

**BASILDON RETAIL AND  
LEISURE NEEDS STUDY**

**FINAL REPORT  
VOLUME 3:  
HEALTHCHECKS**

Prepared on behalf for:

**Basildon Borough  
Council**

February 2024

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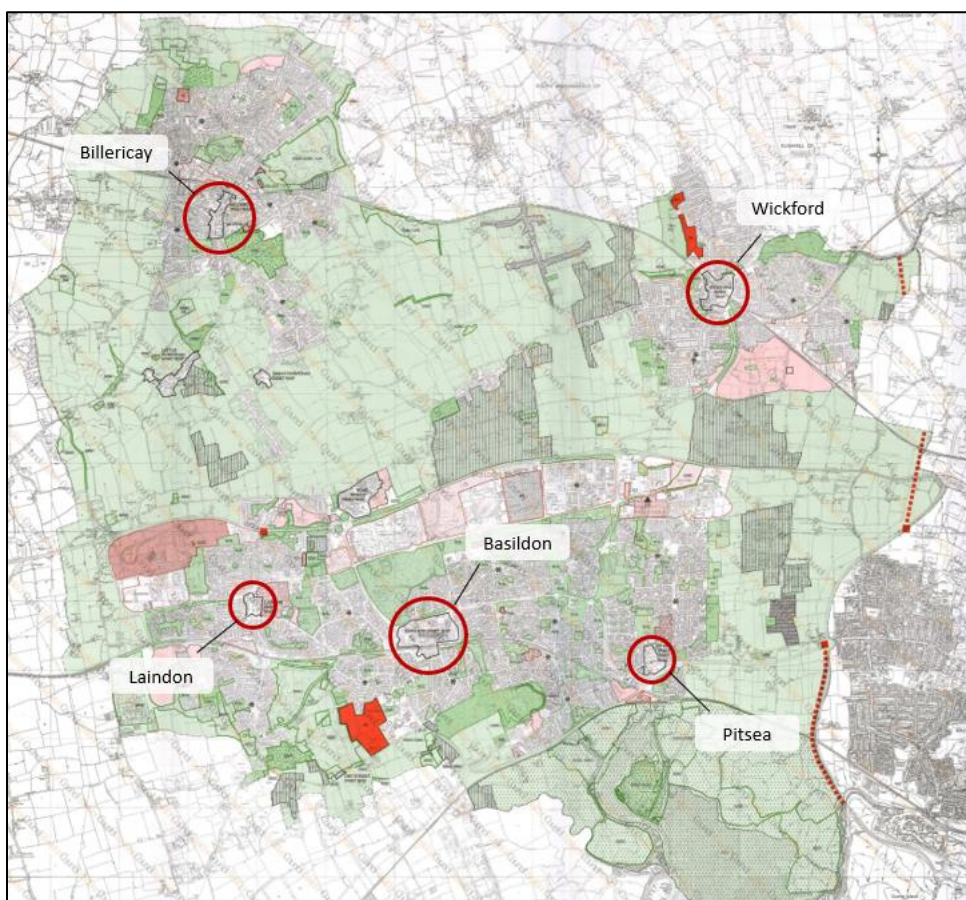
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# 1. INTRODUCTION

1.1. This appendix provides the findings of qualitative and quantitative assessments of the main town centres located within the Basildon Borough Council: Basildon; Billericay; Laindon; Pitsea and Wickford. The Health Check also includes the findings of Household Surveys (HHS) and key stakeholder feedback obtained through consultation. Audits that cover the key out-of-town retail and leisure areas are also provided.

**Figure 1.1: Basildon Borough Boundary and Town Centres**



Source: Basildon District Local Plan 1998 – Proposals Map

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

- Diversity of uses
- Proportion of vacant street level property
- Commercial rents yields on non-domestic property

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

- 1.3. The **Diversity of Uses** is informed by survey data provided by Experian Goad and surveys conducted by LSH and examines the current number of outlets and quantum of floorspace for each commercial category. These are Convenience and Comparison Retail, Leisure Services<sup>1</sup>, Retail Services<sup>2</sup> and Financial & Business Services. Vacancies are also discussed separately.
- 1.4. **Pedestrian Flows** uses Footfall data from Datscha who harvest data from over 10 million mobile devices. All data is fully anonymised and GDPR compliant. Data is collected daily and Datscha can identify footfall levels at different times of the day. These are defined as Morning (5am-11am); Lunch (11am-2pm); Afternoon (2pm-5pm); Evening (5pm-9pm); and Night (9pm-5am). The heat map included in the report also indicates concentrations of footfall, green indicating lower levels and orange / red higher concentrations.
- 1.5. **Retailer representation** is informed by the site visit as well as the retailer requirements which are obtained from the **Requirement List** where commercial property requirements can be viewed.
- 1.6. **Commercial property indicators** are informed using a variety of sources, including PROMIS, Co-Star, and speaking to agents to gather on-the-ground information on current market trends for rents and yields.
- 1.7. For **Crime and Safety**, a postcode within each town centre is chosen as a central point with a ¼ mile radius created to gather crime data within that area for a range of crimes. The crime data, obtained from UK Crime Stats, can be compared across recent years to show any trends. A heatmap can also be generated to highlight where the occurrence of crimes in an area are concentrated.

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<sup>1</sup> Leisure service includes: food and drink outlets, games of chance venues (e.g. casinos, bingo halls, gambling arcades, and betting shops), sports and leisure facilities, night clubs, cinemas, theatres, and concert halls, and hotel/guesthouse accommodation.

<sup>2</sup> Retail service includes: health and beauty services (beauty salons, tattoo parlour, etc.), post offices, dry cleaners and laundrettes, travel agents, photo processing outlets and studios, and other personal services.

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- 1.8. The **Customer Perception** of the town centre was obtained from household telephone interview surveys (HTIS) conducted in March and April 2023 in the defined catchment of Basildon Borough Council and included questions to assess shopping habits. The interview also asked questions to gauge the respondent's perception of the town with regards to what they like about the town centre, what they think could improve the town centre and what would encourage them to visit more in the evening.
  - 1.9. The KPIs help to identify the critical Strengths and Weaknesses of each centre; the Opportunities for future sustainable development and any current and potential Threats to their overall vitality and vitality, summarised in the main report.
  - 1.10. The findings of the health check assessments are set out in the following proformas.

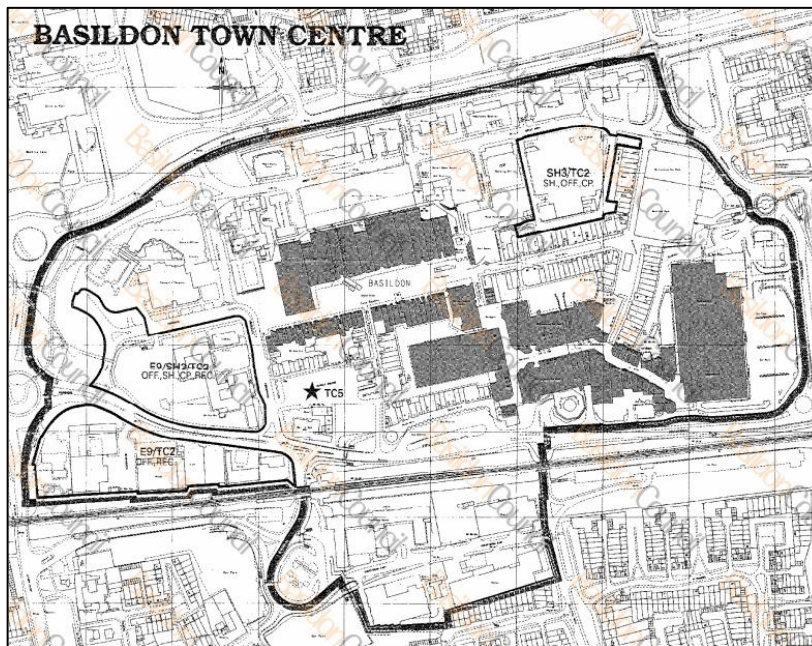
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## 2. BASILDON TOWN CENTRE HEALTH CHECK

