NPPF definitions of ‘main town centre uses’ and it would be important for the emerging version of the Local Plan to set out a clear policy approach to uses in centres.

Summary

- 3.35 Towns, traditional high streets and shopping centres have been challenged for more than a decade by falling market demand, rising occupancy costs and increasing competition from online and out-of-centre shopping. These trends have been further accelerated and compounded by the COVID-19 pandemic; and are resulting in an increase in vacant shop units.
- 3.36 These implications at a national level also have implications for Grays Town centre specifically:
- **UK Economic Outlook** - The broader consumer sentiment impacted by the current cost of living crisis means the consumer has less to spend and will be more cost conscious. Lower spending results in lower revenues for operators resulting in contraction and closure of floorspace and rising vacancy levels. This has a pronounced effect on smaller centres like Grays. The resulting challenge is to retain existing businesses, fill/replace the voids and attract new investment.
 - **Vacancy Rates** - There is a danger that long-term vacancies in centres can lead to a ‘spiral of decline’, which further engender feelings of neglect and lack of investment confidence, and “push” more people to shop online or alternatively to other competing centres.
 - **Online Shopping** - The rise in online spending continues and it will be important for local businesses in Grays to interact in this sphere and develop hybrid models of operation for sustained growth.
 - **Retail Models and Investment** – Most centres have a surplus of retail space. With increasing vacancies. With the rise of digital technology the continued sustained viability for Grays town centre will require good public realm and placemaking to encourage footfall and visitation.
 - **Use Classes Order & Permitted Development Rights** - Residential provision is already being encouraged and where retail vacancies are long-term. It will therefore

be necessary to plan for alternative uses and/or consider options for redevelopment. Residential development within Grays town centre boundary may also sustain local business through a captive footfall level.

- The increasing drive towards **more flexible planning** through changes to the Use Classes Order and Permitted Development Rights, will inevitably lead to more mix of uses within centres particularly residential, and this should be encouraged in Grays and planned for via enabling planning policies.
- **Levelling Up** - Grays town centre has been competitively challenged since the opening of Lakeside Shopping Centre in 1990 and there is a requirement to 'recalibrate' again to take account of not only the physical and spatial challenges but also shifting patterns in usage by a more digitised and experiential focussed consumer and also aligned with the needs of its resident community.

4. GRAYS SOCIO-DEMOGRAPHIC PROFILE

4.1 This section provides a socio-demographic summary on the Grays built-up area.

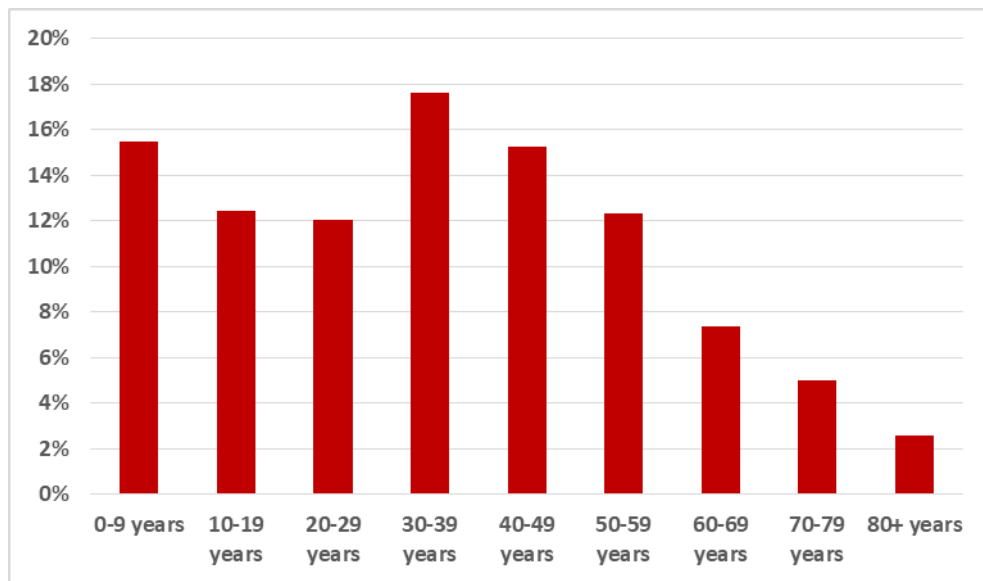
Population

4.2 The built up area population in Grays has increased from 54,820 in 2001 Census to 76,563 in 2020 with an annual population increase of 1.5% since 2011.

4.3 In contrast the Thurrock wide population has increased by over 10% every decade, with the Census 2021 reporting the population to be 176,000, an increase of 11.6% since 2011 (157,705) or 1.1% per annum between 2011 and 2021.

4.4 Within Grays the demographic split in relation to gender is 49.6% female and 50.4% male (2020) in line with the Thurrock average of 51% females and 49% males. The age distribution is illustrated in the figure below which shows that Grays has a relatively younger population under the age of 50 (0-49 years account for 73% of the resident population).

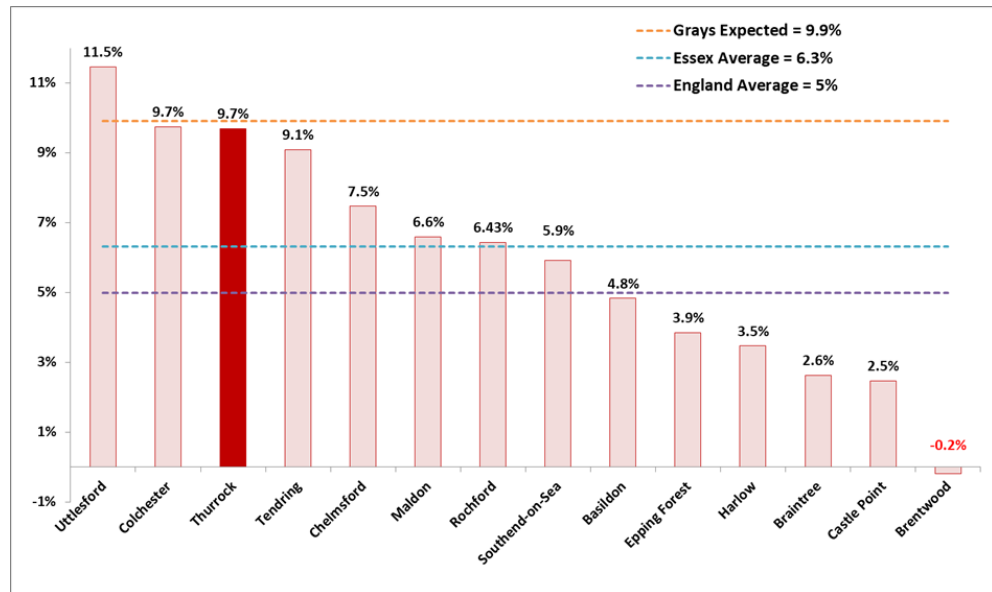
Figure 4.1: Grays Age Distribution (2020)



Source: <https://www.citypopulation.de/>

4.5 Grays population growth between 2018 and 2028 is anticipated to increase by 9.9%, which is marginally higher than the Thurrock average (9.7%) and substantially higher than the projections for Essex and England population projections (6.3% and 5% respectively).

Figure 4.2: Grays Population Forecast 2018-2028

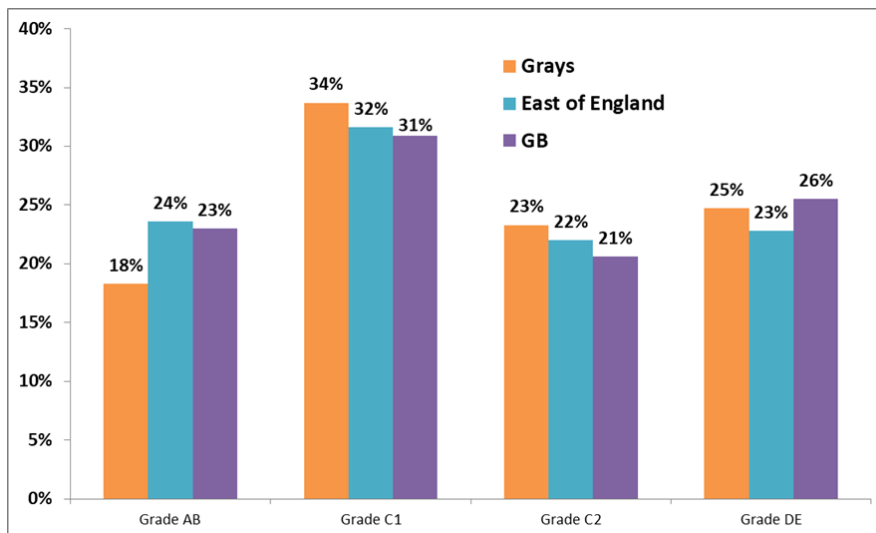


Source: ONS Sub-national Population Projections for England, 2018-based

Socio-Economic Profile

4.6 The **composition** of the population by social grade shows that this primarily comprises within Grade(s) C1, C2 and DE with a much lower proportion in the AB category¹³. Lower social grading also correlates with indicators such as lower educational achievement and poverty which ultimately affect the wellbeing of the community.

Figure 4.3: Social Status by Grade

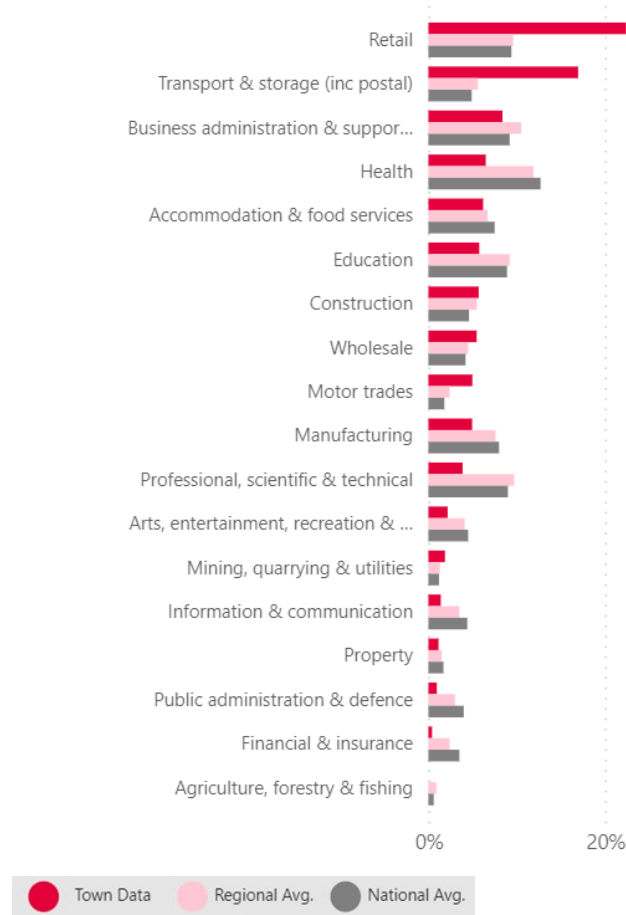


Source: ONS Census 2011

¹³ ONS - 2011 Census: Approximated social grade, local authorities in England and Wales. Note: AB Social Grade - Higher & intermediate managerial, administrative, professional occupations; C1 Social Grade - Supervisory, clerical & junior managerial, administrative, professional occupations; C2 Social Grade - Skilled manual occupations and DE Social Grade - Semi-skilled & unskilled manual occupations, Unemployed and lowest grade occupations.

4.7 The drivers of the **employment** economy are in retail, transport & storage, business administration & support services and health.

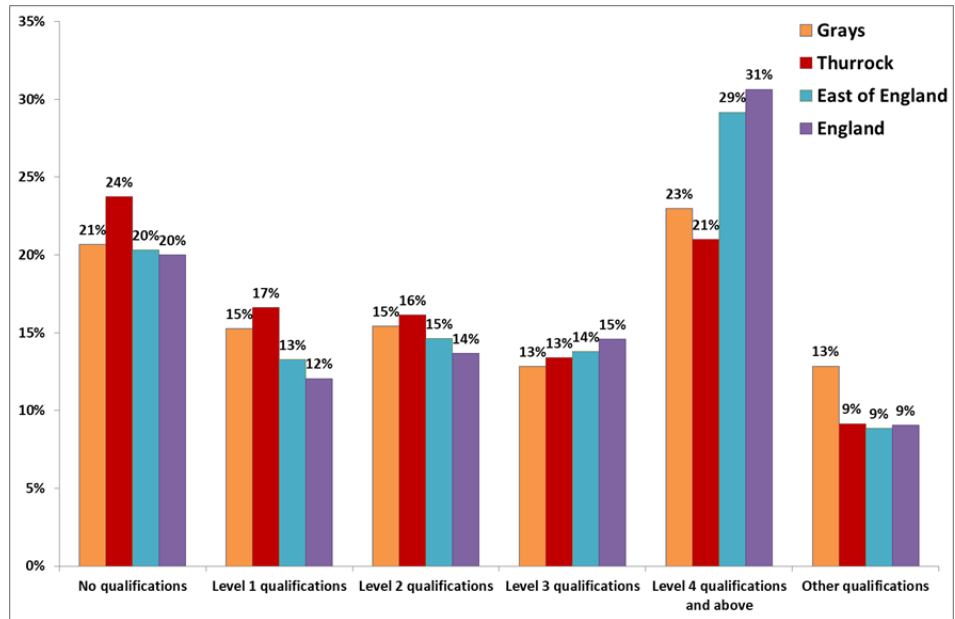
Figure 4.4: Proportion of Total Employment by Sector (2018)



Source: Towns Fund Dashboard (2020)

4.8 The **skills profiles indicate** Grays has a young working age population, but issues of low skills levels and access to employment are constraining opportunities in the labour market.

Figure 4.5: Grays Qualifications



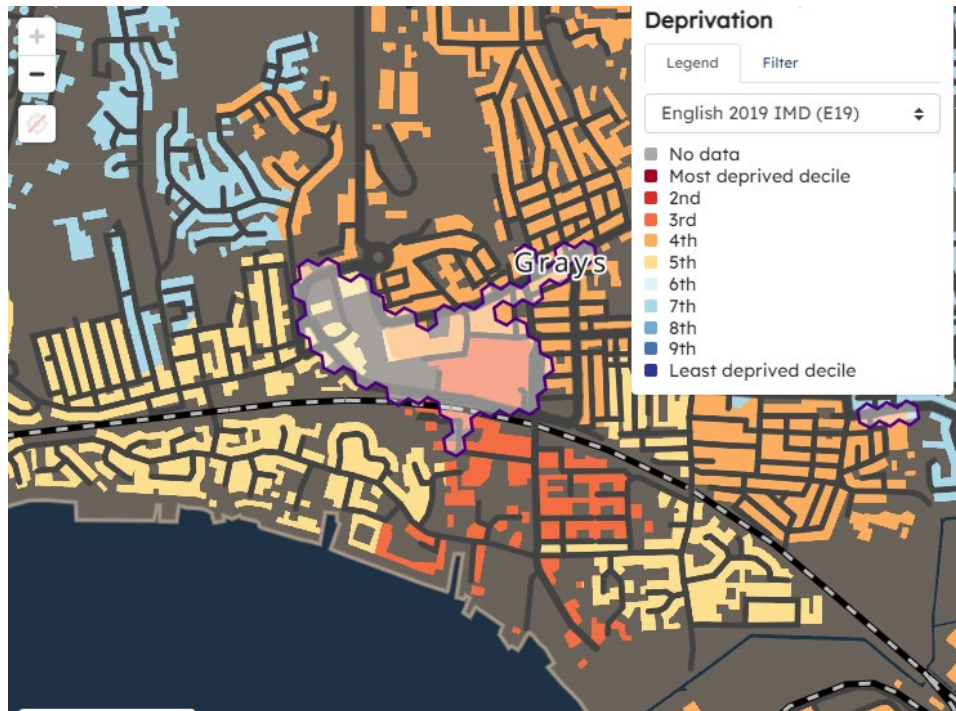
Source: ONS Census 2011

- 4.9 A fifth (21%) of the population in Grays have no qualifications; lower than the Thurrock average (24%) but higher than East of England and GB (both at 20%). Only 23% of the Grays population has Level 4 qualifications, which is higher than Thurrock (21%) but significantly lower than East of England (29%), and England (31%).

Index of Multiple Deprivation

- 4.10 Grays has a varied ranking in relation to the Index of Multiple Deprivation with some lower layer super output areas (LSOAs) ranking in the 10% most deprived neighbourhoods in the country. Grays Riverside ward is ranked 7th out of the 20 Thurrock wards (1 being the most deprived).
- 4.11 Below is a visual representation of the IMD in Grays in which the town centre and the southern part towards the riverside is identified as the most deprived when compared to the rest of the town.

Figure 4.6: Grays Index of Multiple Deprivation



Source: <https://data.cdrc.ac.uk/dataset/index-multiple-deprivation-imd>

- 4.12 Deprivation is strongly associated with poor physical and mental health. For example, child obesity in the ward(s) of Grays Thurrock and Grays Riverside stand at 23.1% and 25.8% respectively which is considerably higher than the English average of 19.3%. Similarly, smoking in the Grays Thurrock and Grays Riverside ward(s) stand at 21.1% and 22.6% respectively which is higher than the English average of 18%¹⁴.

Summary

- 4.13 In summary, the socio-economic profile for Grays shows:
- a growing and young population;
 - poor diversity in employment;
 - the key drivers of employment are in retail, transport & storage, business administration & support services;
 - a fifth (21%) of the population in Grays have no qualifications; and
 - high levels of deprivation in town centre and towards riverside.

¹⁴ Source: Public Health Profile(s) 2017/18: Grays Thurrock Ward (E05002236) and Grays Riverside Ward (E05002235) – Thurrock Public Health

5. GRAYS TOWN CENTRE HEALTHCHECK

5.1 This section sets out the key findings of the health checks for Grays Town Centre. The health check assessment has been informed, where possible, by the following Key Performance Indicators (KPIs) outlined in the National Planning Practice Guidance (NPPG)¹⁵:

- | | |
|--|--|
| <ul style="list-style-type: none">• the diversity of uses;• proportion of vacant street level property;• commercial yields on non-domestic property;• customers' experience and behaviour;• retailer representation and intentions to change representation;• commercial rents;• pedestrian flows; | <ul style="list-style-type: none">• accessibility;• perception of safety and occurrence of crime;• state of town centre environmental quality;• balance between independents and multiples;• any evidence of barriers to new businesses opening and existing business expanding;• opening hours/availability/extent to which there is an evening and night time economy offer¹⁶. |
|--|--|

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

5.3 The health check and SWOT assessments draw on a number of industry standard published datasets (e.g., Experian Goad, CoStar etc.) and LSH's own market intelligence. This will help understand the current vitality and viability of Grays town centre, how its health has changed over time, and the prospects over the short, medium and longer term.

Spatial Context

5.4 Grays is the principle designated town centre in the Thurrock Council area. It is also the unitary authority's main administrative centre. The town is located along the River Thames, 44km (27 miles) east of London and 21km (13 miles) south of Basildon and is in a strategic location with good transport connectivity.

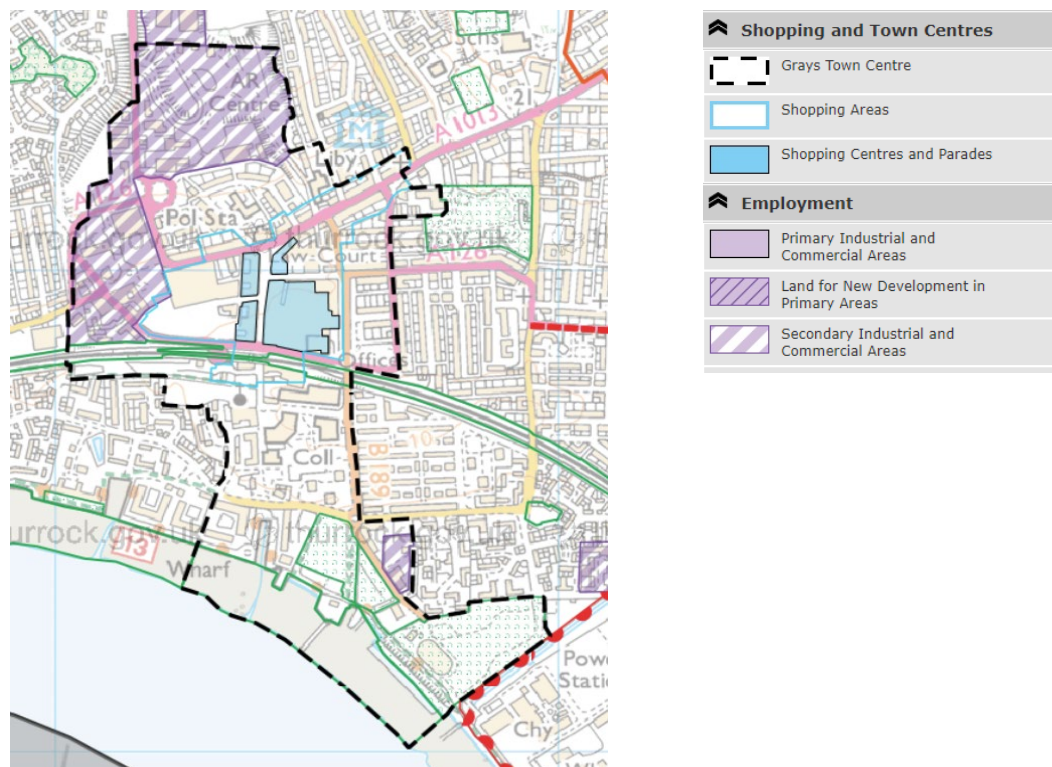
5.5 The town centre of today has origins in the 1850's with the opening of the rail line, serving industry which was based around mineral extraction and riverside wharfs. The retail and social role of the town centre grew in tandem to serve the growing population and became established as the main district shopping and social centre.

¹⁵ Paragraph 006. Reference ID: 2b-006-20190722

¹⁶ The "evening" economy generally relates to all leisure activities that are open until around 11pm. The "night-time" economy is generally defined as businesses and activities with late night licences that are open beyond 11pm, particularly at the weekend.

- 5.6 The contemporary shift of the High Street towards the north (from its original focus to the river in the south), took place following the opening of the rail station in 1854. This was consolidated further following the extensive redevelopment which took place in the 1960s and 1970s. The 1970s modernisation programme led to development north of the railway line and in the construction of Grays Shopping Centre within the town centre.
- 5.7 The northward shift from the riverside crystallised the urban form of Grays today which was consolidated further with the opening of Morrisons' third store in the south-east of London in May 2002.
- 5.8 Grays was the dominant retail centre in the Borough until the opening of Lakeside Shopping Centre in 1990. Ever since, its retail offer and positioning has been negatively impacted. This has been compounded further by the shifts in consumer retail patterns and competition including out-of-centre provision at Lakeside and beyond at Bluewater. The centre has evolved to provide a functional retail provision centred around convenience goods retailing, financial services and a variety of independent retailers, as well as a hub for civic functions and public services.
- 5.9 The figure below illustrates Grays Town Centre Boundary (TCB) as well as the main shopping areas, shopping centres and parades as detailed in the extant Core Strategy Local Plan.