### Overview

- 2.1 Basildon is the main town in the Basildon Borough, located almost half way between Pitsea to the east and Laindon to the west. The town centre is well connected with the A127 and A1321 to the north east and the A13 and A176 to the south and east.
- 2.2 The Basildon Railway Station is on the southern edge of the town centre boundary, located along the London to Shoeburyness railway line, giving access to London (Fenchurch Street) in just over 30 minutes.
- 2.3 Eastgate and Westgate Shopping centres make up a large part of the retail provision along the southern side of the town centre.
- 2.4 Eastgate was built in two phases in the 1980s and underwent significant refurbishment in 2007. In 2014, plans were announced for further redevelopment of the upper levels into a 15-screen cinema, but progress was cancelled as the Council announced their own plans for a cinema complex in the town centre. The pandemic greatly affected the shopping centre, which entered into administration with high-profile shops such as Topshop, Debenhams and Build a Bear closing.
- 2.5 Westgate Shopping Centre is a more recent development completed in 1999 and is an open-air development of 10 large format units with key stores including Home Bargains and JD Sports.
- 2.6 Eastgate Centre was recently sold in early 2023 and Westgate is currently on the market.
- 2.7 The town centre had experienced significant retail and leisure decline even before the pandemic, largely as a direct consequence of the out-of-town Lakeside Centre and Festival Leisure Park, resulting in a significant number of vacant units and floorspace within the town centre. Consequently, this has led to an overall decline in the quality of the town centre environment.
- 2.8 Government investment of over £4 million for Basildon was confirmed in 2023. The money was awarded from the Cultural Development Fund and is to be used for facilities relating to the creative and digital sectors with a focus on making use of empty properties within the area.
- 2.9 The map below, taken from the Basildon District Local Plan 1998 – Town Centre Inset Maps, outlines Basildon's town centre boundary.

Figure 2.1: Basildon Town Centre Boundary



Source: Basildon District Local Plan 1998 – Town Centre Inset Map

### Diversity of Uses

- 2.10 The table below is based on the Category Goad report by Experian which were informed by survey data undertaken in March 2022. It shows that Basildon town centre has a total of 302 outlets and an overall quantum of 115,255 sqm of floorspace.
- 2.11 117 of these outlets are represented by retail (comparison retail having 93 and convenience retail having 24 outlets) and just over 50,000 sqm of floorspace is also occupied solely by retail (comparison retail occupying around 36,000 sqm and convenience around 15,000 sqm).
- 2.12 Retail services have 35 outlets, taking approximately 5,500 sqm in floorspace. This is slightly below the UK average. There are a total of 47 Leisure Service outlets which is around 15% of the overall floorspace in the centre, however this is much lower than the UK average of around 26%.
- 2.13 Financial and Business Services have a total of 27 outlets and approximately 6,000 sqm which as a proportion of total number of outlets and total floorspace, broadly resembles the UK averages.



**Table 2.1: No. of Units in Basildon Town Centre**

	No. Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Basildon	UK Average		Basildon	UK Average
Comparison Retail	93	30.79%	26.87%	36,185	31.40%	30.13%
Convenience Retail	24	7.95%	9.27%	14,827	12.86%	15.47%
Retail Services	35	11.59%	15.75%	5,491	4.76%	7.23%
Leisure Services	47	15.56%	25.31%	17,605	15.27%	26.19%
Financial & Business Service	27	8.94%	8.75%	6,327	5.49%	6.60%
Vacant	76	25.17%	13.85%	34,820	30.21%	13.79%
<b>Total</b>	<b>302</b>	<b>100.00%</b>	<b>99.80%</b>	<b>115,255</b>	<b>100.00%</b>	<b>99.41%</b>

Source: Experian Goad Category Report – March 2022

- 2.14 The table below breaks down the Leisure Service sector into the food and beverage (F&B) offer within the centre. There are a total of 29 F&B related outlets which represents less than 10% of the overall outlets, which is less than half that of the UK average (9.6% compared to 20.78%).
- 2.15 F&B floorspace only occupies 5,277 sqm which is 4.58% of total floorspace and significantly lower than the UK of 15.83%. Cafes have the highest number of outlets (11) and restaurants have the largest quantum of floorspace (1,607 sqm), although both are still below the UK averages.

**Table 2.2: Food & Beverage Units and Floorspace**

	No. Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Basildon	UK Average		Basildon	UK Average
Bars & Wine Bars	2	0.66%	2.24%	269	0.23%	2.36%
Cafes	11	3.64%	5.00%	1,301	1.13%	2.83%
Fast Food & Take-aways	6	1.99%	6.05%	1,171	1.02%	3.03%
Public Houses	2	0.66%	2.60%	929	0.81%	3.45%
Restaurants	8	2.65%	4.89%	1,607	1.39%	4.16%
<b>Total</b>	<b>29</b>	<b>9.60%</b>	<b>20.78%</b>	<b>5,277</b>	<b>4.58%</b>	<b>15.83%</b>

Source: Experian Goad Category Report – March 2022

## Vacancies

- 2.16 There are a total of 76 vacant outlets in the town centre which is just over a quarter of all outlets (25.17%). This percentage increases to just over 30% in relation to vacant floorspace. Both vacant outlets and vacant floorspace as a proportion of the total centre are significantly above the UK average, with the proportion of vacant floorspace in the town centre being over double that of the UK average.

- 2.17 The figure below, taken from Goad and is based on a survey dated 18<sup>th</sup> March 2022, visually represents how vacancies are dispersed through the town centre. It shows that not only is there a spread of vacancies right across the centre, but that several of them are prominent and large, the former Debenhams in the middle of the centre for example.
- 2.18 The former Debenhams unit is subject to a Change of Use application, with a submission proposing a hospital and clinic currently under review.
- 2.19 In addition to the existing large vacant units, Wilko ceased trading nationally in September 2023 and so the large unit to the west of Basildon Town Centre is now vacant. The closure of a store this size will have a significant impact on the total vacant floorspace within the centre. There has been an agreement that will see 71 of the Wilko stores become new Poundland outlets, however the Basildon store is not included within this.
- 2.20 The site known as Market Square has been the subject of a redevelopment proposal which is yet to commence. However, in advance of the scheme progressing the owners of the site have sought vacant possession of all commercial and non-commercial units.

**Figure 2.2: Vacancies in Basildon Town Centre**



Source: Experian Goad (June 2023)

- 2.21 Local Data Company (LDC) also monitor vacancy rates and show figures dating back to 2017. The area covered by LDC does not match that of Goad and so they are not directly comparable.
- 2.22 LDC's vacancy rates show a worsening picture, with rates of 20% in 2017, climbing to 24.5% in 2020, up to 25.9% in 2023. The peak over this period was in 2022 where vacancy rates stood at 28.6%.

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## Multiple and Independent Representation

- 2.23 There are a total of 116 national multiples in Basildon town centre as identified by Goad which represents just over half of all occupied units. The table below shows that half of these are from the Comparison Retail sector with 58 national multiple outlets.
- 2.24 This figure (58) means that in the Comparison Retail sector, national multiples occupy over 62% of all comparison retail outlets. Therefore, Comparison has the highest proportion of national multiples compared to the other sectors.
- 2.25 National multiples include but are not limited to B&M, Boots, Primark, ASDA, Sports Direct, Iceland, Dreams and HSBC. Overall, there is a good range of national brands offering a fair mix of services and goods.
- 2.26 Independent outlets commonly come in the form of food and beverage operators such as Cosy Café, Miracles Bistro and Canton House with a notable presence of vaping shops and beauty related services making up the independent mix.

**Table 2.3: National Multiples in Basildon Town Centre**

	No. of Outlets	% of Total
Comparison Retail	58	50%
Convenience Retail	9	7.8%
Retail Service	12	10.3%
Leisure services	23	19.8%
Financial & Business Service	14	12.1%
Total multiples	116	100%

Source: Experian Goad Category Report – March 2022

## Street Markets

- 2.27 Basildon Market began operating in 1958 and has been a hub of the community ever since. Previously located in Market Square, it can now be found in St Martin's Square by the former M&S unit.
- 2.28 The market is open every Tuesday, Thursday, Friday and Saturday. Over 40 traders operate from the permanent market units selling a variety of goods including clothing, fruit & veg and jewellery as well as offering a range of services including barbers & hairdressers, beauty services and tailoring.
- 2.29 Food and beverage units can also be found within the market with a range of cuisines to choose from along with accompanying seating.

**Figure 2.3: Basildon Market**



Source: LSH Site Visit

### Retailer Requirements

2.30 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 2.4: Retailer Requirements for Basildon Town Centre**

Recorded Date	Operator	Sector	Min Sqm	Max Sqm
July-23	Sleep.8	Comparison	370	930
June-23	German Doner Kebab	Leisure	120	230
May-23	Lidl	Convenience	1,670	2,420
May-23	KFC	Leisure	110	230
Apr-23	NRG Gyms	Leisure	930	3,720
Apr-23	Bodycare	Comparison	190	280
Apr-23	Oodles Noodles	Leisure	65	110
Feb-23	Swim!	Leisure	420	560
Jan-23	Pets Corner	Comparison	110	230
Jan-23	The Range	Comparison	2,320	3,720
Jan-23	Aldi	Convenience	1,670	2,040
Oct-22	Pizza Hut Delivery	Leisure	60	200
Sep-22	Calendar Club	Comparison	70	190
Sep-22	Ready Burger	Leisure	230	280
July-22	Fireaway Pizza	Leisure	70	190

March-22	Machine Mart	Comparison	140	740
Feb-22	Travelodge	Leisure	930	3,720
			<b>9,705</b>	<b>19,790</b>

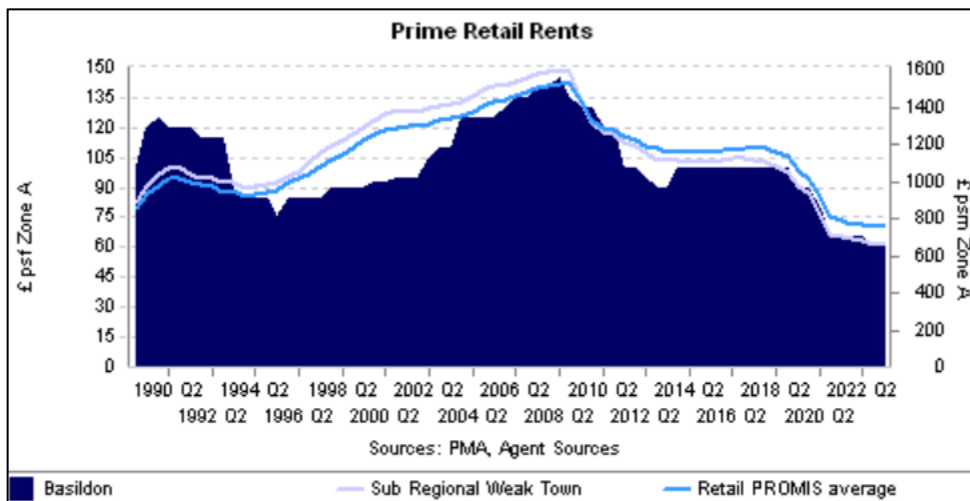
Source: The Requirement List, July 2023

- 2.31 As of July 2023, a review of published operator requirements identified 17 recorded requirements from retail and leisure operators since February 2022, seeking a combined maximum floorspace of up to 19,790 sqm. However, It should be noted that these are not necessarily operators seeking representation in the town centre but potentially out-of-centre locations and industrial parks (e.g., Sleep.8 and The Range). Furthermore, it is also possible that these operators are not looking for opportunities in Basildon specifically, rather they are looking for opportunities in areas similar to and including Basildon.
- 2.32 It should be noted that independents do not publish their requirements in the same way and so are harder to identify.

### Commercial Rents and Yields

- 2.33 Information from PMA Promis<sup>3</sup> estimates prime rents in Basildon to be around £60 psf Zone A as of mid-2023, which represents a cumulative decline of prime retail rents since late 2017 of around -40% (PROMIS average decline is at -36.3% for the same period).

Figure 2.4: Prime Retail Rents in Basildon



Source: PMA Promis

- 2.34 There is limited availability of transactional evidence to report on the current level of prime retail unit shop yields.

<sup>3</sup> In-house data from Property Market Analysis (PMA) Retail Report for Basildon

## Car Parking

2.35 Basildon has 10 main car parks in and around the centre that have a combined capacity of over 4,500 cars. These car parks are as follows:

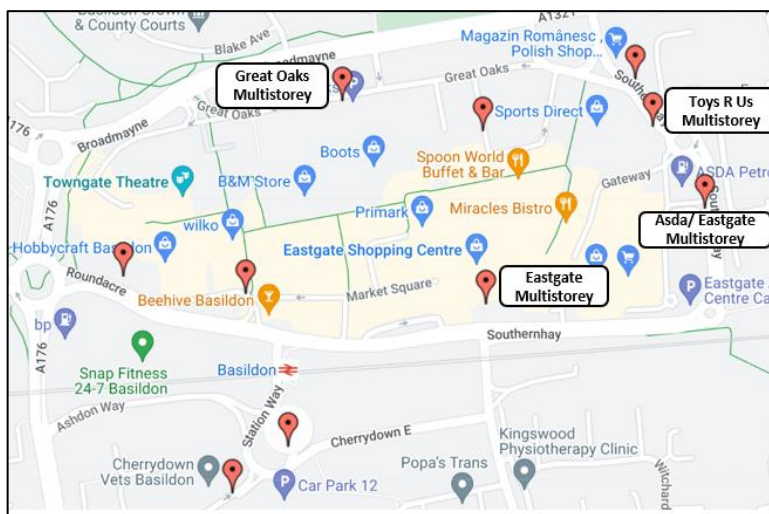
**Table 2.5: Car Parks in Basildon Town Centre**

Car Park Name/ Location	Spaces
Southernhay Surface Car Park	120
Toys R Us Multistorey	670
Asda/Eastgate Multistorey	500
Post Office Surface Car Park	418
Eastgate Multistorey	800
Great Oaks Multistorey	1340
Westgate Shopping Park Multistorey	224
Westgate Shopping Park Surface	207
Basildon Station Short Stay Car Park	80
Basildon Station Long Stay Car Park	300
	4,659

Source: Basildon Council Website

2.36 The figure below outlines the location of each car park, with the largest four (Great Oaks Multistorey, Eastgate Multistorey, Toys R Us Multistorey and Asda/ Eastgate Multistorey) labelled for reference.