Figure 5.1: Grays Town Centre Boundary



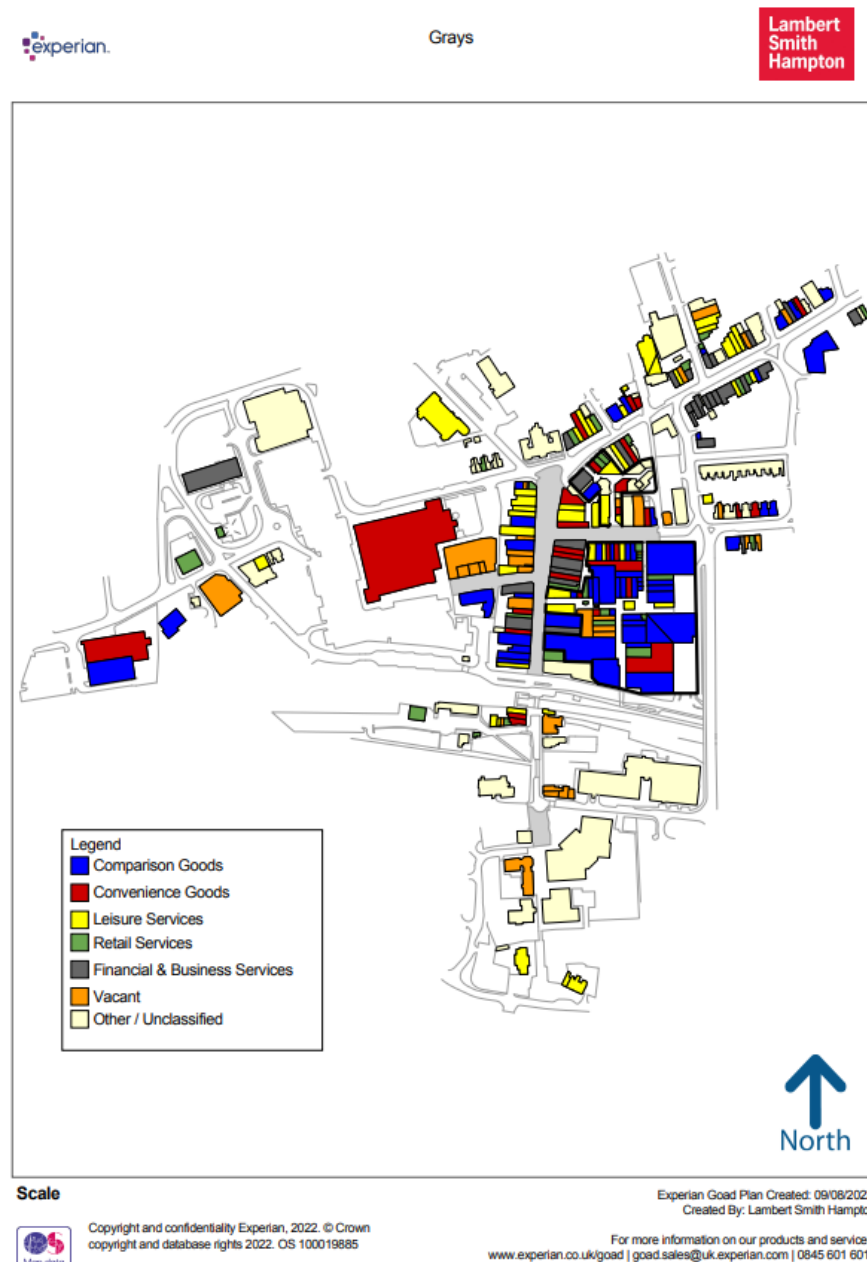
Source: Core Strategy Local Plan Policies Map (2015)

-
- 5.10 The Grays TCB covers the central area with the railway station, main area of retail and service concentration (including High Street, Grays Shopping Centre, Morrisons, South Essex College, Grays Railway Station, Civic Offices, Orsett Road (part) and the Thameside Theatre). It also extends north beyond the Thameside Theatre towards the Industrial Chemical Group premises (Titan Works). To the south and south east the boundary extends to cover the area of the Thames Road Car Park, Thurrock Yacht Club and Grays Beach Riverside Park.
- 5.11 As it stands, the Grays TCB covers the primary shopping area of the High Street / Shopping Centre and areas predominantly occupied by main town centre uses within (e.g., Civic Offices) or as well as the area adjacent to the primary shopping area (Orsett Road). This represents the concentration of town centre uses and, on that basis, appears to be an adequate boundary area.
- 5.12 It is noted that the current policies map does not define a Primary Shopping Area (as defined under the NPPF (Annex 2)) to denote where retail development is concentrated. Based on current provision this is likely to be concentrated around the High Street / Shopping Centre area.

Diversity of Uses

- 5.13 The Town Centre provides a diverse range and choice of retail, leisure, cultural and civic facilities as well as residential and business accommodation. The diversity of uses as illustrated by the Experian Goad plan for Grays town centre is shown overleaf. To note that unlike the Council's town centre boundary (**Figure 5.1**), the Experian Goad Plan does not extend northwards and focuses on the retail 'core' along the High Street and Orsett Road.

Figure 5.2: Grays Town Centre (2021)



Source: Experian Goad (October 2021)

5.14 Spatially it can be seen that there is clustering of comparison goods provision along the southern end of the High Street particularly within Grays Shopping Centre. Correspondingly there is significant proportion of leisure service outlets to the north of the High Street and Orsett Road. Vacancies are interspersed and a significant block is in the heart of the centre which relates to the former old State cinema which is reported to have been vacant since 1989.

- 5.15 The table below provides a breakdown of the changes in the town centre's broad retail and service composition (measured by outlets and floorspace) based on the latest Experian Goad Category Report.

Table 5.1: Grays Town Centre: Diversity of Uses (by Outlets and Floorspace)

	No. Outlets	% of Total Outlets		Gross Floorspace (sq m)	% of Total Floorspace	
		Grays	UK Average		Grays	UK Average
Comparison Retail	55	24.3%	27.0%	15,775	31.6%	30.2%
Convenience Retail	29	12.8%	9.3%	12,226	24.5%	15.5%
Retail Services	32	14.2%	15.7%	2,945	5.9%	7.2%
Leisure Services	47	20.8%	25.0%	7,748	15.5%	25.9%
Financial & Business Service	31	13.7%	8.9%	5,212	10.4%	6.7%
Vacant	31	13.7%	13.8%	5,983	12.0%	13.8%
Total	225	100.0%	100.0%	49,889	100%	100%

Source: Experian Goad Category Report (October 2021)

- 5.16 Experian GOAD estimate that Grays has a total of 49,889 sqm of retail floorspace, of which 15,775 sqm is made up of a comparison floorspace and 12,226 sqm of convenience. These are shared across 55 and 29 outlets respectively giving an average outlet size (sqm gross) of 287 sqm for comparison goods and 422 sqm for convenience goods.
- 5.17 A comparison with the national average indicates a broadly similar profile in terms of outlet provision. The exceptions relate to financial and businesses services and convenience goods outlets both of which have an above average representation in Grays.
- 5.18 In terms of floorspace, the most notable differences are found in the convenience retail sector with Grays having almost 10% more total floorspace than the UK average and comparatively 10% less floorspace in leisure services.
- 5.19 A comparison of outlets between 2016 and 2021 (based on Experian Goad Category Reports) shows an overall increase in the number of outlets from 206 in 2016, 203 in 2018 to 225 in 2021. It also shows a decline in comparison goods outlets and a rise in service outlets. Services (retail, leisure and financial & business) now account for almost 50% of all outlets.

Table 5.2: Grays Town Centre: Diversity of Uses (by Outlets)

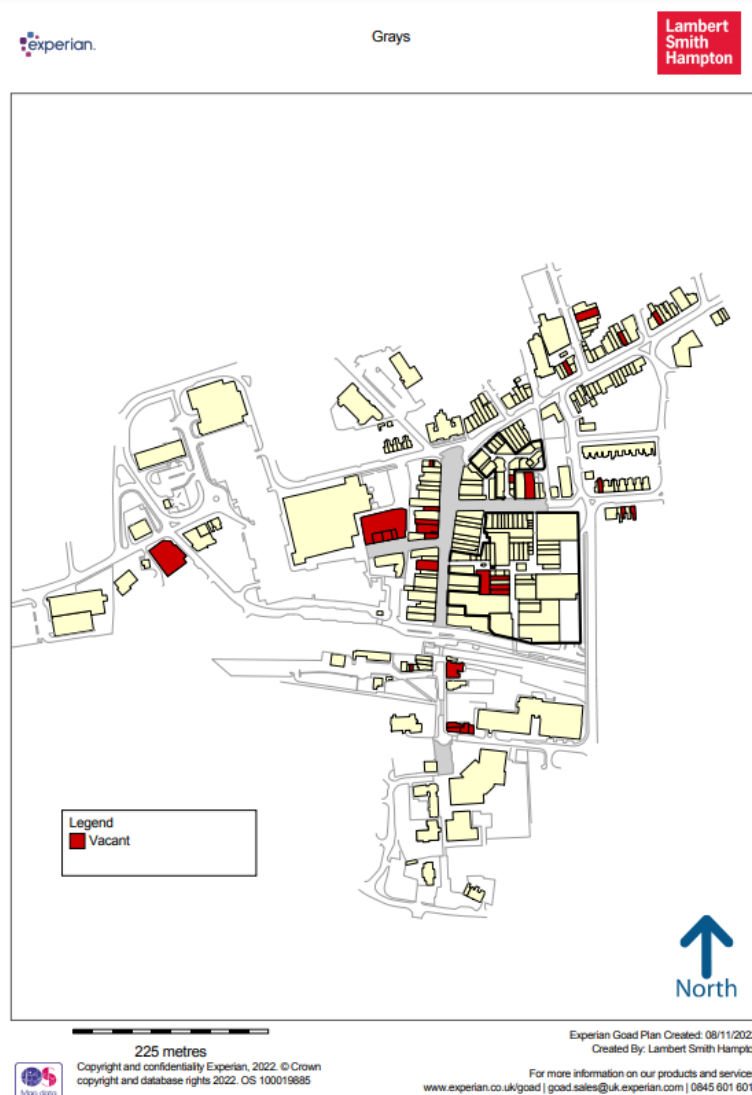
	Outlets			Change		% Total		
	2016	2018	2021	2016-21	2018-21	2016	2018	2021
Comparison Retail	69	62	55	-14	-7	33.5%	30.5%	24.4%
Convenience Retail	22	29	29	7	0	10.7%	14.3%	12.9%
Services	93	89	110	17	21	45.1%	43.8%	48.9%
Vacant	22	23	31	9	8	10.7%	11.3%	13.8%
Total	206	203	225	19	22	100.0%	100.0%	100.0%

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

Vacancy Levels

- 5.20 As **Table 5.1** shows, Grays had a total of 31 vacant units in 2021 which represents an overall vacancy level of 13.72% which is marginally below the UK average of 13.82%. The number of vacant units has increased by 8 units when compared to the 2018 survey which reported a total of 23 vacant units and a vacancy rate of 11.33%. Overall, and as **Table 5.2** shows, the number of vacant units has steadily risen from 22 (2016), 23 (2018) to 31 in 2021,
- 5.21 In terms of floorspace, vacant floorspace in 2021 represents 11.97% (5,983 sqm) of all floorspace which is lower than the benchmark average of 13.82% nationally.

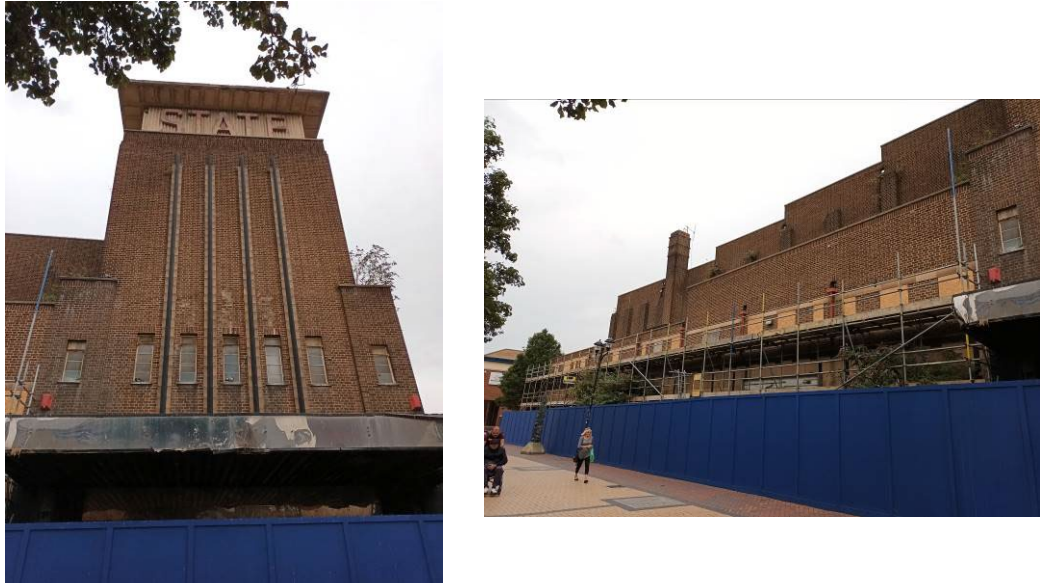
Figure 5.3: Grays Town Centre: Vacancies (2021)



Source: Experian Goad (October 2021)

5.22 The most prominent vacant unit in Grays is the old State cinema which sits between Morrisons and the High Street. This is understood to have been vacant since 1989. The remainder of vacant units are comparatively smaller. Broadly, the vacancy levels are below the national average both in terms of outlets and floorspace and the units are interspersed with no particular spatial agglomeration.

Figure 5.4: Grays Town Centre: Vacant State Cinema Building



Source: LSH

5.23 In relation to the State Cinema, the Grays Town Centre Regeneration Programme – Strategic Assessment (March 2023) report has highlighted the following:

- Has the potential for significant long-term contribution to regeneration and identity.
- The potential to reactivate the near derelict 2* listed State Cinema building has not been fully explored
- It is a significant cultural asset for the town centre which the council should look to take a stronger role in deciding the future of. The building is already on Historic England’s Heritage at Risk register and so it is likely to be eligible for attracting funding from the Heritage Lottery Fund for its repair and restoration into a new community-accessible use.

5.24 The potential of this site is therefore seen as a potential area for Council intervention as part of a strategic regeneration strategy for the town centre.

Retailer Representation

5.25 The scale, mix and quality of national **multiple retailers** and leisure operators in a centre provides a further measure of its relative attraction and strength as a shopping location. According to Experian Goad, a multiple retailer is defined as being part of a network of nine or more outlets. The presence of multiple outlets is traditionally stated to greatly enhance

the appeal of a centre to local consumers. Grays town centre has a total of 51 multiple outlets which account for a total floorspace of 22,723 sqm. Comparison goods multiples have the highest proportion of outlets (18) and retail service having the lowest (5).

5.26 As a broad comparison with the UK multiples average, the proportions are relatively similar, with the exception of financial and business multiples which have a far higher representation in Grays than the national average, 23.53% to 13.55% respectively.

Table 5.3: Grays Town Centre: Multiple Counts by Sector

MULTIPLES - REPRESENTATION	Outlets	Grays %	UK Average %
Comparison	18	35.29%	40.97%
Convenience	6	11.76%	12.29%
Retail Service	5	9.80%	9.99%
Leisure Services	10	19.61%	23.20%
Financial & Business Services	12	23.53%	13.55%
Total	51	100.00%	100.00%

Source: Experian Goad Category Report (October 2021)

5.27 In terms of national multiples these include (amongst others) the following:

Table 5.4: Grays Town Centre: Major Multiples by Goods Type

Convenience Goods	Comparison Goods	Services	Food & Beverage
Morrisons Iceland Aldi	Peacocks Boots Poundland Wilko	Barclays Halifax Natwest Nationwide Santander	KFC Costa Coffee Greggs Wimpy Burger King

5.28 In terms of the spatial location national multiples (including retailers) the majority are located within Grays Shopping Centre as shown below:

Table 5.5: Grays Town Centre: Major Multiples by Location

Within Grays Shopping Centre	Outside Grays Shopping Centre
Barclays Bank	Aldi – London Road
Betfred	Coral – Clarence Street
British Heart Foundation	Costcutter – High Street
Burger King	Greggs – High Street
Card Factory	Halfords – Hogg Lane
Cash Converters	Halifax – High Street
CEX	Kentucky Fried Chicken – High Street
Costa Coffee	Lloyds Bank – High Street
Farmfoods	Mind Charity – Clarence Road
Holland & Barrett	Morrisons – London Road
Iceland	Post Office – Clarence Road
Max Spielman	Sense – High Street
Nationwide Building Society	Subway – High Street
Natwest Bank	
Peacocks	
Poundland	
Poundstretcher	
QD	
Savers	
Select	
Shoe Zone	
Specsavers	
The Fragrance Shop	
The Works	
Warren James	
Wilko	
Wimpy	

- 5.29 The town centre has a main shopping precinct in the form of Grays Shopping Centre that lies in the heart of the town centre. The centre was originally built in 1974 and comprises 19,982sqm (215,091 sq ft) of retail, F&B, grocery and office accommodation across a circa 4.68 acre site including a 700 space car park. It is anchored by Wilko with other multiples including Iceland, Peacocks, Burger King, Poundland, Costa and Warren James.
- 5.30 NewRiver REIT are the owners of Grays Shopping Centre and in June 2022 conducted a public exhibition detailing the potential regeneration of Grays Shopping Centre to provide a mixed-use development comprising ground floor town centre uses with residential above.
- 5.31 In addition to Grays Shopping Centre is the Queensgate Centre, a 1980's defunct retail space which presently contains the Q Gym, some office space, vacant space and with residential above. It also has office accommodation and a hall for hire on the first floor.
- 5.32 A review of retailer representation indicates that Grays town centre is primarily **independent led**. There is a pronounced representation of convenience goods provision including a traditional fishmonger and butchers. It is also evident that this provision caters for the local ethnic mix as evidenced by the diversity of outlet provision for the East European, Afro-Caribbean and Asian communities.

Figure 5.5: Grays Town Centre: Independent Led Offer



Source: LSH

Retailer Requirements

5.33 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:

Table 5.6: Operators Seeking Representation in Grays

Operator	Operator Type	Goods Type	Size (sq m)	
			Min	Max
Toolstation	Tools & building supplier	Comparison	255	557
City Plumbing	Trade plumbing supplies	Comparison	186	465
City Electrical Factors	Electrical wholesaler	Comparison	255	557
Lidl	Supermarket	Convenience	1,672	2,415
CUPP	Bubble Tea Cafe	Leisure	23	93
German Doner Kebab	Fast Food	Leisure	121	232
Graystone Action Sports	Action Sports Facility	Leisure	-	2,787
Travelodge	Hotel	Leisure	929	3,716
Busy Bees	Day Nursery	Service	372	650
Total			3,814	11,473

Source: Retailer Requirements (May 2023)

5.34 As at May 2023 a review of published operator requirements identified 9 recorded requirements from retail and leisure operators since January 2022, seeking a combined maximum floorspace of up to 11,473 sqm.

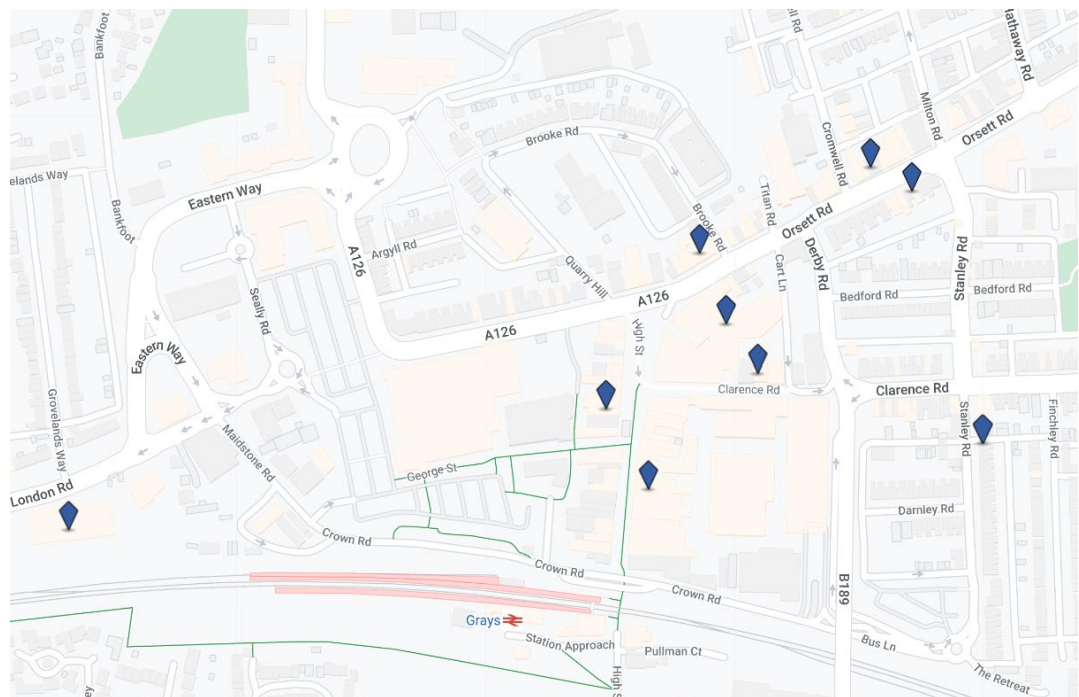
5.35 It should be noted that a number of these are not necessarily operators seeking representation in the town centre but potentially out-of-centre locations and industrial parks. The majority of the reported demand is from retailers who normally seek larger format stores in edge and out-of-centre locations; most likely as part of the tenant mix of

established or planned retail warehouse parks, and/or in stand-alone trading park type units. These include Lidl, Beaumont Beds, City Plumbing and City Electrical Factors. Furthermore, that retail operators seeking town centre space would be CUPP and German Doner Kebab. On this basis the interest from retailers considering Grays as a potential trading location is minimal.

Demand for Retail Space in Grays Town Centre

- 5.36 To understand the demand for retail space in Grays town centre area we have analysed units which have let in the town centre over the last 5 years (May 2018 to May 2023) using data from CoStar.
- 5.37 The figure below shows that nine retail leases were signed over the last five years.

Figure 5.6: Grays Town Centre: Location of Signed Retail Leases (2018-2023)



Source: CoStar (May 2023)

- 5.38 The above indicates there has been limited transactions and they have mainly been located in the town centre core. Additionally, the unit sizes have also been small with an average of just under 140 sqm. Our contact with local commercial agents suggests that stock does not come up frequently. This is also an indication that occupiers are broadly satisfied with their location and trading pattern. We have also been informed that when floorspace comes to the market there is high demand – primarily from independents stemming from the diverse local community.

Table 5.7: Grays Town Centre: Major Lettings

Address		sq ft let	sq m let
49 - 51	Orsett Road	1,299	121
64	Orsett Rd	673	63
11	Orsett Rd	1499	139
1A	Stanley Road	235	22
	Queensgate Centre	863	80
17	Clarence Rd	634	59
28-30	High St	2159	201
	Grays Shopping Centre	904	84
99-101	London Road	5188	482
Average		1,495	139

Source: CoStar (May 2023)

Street Markets

- 5.39 Successful street markets and market halls that are proactively managed and curated can make a significant contribution to the overall vitality and viability of town centres; helping to attract new trips, increased footfall and expenditure to the benefit of other town centre shops and businesses.
- 5.40 Grays Market located on the High Street runs on Fridays and Saturdays between 9am – 5pm. Tudor Markets has been the operator since August 2018.

Figure 5.7: Grays Town Centre: Signposting Grays Market



Source: LSH

- 5.41 Aside from the positive impacts on the town centre’s economy, market stalls and kiosks also provide the “seedbeds” and “incubator space” for new businesses to grow and flourish without the burden of the significantly higher occupancy costs that can erode the trading potential and profitability of businesses occupying more traditional shop units. This positive impact of markets on town centre economies is recognised by the NPPF (paragraph 86c).
- 5.42 Given the current trends and support for new and refreshed street markets in towns across the UK and the introduction of market halls into repurposed buildings and vacant retail space, we consider that there is the potential for Grays Town Centre to grow its market and independent offer, subject to market demand.

Evening / Night Time Economy

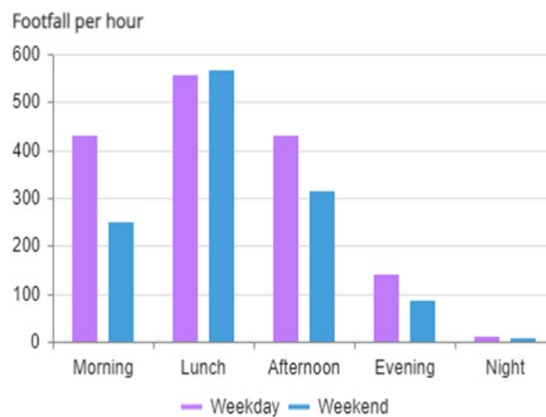
- 5.43 As previously detailed, the Experian data indicates that there are 47 leisure services outlets dominated by 17 fast food and take away outlets, followed by 9 cafes. A large proportion of these are independent led and spread across the centre. Commercial leisure is seen in the form of Burger King, Wimpy, Costa and Kentucky Fried Chicken.
- 5.44 There is no cinema provision and uncertainty surrounds the Thameside Theatre. These are critical components to an evening economy particularly families and at present this is lacking.
- 5.45 A broad review of the opening hours of operators in the town centre indicates that the majority close by 6pm. Grays Shopping Centre also closes at the same time.