**Figure 2.5: Basildon Town Centre Car Park Map**

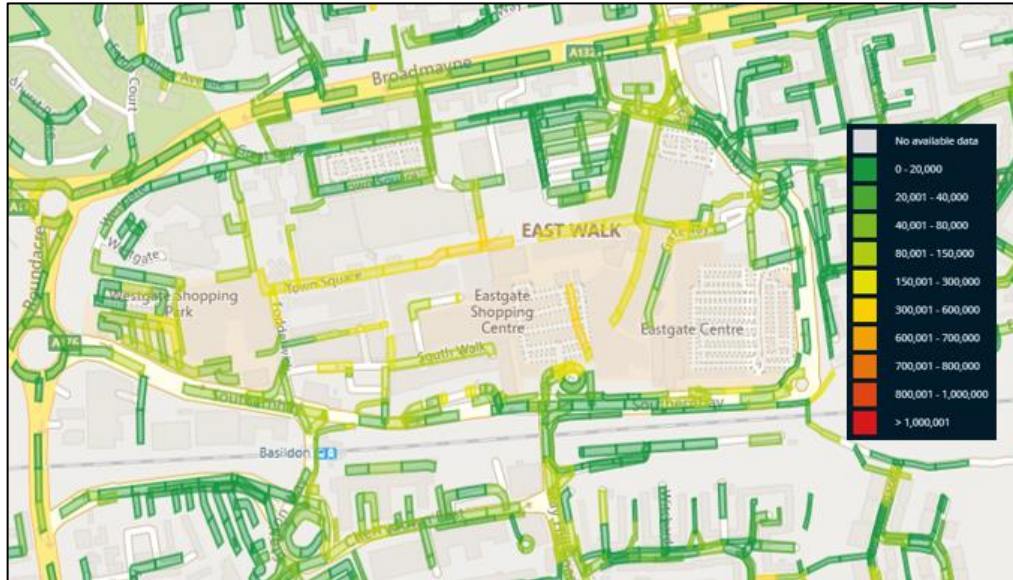


Source: Basildon Council Website

## Pedestrian Flows

2.37 The figure below illustrates the pedestrian heat map for Basildon Town Centre and shows a particular concentration of footfall along Town Square, East Square and East Walk.

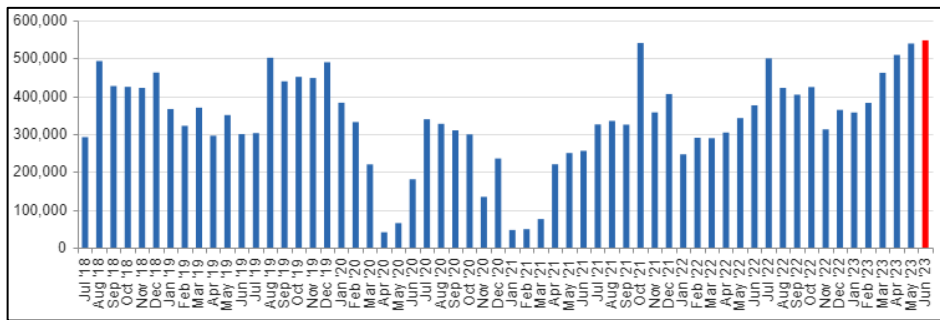
**Figure 2.6: Basildon Town Centre Footfall Heat Map**



Source: Datscha

- 2.38 The busiest section of the town centre, located along East Walk, was sampled to obtain information on how footfall levels have changed between July 2018 and June 2023.
- 2.39 Footfall has remained relatively consistent over this period (with the expected fluctuations through the yearly cycles), with the obvious exception of early 2020 through to mid-2021 where restrictive COVID-19 measures were in place.
- 2.40 A count of 548,000 was recorded for the month of June 2023, making it the busiest month for footfall in the last 5 years. This is an indication that the town centre has bounced back well from the pandemic.
- 2.41 When comparing the five centres within the borough, Basildon Town Centre shows the highest levels of footfall.

**Figure 2.7: Footfall of East Walk, Basildon Town Centre (July 2018 – June 2023)**



Source: Datscha

- 2.42 A Huq footfall report (August 2023) provided to the Council reviewed dwell times in Basildon Town Centre, comparing 2019 to the most recent 12-month period at the time of the report being created. Dwell times can indicate what people are using a town centre for and have been shown to correlate closely with spend.
- 2.43 When comparing the average dwell time of a recent 12-month period to that of 2019, visitors were found to be spending 4% more time in the centre post-pandemic than they were pre-pandemic.

### **Accessibility**

- 2.44 Basildon town centre can be easily accessed from two major roads (the A127 and the A13) via the A176. These connections make it accessible via London, Chelmsford and Southend-on-Sea. There is a strong road network around the town centre which provides good access for those driving. As covered within the car park section, there is a number of car parks within the centre with a large amount of combined parking spaces.
- 2.45 Transportation also comes in the form of railway with Basildon train station located to the southern edge of the town centre. Services run regularly to London and other nearby cities and towns.
- 2.46 A range of bus services can be accessed at the town centre's designated bus and coach station, near to the train station. Services are regular and connect passengers to places such as Stanford-le-Hope, Canvey Island and Chelmsford.
- 2.47 Access to and from the town centre by foot can be challenging due to the busy roads that encompass it. Pedestrian movement around the centre however is safe and convenient. The centre is largely pedestrianised and so there is little need to navigate traffic, curbs, crossings and other obstacles that can typically be found in town centres.



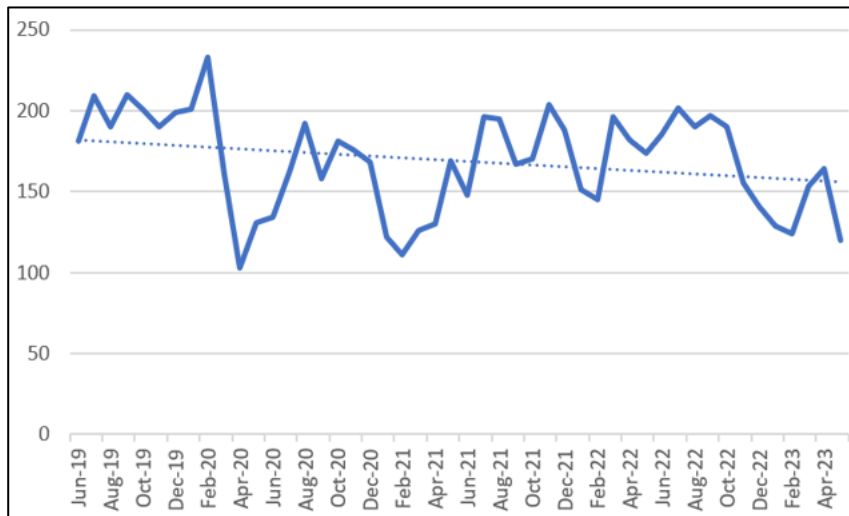
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## Crime and Safety

2.48 A central postcode within Basildon was used to review total crime data within a ¼ mile radius between June 2019 and May 2023. The figure below outlines the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.

2.49 As can be seen, crime rates in Basildon have declined slightly during this time. With monthly rates surpassing 200 in 2019 and 2020 on a few occasions (peaking at 233 in February 2020), rates in 2023 up until May have averaged at 138.

**Figure 2.8: Total Crime Incidences, Basildon, June 2019 – May 2023**

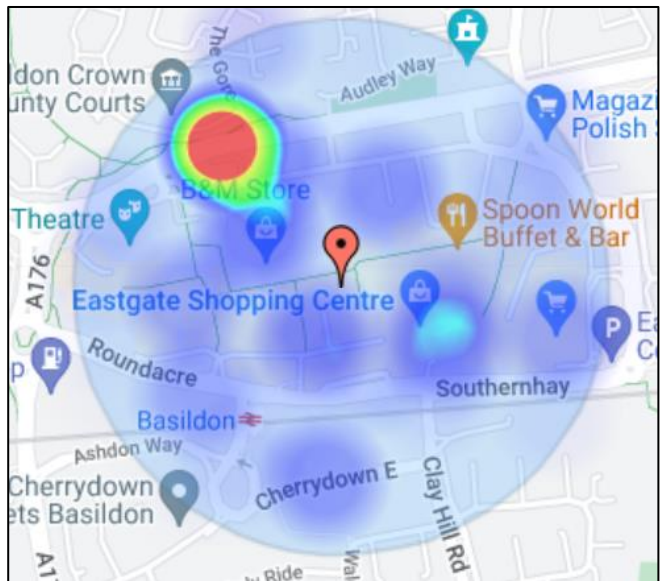


Source: UKCrimeStats

2.50 The figure below shows a heat map representing criminal activity within the same area and for the same period outlined previously. As can be seen, criminal activity has been concentrated to the north of the centre, with some recordings also coming from Eastgate Shopping Centre.

2.51 The top three types of crimes recorded within this area during this period are violence and sexual offences (2,542), anti-social behaviour (1,072) and shoplifting (1,003).

**Figure 2.9: Crime Heat Map, Basildon**



Source: UKCrimeStats

### **Town Centre Environmental Quality**

- 2.52 Basildon Town Centre is varied, with a distinct lack of greenery and vibrancy, yet a safe and quiet environment due to the lack of vehicle access to the main areas of the centre.
- 2.53 The buildings within the centre lack architectural merit and assist in creating a very hard and cold environment. In various parts, buildings look tired and require some cosmetic attention in order to boost their appearance. The new Empire Cinema development is the clear exception to this with a somewhat colourful exterior and the use of large glass frontages.

**Figure 2.10: Empire Cinema Development**



Source: LSH Site Visit

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- 2.54 There is a distinct lack of green space and natural greenery/ vibrancy within Basildon Town Centre. Trees can be found dotted around the area, however, the introduction of features such as planters, hanging basket and flower beds would go a long way to making the centre a more welcoming and pleasant space to visit and spend time.
- 2.55 As mentioned, the largely pedestrianised town centre enhances the environmental quality by making it safer whilst reducing levels of noise and air pollution.
- 2.56 Bins are commonly found in the centre making it easier for visitors to dispose of their waste and in turn reducing the amount of litter in the area. Public benches and seating are located across the centre, enabling visitors to rest and socialise. Lighting and CCTV is adequately present, improving visibility and safety, particularly in the evening.

### **Barriers to Business**

- 2.57 External influences can cause significant problems for businesses such as the current political, economic and environmental conditions which are often outside of our control. Understanding the potential issues and being aware of the barriers to business is important to consider to enable businesses to combat and address them, as these can also result in opportunities. The major challenges include:
- Cost of Living/ Inflation – consumers are tightening their budgets as a result of inflationary pressures on things such as grocery shopping and energy bills.
  - Brexit – adding complexities and costs to the price of goods.
  - Global Climate Emergency – the need to operate and live in a more sustainable and environmentally friendly way, which can sometimes be more costly/ less efficient and the overall impact of climate change (e.g., weather changes and flooding).
  - Digital Connectivity – the provision of low-cost, high-speed broadband to businesses and the ability to aid business start-ups with access to full fibre broadband. The provision of public Wi-Fi to promote interconnectivity between borough residents and businesses. Using smart technology to augment physical spaces to location specific digital services (such as wayfinding) to create a meaningful destination for the borough's residents and businesses.
  - Online Shopping – the convenience and product range offered by online retailers such as Amazon and Temu is leading to a growth in consumers shopping online.
- 2.58 The main challenges businesses currently face include impacts on supply chains, rising cost of supplies, rising operational costs (e.g. energy prices), labour shortages, and the squeeze on household income from the cost of living crisis which combined are impacting on business viability and growth potential.

### **Evening and Night-Time Economy**

- 2.59 A sample of 18 commercial outlets were chosen to provide a general idea of opening & closing times and weekend offer.

2.60 From these samples it appears that, although the town centre has a good weekend offer with many stores remaining open on a Sunday, there is limited offer for evening times. The evening economy is typically supported by a strong Leisure Service sector and Basildon does have an underrepresentation in this sector.

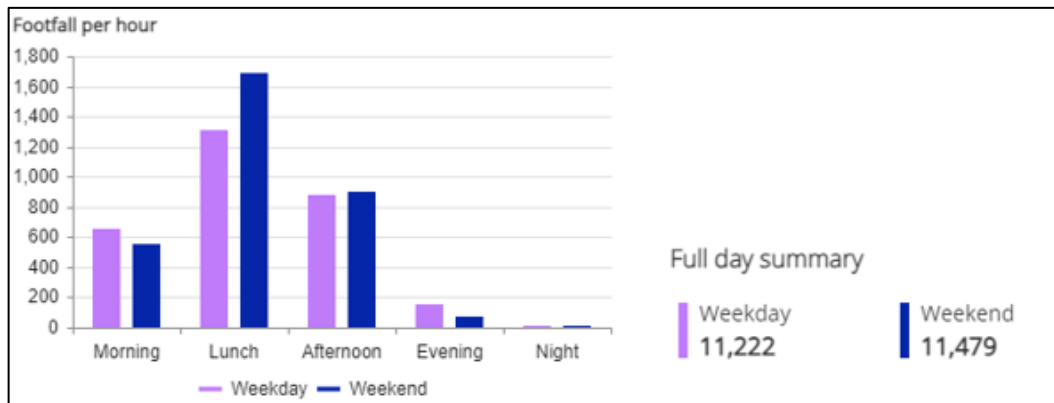
**Table 2.6: Retailer Opening Times**

Retailer Name	Open	Close	Sunday	Type
Asda	7am	10pm	Yes	Convenience
F&S Supermarket	7am	7pm	Yes	Convenience
M&S Simply Food	Open 24hrs	Open 24hrs	Yes	Convenience
Iceland	8am	7pm	Yes	Convenience
Mamma's International	8am	11pm	Yes	Convenience
Greggs	6am	8:30pm	Yes	Convenience
Spoon World Buffet	12pm/5pm	10pm/11pm	Yes	Leisure Services
Mr Biggs Carribean	11am	6pm	No	Leisure Services
Mooboo Basildon	10am	5:30pm	Yes	Leisure Services
Bonmarche	9:30am	5:30pm	Yes	Comparison
Primark	9am	6pm	Yes	Comparison
Game	9am	6pm	Yes	Comparison
JD Sports	9am	6pm	Yes	Comparison
Boots	8:30am	5:30pm	Yes	Comparison
Basildon Post Office	9am	5:30pm	Yes	Retail Services
Belleza Beauty	9am	6pm	Yes	Retail Services
Moe's barbers	08:30am	6pm	Yes	Retail Services
Top Nails	9am	6pm	Yes	Retail Services

Source: LSH Research

- 2.61 The figure below is a graphical representation of the polygon (along East Walk) analysed in the section entitled 'Pedestrian Flows'.
- 2.62 This graph supports the notion that Basildon Town Centre has a weak evening economy, with the busiest footfall section of the town centre dropping substantially in the evening time (5pm-9pm).
- 2.63 Furthermore, when comparing the evening footfall of the five town centres, Basildon Town Centre has the 4<sup>th</sup> lowest average hourly evening footfall rate (132 footfall per hour). This is significant when considering that overall, as outlined in the 'Pedestrian Flows' section, Basildon Town Centre comfortably comes out on top for pedestrian activity.
- 2.64 As a result of a significant number of outlets opening on Sundays, there is little difference between weekday and weekend footfall levels.