Table 5.8: Grays Town Centre: Opening / Closing Times of Selected Outlets / Venues

Retailer Name	Opening Time	Closing Time	Sunday Opening	Outlet Type
Morrisons	06:00	22:00	Open	Convenience
Iceland	08:30	17:30	Open	Convenience
KDC Foods Ltd	09:00	19:00	Open	Convenience
Khan Butchers	08:00	20:00	Open	Convenience
Pinokio Deli Polski Sklep	09:00	18:00	Open	Convenience
Grays Shopping Centre	07:00	18:00	Open	Comparison
Beauty by Zara	09:00	20:00	Open	Comparison
Savers Health & Beauty	09:00	18:00	Open	Comparison
Curtains Babe	10:00	17:00	Closed	Comparison
Timpson	09:00	18:00	Open	Services
Halifax	09:00	15:30	Closed	Services
Kay's Barber Shop	10:00	19:00	Closed	Services
Infinity Hair, Beauty and Tanning	10:00	19:00	Closed	Services
KFC	10:00	00:00	Open	F&B
Costa	07:00	17:30	Open	F&B
Mangal Meze	12:00	23:00	Open	F&B
Tasty African Food Takeaway	12:00	22:00	Open	F&B
Farm Pizza	12:00	23:00	Open	F&B
Greggs	06:30	18:00	Open	F&B
Q Gym	06.00	22.00	Open	Leisure

5.46 The closure of outlets in the evening suggests that there is not much by way of an evening economy which is to the detriment of the centre and its wider economy and related perceptions on safety and security. There are notable exceptions such as the fast food outlets and the Q Gym but they do not necessarily drive footfall in the evening. This is further reinforced by the analysis of footfall during various times during weekdays and weekends in September 2022.

Figure 5.8: Grays Town Centre: Footfall Patterns



Source: Datscha

5.47 Overall, during weekdays, Grays has a relatively strong footfall count from the morning to afternoon. Lunchtime levels are similar throughout the entire week; however, it appears that footfall is much lower during weekend mornings compared to weekday mornings. Furthermore, that the evening and night time economy is very limited with minimal levels of footfall.

Cultural Offer

5.48 Grays main cultural facility is the Thameside Theatre which is part of the Thameside Complex that is home to a theatre, library and museum. This facility was added to the annual "at risk" register when the Council proposed to sell it in 2021.

Figure 5.9: Grays Town Centre: Thameside Complex



Source: LSH

- 5.49 There is no other large scale local cultural facility and the Thameside Complex is understood to be in the need for capital investment. Since announcing it was earmarked for disposal, it has been proposed that the library and museum could relocate to the civic centre and the Council has been working with community groups on a plan for a wider cultural strategy.
- 5.50 Bids by a partnership between Thurrock Lifestyle Solutions and Thurrock International Celebration of Culture and from Waltham International College were considered by the Council March 2023 but neither was recommended as a financially sustainable alternative for the future of the building. The future of the Thameside Complex is currently undecided.
- 5.51 If the theatre closed there would be no cultural facility of scale within Grays. This would represent a gap in provision which will need to be assessed as part of a future cultural strategy for Grays town centre and the Borough.

Commercial Retail Rents

- 5.52 The level of rent which retailers are prepared to pay for retail space within a centre is a useful indication of the perceived strength of a centre (although factors such as the supply of floorspace have an impact on rental value). However, as described in **Section 3**, retail rents have fallen significantly in recent years across most of Britain's cities, towns and shopping locations. This reflects the wider malaise in the UK retail sector due to the impact

of online shopping and the rising costs of operating stores in High Street locations compared with ‘virtual stores’ and even compared with out-of-centre shopping locations. These issues are particularly acute for retailers burdened with legacy store portfolios and debt. This is evident in the number of store closures resulting from corporate failures, CVAs and rationalisation programmes that are affecting the retail sector.

- 5.53 Our agent sources estimate that in terms of Zone A rents (ITZA), and within the High Street, rents are estimated in the region of £398/sqm (37/sqft) to £538/sqm (£50/sqft). Additionally that yields are estimated between 9% and 11% indicating low levels of investor confidence.

Table 5.9: Grays: Retail Rents (ITZA)

Grays (ITZA)	2006	2017	2022
ITZA (£/sqm)	484	412.5	398 - 538
ITZA (£/sq ft)	45	38	37 - 50

Source: LSH

- 5.54 By way of comparison rents have been falling in competing locations as shown below despite their stronger retailer profile when compared to Grays – a further indication of the structural changes and the impending headwinds resulting from the more recent macro-economic factors such as rising inflation and the cost of living crisis.

Table 5.10: Competing Centres: Retail Rents (ITZA)

Centre	ITZA	2006	2009	2013	2018	2022
Lakeside	ITZA (£/sqm)	3,875	3,875	3,714	3,875	2,260
	ITZA (£/sq ft)	360	360	345	360	210
Bluewater	ITZA (£/sqm)	4,413	4,467	3,929	4,198	3,014
	ITZA (£/sq ft)	410	415	365	390	280
Romford	ITZA (£/sqm)	2,045	2,260	1,938	2,153	1,238
	ITZA (£/sq ft)	190	210	180	200	115
Brentwood	ITZA (£/sqm)	807	807	700	753	753
	ITZA (£/sq ft)	75	75	65	70	70

Source: Grays Town Centre Evaluation (2018); Retail Promis 2022; LSH

Out-of-Centre Retail and Leisure Provision

- 5.55 There is a significant amount of retail floorspace in out-of-centre retail parks and solus locations outside of Grays. This includes Lakeside Retail Parks which are part of the largest retail cluster in the country comprising:

- the Lakeside Shopping Centre (4.8km; 3 miles from Grays town centre)
- West Thurrock Retail Park (Furniture Village, Carpetright, AHF, NCF, PureGym, Domino’s, American Golf and Starbucks)
- Lakeside Retail Park (Next Home, Currys PC World, B&M, Homesense, Harveys, Dreams, Mamas & Papas, Oak Furniture Land, Next, Sofology, ScS Furniture, Tapi Carpets, The Range, Wren, Natuzzi, Card Factory, Smyths Toys and Argos),
- Thurrock Shopping Park (M&S Outlet, TK Maxx, Asda Living, Boots, Dunelm, Decathlon, Home Bargains, The Food Warehouse and Pets at Home)

-
- 5.56 Floorspace in the retail parks is dedicated to retailing of bulky comparison goods alongside trade counters and industrial uses. Lakeside also has a substantial commercial provision in the form of a Vue Cinema, Nickelodeon Adventure, Boom Battle Bar, Puttshack and Flip Out.
- 5.57 It should be noted that under the Council's current hierarchy and under extant Local Plan Policy CSTP7, Lakeside is defined as a Regional Shopping Centre. The 2017 South Essex Study concluded that while Lakeside is identified as a regional centre, it will need to meet conditions to attain town centre status. It will *"be subject to diversifying its offer beyond the current largely 'out-of-town' retail model to provide leisure and cultural offer of the scale expected of a regional centre. Added to this, there are design considerations which will need to be addressed to in future development at Lakeside"*.
- 5.58 The competition profile is accentuated by Bluewater Shopping Centre with its substantial retail and leisure provision, approximately 16km (10miles) away from Grays. Like Lakeside, it is also defined as Regional Shopping Centre providing Specialist regional comparison shopping centre¹⁷.
- 5.59 In summary the retail and leisure provision in Grays is overshadowed by the proximity, scale and variety available immediately at Lakeside and beyond at Bluewater both of which are defined regional centres with substantial draw. Hence in terms of their shopping offer these locations have the critical mass from a variety of mid to high range brands that consumers in Grays are easily able to access.

¹⁷ Dartford Borough Council 2011 Core Strategy

Pedestrian Flows

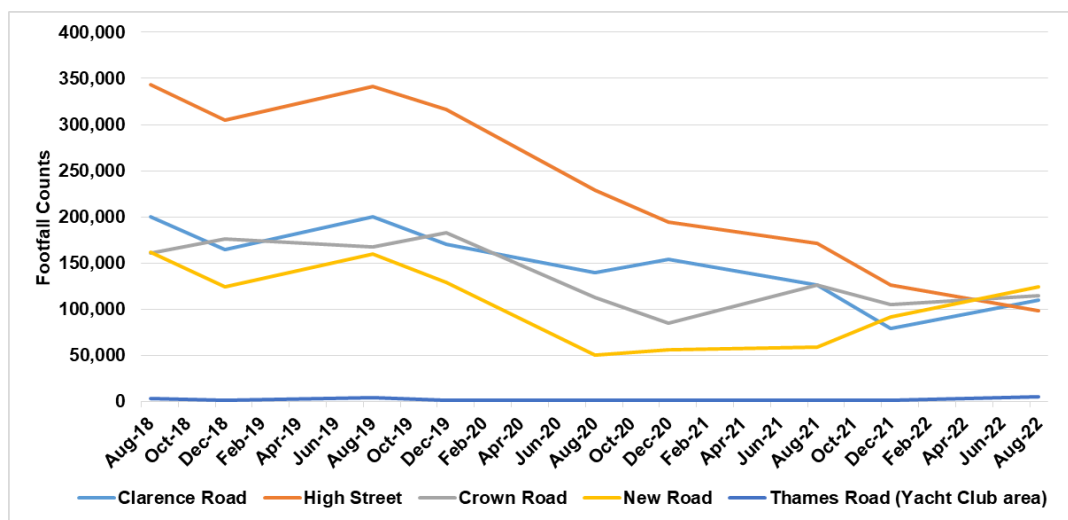
5.60 Footfall data has been sourced from Datscha¹⁸. In total, five locations were analysed, namely:

- High Street;
- Clarence Road;
- Crown Road;
- New Road; and
- Thames Road (Yacht Club entrance area).

5.61 These locations were selected to gauge footfall across the town centre, along the key streets mostly around the High Street and Shopping Centre area, and also leading to Grays Riverside Park area to gauge the levels of footfall around the riverfront.

5.62 The analysis shows the pattern of footfall since 2018 capturing trends pre-pandemic, during and after national restrictions. It is evident from the data that footfall has not recovered since August 2018 across all locations. Overall, the trend shows the uptick in footfall since the easing of Covid-19 restrictions but that they have not necessarily reached pre-pandemic levels.

Figure 5.10: Grays Town Centre: Pedestrian Flows



Source: Datscha

Office Sector

5.63 Modern office premises are found at The Old Courthouse situated at the top of Grays High Street. This facility offers modern office space between 7.4sqm and 102.2 sqm (80 sq ft –

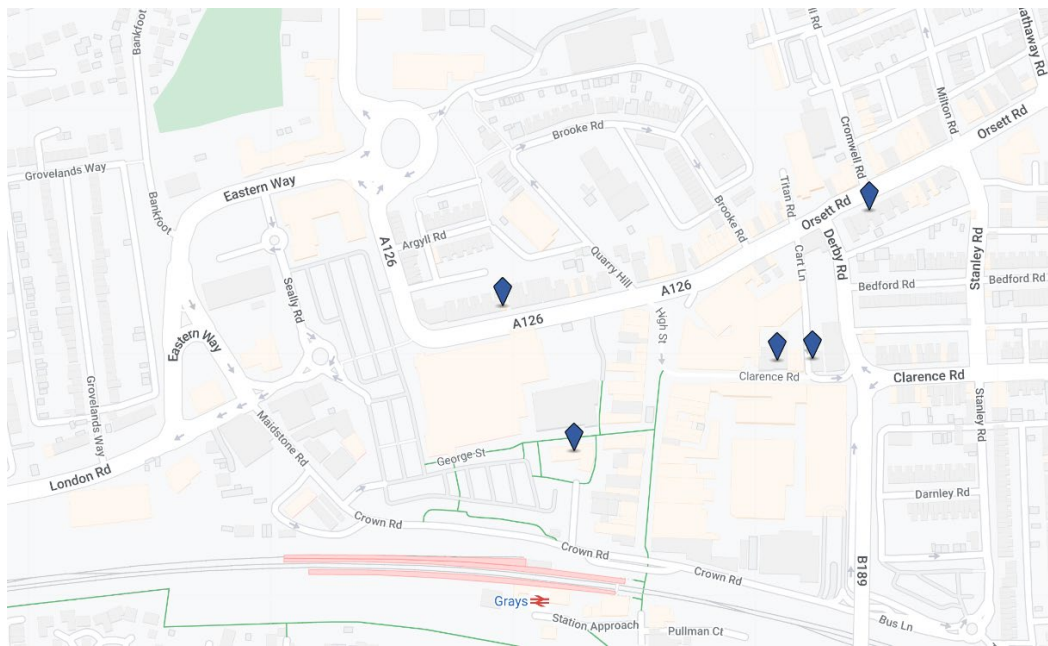
1,100sq ft). Additionally modern office premises are part of the Council's new Civic offices in the heart of the town centre. Essex Police also have a large office on Quarry Hill. During our site visit we also observed offices in use at the Queensgate Centre. These are the only purpose built office facilities and there is no obvious clustering of space noted.

5.64 As the socio demographic profile shown previously the key employment drivers are in retail and transport & storage which are not necessarily drivers for office space. Grays is not an office location per se and the stock prevalent according to agent sources meets local requirements.

Demand for Office Space in Grays Town Centre

5.65 To understand recent demand for space we have analysed the locations and size of signed leases over the last five years.

Figure 5.11: Grays Town Centre: Location of Executed Signed Leases (2018-2023)



Source: CoStar (May 2023)

5.66 This again shows the paucity of transactions and that the floorspace let is comparatively small at an average of 169 sqm. The demand that exists is therefore for small floorplates and potentially locally led.

¹⁸ Datscha collect data from over 10 million mobile devices. This data is provided by Fetch Analytics who access 80+ sources

Table 5.12: Grays Town Centre: Executed Leases Over the Last 5 Years

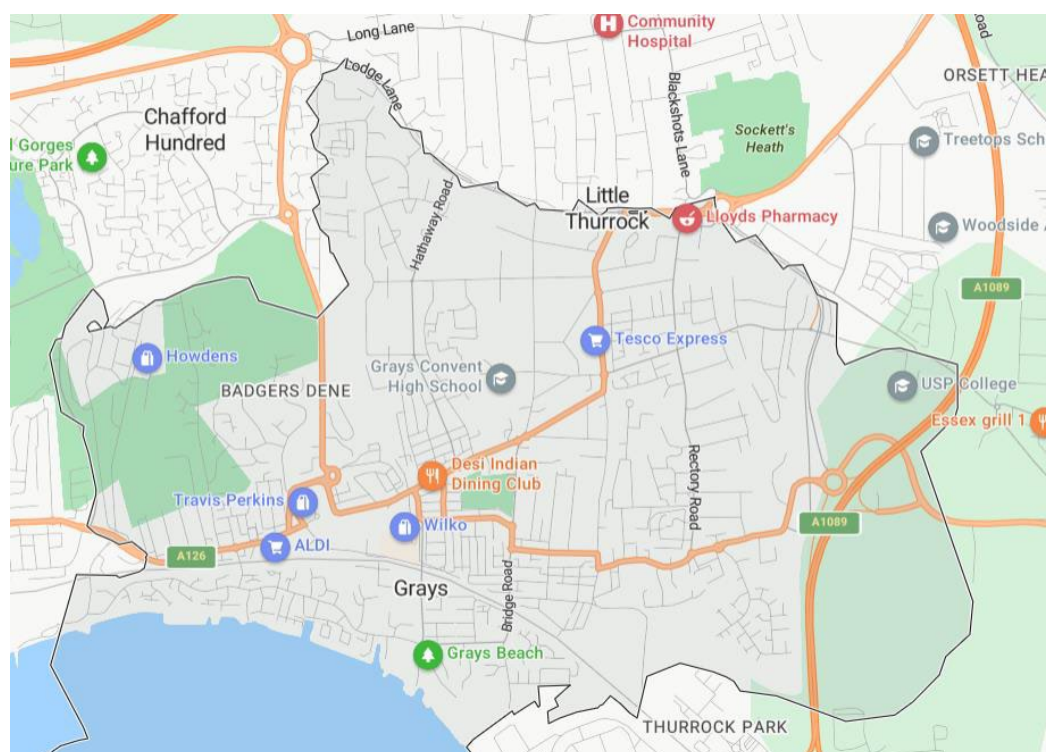
Address	sq ft let	sq m let
40 Orsett Road	908	84
21-23 Clarence Rd	2276	211
17 Clarence Rd	5146	478
22 London Road	607	56
2 George St (Thurrock Centre For Business)	162	15
Average	1,820	169

Source: CoStar (May 2023)

Residential Market Overview

5.67 We have undertaken a broad market assessment (as of May 2023) of the residential market in Grays over the last 12 months (May 2022 to May 2023) by drawing on data from the Connells Group¹⁹. The area of focus has been the RM17 postcode that covers the town centre and beyond to give a better spatial assessment of residential density.

Figure 5.12: Residential Market Assessment: Spatial Area of Coverage



Source: LSH / Connells Group Research

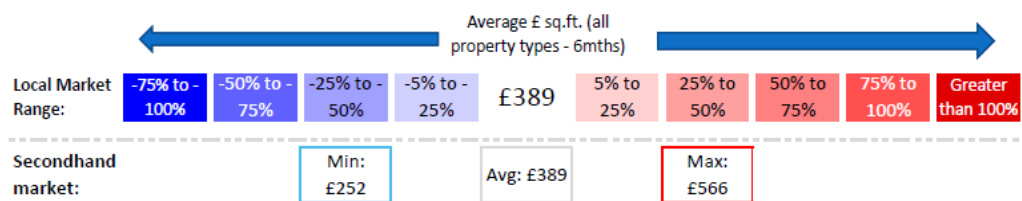
including mobile apps, wifi hotspots and telecom providers (anonymised and GDPR compliant).

¹⁹ Connells Group is the UK's largest integrated property services group, our perspective on the market is unique. With over 1200 estate agency and lettings branches throughout the UK.

5.68 The key findings of the assessment show:

- The total market accounted for 352 transactions, of which the existing market represented 100% of the market with no new homes transactions.
- Across the area 84% of listings are sales versus 16% are rental market listings.
- There have been no recent new homes valuations however, the second-hand market across the area averaged out at £4,187/sqm (£389/sq ft) Gross Internal Area (GIA). Over the last six months and across the total market, the minimum and maximum sales (in £ per sqm) achieved across the area was £2,713/sqm (£252/sq ft) and £6,092/sqm (£566/sq ft) respectively.

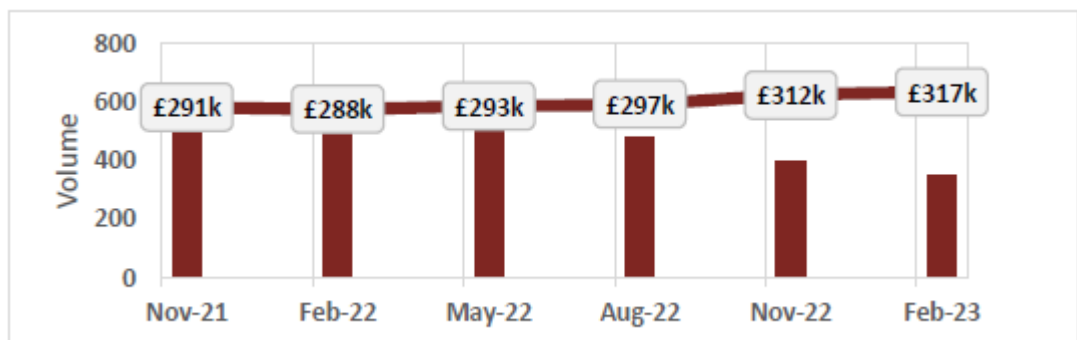
Figure 5.13: Grays Residential Profile: Average Price Paid (per sq ft)



Source: LSH / Connells Group Research

- As stated previously, based on Land Registry data there has been no recent new homes activity in the local market; this notwithstanding and across the wider RM postcode area, the average new homes price paid was £305,000. Furthermore, across the RM17 postcode area, and at the time of writing this report, there are no new planning permissions or submitted planning applications for new homes identified.
- The average price paid for a second-hand home across the local market was £317,000. This is £29,000, (9%) more than what it was twelve months ago.

Figure 5.14: Grays Residential Profile: Average Price for a Secon-Hand Home (£)



Source: LSH / Connells Group Research

- The average rentals listed price across the local market was £1,296 per calendar month (pcm).
- Based on the Experian MOSAIC socio-demographic classification, the majority of the local market area is described as comprising 'Aspiring Homemakers'. These are

younger households who have, often, only recently set up home. They usually own their homes in private suburbs, which they have chosen to fit their budget.

- The average listed sales and rental price for a property across the Local Market is £311,000 and £1,296 pcm respectively, this provides an estimated gross yield of 5%. The table below provides further detail by property and bedroom type.

Figure 5.15: Grays Residential Profile: Average Listed Price & Rentals (£) and Gross Yields (%)

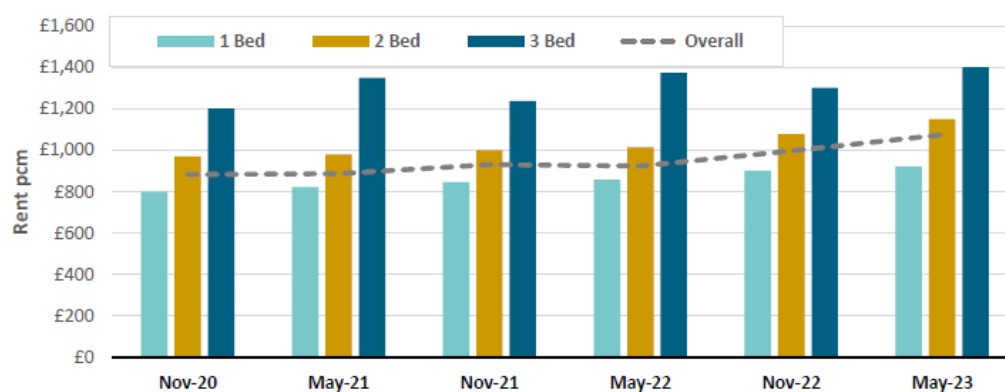
		Local Market Area: RM17				
		Sales Listings and proportion (%)		Rental Listings (pcm) and proportion (%)		Estimated Gross Yield (%)
Overall	House & Apartment	£311,000	100%	£1,296	100%	5.0%
	House	£397,000	58%	£1,558	46%	4.7%
	2 Bed	£328,000	12%	£1,297	13%	4.7%
	3 Bed	£385,000	36%	£1,622	29%	5.1%
	4 Bed	£506,000	10%	£2,450	3%	5.8%
	5 Bed	£538,000	1%	-	0%	-
	Apartment	£188,000	42%	£1,074	54%	6.9%
	1 Bed	£166,000	23%	£920	18%	6.7%
	2 Bed	£209,000	17%	£1,151	35%	6.6%
	3 Bed	£257,000	2%	£1,400	1%	6.5%

Note: If there is no value shown above, there is no data for the period in that Local Market Area or Area.

Source: LSH / Connells Group Research

- The six month trend of Private Rented Sector (PRS) listings for apartments shows an average listing across the local area of £1,074 pcm.

Figure 5.16: Grays Residential Profile: Average PRS Listing (£)



Source: LSH / Connells Group Research

- Based on the Connells Group Network of local residential agencies in Grays some 4,400 applicants registered over the last six months of which 31% were registered as First Time Buyers.

Town Centre Environment

- 5.69 Grays Town Centre is a compact centre with the streets surrounding the shopping centre representing the core shopping circuit. The town centre has a series of listed buildings including the former Ritz cinema, the Grade II* art deco State Cinema (closed since 1989) which retains most of its 1930s décor, Church of St Peter and St Paul and the White Hart public house. These buildings add to Grays unique history and character.
- 5.70 Newer additions to the centre include the South Essex College and the Council's new Civic offices. Both of which overlook the Church of St Peter and St Paul and provide a contemporary aspect in comparison to the more traditional High Street over the rail crossing.

Figure 5.17: Grays Town Centre: South Essex College & St. Peter & St. Paul Church



Source: LSH

- 5.71 The proximity to the riverside is an added advantage however it is an underutilised blue corridor for the centre but which can make a significant contribution to the quality of life, health and well-being of its residents. This underutilised area can be a key part of the Council's Health & Wellbeing Strategy whose stated objective in terms of levelling the playing field is *'improved accessibility and equity of access to education, employment, healthcare and green spaces through walking and cycling infrastructure, and improved public transport'*.

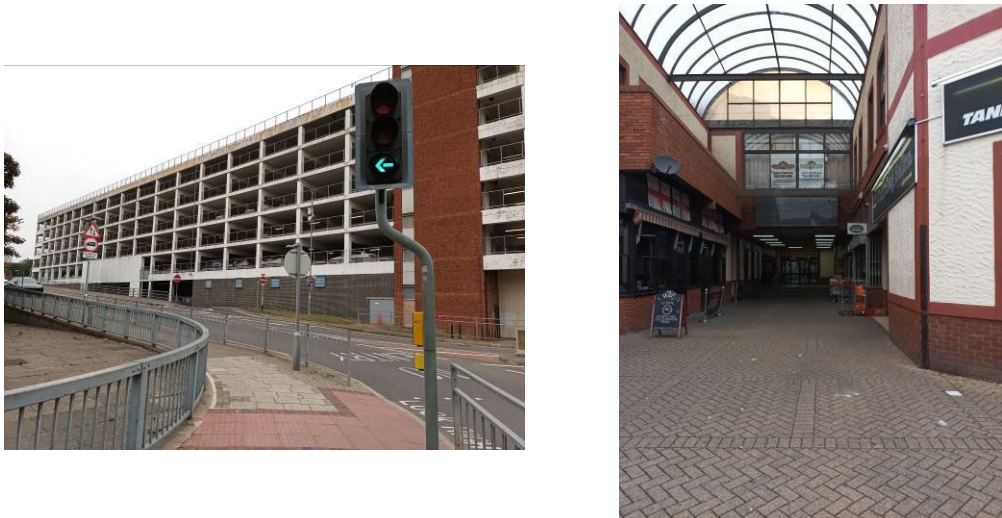
Figure 5.18: Grays Town Centre: The Riverside



Source: LSH

5.72 The condition of the buildings in general within the town centre can be termed as fair although some appear to be dated and tired in appearance. Some structures, such as the shopping centre car park are visually unappealing and appear to be in a poor condition.

Figure 5.19: Grays Shopping Centre Car Park & Queensgate Centre



Source: LSH

5.73 The roads are also in relatively good condition with some roads appearing to be recently resurfaced such as Argent Street.

5.74 The town centre itself is mostly paved with red and grey brick and is in fair condition although noticeably uneven at parts.

Figure 5.20: Grays Town Centre:



Source: LSH

- 5.75 The lack of greenery and street paving appear to make the physical environment feel very hard. The provision of soft greening is poor throughout the town centre.
- 5.76 Some parts of the town centre would benefit from improved wayfinding to promote leisure attractions and encourage the use of available facilities.

Figure 5.21: Grays Town Centre: Low Levels of Greenery



Source: LSH

- 5.77 A pedestrian network links the north end of the High Street down to the River Thames. However, the condition and pedestrian experience is poor, particularly from the High Street to the Riverfront. During our site visit the access to the Wharf was closed and a detour to the Riverfront was necessary. The public path along this route at Thames Road is narrow and the walk along the Riverfront does not celebrate the riverside as it is, overgrown and walled. The beach itself has very poor accessibility with a lot of surrounding litter contributing to the poor environmental quality of this area.

Figure 5.22: Grays Town Centre: Walkway to Riverfront



Source: LSH

- 5.78 Public benches and bins are provided throughout the town centre. Informal seating is also located in front of South Essex College and used by its resident students.

Figure 5.23: Grays Town Centre: Benches & Bins



Source: LSH

- 5.79 The walk down to the Grays Beach Riverside Park is not well sign posted and the general condition of the park is moderate. The sand pit and play area appears to be in good order.

Figure 5.24: Grays Town Centre: Grays Beach Riverside Park



Source: LSH

- 5.80 Collectively, the environment across the centre varies from good to average with a complement mix of modern and traditional architecture. The centre in most parts is litter free and with moderate areas showing dereliction or decay. The High Street and the Grays Shopping Centre area are both well maintained.
- 5.81 We assessed the quality of the environment based on the street scene including lighting, railings, litter bins, paving and street furniture, and how they contribute to the identity of Grays. Our assessment is detailed below which highlights the key areas of concern relate to internal movement across the centre; public open space and access / availability to blue infrastructure.

Table 5.13: Environmental Quality Assessment

Environmental Quality Indicator	Score
Character (Conservation Area / Heritage/ Listed Buildings)	3.5
• Conservation Area	3.5
• Heritage Assets	3.5
• Listed Buildings	3.5
Condition of Buildings	3
Condition of Built Environment	3
Public features (Bins, Public Seating)	3
Public Open Space	2
Barriers to movement / condition of infrastructure	2
• Vehicle	2
• Cycling	2
• Pedestrian	2
Green Infrastructure	3
Blue Infrastructure	2
Clutter / Cleanliness / Graffiti	3
Scoring Matrix	
Quality	Score
Poor	1-2
Average	3-4
High	4-5

Source: LSH

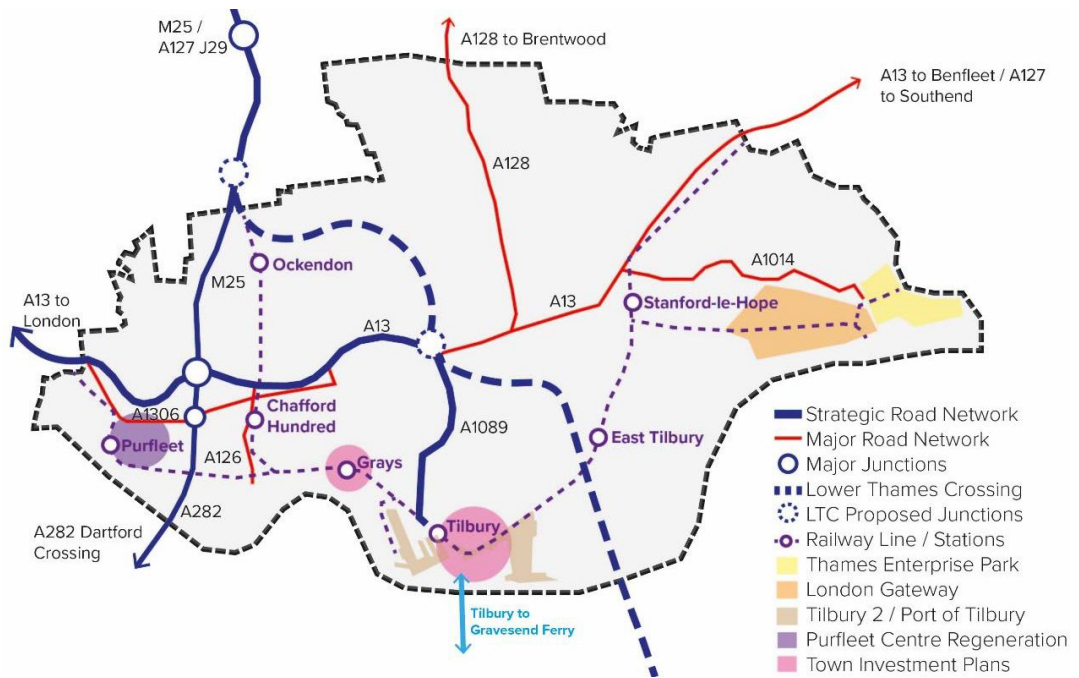
Accessibility, Movement & Parking

- 5.82 As detailed in the Grays Town Centre Transport Study (2023) the centre is well-located in relation to the strategic road network, with the town centre being less than three miles from the A13, and around four miles from the M25 at Junction 30 (Mardyke Interchange). Grays also has good access to public transport with both a train station and bus station within the town centre.
- 5.83 The train station is located in the heart of the centre. It is serviced by the operator C2C and is on the line that is located on the Tilbury ‘Loop’ which provides regular services to London Fenchurch Street (39 minutes), as well as Rainham (12 minutes), Southend (37 minutes) and Shoeburyness (46 minutes).
- 5.84 The bus station is also well located; adjacent to the railway station and close to the High Street. It is served by routes to Basildon, Brentwood, Lakeside and Bluewater. Bus stops are located along Stanley Road and Crown Road which provide good links into the town

centre from the immediate residential areas and beyond from locations across South Essex.

- 5.85 The town's location also offers good potential for riverboat services to neighbouring areas and Central London, as well as river freight. Tilbury, located immediately to the east of Grays, is one of Britain's three major container ports and has a cruise ship landing stage (London International Cruise Terminal).

Figure 5.25: Transport Networks Across Thurrock



Source: Thurrock Interim Transport Strategy (Draft) as shown in the Grays Town Centre Transport Study (2023)

- 5.86 The high street is pedestrianised which facilitates shopper movement within the core of the town centre.
- 5.87 There is limited cycling infrastructure and associated facilities and pedestrian accessibility is hindered by the severance caused by the passing railway line. This is exacerbated by street clutter, traffic volumes and existing road network which act as barriers for pedestrians and cyclists, particularly evident at the top end of the High Street and Orsett Road. However, there are plans to replace the level crossing in Grays High Street with an underpass. This will be a new pedestrian walkway under the railway line, replacing the current unsafe rail crossing with its bridge and barriers making it easier for people to walk along the High Street. This will serve to create a safer connectivity link for pedestrians especially north and south of the High Street together with improved public realm including and around the station entrance.

5.88 These factors are considered along with access to town centres by all modes including safe walking and cycling routes, parking facilities, bus stops and station entrances/exits in our accessibility assessment matrix detailed below.

Table 5.14: Accessibility Assessment

Accessibility Indicator	Score
Public Transport	4
• Buses	3
• Railway	4
Accessibility to other locations	4
Taxi Rank	2.5
Pedestrian + Cycle Connectivity / Layout	1.5
• Physical Constraints	1.5
• Speed Restrictions	3
Access to Key Areas and Services	2.5
• Built Environment (dropped kerbs, tactile paving)	3
• Crossings	3
Road Network / Layout	2
Parking	3.5
Signage	2
Scoring Matrix	
Quality	Score
Poor	1-2
Average	3-4
High	4-5

Source: LSH

5.89 Grays town centre is well located on the local road network and provides a considerable number of car parking spaces. These include:

Table 5.15: Grays Car Parking Provision

Council-owned off-street car parks in Grays	Private off-street car parks in Grays
<ul style="list-style-type: none"> ▪ Argent Street – 42 Spaces ▪ Cromwell Road - 60 Spaces ▪ Crown Road - 96 Spaces ▪ Darnley Road – 30 Spaces ▪ Grays Beach, Thames Road - 182 Spaces ▪ Station House - 10 Spaces 	<ul style="list-style-type: none"> ▪ Grays Shopping Centre Multi-Storey Car Park – 700 Spaces ▪ Morrisons supermarket – 540 Spaces ▪ Grays railway station – 168 Spaces

5.90 The Grays Town Centre Transport Study (2023) indicates that the town centre is currently served by three privately owned car parks with a total of 1,408 spaces, and five public car parks operated by the Council with a total of 358 spaces. Furthermore that significant

spare capacity exists across the on- and off-street parking stock overall which suggests that there is scope to accommodate future growth in car parking demand, particularly during the evenings.

- 5.91 The Grays Town Centre Transport Study (2023) calls for the reduction in the amount of long-stay parking in the town centre to reduce trips being taken by car unnecessarily and release valuable town centre sites.
- 5.92 Throughout the town centre disability access has been considered as part of the pedestrianisation and public realm. Though the level crossing surface around the railway station is not user friendly for those with physical disabilities.

Figure 5.26: Grays Town Centre: Level Crossing



Source: LSH

- 5.93 Dropped kerbs were observed allowing wheelchair and mobility access at road intersections and pedestrian crossings. Additionally, there are disabled bays at the various car parks listed above. It was observed that pedestrian crossings had audible sensors for the disabled, elderly and visually impaired especially around the railway crossing (Crown Road). Along Orsett Road and London Road this was more sporadic but noted at the crossing along the Thameside Theatre.

Figure 5.27: Grays Town Centre: Local Pedestrian Crossings



Source: LSH

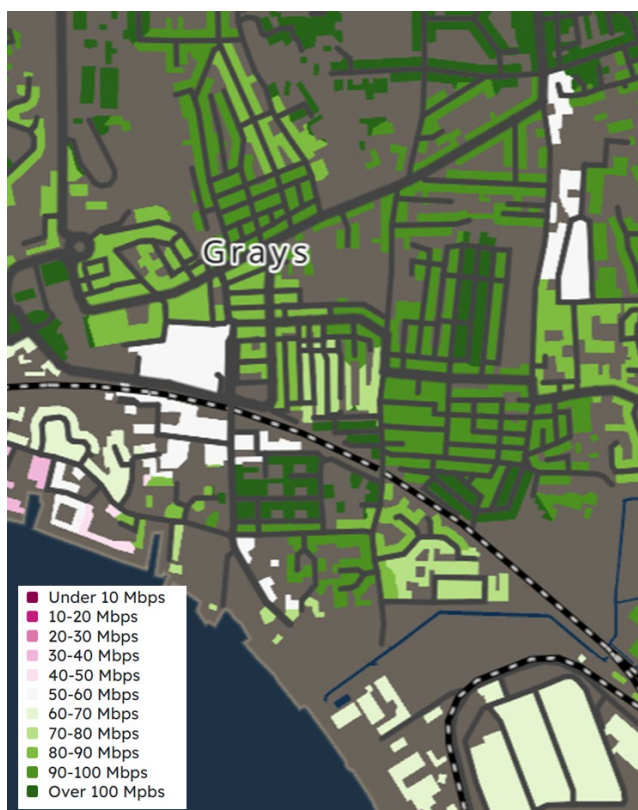
5.94 As detailed in the Grays Town Centre Transport Study (2023), there are currently only very few electric vehicle charging points within Grays town centre. These include within the Halfords car park and provides three rapid (43kw+) chargers. There are reportedly further charging bays at Argent Street and Crown Road car parks.

Digital Connectivity

5.95 Grays currently achieves a good, fixed line broadband speed of between 50mbps²⁰ and 100+mbps.

²⁰ Megabits per second (mbps) are units of measurement for network bandwidth

Figure 5.28: Grays: Broadband and Ultrafast Availability



Source: Consumer Data Research Centre

5.96 The Internet User Classification is a bespoke classification that describes peoples' interactions with internet. For Grays, and within the broad town centre area, this shows that it incorporates a mixture of: 'e-mainstream', 'e-veterans' and 'youthful urban fringe' and some 'passive and uncommitted users'.

The fixed line connectivity and broad good usage suggest that this can help to support new ways of working, such as flexible hours and working from home, and help to reduce pressure on the highway network and any associated issues such as poor air quality.

Figure 5.29 Grays: Internet User Classification

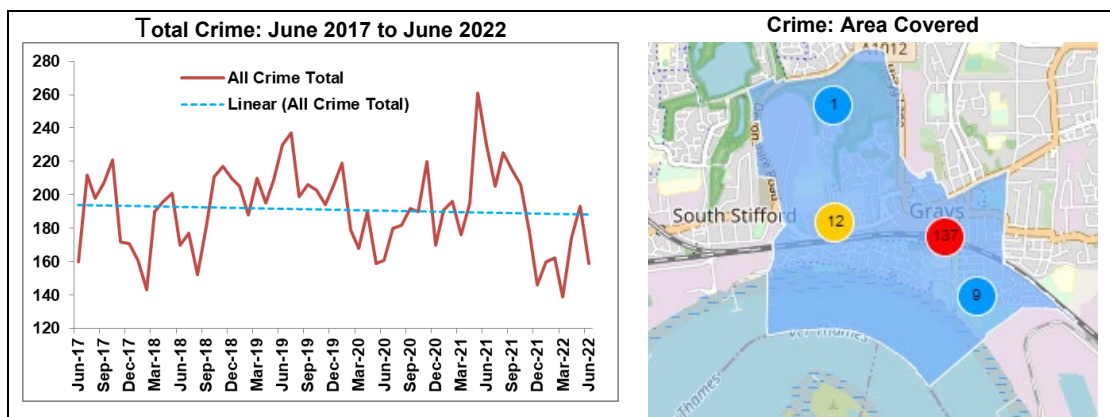


Source: Consumer Data Research Centre

Crime & Safety

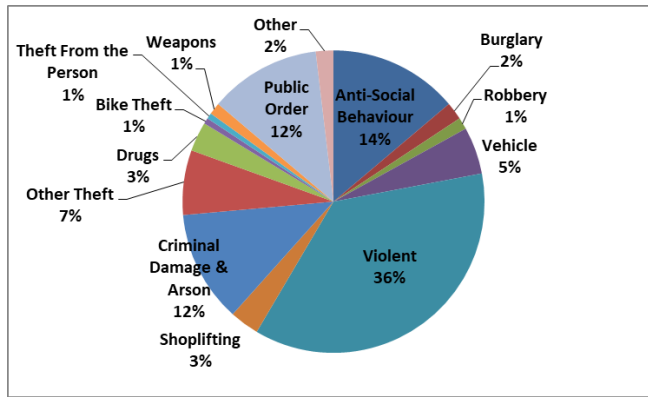
- 5.97 At the time of our site visit we found the town centre to be safe and secure during the day. Security patrols were observed both on the inside and outside of the shopping centre(s). The town centre is also covered by CCTV and cameras were also observed at the train and bus station(s). Anecdotally based on our stakeholder feedback, the perception of safety does change at night particularly for users of the transport hubs and moving through the high street. Lighting and the lack of natural surveillance are areas that require assessment especially if in the future there is potential opportunity to encourage shoppers and visitors to stay longer in the centre as part of a future evening / night-time strategy.
- 5.98 A review of crime data that covers the Grays Town centre area shows that in overall terms, and since June 2017 the trend for the total number of incidences of crime is broadly similar. Total incidences as of June 2022 stood at 159, which is lower than the peak in August 2021 at 225 and almost on par with that recorded in June 2017 at 160.

Figure 5.30: Total Crime Incidences



- 5.99 Currently, of the total 159 incidences reported (as of June 2022), the dominant types of crime are Violent Crime (36%), Anti-Social Behaviour (14%) and Criminal Damage & Arson (12%)

Figure 5.31: Total Crime: June 2022



<https://www.ukcrimestats.com/Neighbourhood/1196>

5.100 Notwithstanding the security patrols observed, the crime statistics point to a particular problem in relation to violence and antisocial behaviour in the centre. This accentuates the negative perception of the centre.

Barriers to Businesses

5.101 We are not aware of any immediate barriers to entry to businesses. However, in the current economic climate the main barriers to investment for new and existing businesses will relate to the fallout from the COVID-19 pandemic, rising inflation as well as the impact of the cost of living crisis. This will have an impact on the operation and running of all types of business including both multiples and independents. It is likely to affect consumer shopping patterns as well as the business plans of operators of all types. Other factors such as operational costs and business rates are also likely to act as key constraints due to constrained investment at local level, particularly for independents.

5.102 Whilst there is no standardised metric to gauge evidence of barriers to new businesses opening and existing businesses expanding across centres, it can be inferred that low rents, high yields, rising vacancies point to low business investor interest. The fact that the most prominent vacant unit (the old State cinema) has been vacant since 1989 reinforces this point.

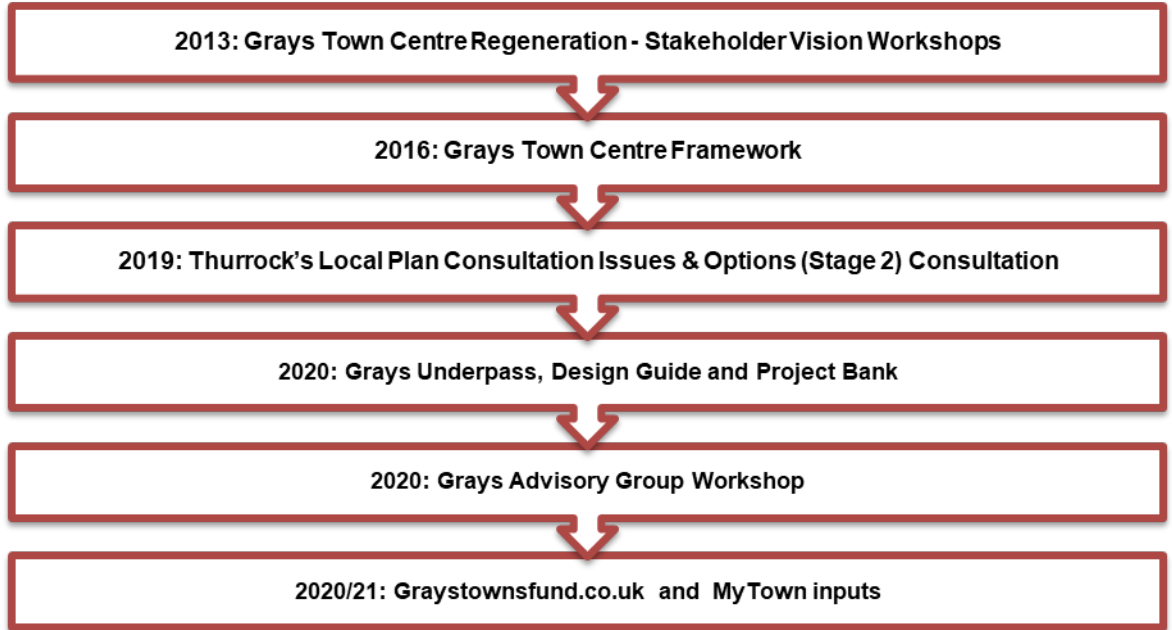
Stakeholder Consultations

5.103 The resident community in Grays has gone through a number of consultations. All of these provide an indication of the wants and needs of the local community. These are detailed below:

Previous Consultations

5.104 Local communities within Grays have been on a journey through several community focussed consultations by the Council in the past as shown below and the outputs for which are summarised at **Appendix 2**:

Figure 5.32: Community Consultation Journey



5.105 The common actions/interventions raised again and again by the different engagement exercises have the following common themes:

Placemaking	<ul style="list-style-type: none"> ▪ Tackle poor perceptions ▪ Improved culture and entertainment ▪ Intergenerational meeting spaces ▪ Integrated health facilities ▪ Make more of the riverfront ▪ Tackling anti-social behaviour ▪ Creating socialising spaces ▪ Enhancing green spaces ▪ Provision of youth facilities
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Regeneration	<ul style="list-style-type: none"> Alternative use of vacant retail space Better use of town's heritage Riverfront animation with diverse uses
Enterprise	<ul style="list-style-type: none"> Help diversify the local economy Help develop new skills base Promote creative and culture industries
Connectivity	<ul style="list-style-type: none"> Connect with the River Thames / London Make all parts of Grays more accessible Make improvements to the bus station Support and connect communities Enhance digital connectivity

Figure 5.33: Thurrock's Local Plan Consultation Issues & Options (Stage 2) Consultation (2019)



Figure 5.34: Thurrock's Local Plan Consultation Issues & Options (Stage 2) Consultation (2019)



Source: Thurrock's Local Plan Consultation Issues & Options (Stage 2) Consultation

New Stakeholder Consultation for Grays Town Centre Strategy (2022)

5.106 As part of our analysis we have also undertaken a fresh stakeholder assessment. Individual consultations were held with a range of key stakeholders (resident groups, community groups and retailers) to gain an up to date understanding of the key strengths, weaknesses, opportunities, threats (SWOT) for Grays. The key outputs are summarised below:

Strengths	<ul style="list-style-type: none"> ▪ Strategic location with good transport links. ▪ Strong local industrial economy. ▪ Strong resident community, e.g. Orchards Community Forum, Residents Groups etc. ▪ South Essex College in a good location, linking the curriculum to local needs, local skills improvement programmes. ▪ The riverfront, parks, heritage wharf. ▪ Dedicated town centre policing team, engagement officer, CCTV. ▪ Shopping centre.
Weaknesses	<ul style="list-style-type: none"> ▪ The pandemic has resulted in a decrease in the sense of community / apathy due to isolation with much less desire from the community to engage. ▪ Lack of good quality shops, poor retail offer overall. ▪ No night time economy. ▪ Anti-social behaviour, unsafe pedestrian environments, particularly around the station (and the route to it), high levels of crime, drug use. ▪ A lack of amenities for young people.