**Figure 2.11: Average Footfall Counts**



Source: Datscha

## Stakeholder Feedback

2.65 Stakeholder engagement has been undertaken to provide feedback on the town centres from those who have a strong connection and vested interest in the area. Stakeholder feedback collected on Basildon Town Centre can be summarised as follows:

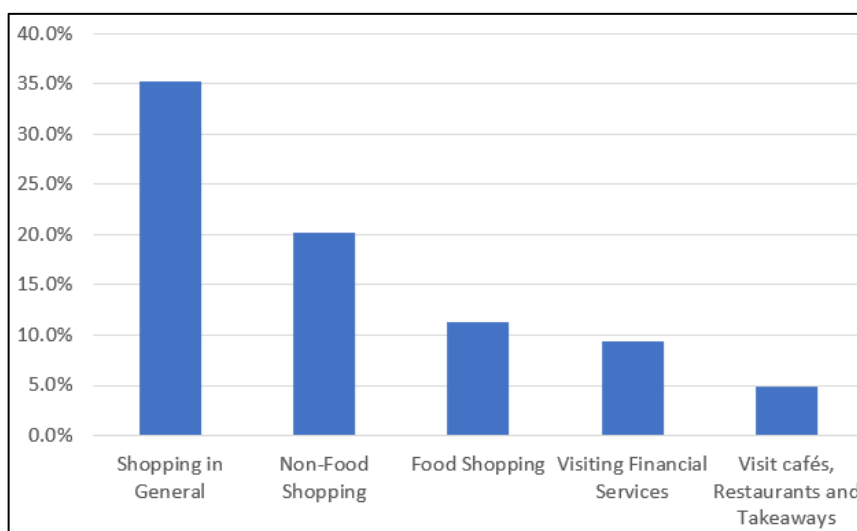
- Basildon Town Centre currently has a significant number of void units, partly due to there being too much retail space. Foot traffic is low, and the public realm is tired in places and needs improving.
- Some of the challenges that face Basildon Town Centre are attracting more people, re-purposing the void units and competing with out-of-town retail parks & the internet.
- The key opportunities for Basildon Town Centre include bringing in new uses such as residential and leisure, small businesses setting up and community-based events.
- Basildon Town Centre is lacking leisure uses and the ability to retain big name stores when it comes to serving its resident community.
- The key competing centres and locations are Southend, Chelmsford, Mayflower Retail Park, Pippis Hill Retail Park and Lakeside Shopping Centre.
- Over the next 5 to 10 years, the role of Basildon Town Centre will likely need to change by reducing its retail space and aligning more with what people want – attracting people into town centres will need to be through other means than just retail.

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## Customer Perception

- 2.66 Our assessment of customers' views and behaviours draws on the household survey conducted by NEMS Market Research (NEMS) across the 8 study zones between March and April 2023.
- 2.67 Apart from helping to identify shopping and leisure patterns across the defined catchment area and zones, the household survey also asked specific questions on their main reason for visiting Basildon Town Centre, what they like about it and what improvements (if any) could be made to make them likelier to visit more frequently in the daytime and evening time.
- 2.68 The figure below sets out the main reasons for respondents visiting Basildon Town Centre. As can be seen, the three most common answers revolve around shopping, with 'Shopping in General' coming out on top (35.3%), followed by 'Non-Food Shopping' (20.2%) and 'Food Shopping' (11.4%).
- 2.69 'Visiting for Financial Services' (9.3%) and visits to 'Cafes, Restaurants and Takeaways' (4.8%) also feature in the top 5 reasons for customers visiting Basildon Town Centre.

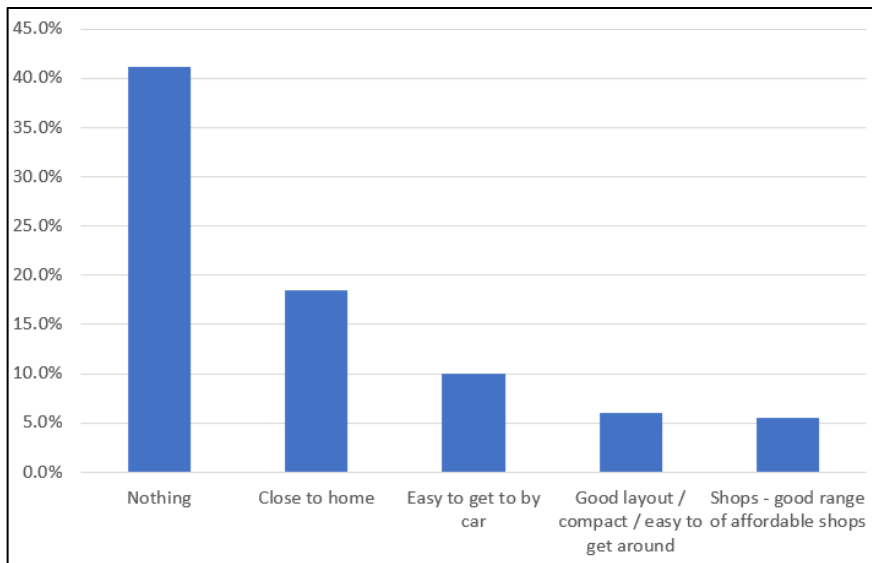
**Figure 2.12: Basildon Town Centre, Main Reasons for Visiting**



Source: NEMS Household Survey Results

- 2.70 The figure below sets out the main things that respondents like about Basildon Town Centre. The most common answer was 'Nothing' (41.1%), with 'Close to Home' a near second (18.5%) – neither painting a particularly positive picture of customer perception, however proximity to home is to be expected with any town centre.
- 2.71 Beyond the two most common responses, good accessibility by car (10%), a compact layout that's easy to navigate (6%) and a good range of affordable shops (5.5%) were notable inputs from visitors of Basildon Town Centre.

**Figure 2.13: Basildon Town Centre, Main Customer Likes**



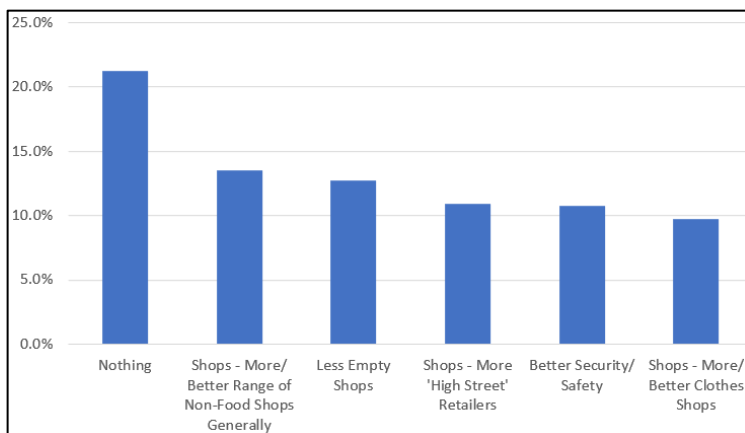
Source: NEMS Household Survey Results

2.72 The figure below outlines the main areas where respondents believe improvements could be made to Basildon Town Centre, making them likelier to visit more frequently in the daytime.

2.73 Whilst 'Nothing' is the most commonly provided response (21.3%), there is a strong theme that can be taken from the feedback. Four out of the top six answers revolve around the provision and quality of the shopping offer in the centre. 'More/ Better Range of Non-Food Shops' was provided by 13.5% of respondents, 'Less Empty Shops' by 12.7%, 'More High Street Retailers' by 10.9% and 'More/ Better Clothes Shops' by 9.7%.

2.74 'Better Security/ Safety' also features on the graph and is a theme that continues into the following section.

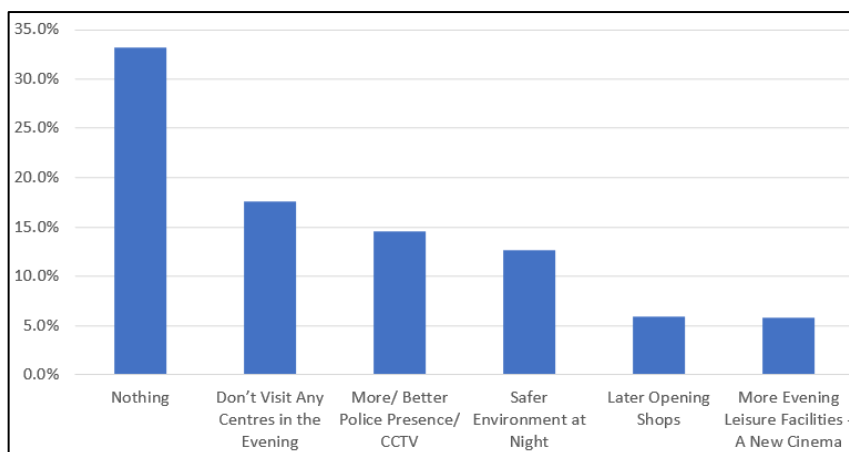
**Figure 2.14: Basildon Town Centre, Main Possible Daytime Related Improvements**



Source: NEMS Household Survey Results

- 2.75 The figure below outlines the main areas where respondents believe improvements could be made to Basildon Town Centre, making them likelier to visit more frequently in the evening.
- 2.76 By far the most common response, as with the potential daytime improvements, is 'Nothing' (33.1%). On a similar note, 17.6% of respondents outlined that they 'Don't Visit Any Town Centre in the Evening'.
- 2.77 Where some actionable pieces of feedback were given, the themes of security and a better provision of evening attractions can be seen.
- 2.78 On security and safety, 14.6% would like to see 'More/ Better Police Presence/ CCTV' and 12.7% suggest that a 'Safer Environment at Night' would make them likelier to go into the town centre in an evening.
- 2.79 In terms of a provision of evening attractions, 5.9% suggest that they would like to see 'Later Opening Shops' and 5.8% say that 'More Evening Leisure Facilities' such as a cinema would make them likelier to visit the town centre later in the day.