	<ul style="list-style-type: none"> ▪ Competition from Lakeside, Basildon and Southend. ▪ The town is perceived negatively in terms of its overall offer. ▪ Too many apartments with little for residents in Grays. ▪ Post office and theatre in poor locations.
Opportunities	<ul style="list-style-type: none"> ▪ Deliver usable outdoor public space, to sit, meet and gather and make the town centre more attractive. ▪ Utilise and open up the waterfront. ▪ For more cafes and restaurants and support local businesses. ▪ To improve the route into town. ▪ More ground floor retail. ▪ Need to create a unique focal point for the town centre. ▪ The old, listed State cinema building has been empty for many years.
Threats	<ul style="list-style-type: none"> ▪ Anti-social behaviour and resultant impacts. ▪ Engagement fatigue, projects continually being stalled or scaled down. ▪ The demolition of the shopping centre car park. ▪ Concerns about gentrification due to regeneration e.g. pricing out / shops not being locally relatable. ▪ 'Patchwork' projects, with some parts of the town revived and others not/or remaining. ▪ Competition from larger centres (Basildon, Southend, Lakeside) ▪ Litter, mess and safety concerns from non-council owned land.

MaybeTech Social Media Analysis (2022)

5.107 An additional element of analysis has been to understand the 'opinion' or 'chatter' on the ground through social media on Grays. We consulted with social media analysts MaybeTech who are also a partner on the Government's High Streets Task Force. Their platform Maybe* collects social media data from 3.9m UK businesses daily providing a way to compare social media performance locally by businesses and place. According to their data, 79.1% of consumers in the UK spend over an hour per day daily finding out physical shopping, information, inspiration, entertainment and activity.

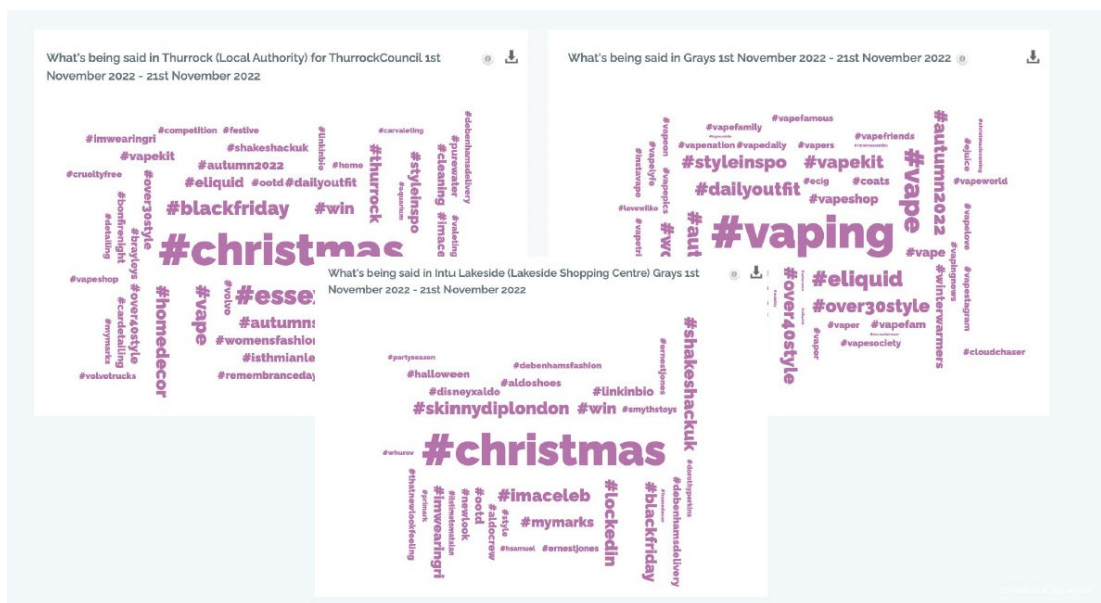
5.108 Of particular interest was to focus on Grays as a place and compare this with the Borough area and Lakeside Shopping Centre. The analysis is summarised below and represents a snapshot in November 2022 (between 1st November and 21st November). Social media activity data was analysed across both national multiples and local independent businesses collectively and also separately for local businesses. The findings were as follows:

Table 5.16: Maybe* Social Media Findings

National Chains and Local Businesses	Local Businesses Only
<ul style="list-style-type: none"> Thurrock Local Authority Area – 6,700 businesses identified, 24% had a social media presence, and a mere 393 (6%) had posted on their feeds in the last 7 days. Grays Town Centre - 436 businesses identified, 37% had a social media presence and just 55 (13%) had posted on their feeds in the last 7 days Lakeside Shopping Centre - 347 businesses identified, 78% had a social media presence and 170 (49%) had posted on their feeds in the last 7 days. 	<ul style="list-style-type: none"> Thurrock Local Authority – 5,400 local businesses identified, 14% had a social media presence, and a mere 57 (1%) had posted on their feeds in the last 7 days Grays Town Centre - 254 local businesses identified, 17% had a social media presence and only 1 (0.5%) had posted on their feed in the last 7 days Lakeside Shopping Centre – 49 local businesses identified, 15% had a social media presence, however again, only 1 (2%) had posted on their feed in the last 7 days (due to not many being local / independent businesses)

5.109 In terms of what is being said by businesses that are communicating via social media the outputs showed the following topics: ‘Christmas’; ‘Black Friday’ and in the case of Grays ‘vaping’. This indicates that there is very little local conversation – no mention of Grays as a place and shows that shoppers are not engaged locally as there is no local social media signposting.

Figure 5.35: Maybe* - What is Being Said Locally



Source: Maybe Tech (November 2022)

5.110 The output from this indicates the following:

- National content created by Lakeside is dominating the conversation - 49% of their tenants have posted on their social media feeds – largely due to the national chains posting material.

- The conversation created by local stakeholders and local businesses in both Grays Town Centre and across the Local Authority area is not cutting through - only 0.5% of them are actively posting on the feeds.
- Neither Grays nor Thurrock feature as a strong key word in the local conversation.

Summary

5.111 Grays town centre is the main administrative civic hub and designated town centre within the Borough. The centre's future vitality and viability is contingent on attracting more footfall and having a mix of uses that create interest and generate a purpose and dwell time for those visiting the centre.

5.112 The healthcheck analysis has identified the following key strengths and weaknesses:

Strengths	Weaknesses
<ul style="list-style-type: none"> ▪ Good level of independent and multiple representation. ▪ A compact centre. ▪ Low levels of vacancies. ▪ Established street market. ▪ High level of connectivity and accessibility by all transport modes. ▪ Fast connectivity into central London, ▪ Good provisioning of car parking. ▪ Presence of a covered shopping centre. ▪ Pedestrianised High Street. ▪ Mix of units in historic and modern premises across the centre. ▪ Large number of independent and multicultural businesses. ▪ Good digital connectivity. ▪ Independent led centre. 	<ul style="list-style-type: none"> ▪ Falling footfall. ▪ Poor evening economy. ▪ Poor cultural offer. ▪ Poor family leisure offer. ▪ Empty vacant units. ▪ Reliance on core retail activities. ▪ Low market demand for retail representation. ▪ Competition from Lakeside and Bluewater. ▪ Perceived lack of regeneration and delivery. ▪ Too much rhetoric not enough action on interventions. ▪ Inconsistent engagement with local community and businesses. ▪ Lack of amenities for the youth. ▪ Low level of investor confidence. ▪ Businesses not digitally engaged. ▪ High traffic volumes and heavy goods traffic in local area due to activities at the Port of Tilbury. ▪ Quality of public realm. ▪ Severance caused by railway ▪ Centre is car dominated.

5.113 The healthcheck has also highlighted that in terms of uses, services (retail, leisure and financial & business services) are a key driver as the centre evolves. In this vein, the role of retail (comparison and convenience goods) in the mix of uses is likely to be diminished in the future and requires a curation of a mix of a variety uses and activities.

5.114 The town centre has witnessed a decrease in the number of comparison goods outlets between 2018 and 2021. The town centre has a functional retail role that serves the day to day needs of its surrounding community. Aspirational retailing in the form of big brands and comparison shopping is found close by in the surrounding competing locations of Lakeside and the adjacent Retail Parks as well as at Bluewater Shopping Centre. Grays is unable to

compete with this critical mass of provision. Its role and function is more localised to its immediate residential community and serving a convenience role and functional day to day comparison role. In this more localised role it is important to capture the energy of local communities and businesses. As the centre is primarily independent led, there needs to be a concerted effort to engage with local communities to promulgate local entrepreneurial spirit. Success and prosperity are dependent on the community's continued relationship with the town centre.

5.115 As the analysis has shown, there is little by way of leisure provision especially for families. Furthermore, the centre witnesses activity during the day but there is little provision by way of an evening economy. The town centre during the day is frequented by students from the college but there is very little activity or provision in the town centre to retain them beyond their education experience at the College.

5.116 As previously detailed the Council's Health and Wellbeing Strategy (2022-2026) as strategic ambitions to help achieve the Government's Levelling Up ambition. On this there is a direct link to 'levelling up' Grays, particularly, through:

- Building strong and cohesive communities - for all to have equal opportunities to prosper in a connected community.
- Opportunity for all - supporting local businesses to generate wealth and employment.
- Housing & the environment - planning policies that support the creation of healthier, safer and greener places.

5.117 In addition to the above the importance of 'place' as part of this strategy resonates especially *"the design of new neighbourhoods will enhance community resilience and social capital, reduce anti-social behaviour, designing crime out and physical activity in. Improved physical and mental well-being will be a key consideration for new planning policies"* and *"supporting local business aspirations to generate wealth and employment, promoting social enterprises, and helping small business and micro-enterprises to grow"*. The relevance to Grays is that there are opportunities at a spatial and economic level that need to be pursued for future vitality against the background of an evolving town centre matrix that will not be retail led but through a curated mix of uses in which the community has a prime focus.

5.118 For existing business, it is vital to ensure that they are digitally connected with their consumer base – this would start to highlight the events, opportunities, products etc available in Grays. The current lack of a digital presence in the social media sphere highlights a weakness that needs to be tackled through better digital education, especially for independents. This would also conform to the Council's required objectives under its Health & Wellbeing plan for stronger digital inclusion and supporting local businesses to generate wealth.

5.119 Highlighted below are some of the emerging areas of opportunity and potential threats for any future placemaking strategy:

Opportunities	Threats
<ul style="list-style-type: none"> ▪ Placemaking and new direction. ▪ Create focal point(s) for the centre. ▪ Provision of residential uses in the town centre to aid footfall and patronage of the centre's facilities. ▪ Enhance specific safety concerns across the core area of the High Street and towards the riverside. ▪ Improve pedestrian network links from the north end of the High Street down to the River Thames. ▪ Enhance cycling infrastructure. ▪ Capitalise on the underutilised blue corridor for the centre and open up the river front. ▪ Invest in 'greening' of the town centre. ▪ Improve on the perception of safety across the centre – visible patrol during evening / night time. ▪ Increase more family oriented evening economy across the centre. ▪ Disused State Cinema building is ripe for an alternative focus of activity for the centre. ▪ Potential for additional footfall from residents if Grays Shopping Centre is repurposed with a substantial residential above. ▪ Support social media training for local businesses. ▪ Incentives for local businesses. ▪ Cycling potential (existing routes, relatively flat topography) ▪ Curate the centre and engage actively with local business and resident community. 	<ul style="list-style-type: none"> ▪ Piecemeal regeneration of the centre. ▪ Lack of delivery on strategic regeneration projects. ▪ Further loss of key multiples and stagnation of the retail and wider economy. ▪ Rising vacancies as a result of failure of key national multiples / rationalisation of store portfolios. ▪ Lack of new occupiers for vacant space. ▪ Competition from neighbouring centres such as Southend and Basildon. ▪ Competition from out-of-centre retail locations. ▪ High/increasing business operating costs.

5.120 In terms of a mix of uses, residential provision may play a part in increasing footfall as residents are a captive audience for day to day trade and activities on the ground. The healthcheck analysis has shown Grays is a fair value location for young aspiring households. The local socio-demographic dynamic also denotes a younger population. On this basis there is a requirement to cater for this demographic.

5.121 Concerns also relate to the direction of cultural and community provision. The uncertainty surrounding Thameside Theatre will lead to the existing community drifting to other locations if alternatives are not found locally. There is a need for a wider cultural strategy across the Borough in which Grays can play a key part by capitalising on its inherent riverside asset and potential for activity and animation.

5.122 The stakeholder consultation confirms the need for a new direction for the centre. This includes a comprehensive placemaking strategy in which the centre works both during the day and night, where there is activity for all and residents feel safe and are able to connect with the riverside.

5.123 The town centre is accessible but internal movement remains a concern. Grays has the potential to achieve higher levels of active travel and access to the riverside needs to be improved. There is also a requirement to build in safety and security measures to encourage movement especially in the evening.

5.124 The future of the town centre will require capacity building across a mix of uses but in which the community is at the heart so that the centre becomes of relevance to the people making use of it.

6. CASE STUDY EXEMPLARS

- 6.1 This section details comparable case studies on centres that are undergoing, or have undergone, substantial regeneration activity to draw on good practice fundamentals for any future revitalisation of Grays. The case studies also highlight the following key drivers in terms of their regeneration:
- shopping centre repurposing;
 - improved connectivity;
 - public realm improvements; and
 - creating a diverse mix of uses including a residential component.
- 6.2 The case study locations chosen share broad characteristics similar to Grays including some, or all, of the following:
- high levels of deprivation;
 - civic led regeneration;
 - declining retail;
 - maritime influences;
 - public realm improvements; and
 - the utilisation of government funding and grants for regeneration.
- 6.3 The centres chosen are detailed in **Table 6.1** and the case studies are detailed further at **Appendix 1**.

Table 6.1: Case Study Exemplars

Case Study Location 1: Stockton-on-Tees
<ul style="list-style-type: none">• Home to arguably the UK's most radical plan for shopping centre repurposing. To address the imbalance between supply of retail floorspace and retailer demand transformational action is proposed through the removal of circa 27,000sqm of retail floorspace via the demolition of the Castlegate Shopping Centre and the consolidation of Stockton Town Centre's retail offer down to a sustainable level.• The overarching vision for Stockton Town Centre is to create a vibrant, modern town centre with a sustainable retail offer that safeguards the traditional function of the High Street while creating high quality spaces which capitalise on the proximity of the River Tees as a significant natural asset and creating an improved riverside area.• The longer term aim is to create investor confidence through quality of place, increased footfall and new uses.

Stockton-on-Tees: Outcomes

- Demolishing a failing shopping arcade and replacing it with a new riverside park focusing on leisure, culture, events and recreation activities.
- Increase in footfall.
- The town centre has become an outdoor community centre for events and markets.
- Creating a town centre that the community choose to visit for reasons other than just shopping.
- Strategy to concentrate shops in one place moving Castlegate tenants to empty units in Wellington Square, bought by the Council in 2019 (both had vacancy levels of around 30%).
- Council offered grants of up to £5,000 to help businesses refurbish vacant units.
- The council built (and own) a new 128-bed, five-storey hotel in the town centre. The hotel (opened in 2019) forms an important part of the town centre's regeneration scheme in supporting increasing visitor numbers.
- A key element of the riverside regeneration is the Council's £30m refurbishment of the Globe theatre, a Grade II listed 1930s art deco building on the high street providing a cultural component.

Stockton-on-Tees: Lessons for Grays

- ✓ Being bold in terms of interventions.
- ✓ Riverside regeneration and ensuring that the River Tees that passes through the centre is a key leisure destination and green / blue corridor.
- ✓ Conveying a sense of progress; Stockton town centre is increasingly a place people want to visit, supported by offering amenities.
- ✓ Change perceptions of Stockton as place to visit and invest.
- ✓ Partnership working (such as with the NHS) has been important to identify a range of activities and assets that can be moved back into the town centre.
- ✓ Putting on events to get community back to the town centre - The Stockton International Riverside Festival attracts up to 500,000 people.
- ✓ Creating an attractive, well-maintained public space with attractions is key to bringing the local community back to the town centre.
- ✓ Continual community engagement.

Case Study Location 2: Altrincham

- Branded a 'ghost town' in the national press in 2010, Altrincham had poor public realm, underachieving retail offer, developer inactivity and competition from the Trafford Centre and online shopping.
- 'Altrincham Forward' established in 2011²¹ provided the strategic direction and a 'whole town centre' approach. It made the policy decision to start developing a BID and all sectors were engaged e.g. business, education, transport, landlords, developers & community with a long term aim to create an experience and diversifying the offer within the centre.
- The arrival of Altrincham Market and Food Hall in 2014 kick-started the town's regeneration. More than a decade later in 2021 Altrincham was named as The Sunday Times' 'Best Place to Live in the North West of England. Trafford Council continues its investment in Altrincham town centre most recently with a number of public realm improvements.

Altrincham: Outcomes

- Altrincham went from having the highest shop vacancy rate in the UK, to being voted the 2018 best place to live in the North West.
- The improvement to public realm made Altrincham streets more walkable and more inclusive, with measurable benefit in rising visitor numbers and footfall.
- Thriving night-time and leisure economy.
- New commercial spaces for start-ups and co-op space.
- Encouraging entrepreneurs to take space and try out new ideas and start-up new businesses.
- Supporting businesses through BID projects and Town Centre Business Loans.

Altrincham: Lessons for Grays

- ✓ The town's reinvention was organic, the BID encouraging diversity of uses in the town at the heart of its marketing and management strategies.
- ✓ The refurbished Market House and Market were a catalyst for regeneration. The town centre also benefited from around £4m of public realm improvements, an improved transport interchange (£19m) and new hospital (£17m).
- ✓ The local community built its story around being a modern market town.
- ✓ Promoting local businesses and creating community events in the town centre to get people out onto the high street
- ✓ Public realm improvements have helped to stimulate active travel across the town centre and reduced traffic.

²¹ Altrincham Forward was led by a group of 16 individuals, including representatives from Trafford Council, Altrincham and Sale Chamber of Commerce, Altrincham Traders and Residents Association, the Altrincham Town Centre Partnership, Altrincham and Bowdon Civic Society, ASK Developments, GM Business Leadership Council, Tushingam Moore, Bruntwood, Merepark, Regeneris and Erimax.

- ✓ Retail now plays a less prominent role with the high street that now hosts two gyms, an Everyman cinema and a bustling food market, which houses a plethora of eateries and a 180-seater dining area.
- ✓ The projects have encouraged people back into the town centre to live, work and visit.
- ✓ Co-working spaces have been encouraged and in-fill residential development has supported people living and working in the town.

Case Study Location 3: Erith

- Erith has a long and rich history owing to its prominent position on the river front. The regeneration of Erith Town Centre is anticipated to create new coherent predominantly residential riverside communities, which will provide a mix of housing, new and improved business premises, community uses, and public transport improvements within a framework of new residential streets with an improved public realm.
- The Council has received funding from the Growing Places Fund, TfL's Major Schemes programme, London Regeneration Fund and the Government's Getting Building Fund.
- The Council's vision for Erith is to encourage housing and employment growth, allied with the provision of additional services, facilities and infrastructure, including an enhanced educational and leisure offer, to ensure the creation of a sustainable and healthier community.

Erith: Outcomes

- Transformed estates previously dominated by ageing, poor quality, tower blocks into new, vibrant and attractive, mixed tenure communities.
- Pier Square - Car park becoming a public space with visitors able to enjoy more extensive views to the river, and a central space will be kept open and flexible for holding community events.
- Mixed use developments which respect the areas built and natural heritage.
- Maximise the recreational, ecological and flood management potential of the River Thames.
- Providing a mix of housing, new and improved business premises, community uses, and public transport improvements within a framework of new residential streets with improved public realm.

Erith: Lessons for Grays

- ✓ Creating a coherent riverside residential community.
- ✓ Capitalising on riverfront location to support future growth and attract more visitors to the town centre.
- ✓ Enhancing key areas of public realm having a positive effect on the perceptions of Erith and on footfall in to the town centre.
- ✓ New development contributing to improving land and sales values for nearby development sites and thereby aiding their viability.
- ✓ Creating a space where local entrepreneurs / makers display their products in a prime town centre location for free.
- ✓ All projects being delivered under one of three interrelated sets of intervention themes namely: physical environment; work and training and accessibility.
- ✓ Regeneration promoting housing and employment growth.

Case Study Location 4: Radcliffe

- The town of Radcliffe lost its retail position as a consequence of changing retail patterns. There was an identified need to clear obsolete stock and to deliver a high quality hub for community leisure, recreation, health and work.
- The approach to regeneration was to re-define the town's role and make use of the underutilised characteristics and to create unique and attractive places and a successful evening economy.
- The Strategic Regeneration Framework is the document that the Council is using to guide the regeneration of Radcliffe over the next 15 years. It recommends the following priority projects to be delivered before 2025:
 - A new civic hub in central Radcliffe.
 - The refurbishment of Market Chambers and the Market Basement.
 - New Leisure facilities.
 - A new secondary school.
 - Brownfield housing.
 - A transportation strategy.
 - A riverside walkway.
 - Improved walking and cycling routes around the town centre.
 - New and improved employment opportunities.

Radcliffe: Projected Outcomes

- Major physical improvements, creating new facilities, and creating the right environment for local communities to prosper.
- A riverside walkway.
- Brownfield housing.
- New and improved employment opportunities.
- The new Radcliffe High School - 750-place new school to open in autumn 2024.
- A new Civic Hub opening in 2024 will provide :
 - New library with seven day opening
 - A 6-lane 25m swimming pool
 - A 100-station high-tech gym, and 2 large purpose-built fitness studios
 - Café and teaching pool viewing area, shared with library customers
 - A rooftop activity space, and multiple climbing walls
- A New Enterprise and Skills Centre
- Radcliffe Piazza - quality outdoor space, public realm improvements and traditional bandstand.
- The Market Chambers building is being fully refurbished, with shops and cafes on the ground floor and office and studio space on the first and second floors.

Radcliffe: Lessons for Grays

- ✓ Long term regeneration plan to reposition the town centre physically, socially and economically.
- ✓ People and community at the heart of shaping and developing proposals for regeneration, supporting people to determine their own priorities, recognising the strengths and community assets of the town.
- ✓ Priorities identified by the community with thematic delivery plans produced, focusing on:
 - Strengthening community safety.
 - Protecting and enhancing Radcliffe's environment.
 - Improving health and care outcomes.
 - Improving education outcomes.
 - Improving resident skills and employability.
 - Closing the digital divide.
 - Promotion of culture and sport.

Case Study Location 5: Morden

- Morden has been identified as one of the major growth and housing opportunity areas in south-west London, by the London Borough of Merton (LBM), Transport for London (TfL) and the Mayor of London.
- The town centre represents a unique development opportunity because it is a suburban town centre at the beginning of one of the busiest tube lines in London. It has had a chequered history in that the idea of revamping the town centre had been detailed in 2006 and positive public consultation took place in 2008 but plans were put on hold due to the global financial crisis.
- A development framework was put together in 2019 that set out a vision to regenerate Morden into a thriving town centre with new homes, improved transport and public realm, revitalised retail and modern business space.
- The Council is currently reviewing different funding options to deliver the regeneration.

Morden : Projected Outcomes

- A network of connected streets with clear wayfinding
- To reawaken the garden city principles which inspired the initial growth of Morden and prioritise people before the road network.
- Enhance biodiversity, reduce noise, provide urban microclimate enhancements, improve air quality and provide delightful routes and soft landscaped areas.
- Create a Diverse Residential Community.
- Develop an Innovative Local Economy.
- An Evolving Retail Experience.
- Reinvigorate Community Focus.
- Active and Engaging Public Realm.
- Create a 21st Century Transport Hub.

Morden: Lessons for Grays

- ✓ Complicated transformation and regeneration over the last 15 years that has been stymied by funding.
- ✓ No action results in stagnation and delivery methods and funding options need to be advanced in parallel with regeneration decisions.

Comparator Centres: Lessons for Grays Town Centre

- 6.4 The case studies summarised above and set out in **Appendix 1** provide an indication of the complex nature of town centre regeneration and repositioning. First there has to be

recognition that each town is unique with its own challenges. The solutions that materialise are also bespoke addressing local constraints and opportunities.

- 6.5 Critical amongst the examples is local curation and reimagining of existing stock, creating more mixed-use spaces and revitalising commercial assets, as well as incorporating residential ones. Underpinning this is also a strategic framework that guides that the intervention as in Radcliffe and Erith.
- 6.6 For each location a key common denominator has been the local community. Reimagining for the future of Grays needs to be locally inspired and led. It also has to be future looking. There has to be a sense of progress and so as to change local perceptions as well as making it a place to visit and invest.
- 6.7 As Stockton-on-Tees and Radcliffe have illustrated there should be a bold vision and outlook so that the local community take charge and enable a perceptual change.
- 6.8 Placemaking and good public realm will be crucial ingredients as will be an assessment of inherent assets (opening up to the riverfront was important for both Stockton and Radcliffe). In the case of Altrincham whilst the town's reinvention was organic, the refurbished Market House and Market were catalysts for regeneration.
- 6.9 In the matrix of curation, and as shown in Altrincham, Radcliffe and Erith, there is also a requirement for promoting existing businesses and creating events to bring the community back in to the centre.
- 6.10 The comparator analysis shows that there are a number of factors required to successfully redefine and transform centres. Key messages that are of relevance to Grays include:
 - **Leadership and Control:** The Council can play a proactive role in being bold, leading and guiding any transformation as shown in Stockton, Erith and Radcliffe.
 - **Community, Growth & Social Value:** the need to involve all sections of the community (residents, landowners, businesses etc) as illustrated in Radcliffe, Altrincham and Erith. There has also got to be demonstrable and beneficial environmental, cultural, health, social care and security effects for the positive welfare and wellbeing of the local community.
 - **Strategic Planning and Vision:** Allied with leadership is the need for strategic framework and vision that is able to create community and investor interest and confidence as in Stockton, Altrincham and Radcliffe.
 - **Placemaking and Design:** ensuring the creation of high quality spaces, for Grays this capitalising and opening up to the River Thames as a significant natural asset. Enhancing the blue and green infrastructure to improve the physical form and attractiveness and liveability of a town is important as seen in Altrincham and Erith.
 - **Funding:** Ensuring that this is in place for strategic projects as undelivered ideas lead to stagnation, apathy and decline. Piecemeal development is unlikely to result in change. The example of Morden is a good example where regeneration has been hindered by a lack of funding.
 - **Sustainability and Healthier Community:** Encouraging mixed use of uses within and around the town centre of high design quality. Stockton is a good example where the River Tees is at the heart of with natural heritage, accessibility, enhancing

environmental quality and in encouraging its recreational potential to the benefit of its residents and in curating events for the town centre.

7. CONCLUSIONS

- 7.1 This final section provides high-level advice and recommendations to help the Council to effectively plan and manage the health and performance of Grays Town Centre over the long term. This has been prepared in the context of national, regional and local planning policy and regeneration objectives for town centres. For example, the National Planning Policy Framework (NPPF) requires that: “...*planning policies and decisions should support the role that town centres play at the heart of communities, by taking a positive approach to their growth, management and adaptation*” (paragraph 86).
- 7.2 Both the NPPF and the Council’s adopted development plan policies support the need to maintain and enhance the long term vitality and viability of town centres first, as the most appropriate and sustainable locations for new investment and development. This principle will be embedded in the emerging local plan.

Issues and Challenges

- 7.3 The preceding sections have provided context and highlighted the need to reimagine and reposition Grays to help maintain and enhance its future health and performance. What is clear is that any future vision and strategy for Grays should reflect the reprioritised economic, social and environmental needs and objectives for the centre and its resident community.
- 7.4 There is potential to provide a mix of new residential development in and on the edge of Grays town centre which will help to maintain and strengthen its overall vitality and viability through increased footfall. Provision of the right type of homes, in the right locations that cater for the needs of different ages and socio-economic groups will help to generate new trips, footfall and spend for the benefit of existing shops and business, as well as supporting new mixed-use provision.
- 7.5 There is a need to invest in the quality of the town centre environment - including frontages, streetscape, buildings and public realm, including more outdoor space for pedestrians. This will help create a more attractive, accessible, safe and “greener” (carbon neutral) environment that appeal to all ages and groups. Any such initiative will also directly link with the Council’s broader Health & Wellbeing Strategy. The positive impacts on the environment and on health and well-being of introducing more planting (particularly of trees) and pocket-parks, where space allows, should not be underestimated or undervalued.
- 7.6 It is apparent that Grays (like other centres across the UK) is facing a myriad of issues and challenges to its vitality and viability from the dynamic changes in the retail and leisure

sectors. The challenges have been further accelerated and compounded by the impact of the pandemic, and more recently the energy and cost-of-living crisis. Some of the key issues and challenges facing town centres include:

- the growth of online shopping and home-based leisure activities;
- the increase in retail failures and closures;
- a fall in market demand for space; and
- a rise in vacancies and fall in footfall.

- 7.7 These accelerated challenges for Grays over the last decade have occurred against the backdrop of longer term impacts and retail decline and competition from elsewhere particularly Lakeside Shopping Centre and the surrounding out-of-centre retail and leisure provision.
- 7.8 Grays town centre will remain the main administrative civic hub and designated town centre within the Borough, however it will not be a retail location destination. Its future rests on curating a mix of alternative uses and repurposing of existing space that meets the needs of its resident community.
- 7.9 The centre also has an anti-social behaviour problem that compounds the perception of safety and can deter trips to the town centre, particularly at night. A night time economy will not develop unless it is safe across the centre.
- 7.10 The socio-demographic analysis has shown that Grays benefits from a growing and young population. However there is poor diversity in employment, and approximately one-fifth of the urban population have no qualifications. There are also high levels of deprivation in the town centre and towards the riverside area(s). Despite a young population, it is also notable that there is a lack of amenities for young people within the town centre itself. The healthcheck analysis details the centre as a fair value location for potential residential growth that may engender more footfall provided that there is a curated blend in offer to attract and retain this populous.
- 7.11 Over a period of years some projects aimed at revitalising the town centre have either not been delivered or have been scaled down. This has had a negative impact on perceptions of the town by key stakeholders and the resident community. This represents a challenge, as they are stewards for the future recovery, regeneration and renaissance of the centre. As the comparator example of Morden has highlighted the ingredients necessary to make repositioning possible need to be placed in advance as otherwise planned interventions are stalled with false dawns resulting in stagnation – something that is of particular relevance to Grays.
- 7.12 There is strong competition from larger centres and there is a perception of the lack of good quality shops in Grays and a poor retail offer. However, there is also a lack of recognition in the variety of independent business that operate within the centre, and their

positive contribution to the town's overall offer and performance. This needs to be capitalised upon and be part of a grass roots initiative for differentiation and for placemaking Grays town centre for the future.

- 7.13 At a spatial level, safe access and use of its adjacent blue corridor the River Thames is limited. Furthermore there are limited visible initiatives to promote a shift to sustainable travel such as walking, cycling and making the best of both blue and green space. There is a need to consider the 15 minute neighbourhood concept that provides residents access to most, if not all, of their needs within a short walk or bike ride from their home. The River Thames and pathways can contribute to active travel and towards important amenity space.
- 7.14 The potential repurposing of Grays Shopping Centre by the owner New River REIT, should it go ahead, will change the spatial composition of the town centre. The proposal which is at pre-application stage at the time of writing this report, proposes circa. 850 new apartments above a new open public square. Inevitably this would represent a significant increase in the resident catchment population, resulting in greater levels of footfall over the long term for the centre which could significantly benefit the local economy. The key will be to ensure that there are sufficient facilities within the town centre overall that can attract the related spend from these residents. In the interim, it is likely that should the proposals be implemented, there will be a period of disruption and it will be important for the Council to work with the owners and existing businesses to ensure that mitigation measures are in place and there is sufficient level of interest to entice local residents into the centre. It is also the case that Council will need to work with the developer to ensure that the new development creates a good mix of tenures, along with high quality facilities and place-making initiatives that benefit everyone in the town and the local community including places that are to the benefit to the entirety of the Grays local community. Should the scheme go ahead then it also should provide a level of confidence to invest or regenerate other parts of the town centre.
- 7.15 Based on the significant proposal to redevelop the shopping centre, it has to be recognised that any future curation for the centre must recognise that piecemeal development is unlikely to result in meaningful change. Equally important will be the sequencing of development and in this way, it is important that a placemaking strategy is phased over the short (5 years), medium (10 years) and long term period (10+ years).
- 7.16 Separately, the projects proposed as part of the Grays Town Investment Plan (TIP)²² also represent a potential and important step in the town's evolution and growth. These

²² Three projects being considered to create a destination park space including improved accessibility to the riverside, a beach, outdoor and indoor events space, café and activities centre. With a budget of £19.9m, and subject to business case approval, the grants have to be used by March 2026.

interventions will help Grays to capitalise on its inherent opportunities, and will help to deliver a range of economic, social and environmental benefits for all stakeholders and the community.

- 7.17 Aligned with this, and as detailed earlier in this report, there are plans to replace the level crossing in Grays High Street with an underpass. There will be a new pedestrian walkway under the railway line, replacing the current unsafe rail crossing. This will result in a safer connectivity link for pedestrians, especially north and south of the High Street, together with improved public realm including around the station entrance. This too is sequentially important for the evolution of Grays as these planned improvements to the station, local infrastructure and connectivity across the town will further help to promote economic growth.
- 7.18 Phasing and timing are important to take account of any wider proposals. For example, at the time of starting this study there was the prospect that proposals for the London Resort on the Swanscombe Peninsula in North Kent would progress following the withdrawal of their application early in 2022. However in March 2023, London Resort Company Holdings went into administration and the status of this project remains closed for the foreseeable future. Any similar future proposal may have implications in terms of rail connections and river connections – a watching brief for the Council.
- 7.19 The planned and potential delivery of some of these key projects over the next 5-10 years, may help to change the town's physical composition and economy. The overarching aim should be to ensure that they help to attract more visits, higher footfall and spend.

Opportunities

- 7.20 To help increase activity and footfall, and improve the town's overall resilience, vitality and viability, there will need to be an increasing emphasis on, and investment in consumer experience and satisfaction. For example, this could include:
- providing better (digitally based) signage, wayfinding and information;
 - introducing, managing and curating a more attractive, diverse and vibrant mix of uses and facilities - including leisure, food, markets, pop-up uses, events, etc.;
 - promoting the character, history and heritage of Grays building on the importance of civic uses, education, healthcare, library to help replace retail dependence and generate trips; and
 - aim to be a smart town with free wi-fi connectivity / helping businesses / start-ups with digital marketing and easy-to-access digital information.
- 7.21 To take account of all of the above and the inherent challenges posed, a cohesive phased place making strategy will be required that focuses on the following critical repositioning outcomes:

- **Social** - creating an attractive place as an experience, restore civic pride; introduce a mix of homes with different tenures, range of public/community services to access together with community spaces.
- **Economic** – a vibrant town centre, supporting businesses with activity, with space(s) for a mix of commercial and leisure uses, encouraging economic development, diversification and prosperity.
- **Environmental** - green spaces and attractive places, safe links to the riverfront, support active travel modes and green buildings.

Actions

7.22 To develop and deliver on the opportunities we recommend the facilitation of the following:

Policy Framework

7.23 As a result of the increasing drive towards more flexible planning through changes to the Use Classes Order (UCO) and Permitted Development Rights (PDR), there will inevitably be more mixed-uses within the centre, and particularly residential uses.

7.24 This increased provision should be encouraged and planned through enabling planning policies for the centre. Grays town centre offers a sustainable location for a mix of intergenerational residential provision and tenures, but as part of a balanced mix of uses. Encouraging housing and employment growth together with associated services, facilities and infrastructure is essential to create a sustainable and healthy community.

Leadership & Governance

7.25 The Council has to lead on the future direction of Grays as the main town centre for the Borough. The Council should put in place effective leadership and governance structures to co-ordinate the Council's activities for place delivery in Grays. This would then be an appropriate forum to develop and implement ideas on the ground. The ensuing structure then needs reach out, engage and involve key stakeholders and the local community at the outset. This is to ensure that people know what to expect, and so that there is buy-in from the outset and for champions who can help drive forward delivery. The community must feel that they are partners in the process. This will be particularly important for example should the regeneration of Grays Shopping Centre go ahead, as this could potentially provide a regular forum to speak with the owner and for the community to share their views and concerns.

7.26 To promote the town centre area further, and at appropriate juncture, the Council may wish to consider developing a Business Improvement District (BiD) together with local businesses. This entity could then promote Grays as a destination for say independent shopping, business and leisure through its website, social media, promotions,

consultations, tackling antisocial behaviour as well as assisting small scale enterprises in the town centre.

Community at Heart

- 7.27 The pandemic brought about rapid societal change, transforming people's attitudes, behaviour and aspirations. People are now working differently, shopping differently and socialising differently. In this context the local area matters more now than ever. Some groups and communities have been particularly affected by the health, social and economic impacts of the pandemic and will require more help to recover. Whilst for some, the issues they faced pre-pandemic have been amplified such as access to fast broadband; housing that is right for them and their families etc.
- 7.28 The opportunity that exists here has to focus on the needs and wants of the local Grays community and businesses. In the case of Grays it must truly be local to develop social value as shown by success stories in Radcliffe and Stockton-on-Tees. If social value outcomes are to genuinely be achieved, the right questions must be asked to the right people and at the right time. For example, the healthcheck for Grays town centre has indicated that provision is primarily independent led; however there is little tangible evidence of engagement with these entrepreneurial businesses. Additionally the centre shows a healthy mix of outlets that cater for minorities (East European, African and Asian). These groups have a high propensity to set up businesses or be self-employed. However there is little by way of evidence in terms of engagement. These outlets also meet the essential needs of a resident minority population that needs to be engaged further to ascertain their future needs, and whether this can provide a unique differentiator for the future of Grays.
- 7.29 There is a greater awareness than ever before that any form of meaningful regeneration must reflect and give greater consideration than ever to its impact on local communities and the lives of those who live and work there. Grassroots action is therefore a necessary precept.
- 7.30 There is a critical view from the stakeholder consultations that the local community has seen and heard about projects before, but with little happening on the ground and with little tangible benefits.
- 7.31 Priorities for the local community from the stakeholder engagement centre on issues such as security and good design / placemaking. On this basis there is a requirement for greater consideration as to the positive impacts of projects and initiatives on those who live, work, socialise and visit Grays for different reasons.
- 7.32 This is the time to consider the '15/20 minute neighbourhood concept' for Grays where the future vitality and viability of the centre is predicated not only on visitors and commuters but

is generated from within to sustain and enhance the centre and build in greater resilience. The provision of residential together with an appropriate mix of uses is critical to help promote sustainable growth and build resilience. Creating somewhere people feel safe and want to live, work and spend, will then attract and sustain prosperity in the area.

Enhancing Wellbeing

- 7.33 Regeneration also has a pivotal role to play in improving population health, wellbeing and tackling social exclusion. The Council's Health & Wellbeing strategy forms a critical component as it highlights the social and economic needs to level up across and prosper across communities and places.
- 7.34 A balanced mix of physical, economic and social regeneration is most likely to enhance health and wellbeing within Grays. This aligns the built environment (i.e. where people live, shop, work and socialise) with the 'social' aspects such as health improvement, education and skills, community spaces, arts and culture, and family and child wellbeing. These facilities will be critical in empowering and engaging individuals and the local community to be equal and active partners in creating and protecting places and spaces for improvement and enduring change.
- 7.35 Developing and strengthening access to local resources for communities aligned with high quality place-making, will help create a healthy and sustainable town for present and future generations. This should be at the heart of the transformation of Grays town centre. As part of this, emphasis should be placed on developing green pockets and "rewilding" the town, as well as linking the town centre with the surrounding green and blue infrastructure.

Digital Support

- 7.36 In an ever increasing digital space the healthcheck analysis has shown that local businesses and their stakeholders are not maximising this opportunity. They therefore need support to maximise their visibility and offer through additional training and support.
- 7.37 This could be developed further with a digital skill offering at South Essex College which could provide an accessible route to a progressive portfolio of training programmes of knowledge, skills and behaviours. This will help to propel individual professional success and equip Grays and Thurrock overall with a skilled workforce, entrepreneurs driving productivity and enhancing economic growth.

Future Vision

- 7.38 The current town centre vision is found in the Grays Town Centre Framework Refresh (2017) which states:

“Building on its strengths as a Chartered Market Town, Grays will be an exciting, high quality destination for people to live, work, learn, shop and socialise. Reconnected to the River Thames, Grays will support growing resident, student and business communities throughout the day and entertain a diverse and vibrant population through the evening. Cafés, bars, restaurants, shops and markets will combine with culture, entertainment and events in unique venues to provide a safe and attractive place for communities to meet”.

7.39 The principles of this still apply and any updated vision must continue to focus on the local community of Grays that links with local social, economic, environmental and health & wellbeing objectives.

Next Steps

7.40 In terms of key next steps it is our recommendation that the Council focus on curating an interesting mix of alternative uses within Grays town centre with the following immediate steps:

- **Leadership & Governance:** To put in place effective leadership and governance structures to co-ordinate the Council's activities for place delivery in Grays. Also to link with a community engagement forum (see below) that can be consulted across on any development, idea or intervention for Grays town centre.
- **Community Engagement** – develop a programme to create a forum that incorporates a wide range of the community (business, residents, voluntary groups, minorities) so that they are seen as a shared partner in leading change across the centre.
- **Placemaking Strategy or Framework** – that provides a phased roadmap for continued positive change and incorporates current and planned developments that will have a significant impact on Grays town centre.
- Consider immediate **targeted interventions** together with the Council’s public, private and voluntary sector partners to carry out focussed actions. This should be independent of any major non-Council led projects, such as the potential redevelopment and repurposing of Grays Shopping Centre in which the Council should take a proactive interest. Examples include:
 - **State Cinema** – landmark with potential for leisure and cultural uses to generate local interest. Needs engagement with current landowner.
 - **Activities Programme & Place Promotion** – develop a rolling information guide and shift focus to what is happening across the centre.
 - **Develop a Cultural Strategy** – formalise a creative cluster and promote offer. Establish stronger linkages with the Creative Estuary opportunity.
 - **Engage with local businesses** – raise their digital skills and promotion.
 - **Identify areas of additional greenery and pocket parks** – to improve the quality of the public realm and creating usable spaces through additional greenery and pocket parks within the town centre.

APPENDIX 1: CASE STUDY EXEMPLARS


Case Study: Stockton-on-Tees

Background:

- To address the imbalance between supply of retail floorspace and retailer demand, transformational action was proposed through the removal of circa 27,000 sqm of retail floorspace via the demolition of the Castlegate Shopping Centre and the consolidation of Stockton Town Centre's retail offer down to a sustainable level.
- A Compulsory Purchase Order (CPO) secured the redevelopment of:
 - Castlegate Shopping Centre,
 - The High Street, and
 - Riverside Road area.
- Stockton-on-Tees Borough Council bought the buildings before seeking public views on a "once in a generation" opportunity to change the town.
- Under the plans, Castlegate and the Swallow Hotel - which occupy a site around three times the size of Trafalgar Square - will make way for a riverside park and offices. Stockton Council hopes the plans will provide opportunities to boost the health and wellbeing of the town's residents.
- The riverside park will feature public artwork and pleasant green spaces for families to enjoy.
- A "land bridge" structure will enable the park to span a section of Riverside Road, providing uninterrupted access to the waterfront.
- The Council is also proposing to build a new central library, customer service centre and council office on the site, kick-starting its regeneration and saving money as part of plans to consolidate its 10 existing council offices into two.
- The town's main retail offer will be focussed on Wellington Square, the 700-year-old market, and other parts of the High Street and town centre, such as Silver Street.

Challenges

- Growth of online shopping and out of town retail parks means the retail-dominated function of the High Street has changed and town centres need to react to changing consumer habits.
- Stockton vacancy rates having risen to almost three times the national average.
- Stockton Town centre lost a number of major retailers in recent years, including Debenhams and Marks & Spencer.
- Reducing the inequalities faced by disadvantaged communities (9 of the wards in Stockton on Tees are in the 10% most deprived in the country).
- Public Health England 2019/20 showed two-thirds of adults in Stockton were classed as either overweight or obese.
- Covid-19 accelerated challenges for the town centre.

<p>Opportunity / Solution</p>	<ul style="list-style-type: none"> • The overarching vision for Stockton Town Centre is to create a vibrant, modern town centre with a sustainable retail offer that safeguards the traditional function of the High Street while creating high quality spaces which capitalise on the proximity of the River Tees as a significant natural asset and creating an improved riverside area. The longer term aim is to create investor confidence through quality of place, increased footfall and new uses. • To create a riverside park with direct access to the river from the High Street capable of hosting large-scale events. • To relocate businesses from Castlegate Centre into Wellington Square. 
<p>Scheme</p>	<ul style="list-style-type: none"> • A Compulsory Purchase Order (CPO) secured the redevelopment of: <ul style="list-style-type: none"> ○ Castlegate Shopping Centre, ○ The High Street, and ○ Riverside Road area. • A comprehensive regeneration scheme delivering retail, leisure and public realm improvements. • Transform the Town Centre through demolition of the Castlegate Shopping Centre and consolidation of the retail offer in Wellington Square and across other areas of the High Street. Creating a riverside development site. • Proposed urban park will also connect the High Street to the riverside area with a new land bridge crossing over the reduced width of Riverside Road. This will deliver a new, flexible public space to accommodate public events, new building plots on the riverside and future commercial and leisure opportunities.
<p>Developer</p>	<ul style="list-style-type: none"> • Stockton-on-Tees Borough Council
<p>Funding</p>	<ul style="list-style-type: none"> • The overall cost of the Scheme will be £43.5 million with funding allocated as follows: <ul style="list-style-type: none"> ○ Council has secured funding from the Tees Valley Combined Authority in the sum of £20 million ○ Further funding has been approved via the Future High Streets Fund in the sum of £16.5 million. ○ This is being supplemented by the Councils own funding in the sum of £5 million. • Together these sums will be used for decanting and demolition across the remainder of the Scheme Land, and creation of the urban park and Riverside urban bridge

<p>Anticipated Outcomes</p>	<ul style="list-style-type: none"> • New community facilities on the southern end of the site including a new leisure centre, library and customer service centre. • Accessible space for community events and play host to the town's world-class events programme. • Change perceptions of Stockton as place to visit and invest. • Make the town a great place to live, work and thrive. • A modern town centre that safeguards day-to-day retail functions but allows residents and visitors to experience other things on offer set in a riverside environment. • Attracting new uses. • Increased footfall.
<p>Timelines</p>	<ul style="list-style-type: none"> • The first stage of the £36m, three-year project began in May 2022, with enabling works and a strip out taking place before the main demolition works begin in late July 2022. The demolition will take around 12 months to complete, before construction begins in summer 2023. Anticipated completion in 2025

Case Study: Altrincham

Background:

- In 2010, Altrincham was branded a 'ghost town' in the national press and up to that point was in a cycle of decline.



- It had poor public realm, underachieving retail offer, developer inactivity and competition from the Trafford Centre and online shopping. Altrincham Forward²³ provided the strategic direction and a 'whole town centre' approach. This helped to instil confidence in the town from businesses, investors and residents and delivered business and skills support initiatives and a range of events and promotional activity. The regeneration of Altrincham created an entirely new vision (below) for the town centre:

“Altrincham will be a unique, attractive and vibrant Modern Market Town and an integral part of people’s everyday lives. It will have its own distinctive identity and be a place people can be proud of. The town centre will be an aspirational place with a wide variety of shops, cafes, bars restaurants, theatres, leisure, cultural and sports facilities, thriving businesses, strong visitor economy and a quality residential offer.”