**Figure 2.15: Basildon Town Centre, Main Possible Evening Related Improvements**



Source: NEMS Household Survey Results

## Conclusion

- 2.80 Basildon Town Centre is the largest centre within the borough and as such provides a focal point of retail, leisure and services for the area.
- 2.81 Whilst the presence of many national multiples has allowed for the recovery of footfall levels post-pandemic, the number of vacancies within the centre is of concern. The recent closure of Wilko only adds to this issue, with 1 in 4 units vacant as of June 2023.
- 2.82 With the rate of vacancies, and the spread of these vacant units across the centre, Basildon Town Centre lacks a sense of cohesion and focus. There is room to consolidate the offer



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given that the 30%+ of vacant floorspace is unlikely to be fully occupied by a retail and leisure offer.

- 2.83 The centre lacks greenery and vibrancy. The provision of green space would likely encourage more visitors whilst also improving dwell times further.
- 2.84 The centre can conveniently be accessed by car, with a strong local road network and ample parking provision. Pedestrian access around the centre is good, however access to and from the centre is more challenging. This lack of pedestrian access in and out of the centre links to the insular, inward-looking nature of the centre's layout.
- 2.85 Investment into the area through the Government's Cultural Investment Fund provides an opportunity that if capitalised upon, could bring a vibrancy and energy to the centre that it currently lacks. In addition to this, the transport connections that Basildon has to London could allow the area to benefit from being a more affordable place for people to live whilst still being within 40 minutes travel time of the capital.
- 2.86 Basildon Town Centre like other centres is facing its challenges dominated by an extensive floorspace footprint that in the long term is likely to be consolidated by other types of uses. Opportunities available such as the funding support on the digital and creative sector if capitalised upon will lead to a more diversified economy and ensure a vital and viable future for the centre.
- 2.87 Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows:

<b>Strengths</b>
<ul style="list-style-type: none"><li>• Good provision of national multiples with big brands providing a draw to the centre</li><li>• The town centre has a relatively strong comparison retail offer which is slightly above the UK average.</li><li>• The market has a diverse and varied offer with the permanent market units/ stalls allowing for a uniform and well-kept look.</li><li>• There is good parking provision across the centre.</li><li>• Footfall levels have bounced back to pre-pandemic levels as opposed to having a lasting negative impact.</li><li>• Recent dwell times have surpassed levels recorded in 2019 (pre-pandemic).</li><li>• Good car parking provision.</li><li>• The core of the centre is largely vehicle free and pedestrianised, making it safe for visitors to move around on foot.</li></ul>

- Train station and bus station provide good transport links to and from the centre.

### **Weaknesses**

- There is a surplus of retail space which is leading to clusters of vacant units and neglected areas of the centre.
- Leisure service provision is below the national average.
- There is a lack of greenery and colour to bring the area which would make it a welcoming place that people would enjoy spending time in.
- The town centre's environmental quality is hard and stark in parts and missing landscaping or other forms of softening which impacts the perception of the centre.
- Customers are not particularly positive about what the centre has to offer and what they enjoy about visiting.
- The evening economy is weak relative to its size with most places closing early.
- The centre is very inward looking and insular and therefore lacks the ability to naturally draw people in from places such as the train station.
- Limited EV charging points.

### **Opportunities**

- To contract/refine the retail areas to make it easier for visitors to navigate the offer and to strengthen the areas that do have retail and leisure.
- Potential demand for space from national multiples.
- To capitalise on the regular and quick rail connections to London to attract a broader demographic.
- Focus on improving perceptions of safety and security and encourage promotion of an evening economy.
- With more shops opening until later and improved security/ safety, the customer survey indicates some appetite for evening visits to the centre.
- Securing £4m in funding to support the digital and creative sector in Basildon providing opportunities for diversification of the local economy.

### Threats

- Further closure of outlets.
- Rising vacancy rates.
- Competition from out-of-centre retail parks that have big brands attracting shoppers, such as the new St Hilary's Retail Park.
- The growth in online shopping and its impact on brick-and-mortar retail outlets.
- The longer-term impacts of the pandemic are still yet to be determined.
- High / increasing business operating costs.

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### 3. BILLERICAY TOWN CENTRE HEALTH CHECK

#### Overview

- 3.1 Billericay much like other towns in the county of Essex is considered a commuter town to the City of London as it is roughly 40km from central London. The town has a few main roads in its proximity - the A12 to the north, the A127 to the south and the A130 to the east of the town.
- 3.2 The centre is roughly 6.5km north west of Basildon Town Centre and around 13km south of the city of Chelmsford.
- 3.3 Billericay Train Station can be found just north of the town centre boundary, with direct services running west into London (Liverpool Street) in roughly 30 minutes and east to Southminster and Southend.
- 3.4 The town centre has a Waitrose store that acts as a focal point and anchor. The convenience store has a floorspace of c.4,000 sqm along with a large customer car park to the rear, accessed via Alma Link. The centre also boasts a strong mix of leisure outlets – bars, cafes, restaurants and pubs.
- 3.5 The map below, taken from the Basildon District Local Plan 1998 – Town Centre Inset Maps, outlines Billericay's town centre boundary.

Figure 3.1: Billericay Town Centre Boundary



Source: Basildon District Local Plan 1998 – Town Centre Inset Maps

### **Diversity of Uses**

- 3.6 The table below is based on the Category Goad report by Experian which were informed by survey data undertaken in September 2022. It shows that Billericay town centre has a total of 174 outlets and an overall quantum of 28,001 sqm of floorspace.
- 3.7 56 of these outlets are represented by retail (comparison retail having 41 and convenience retail having 15 outlets) which has a combined floorspace of approximately 10,500 sqm (comparison retail occupying around 5,400 sqm and convenience around 5,100 sqm).

- 3.8 There are 35 Retail Service outlets which account for approximately 3,600 sqm in floorspace. Retail Services therefore have a 20.1% representation of units and 12.8% representation of floorspace, which are both comfortably above the UK averages.
- 3.9 There are a total of 49 Leisure Service outlets which is around 28% of the overall outlets in the centre, slightly above the UK average of around 25%. In relation to Leisure Service floorspace, 9,142 sqm represents over 32% of the total and is higher than the UK average.
- 3.10 Financial and Business Services have a total of 21 outlets and approximately 2,800 sqm, meaning that it has a higher representation for both number of outlets and floorspace than the UK average.