- An action plan was developed in 2012, which set out key priorities and a vision for the town centre to re-establish itself as a 21st Century market town. Among the key decisions taken were:
 - Altrincham market hall: Bringing market halls back into use as the heartbeat.
 - Altrincham Hospital: Trafford Council supported the development of a new hospital on a prominent town centre site to help showcase new investment in Altrincham.
 - Altrincham Interchange: A £19m redevelopment completed in 2014 to create a landmark gateway to Altrincham by bus, tram, train and taxi.
 - Town centre loans: Trafford Council has also pioneered a new form of loans allowing businesses to borrow up to £20,000 to set up in Altrincham.
 - Public realm improvements: By far the most wide-ranging set of improvement to have taken place is the first of two phases of public realm improvements delivered at a cost of £3m.

²³ Altrincham Forward was led by a group of 16 individuals; including representatives from Trafford Council, Altrincham and Sale Chamber of Commerce, Altrincham Traders and Residents Association, the Altrincham Town Centre Partnership, Altrincham and Bowdon Civic Society, ASK Developments, GM Business Leadership Council, Tushingham Moore, Bruntwood, Merepark, Regeneris and Erimax.

Challenges	<ul style="list-style-type: none"> • Competition from Trafford Centre, Manchester City Centre and other out of centre retail • Accessibility to City Centre and competition from nearby centres such as Chorlton and boutique centres in Cheshire • Online shopping and changing retailer strategies including loss of major retailers • Poor environmental quality and public realm • Rising vacancy rates (30% - highest in the UK in 2010). • Without continued intervention to provide a more attractive and competitive retail and a more diverse town centre – expenditure went to other centres • Lack of an evening economy
Opportunity / Solution	<ul style="list-style-type: none"> • Trafford Council made Altrincham a priority. • Altrincham Forward was established in 2011 • Vision and Action Plan - “Modern market town”. • Public Realm Strategy completed in 2012. • Landlords Forum established to share intelligence, market the town and improve properties in poor condition.□ <div style="display: flex; justify-content: space-around; align-items: center;">    </div>
Scheme	<ul style="list-style-type: none"> • To harness Altrincham town centre's six distinct quarters: <ol style="list-style-type: none"> 1. Market Quarter – Grade II listed house, outdoor market and other heritage assets 2. Anchor Retail Quarter – National retail operators continue to dominate 3. Boutique quarter – opportunities for small independent retailers, cafes and bars 4. Leisure Quarter – numerous leisure facilities but poorly connected to rest of town 5. Evening Economy Quarter – already contains mix of restaurants, bars and jazz clubs – opportunities for these to flourish 6. Commercial Quarter – important employment location – could flow into other quarters
Developer	<ul style="list-style-type: none"> • Trafford Council

Funding	<ul style="list-style-type: none"> • Town Team established in 2013. • £900k Refurbished Market House and Market – catalyst for regeneration. • Initial £3m Public Realm Improvements. • £19m for Transport Interchange • £17m for Hospital. • A Loan Scheme –£260,000+ loaned to new businesses in Altrincham to date.
Outcomes	<ul style="list-style-type: none"> • Altrincham was the first town in the country to trial the National Skills Academy for Retail's Digital High Street training. • Trafford Council pioneered a new form of loan allowing businesses to borrow up to £20,000 to set up in Altrincham, and other town centres, or access extra money for training or marketing. • Altrincham vacancy rates decreased from 19.5% in June 2014 to 7.2% in June 2019. • Altrincham Interchange redevelopment has improved the experience of those arriving in Altrincham by train, tram, bus and taxi • Altrincham Market – successful since refurbished and .relaunched in 2014 - acted as a catalyst for change in the town centre, an important USP. • Creating an experience – diversifying offer. • Altrincham has seen major public realm and highway improvements – this has reduced congestion and boosted visitor numbers. • Altrincham has a lively and growing food and drink scene that extends into the evening. • Strong café culture has developed including in surrounding areas. • Additional continued investment: George St, Market St, Moss Lane, Regent Road • Footfall increased by 25% since 2010.
Timelines	<ul style="list-style-type: none"> • 2012 and ongoing.

Case Study: Erith

Background:

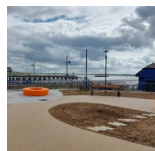
- Erith is an ancient settlement which has always been intrinsically linked with Thames and one of the earliest industrial businesses was the Erith Iron Works at Anchor Bay in 1864.
- The 1960s saw the layout of the town and many critical routes altered, most notably the High Street which became a large service road for the new shopping centre. Public spaces were replaced with flood defences which now sever the town from the river.
- The London Borough of Bexley has recently been awarded significant funding for Erith, which will be used to remedy these changes and make much needed improvements to improve the quality of the public areas.
- The aim is to make the town centre more pedestrian and cyclist friendly and assist with bringing high quality new housing and shops and activity to the town centre.
- Changes have already started taking place, including the opening of a new London South East College and other developments currently underway such as the former Swimming Baths and Erith Quarry.
- The regeneration of Erith Town Centre is anticipated to create new coherent predominantly residential riverside communities, which will provide a mix of housing, new and improved business premises, community uses, and public transport improvements within a framework of new residential streets with an improved public realm.
- The Council have been buying property since July 2017 (mostly on Pier Road) as part of the Erith Regeneration Programme (detailed later).

Challenges

- The 1960s saw Erith extensively redeveloped including pedestrian and traffic separation; multilevel commercial environments and residential tower blocks.
- This redevelopment, which had been partly prompted by wartime bomb damage, dramatically altered the layout of the town, and many crucial routes were radically altered: notably the High Street became largely a service road for the new shopping centre.
- The town's public spaces were also fundamentally altered by the construction of flood defences, which serve a crucial purpose in protecting the area from flooding but which sever much of the town from a connection to the river. Additionally, views to the river are restricted.
- The town is largely constrained and divided by the A2016. This reduces permeability into the town centre, especially for pedestrians. It also places constraints on future growth/ expansion and development.
- Wayfinding and legibility of public spaces – poor connectivity with station, the river and wider residential area. The centre lacks an identity or character – no sense of arrival or central focus.
- Erith is a key location, adjacent to the River Thames within the Bexley Riverside Opportunity Area (as identified in the London Plan). The town offers significant capacity to help meet London's growing demand for affordable homes local land values were not attracting the right kind of development to make that happen.
- Larner Road Estates - local authority high-rise estate with low demand and a very poor local reputation compounded by anti-social behaviour.

**Opportunity /
Solution**

- The town centre is identified as one of the Borough's major growth locations (based on the Bexley Growth Strategy).
- Forecast to accommodate up to 6,000 new homes in or within short distance of the town centre during the next 30 years.
- Potential to capitalise on River Thames location to support future growth and attract more visitors to town and area.
- Better links to the Riverside to encourage more daytrips and longer dwell times by residents and visitors.
- Enhance key areas of public realm which will have a positive effect on the perceptions of Erith and on footfall in the town centre.
- Create new coherent predominantly residential riverside communities, which will provide a mix of housing, new and improved business premises, community uses, and public transport improvements within a framework of new residential streets with an improved public realm.
- Enhance key areas of public realm which will have a positive effect on the perceptions of Erith and on footfall in the town centre.
- Improve access to the gardens and riverfront so that it is safer for pedestrians and cyclists.
- New development contributing to improving land and sales values for nearby development sites and thereby aiding their viability.
- Expanding and opening up the square to be more accessible and safer.
- Reconfiguration of ground levels - easier to move around and better views of River Thames
- Vacant units on the ground floor of the Riverside Shopping Centre have been renovated for use by London Borough of Bexley Business and Employment Services and local charity Re-instate
- Creating the 'Curiosity Cabinet' which provides an opportunity for local makers to display their products in a prime town centre location for free.
- The car park will become public space with visitors able to enjoy more extensive views to the river. A central space will be kept open and flexible for holding community events.
- Erith Park transformed Lerner Road in a low-medium density mixed tenure residential development



<p>Scheme</p>	<ul style="list-style-type: none"> • The Council has been awarded significant funding for Erith, which will be used to make much needed improvements to improve the quality of the public areas, make the town centre more pedestrian and cyclist friendly and assist with bringing high quality new housing and shops and activity to the town centre. Overall the interventions focus on three interrelated elements namely, the physical environment; work and training; and accessibility. • The Greater Erith programme is made up of a number of different projects in and around the town centre including: <ul style="list-style-type: none"> ○ The restoration of Carnegie Library Phase 2 (The National Lottery Heritage Fund has committed £980,000 towards a £1.8m project) ○ Improvements to Erith High Street ○ Riverside Shopping Centre and Public Realm Improvements ○ Improvement to the top end of Pier Road ○ Heritage enhancements to 70 Pier Road ○ Riverside Garden improvements ○ Pier Road improvements for better cycle infrastructure ○ 66 & 68 Pier Road brought into use • Lerner Road (now completed) comprises medium density mixed tenure residential development comprising almost 600 family homes and apartments. Funded by the Homes & Communities Agency (HCA and supported by a grant from the Mayor's Affordable Homes Programme, it represents one of the largest projects of its type in London.
<p>Developer</p>	<ul style="list-style-type: none"> • London Borough of Bexley's internal project team supported by external professionals with expertise in design, engineering, consultation and development. • Erith Park: UK housing group Orbit and Wates Residential.
<p>Funding</p>	<ul style="list-style-type: none"> • The total funding package for this Erith Regeneration Programme is £8.12m and all the funding has been secured. • The £4.2m investment from the Growing Places Fund (GPF) will represent 52% of the total project funding package. • £1.96 million grant funding will be provided by the Mayor's London Regeneration Fund (LRF), representing 24% of the total project funding package. This grant was awarded in January 2016. • The remaining 24% (£1.96 million) of the funding package is being provided directly by internal funding from the London Borough of Bexley. • Erith Park: The £120m housing project was awarded £23 million from the affordable housing funding. The Second Phase was awarded £6.7 million from the same programme.

**Anticipated
Outcomes**

- All projects being delivered are under one of three interrelated sets of interventions: physical environment; work and training and accessibility.
- Promoting housing and employment growth.
- Additional services, facilities and infrastructure including enhanced educational and leisure offer.
- Mixed use developments which respect the areas built and natural heritage.
- Maximise the recreational, ecological and flood management potential of the River Thames.
- To create new coherent predominantly residential riverside communities, which will provide a mix of housing, new and improved business premises, community uses, and public transport improvements within a framework of new residential streets with improved public realm.
- Improving crossing points to for pedestrians and cyclists, providing easier access into the park, street greening, improved access to buses and integrated parking facilities.
- Erith Park: Reported crime on the estate remains low in volume and impact and police have received relatively few reports of anti-social behaviour. It now has 80% less crime compared to the rest of its composing ward.

Timelines

- The Erith programme is expected to be delivered over the next 10 years. Elements such as activities around the town centre, public realm works and restoration works at the Carnegie Building will be happen in the first 5 years.
- The development of new housing, shops and leisure facilities will begin in a second phase from years 5-10. The programme aims to create the right conditions for further development and investment beyond this.
- Phase 1 and 2 works completed at Erith Park.

Case Study: Radcliffe

Background:

- The town of Radcliffe lost its civic heart as a consequence of changing retail patterns and service provision. There is an identified need to clear obsolete stock and to deliver a high quality hub for community leisure, recreation, health and work.
- The approach to regeneration is to re-define the town's role and make use of the underutilised characteristics to create unique and attractive places and a successful evening economy. Some steps have already been taken which includes the £1m refurbishment of the Market Hall.
- The vision for Radcliffe is: to be a prospering community, based upon a thriving and distinctive town centre, incorporating sustainable transport and growth, promoting healthy lifestyle opportunities, a good range of homes, along with a strong education, employment and leisure offer, for all residents.
- Radcliffe had already delivered on previous regeneration agendas which have made some significant progress and brought forward several improvement schemes in the town, such as:
 - Re-purposing of the Market Hall;
 - Relocation of the bus station;
 - The expansion of the Dunelm Call Centre;
 - The introduction of Lidl;
 - New affordable homes; and
 - The introduction of a new Medical Practice
- However, there were still several challenges in order to attract people, generate investment and facilitate growth within the town centre which is complimentary to growth across the wider town.
- The Strategic Regeneration Framework is the document that the Council is using to guide the regeneration of Radcliffe over the next 15 years. The six priority projects to be delivered before 2025 include:
 - A new civic hub in central Radcliffe
 - The refurbishment of Market Chambers and the Market Basement
 - New Leisure facilities
 - A new secondary school
 - Brownfield housing
 - A transportation strategy

Challenges

- Radcliffe's key asset is its location the River Irwell. However, it generally turns its back on the river, the river walkway to the south is closed and developments do not make the most of their location fronting the river.
- Declining retail function associated with the core of the town, high vacancy rates generally lower order retailers and the need for diversification.
- Radcliffe Town Centre benefits from a Metrolink stop and a relatively new bus station, however, links to the core of the town need to be improved from the Metrolink stop.
- Radcliffe has a fragmented Civic estate. Whittaker Street, outside of the core, is home to Council employees; however, residents must travel to Bury or Prestwich to access civic facilities. An Integrated Neighbourhood Team is located outside of the core at Coronation Road and whilst Radcliffe Library is home to the Local Care Organisation integrated neighbourhood team for health and care.
- Radcliffe as a whole suffers from low academic achievement and attainment when compared with Borough-wide average and has an unemployment rate above both the Bury and England averages
- The core of the town centre has no leisure provision.
- Poor connectivity, particularly in relation to A665 Pilkington Way which causes a barrier and a division through the town centre.
- A lack of arrival when entering the town centre.
- Social equity – Radcliffe suffers from extensive and severe deprivation, particularly in terms of income, employment, and health.

<p>Opportunity / Solution</p>	<ul style="list-style-type: none"> • Radcliffe has a distinctive location on the River Irwell - opportunity to maximise this key environmental asset and develop Radcliffe's strengths to create a new core that is thriving and promotes healthy lifestyle choices. • The River Irwell is one of Radcliffe's greatest assets and there is great potential to reconnect the town with its river. • Improvements to this blue and green infrastructure are crucial to improving the physical form of the town as well as to improving the health and wellbeing of Radcliffe residents. • There is an opportunity to create a wider functional housing market in the town particularly for young people. • Opportunity to bring civic functions together in the core of Radcliffe. In addition there are additional opportunities to co-locate services to further improve use and achieve potential rationalisation. • Providing the educational facilities giving young people the opportunity to achieve without the need to travel. • Radcliffe's key transportation assets are the Metrolink and the relocated bus station. There is an opportunity to connect these better with the core of the town and to create a sense of arrival. <div data-bbox="486 936 1401 1093"> </div>
<p>Scheme</p>	<ul style="list-style-type: none"> • Radcliffe Civic Hub will be a new building in Radcliffe town centre which will provide a permanent new home for a relocated Radcliffe Leisure Centre and Radcliffe Library, together with other council services, learning opportunities and community space. • Radcliffe Market, Market Basement and Market Chambers - <ul style="list-style-type: none"> ○ The Market Basement will be refurbished to create a large community and cultural events space; this will be linked to a new entrance and courtyard with access onto a balcony facing the River Irwell. ○ The works to the Market Chambers will bring one of Radcliffe's key heritage assets back into everyday use. This new entrance space will be created on the site of the former TSB building and will also provide access to the Market Chambers first and second floors. The Market Chambers ground floor will be turned into new retail and food and beverage spaces. The first and second floor will be used as flexible office and studio space.
<p>Developer</p>	<ul style="list-style-type: none"> • The project(s) are currently being led by Bury Council with support from professional advisers.

Funding	<ul style="list-style-type: none"> • The Strategic Regeneration Framework's projects will be funded by a mix of: council funds, funding from central and regional government programmes, and private sector partners. • The Civic Hub total budget in the region of £40 million. It is being funded through £20 million won from the Levelling Up Fund in autumn 2021 and £20 million Bury Council capital programme commitment. • The work to fix structural issues in the Market and protect the Market Basement from flooding are being paid from the Council's backlog maintenance fund. The remainder of the funding will come from the Levelling Up Fund.
Anticipated Outcomes	<ul style="list-style-type: none"> • A new civic hub in central Radcliffe. • The refurbishment of Market Chambers and the Market Basement. • New Leisure facilities. • A new secondary school. • Brownfield housing. • A transportation strategy. • A riverside walkway. • Improved walking and cycling routes around the town centre. • New and improved employment opportunities.
Timelines	<ul style="list-style-type: none"> • Civic Hub, completion expected by mid to late 2024. • Radcliffe Market, Market Basement and Market Chambers, completion of the developments is expected in late 2023.

Case Study: Morden

Background:

- Morden functions as a successful town centre and well connected. However London Borough of Merton's consultation feedback over many years has highlighted that residents would like to see changes made to the public realm and retail offer.
- Morden town centre represents a unique development opportunity due to its suburban town centre at the beginning of one of the busiest tube lines in London (Northern Line), surrounded by green and open spaces. The broad aim is to create spaces for the entire community to come together; deliver new civic amenities; support arts and culture.
- This aim is to achieve a more attractive and revitalised high street which will encourage more footfall, more time spent shopping and more social interactions.

Challenges

- Morden benefits from wide streets which can accommodate a range of uses and activities. The key challenge is to allow sufficient space for these to occur simultaneously without prohibiting each other.
- It has been four years since the London Borough of Merton (LBM) and Transport for London formulated (TfL) a 'development framework' for the revamp of Morden town centre. But solid plans on what will happen next are yet to materialise.
- Making the town centre more of a destination and not simply a thoroughfare.
- The limited number of smaller dwellings and flats, particularly within close walking distance to the underground station.
- Multiple land ownerships within the regeneration zone including the Council and TfL which could lead to fragmented development.
- The current location of the bus standing facilities directly outside the underground station creating a poor user experience and has a negative impact on air quality.
- The dominance of the road and traffic network throughout Morden which results in a poor experience for pedestrians and cyclists and negatively impacts on public realm.
- Opportunity to extend tram network between Merton and nearby Sutton, has been paused as it has not proved possible to identify the funding needed to deliver the scheme.
- To meet the need for additional and mixed housing in the area.

<p>Opportunity / Solution</p>	<ul style="list-style-type: none"> • Intensification of residential development at the heart of Morden, alongside the delivery of a range of associated improvements to the public realm, transport and town centre type uses. • To create a broader range of housing types and tenures. • To relocate the bus standing facilities away from their current location as part of the plan-led approach to the regeneration of the town centre. • Giving pedestrians a great priority, including the opportunity to review the Transport for London Road Network (TLRN) and potential removal of the gyratory, have been captured in the SDF, which incorporates the Healthy Streets Approach. • The introduction of higher density development (tall buildings) within in the Wider Morden Town Centre Area and in particular within the Morden Regeneration Zone • An appropriate land assembly strategy to facilitate the delivery of the comprehensive regeneration of Morden Regeneration Zone will need to be developed for this scheme which includes the possible use of compulsory purchase powers if considered necessary and appropriate. • The scheme has always received cross party support within Merton Council. The partnership between the council and TfL (since 2015) has strengthened the potential for Morden to be developed comprehensively to ensure that widespread change occurs to provide additional benefits that would otherwise not transpire if development came forward on a fragmented basis. • Merton Council and TfL have agreed to procure a development partner to deliver the regeneration of Morden Regeneration Zone in accordance with a plan-led approach.
	
<p>Scheme</p>	<ul style="list-style-type: none"> • With a broad site area of some 8.4ha, the focus of the project is to create a new civic hub, providing community amenities and promoting arts and culture. Proposals also include flexible indoor spaces that could accommodate a leisure / entertainment hub (including good quality food and beverage services) and opportunities for seasonal events, indoor / outdoor markets and 'meanwhile' uses. • Circa 2,000 homes are planned to be delivered of which 40% will be affordable housing. • Improving connectivity to existing community facilities and promoting activity within the town, by offering an engaging public realm, will also be important elements in the overall scheme. • Morden already benefits from a number of large green spaces on its periphery. Therefore, improved connectivity between the town centre and the surrounding neighbourhoods and local parks can be expected, through establishing a network of green spaces that range in scale and form, to incorporate a variety of uses that cater for people of all ages.

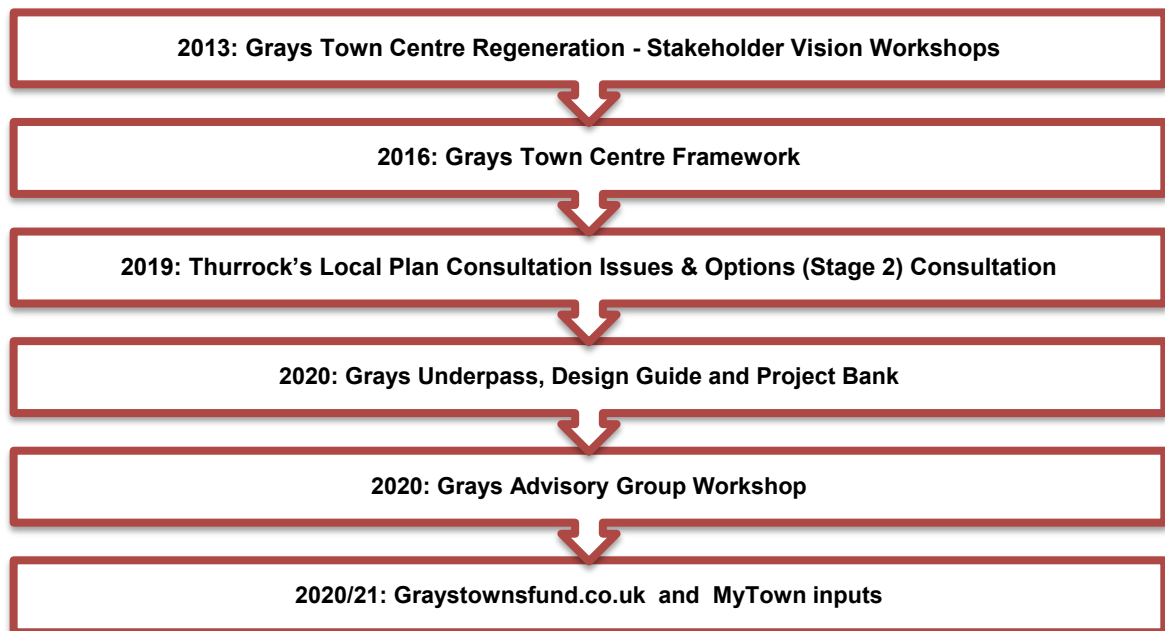
Developer	<ul style="list-style-type: none"> Merton is working in partnership with Transport for London to pursue funding opportunities to develop, fund and deliver on this project.
Funding	<ul style="list-style-type: none"> In November 2019, LBM approved a comprehensive set of proposals to enable the procurement of a development partner, subject to final confirmation of Greater London Authority (GLA) funding for land assembly costs. However in March 2020 the GLA advised the Council LBM and TfL that although they still support the scheme in principle, at the current time they were not in a position to support it financially through a significant sum of grant funding from their Land Assembly Fund within the Homes for Londoners Land Fund. As at December 2020, Merton's total financial investment was £10.3m and TfL stated to be investing up to £20m in capital. LBM continues to work with TfL, the Mayor of London and Homes England to prepare for funding opportunities to bring forward the regeneration plans. A review is currently being undertaken of alternative delivery methods and funding options for the town centre, to explore ways to deliver the regeneration more swiftly.
Anticipated Outcomes	<ul style="list-style-type: none"> Urban layouts to be based on a permeable and easily navigable network of recognisable streets. Streets that are easy to navigate are easy to understand and remember and make places comfortable and attractive. A network of connected streets with clear wayfinding Improved connectivity between the town centre and the surrounding neighbourhoods and local parks can be expected, through establishing a network of green spaces that range in scale and form, to incorporate a variety of uses that cater for people of all ages The addition of spaces which include features such as benches and public seating areas, to enable rest and relaxation throughout the town centre. To reawaken the garden city principles which inspired the initial growth of Morden and prioritise people before the road network. Appropriate planting to enhance biodiversity, reduce noise, provide urban microclimate enhancements, improve air quality and provide delightful routes and soft landscaped areas. The orientation of buildings to maximise daylighting on these areas and reduce wind levels to encourage active travel and outdoor activities. Proposed development to be of a flexible design to adapt to change over time and buildings should be designed for a long lifespan - being suitable for a number of uses over time.
Timelines	<ul style="list-style-type: none"> The regeneration is anticipated to take place in a number of phases over an 8-10 year period whenever it commences.

**APPENDIX 2:
PREVIOUS STAKEHOLDER
CONSULTATIONS**

1. GRAYS TOWN CENTRE: PREVIOUS STAKEHOLDER ENGAGEMENT

1.1 Grays has been on a journey through several community focussed consultations as illustrated below:

Figure 1: Community Consultation and Intervention Selection Journey



2013: Grays Town Centre Regeneration - Stakeholder Vision Workshops

1.2 Our Community Regeneration Strategy and Local Development Framework identified Grays as one of the five 'growth hubs' where regeneration was to be concentrated. This was on the back off a concern of an increasing dominant impact of the nearby Lakeside Shopping Centre and its potential future expansion and other centres.

1.3 The Council's vision was to involve communities in shaping where they live and that Grays should be a place of opportunity, enterprise and excellence where individuals, communities and businesses flourish. Residents, community groups and businesses were consulted. Resident surveys were based on a statistically significant sample based on age, sex and ethnicity of all the wards that make up Grays and Chafford Hundred. Over 1,500 respondents who were then invited to join workshops to go deeper. The draft vision was circulated to all attendants at workshops for agreement before it was reported to the Council's Cabinet.

1.4 The key messages from this consultation were:

Beach and Riverfront	"Make better use of the beach and riverfront" "Improve the facilities on offer in this area"
Accessibility	"To make Grays more accessible through better and cheaper public transport" "Improve road and path ways in and around Grays supported by better parking"
Food/Drink/Cafe Culture	"More choice of food and drink places to meet all different groups of people" "location of food and drink outlets is important"
Shops/Market	"More choice in shops and markets" "Utilise the market/shops to support other areas of the town"
Entertainment/Leisure/ Events/Nightlife	"More different facilities to meet the needs of different groups and make them accessible" "Use the town's heritage to develop leisure facilities"
Appearance/Environment/	"Improve the appearance and environment that people see and experience"

Welcoming	when in and around Grays" "Maximise on the history and facilities already in the town1 and look at ways to improve and increase them"
Safety/Security	"Increase Police and Security presence around the town" "Regenerate community spirit and accountability" "Address the perception of crime that exists"
Business support / processes and systems	"The Council to support and improve the business environment" "Develop facilities and offerings to support the town in attracting new business staff and customers"
Communication/Marketing/Promotion	"Promote, market & communicate"
Finance/Funding	"look at ways to secure funding and ensure it is effectively spent to support local events and businesses"
Whole community/Meeting the needs of different groups/Future proofing Grays	"It is a whole system approach" "Once changes are underway - tell people"

- 1.5 In July 2013, the extensive public engagement with over 1,500 respondents and 12 workshops and discussion groups, formulated the original vision for Grays. The 2013 vision stated:

Building on its strengths as a Chartered Market Town, Grays will be an exciting, high quality destination for people to live, work, learn, shop and socialise. Reconnected to the River Thames, Grays will support growing resident, student and business communities throughout the day and entertain a diverse and vibrant population through the evening.

Cafés, bars, restaurants, shops and markets will combine with culture, entertainment and events in unique venues to provide a safe and attractive place for communities to meet and businesses to thrive.

- 1.6 The vision sought to revitalise the town centre by:

- Building a local economy based on retail and leisure, entertainment, residential and commercial development;
- Making it easier to travel in to and move around the town centre;
- Enhancing the quality of the public realm; and
- Supporting communities.

- 1.7 This vision has been reflected in subsequent policy documents such as the 2016 Gays Town Centre Framework where strong support was shown for the initiatives suggested. This was tested again in 2020 as part of the TIP engagement to see whether it still resonated. The vision outlined earlier updates this based on the contemporary requirements of the local community.

- 1.8 Since the adoption of the 2013 vision, Grays has seen a number of significant developments including the opening of the South Essex College campus in the town centre, new housing and a new community centre on Seabrooke Rise, the refurbishment of the former Magistrates Court to create small business accommodation, a package of schemes to improve accessibility in to and around the town centre, dedicated town centre management and changes to licenses that allow more frequent and more varied market.

- 1.9 These projects have been encapsulated in a development framework which provided the context for their delivery (see below). Importantly, the interventions defined in this TIP also align with this document in terms enhancing economic diversity and to define an alternative offer in Grays that is based on better connectivity with the community actively benefiting from a green and riverside setting.

2017: Grays Town Centre Framework (Refresh)

- 1.10 The framework identifies a range of opportunities to increase the prosperity and attractiveness of the town centre. The consultation consisted of:
- 300 respondents to the 2013 consultation (on the Grays vision) were contacted to check whether the principles and the adopted vision for Grays remained relevant;
 - Online information and questionnaire using the Council's consultation portal some 8,000 registered users;
 - A roving exhibition located at Grays Library, Civic Offices, Grays Shopping Centre and South Essex College;
 - Discussion with the Grays Town Partnership¹, Grays Programme Board, Network Rail, C2C and South Essex College; and
 - A workshop with a range of key stakeholders.
- 1.11 Respondents confirmed that the broad principles of the framework remained valid and appropriate, but they did take the opportunity to raise a number of specific issues including the view that there is a need to address car parking, safety, cleanliness, the need to clean up and make better use of the **riverfront** including provision of moorings and providing access to the then proposed 'Paramount Studios²' on the Swanscombe Peninsula in Kent.
- 1.12 Respondents were asked about their level of support for key projects proposed in the Framework. Support was strong for:
- **Aspirations for a pier:** 75% supported or strongly supported the proposal;
 - Re-provision of the theatre at the **riverfront:** 65% support or strongly supported the proposal;
 - **Removal of the one way system:** 69% support or strongly supported this; and,
 - **Underpass:** 72% support or strongly supported the proposals.
- 1.13 Responses to the survey showed strong support for the overall approach set out in the framework. This was also reflected in the feedback received at the stakeholder workshop. Key points raised included:
- Design of the **riverside** needs to properly reflect the needs of the yacht club for car parking, land area, access for crane to move large boats. A pier could reduce the number of moorings available to the club. These are detailed issues that will need to be fully addressed as the ideas for the riverside area are developed in more detail;
 - Need to **improve the bus station** and the link between the bus station and the rail station; and
 - Need to ensure sufficient accessible parking.
- 1.14 The interventions defined in this TIP reflect the local community's desire to rebuild Grays connection with its riverside and more permeability across the centre.

2019: Thurrock's Local Plan Consultation Issues & Options (Stage 2) Consultation

- 1.15 This consultation ran from December 2018 to March 2019 as part of the preparation for the Council's new Local Plan (setting out the amount and location of new development across the Borough in the period up to 2037/38). The consultation sought views on how Thurrock should develop and grow in the future and where, in broad terms, new development should be located to meet identified needs.

¹ Grass roots community interest and support group formed from existing local businesses.

² Now known as the 'London Resort' <https://londonresort.info/>



Source: Thurrock's Local Plan Consultation Issues & Options (Stage 2) Consultation

- 1.16 On Grays, the responses from the 'Your Place, Your Voice' (YPYV) sessions highlighted, inter alia, the following:
- Opportunity for **river taxis**;
 - Incubator spaces for start-ups needed;
 - Empty shops are an issue;
 - Opportunity for a **night-time economy** with more leisure and entertainment;
 - **More professional / highly skilled jobs** and **creative industries** needed;
 - Congestion and parking are issues, particularly near schools;
 - Tech education required (web design, video editing, social media);
 - **Bus service improvements** needed;
 - Opportunity here for a new community sport / leisure facility to serve as home for Grays Athletics;
 - **Air quality** is an issue;
 - More facilities for young people are needed;
 - Town centre needs a wider variety of shops and a farmer's market; and
 - Orsett Hospital should be expanded, not closed.
- 1.17 The YPYV consultation highlighted the diversity needed for Grays to flourish in the future. Connectivity, entrepreneurship and education emerge as strong themes led by a desire to make more beneficial connection and use of the riverside.



2020: Grays Underpass, Design Guide and Project Bank

- 1.18 The principal objective of the consultation³ was to measure the level of support for a number of Town Centre proposals being developed, or proposed, as part of the regeneration programme for Grays. The Project Bank arose from the town centre framework providing more detail and a high level project brief for each project or, where relevant, groupings of projects. This represented a bank of future ideas for regeneration of Grays.
- 1.19 Hosted by the Council between February and March 2020, the Council invited residents that live, visit, work and learn in Grays as well as local businesses and community groups, to share their views on potential projects. The consultation was advertised via leaflets, posters and social media.
- 1.20 There were 20 projects published via the online consultation portal, including the initial design concepts for Grays underpass. The key projects relevant to this submission were:
- Grays High Street and Shopping Centre;
 - Grays Beach and park and Kilverts Field; and
 - Grays Bus Station.
- 1.21 On these, the respondents suggested the following improvements:

³ Through staffed exhibitions

Grays High Street and Shopping Centre	Grays Beach and park and Kilverts Field	Grays Bus Station
<ul style="list-style-type: none"> • create a better offer that caters for needs of everyone, • create a social area with bars, restaurants and cafes and family friendly places in the town centre e.g. soft play, • better utilise the old cinema building, as e.g. a leisure complex or a youth hub which would bring better social value rather than a pub, • provide 'mini parks' where people can sit, take a break, have a chat, drink a cup of coffee, read a book, • introduce more greenery; trees and flowers. • cycle access and cycle storage in the town centre, especially at the station, • more policing in the town, security in the centre is the priority, • a credible night time economy plan. 	<ul style="list-style-type: none"> • by involving Thurrock yacht club, • by expanding Grays Marina, • creation of a heritage trail, • food and drink offer on the river, • outdoor exercise area in the summer, like yoga or boot camp, • better lighting along the river • introduce better cycling routes, • adding CCTV to ensure safety, • integration and acknowledgement of the natural environment and wildlife. • this project would attract more visitors and therefore more parking would be required, • wheelchair / accessible access, 	<ul style="list-style-type: none"> • wide pavements to ensure those walking and those waiting for buses are able to do so without issues, • better signage or wayfinding information, • improved shelters DDA accessible, better CCTV • focus not only on buses in Thurrock but also cycling, • all train stations in Thurrock should have a huge amount of secure and safe cycle storage to encourage commuters to cycle to stations.

1.22 The consultation reaffirmed the need for green and socialising space; boosting the leisure economy and better connectivity and security.

2020: Advisory Group Workshop

1.23 Despite the constraints posed by the Covid-19 lockdown, a workshop with local businesses and community groups that form part of the Advisory Group (AG) was undertaken for the Town Deal process. This was an additional sounding board and a forum for on-going engagement.

1.24 The key Strengths, Weaknesses, Opportunities, Threats (SWOT's) identified by the AG during the workshop were:

<p>Strengths</p> <ul style="list-style-type: none"> • Close to Riverside
<p>Weaknesses</p> <ul style="list-style-type: none"> • Poor perception of town centre by local community • Town centre looks tired • Levels of deprivation and poverty around the town centre
<p>Opportunities</p> <ul style="list-style-type: none"> • Labour pool • Marine sector development • Link riverside to town centre • Enhance green areas and make them environmental rich • Create intergenerational spaces • Riverside with green spaces • Promote active by design to tackle health issues • Part of Thames Estuary 2100 project
<p>Threats</p> <ul style="list-style-type: none"> • Future plans for Lakeside (town centre retail and leisure expansion) • Level of deprivation and poverty in town centre

1.25 The AG also made key statements on Grays future. These were :

Urban Regeneration

“everything looks tired, everything looks uncared for...there is a backdrop here of perception that is going to be a really key thing to reverse”

“lack of diversity in the shopping experience”

“Grays town centre decline due to Lakeside”

“perception of community towards town centre is poor”

“enhance green areas and make environmentally rich”

“intergenerational and play spaces where communities can interact”

“design ‘bumping’ (socialising) spaces”

“Few times I’ve been there, the riverside is quite bland and concrete, could be soften up to make greener”

Skills and Enterprise Infrastructure

“opportunity for marine sector from deck hand to captain”

“strength of labour pool to create employment and supply chain”

“hub for learning and skills”

“reskilling for a post-Covid world”

“adult skills front and centre”

Connectivity

“Grays riverfront: Pier in this location close to the High Street is important”

“link culture and heritage”

“include superfast 5G”

“Grays represents opportunity to holistically counter local health challenges”

“lots of opportunity to get people active”

“active by design”

2020 -2021: Graystownsfund.co.uk and #MyTown inputs

- 1.26 A dedicated website - (<http://graystownsfund.co.uk/>) - was launched in November 2020. Members of the Town Board actively participated and were responsible for the design and content of the website. This website describes the main aims and objectives of the Town Deal Fund, the structure of the Board and a list of the proposed projects/interventions. The website will be a forum for continued engagement as part of this submission and for the future as business cases evolve for individual interventions. The main findings were:

1.27 Role of the Town Centre

- a. Grays Town Centre continues to have an important role to play in people's lives. Almost 40% of respondents visit the town centre at least several times a week, with nearly 14% visiting every day. 35% visit once a week or a few times a month.
- b. The main reasons identified for those visits were for the shops, and particularly specific outlets, and banks. These score highly amongst the 'Best things about Grays'. Work and public transport were also important reasons, the latter presumably reflecting the use of the train station to get to London and the role of the bus terminus acting as an interchange between routes. Respondents also identify a range of different social and leisure activities. These include for example restaurant/cafe/public house, Thameside complex, which also score relatively highly as the "Best things about Grays". Socialising, recreation and leisure such as walks, cycles and the gym were also relatively important. Individually many of these socialising, leisure and recreation activities received relatively low scores but cumulatively they add up to a significant proportion of reasons given for visits by respondents and feature high in the "Best things about Grays, with food and drink outlets third, the riverfront fourth and the Thameside complex with the Theatre, Library and museum fifth.
- c. While shopping is the main reason for visiting the town centre, the majority of respondents consider what's available to be average with a large proportion identifying this as poor or very poor.
- d. Leisure activities are considered to be poor or very poor by a large majority of respondents and the selection of leisure facilities is considered average or poor by most respondents.
- e. The range of public events is considered by a large majority to be poor or very poor. The quality of events that do take place are also rated as poor or very poor by the majority, although a larger proportion of respondents rate this as average.
- f. A notable response to Question 6 in the online survey where respondents were asked to list the three best things about Grays, 32 respondents skipped the question and 35 stated 'nothing' and a further 7 identified the best thing as being it has potential. In combination these were the second most common response.
- g. When asked about the improvements needed in the town centre, the online survey shows a strong opinion that the town centre should be a place for events and activities, arts, culture and entertainment, places to eat and drink and to socialise. Where additional comment is added it normally emphasises the need for quality and variety. There is also a clear strand in this that emphasises the importance of family activities, and activities for children and young people. These opinions are also clear in the responses via #MyTowns and the social media responses.
- h. When asked about the things that would improve Grays Town Centre, 'Making better use of the riverfront' is specifically mentioned by relatively few respondents to the online survey (maximum of 22 in any of the samples). This is in marked contrast with the high levels of support for improvements to the riverside in response to question 2 as a means of encouraging more visits referred to at 4a below. One explanation maybe in the high level response relating to events and activities; the Grays Beach area is the only space of sufficient size to accommodate many of these.
- i. During the day time, responses to question 7 of the online survey, what to put in place to improve the town centre, improved quality and choice of shops, restaurants and cafes were favoured in most responses. There was a clear emphasis on quality and variety. Some respondents wanted to see High Street names' return and some respondents emphasised the importance of affordability.

1.28 The Town Centre Environment

- a. There were positive comments about the town centre environment; that it is accessible, convenient and compact.
- b. However when asked about the improvements needed in the town centre the main issues identified were about addressing anti-social behaviour, the need for more policing, and the need to improve the sense of safety. Many responses also refer to the need for improved lighting. The importance of these issues is also very clear in the responses received in #MyTowns and social media responses.

1.29 Getting to the town centre and travelling around it

- a. Most people visit by car and a third walk in to the town centre. Traffic congestion has in the past been a problem but most respondents rated 'getting to and around the town centre' as average to good. Public transport is rated by a large majority as average to good.

- b. Facilities for people with impaired mobility are considered to be average by the majority of respondents and a large proportion consider facilities to be poor.
- c. There was a mixed response on parking. Generally the level of responses on this were relatively low in number but ranged from being amongst the 'Three best Things about Grays to a need for better or cheaper or free parking.

1.30 What would encourage more visits/use of the town centre?

- a. Grays Riverside and public open spaces; In the online survey, improvements to Grays Beach and Riverside had the highest proportion respondents identifying improvements here as being very likely (47%) to encourage with a further 39% saying that this is likely to do so. General improvements to open space provision also received high proportions of respondents identifying this a way to increase the likelihood of visits.
- b. In the online survey facilities for community groups, events in and around the town centre, and facilities for young people all received high proportions of responses identifying these as likely or very likely to encourage more visitors to the town centre.

1.31 Conclusions

1. There was a clear response identifying antisocial behaviour, and the need for more policing and the need to address safety issues. The experience of crime and the perception of crime and that a place is unsafe are clearly critical issues to address to enable people to feel safe when visiting the town centre. Much of this is beyond the scope of the Towns Fund but the Board will have a role in supporting initiatives by other organisations to address these issues and ensuring design of its own projects takes account of Secure by Design principles.
2. There was a strong sense that people do see unrealised potential for Grays town centre based particularly around the following roles
 - a. A place to relax and have fun: Events, activities, places to eat, drink and be entertained with an emphasis on families, children and young people.
 - b. A place for the community to meet up
 - c. A shopping experience based on variety and quality. While high street brands are mentioned there is an emphasis on local and specialist outlets.

Graystownsfund.co.uk: Top 3 Suggested Improvements:

Daytime	Evening	Weekend & Bank Holiday
Tackling antisocial behaviour, Police, Security (39%)	Tackling antisocial behaviour, Police, Security (36%)	Events and activities (33%)
Better Quality / Variety Shops (20%)	Quality Food & Drink Offer Particularly for Families (20%)	Tackling antisocial behaviour, Police, Security (16%)
Quality of Food & Drink Offer, Cater for Family Provision (9%)	Arts, culture and entertainment (11%)	Provision of Leisure Facilities (9%)

Graystownsfund.co.uk: Social Media Engagement: Frequently Suggested Improvements

Tackling Antisocial Behaviour, Police, Security (23%)

Better Use and Provision at Riverfront (14%)

Better connectivity, pedestrian and cycle access (14%)

Keep centre clean and tidy (14%)

2020-21: Grays Towns Fund: Response to Social Media Campaign

Grays #MyTown Campaign

1.32 The government launched the online #MyTown campaign when the Town Deal Fund was formally launched for all 101 centres selected across England. As of 23rd February 2021 the Grays #MyTown page (<https://mytown.communities.gov.uk/town/grays/>) received 32 suggestions and 47 additional comments about Grays. Their key messages from the site included:

“I would like proper cycle infrastructure and secure (indoor) cycle storage to encourage use of cycling to visit the town centre.”

“We need to bring in the right sort of people to spend money... A restaurant by the yacht club. A clipper boat to London. A victorian cafe at beach like the original.....”

“Riverside Facilities.. Due to our fantastic location investment in this area would give a boost to the area... A couple of restaurants would bring in people and income. Its a tough call but the area by the yacht club and the wharf is a suggestion.”

“Would be nice a centre designed for children where the little one could practice gymnastics, or learn how to play an instrument under qualified instructors..”

“The town centre needs more spaces to socialise. Restaurants, bars and coffee shops would attract more people. More activity spaces especially for young families. Use of the water front and other end of the town centre down towards the wharf area..”

“Increase footfall.”

“Invest In community centres.”

“Better facilities more shops and more things to do for the community.”

“More greenery on Grays High Street; replacing paving... It's part of the reason Grays is looking a bit tired.”

“Local cultural centre development - investing in a more exciting local cultural offer (gallery and/or theatre) could help bring people into the town centre and drive local growth. Whilst London is easily accessible by train, I don't feel the current local provision is adequate. It could help build a sense of local cohesive community, which I feel is in need of development.”

“there isn't anywhere in grays for mothers and babies, there are a few parks in Grays but more suitable for older children..”

“Regeneration led by Creativity & Culture.”

“Thurrock and Grays has changed and is still changing. The Town Centre has not kept up with the times. Relying on retail to bring people in to the town centre is not going to work and we need to think out side the box”

“People want to more than a cloned high street found anywhere else in the U.K. ... People want experiences and memories, so yeh high street needs to be a place for celebrating and exploring creativity, culture and heritage with festivals, events and a night time economy - no one of which are happening right now”

“Use colour, light and art to make a statement, allow residents to take ownership and to be proud of where they live!”

Summary of responses to Grays #MyTown Campaign (as at 23rd of February 2021)

1.33 **Make more of the riverfront** - The riverfront is perceived as a particularly important but poorly utilised part of the town centre. Respondents specifically refer to the importance of the riverfront and Grays Beach Park and the need to improve connections between the town centre and its riverfront. Specific suggestions included;

- A range of outdoor sports and leisure facilities
- Need for facilities such as public toilets and staffed car parking (links to perceptions of crime)
- Attractions and facilities for families, children and teenagers
- Restaurants and cafes
- A clipper boat to London
- Public transport to the area

1.34 **Provide more and better facilities** - The town centre is perceived as lacking attractions and facilities and choices of shops and things to do and being out-dated. Some 51 responses refer specifically to new or improved facilities that are considered necessary. It should be noted that while these responses did not specifically refer to the riverfront that some would apply to the riverfront. Responses including:

- Community facilities;
 - Youth groups
 - Centre for children to learn things like musical instrument or gymnastics and play
 - Spaces for the elderly
 - Community based training and mentoring
 - Community Centre
 - Peer support for families
 - Community cafe
- Retail and places to eat and drink
 - Local and specialist shops.
 - Opportunities for youth enterprise and for independent traders.
 - Need to bring back branded high street shops such as M&S
 - More and better markets
 - More places to eat out, serving good quality food
- Culture and entertainment
 - Improve the theatre
 - Cinema
 - Music and arts
 - Places to go out in the evening
 - Public and community arts projects
 - Cultural Centre
- Health and sports
 - Expanded NHS services to support growing population
 - Walk in GP services
 - A range of sports facilities (suggestions included football pitches, gyms, ice rink, yoga studio, climbing wall)
- Green spaces
 - Improve green spaces
 - Improve accessibility of green spaces
 - Facilities e.g. community café in Grays town park
- Other
 - Toilets
 - Drinking fountains

- Dew facility to cool off in the summer
- Free parking
- Cycle lanes and parking facilities
- Improve public realm

1.35 **Tidy the town up and make it more inviting** - The town centre is perceived as being uninviting. In part this is due to a lack of attractions but 29 respondents refer specifically to the quality and appearance of the town centre, comments included;

- Remove eyesores
- Tidy back alley areas
- Rebuild shopping centre
- Do something with vacant buildings
- Renew and improve hard and soft landscaping
- Repair pot holes and improve pedestrian crossings of roads
- More soft landscaping and natural areas
- Reduce traffic congestion and air pollution
- Stop continuous roadworks

1.36 **Make the town a safe place to be** - A further issue that causes the town to be perceived as uninviting is the perception of crime; 18 respondents specifically refer to this including:

- Threat from others in the town centre
- Poor lighting
- Need more and better CCTV
- Crime
- Lack of police presence
- Need to deal with antisocial behaviour arising due to alcohol and drug consumption
- Need programmes for drug and alcohol rehabilitation.

1.37 **General comments and suggestions** - Some 13 responses included general comments including:

- Need another board for individuals that live and work in the area.
- Keep old buildings
- Get decent shops
- You keep ask, get on with it
- Jobs for local people
- Affordable housing
- Need more schools and hospitals
- Stop building houses, it causes congestion
- Need funding for schools and for children with insufficient food to eat.
- Overnight parking for motorhomes