**Table 3.1: No. of Units in Billericay Town Centre**

	No. Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Billericay	UK Average		Billericay	UK Average
Comparison Retail	41	23.56%	26.87%	5,416	19.34%	30.13%
Convenience Retail	15	8.62%	9.27%	5,137	18.35%	15.47%
Retail Services	35	20.11%	15.75%	3,586	12.81%	7.23%
Leisure Services	49	28.16%	25.31%	9,142	32.65%	26.19%
Financial & Business Service	21	12.07%	8.75%	2,861	10.22%	6.60%
Vacant	13	7.47%	13.85%	1,858	6.64%	13.79%
<b>Total</b>	<b>174</b>	<b>100.00%</b>	<b>99.80%</b>	<b>28,001</b>	<b>100.00%</b>	<b>99.41%</b>

Source: Experian Goad Category Report – September 2022

- 3.11 The table below breaks down the Leisure Service sector into the food and beverage (F&B) offer within the centre. There are a total of 43 F&B related outlets which represents 24.7% of the overall outlets, slightly higher than the UK average (20.8%).
- 3.12 F&B floorspace occupies 7,627 sqm which is 27.2% of the total floorspace and much higher than the UK figure of 15.8%.
- 3.13 Restaurants have the highest number of outlets (13) which is above the average as a percentage (7.5% compared to 4.9%) and occupy the largest quantum of floorspace with a total of 2,285 sqm.

**Table 3.2: Food & Beverage Units and Floorspace**

	No. Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Billericay	UK Average		Billericay	UK Average
Bars & Wine Bars	6	3.45%	2.24%	966	3.45%	2.36%
Cafes	9	5.17%	5.00%	1,245	4.45%	2.83%
Fast Food & Take-aways	9	5.17%	6.05%	1,161	4.15%	3.03%
Public Houses	6	3.45%	2.60%	1,970	7.03%	3.45%
Restaurants	13	7.47%	4.89%	2,285	8.16%	4.16%
<b>Total</b>	<b>43</b>	<b>24.71%</b>	<b>20.78%</b>	<b>7,627</b>	<b>27.24%</b>	<b>15.83%</b>

Source: Experian Goad Category Report - September 2022

### Vacancies

- 3.14 The tables above have demonstrated that Billericay has a relatively low vacancy rate at 7.47% (13 units), considerably below the UK average of 13.85%. In relation to floorspace, these 13 units have a combined footprint of 1,858 sqm which accounts for 6.64% of total floorspace within the area as defined by Goad.
- 3.15 The figure below shows how these are dispersed throughout the town centre with the few vacancies generally located to the middle and south of the centre. There were no recorded vacancies in the northern section of the centre.

**Figure 3.2: Vacancies in Billericay Town Centre**



Source: Experian Goad (June 2023)

- 3.16 Local Data Company (LDC) also monitor vacancy rates and show figures dating back to 2017. The area covered by LDC does not match that of Goad and so they are not directly comparable.
- 3.17 LDC's vacancy rates show a worsening situation over this period, with rates at 3.5% in 2017, rising to 8.9% in 2020 with a lower figure of 7.8% recorded in 2023. Although vacancy rates have more than doubled in this period, as mentioned above, the latest figure is comfortably below the national average.



## Multiple and Independent Representation

- 3.18 Experian Goad data identified 46 multiples in the town centre which accounts for 29% of all outlets in the centre with a total quantum floorspace of 12,384 sqm. National brands include W H Smith, Waitrose, Superdrug, Post Office, Iceland and Holland & Barrett. The identified national brands provide a good mix of offer that meet the needs of local residents and visitors on a day-to-day basis.

**Table 3.3: Retail Multiple Representation**

	No. of Outlets	% of Total
Comparison Retail	14	30.4%
Convenience Retail	7	15.2%
Retail Service	4	8.7%
Leisure services	13	28.3%
Financial & Business Service	8	17.4%
Total multiples	46	100%

Source: Experian Goad Category Report – September 2022

- 3.19 Billericay has a strong representation of independent operators which is essential for town centres to create a unique and local feel. Examples of these include Queenies (restaurant), Rumours (wine bar) and Harry's Bar & Restaurant.

## Retailer Requirements

- 3.20 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 3.4: Retailer Requirements for Billericay Town Centre**

Recorded Date	Operator	Sector	Min Sqm	Max Sqm
June-23	Busy Bees	Service	370	650
May-23	Majestic Wine	Convenience	230	460
May-23	Lidl	Convenience	1,670	2,420
March-23	Perfect Start Nurseries	Service	280	460
Feb-23	Savers	Comparison	190	330
Jan-23	Pets Corner	Comparison	110	230
Nov-22	Taco Bell	Leisure	110	170
Oct-22	McMullen Brewing and Pubs	Leisure	230	460
Oct-22	Toolstation	Comparison	260	560
July-22	Fireaway Pizza	Leisure	70	190
Apr-23	M&S Food	Convenience	1,160	2,320
Feb-22	Bright Horizons Childcare	Service	330	840

Feb-22	Travelodge	Leisure	930	3,720
Jan-21	ECigWizard	Comparison	28	93
Jan-21	Creams Cafe	Leisure	130	190
			<b>6,098</b>	<b>13,093</b>

Source: The Requirement List, July 2023

- 3.21 As of July 2023, a review of published operator requirements identified 18 recorded requirements from retail and leisure operators since January 2021, seeking a combined maximum floorspace of up to 13,093 sqm.
- 3.22 It should be noted that these are not necessarily operators seeking representation in the town centre but potentially out-of-centre locations and industrial parks (e.g., Majestic Wine and Toolstation).
- 3.23 It is also possible that these operators are not looking for opportunities in Billericay specifically, rather they are looking for opportunities in areas similar to and including Billericay.
- 3.24 Independents do not publish their requirements in the same way and so are harder to identify.

### **Street Markets**

- 3.25 Billericay hosts an annual Christmas market which tends to take place on a Sunday, early in December. The event is hosted by Billericay Mayflower Rotary and sees the High Street closed to traffic to make way for stalls, live stage entertainment and a children's funfair.
- 3.26 Over 150 stalls make up the Christmas market and it is estimated that over 20,000 visitors attend each year.

### **Commercial Rents and Yields**

- 3.27 Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or Pre pack Administrations. Retailers and restaurateurs have frequently used these processes to effectively impose lower rentals, turnover rents and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.
- 3.28 In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.
- 3.29 The impact of the pandemic has exaggerated this trend and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the

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policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.

- 3.30 A broad estimate of prime Zone A rental tone within Billericay would indicate a rental level in the region of £540/sqm (£50/sqft) – £590/sqm (£55/sqft).
- 3.31 In terms of investment yields, retail as an asset class has seen a significant fall in value over the past decade. Transactional volumes in 2023 are subdued with high interest rates and global political uncertainties impacting on investor sentiment. Clearly, there are many factors that impact on town centre retail yields including lease length, tenant covenant and basis of rent review but in the broadest terms we would comment as follows:
- Prime high street yields – 6.75%
  - Good secondary high street yields – 9%
  - Secondary high street yields – 12%

### Car Parking

- 3.32 There are three official car parks within the town centre’s border which can be viewed in the table below. There is also good provision of on-street parking along the High Street which allows for quick and convenient visits to the centre by car.
- 3.33 High Street car park can be accessed via a side street directly opposite Superdrug and has a somewhat narrow entrance/ exit. There is a continuous pavement on one side of the road that connects the car park to the High Street. It has electric vehicle charging points to the rear.
- 3.34 Union Street car park can be found to the rear of Greggs and is accessed via St Ediths Lane which has a pavement on both sides allowing for pedestrian access to and from the High Street.
- 3.35 Waitrose car park is to the rear of the grocery store and can be accessed via Alma Link. The Waitrose store has a car park entrance as well as a High Street entrance.

**Table 3.5: Car Parks in Billericay Town Centre**

Name / Location	Spaces
High Street	200
Union House	42
Waitrose	220
	462

Source: Parkopedia

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## Pedestrian Flows

- 3.36 The figure below illustrates the pedestrian heat map for Billericay Town Centre and shows a particular concentration of footfall along High Street, Alma Link and the pedestrian passage linking High Street to Waitrose car park.

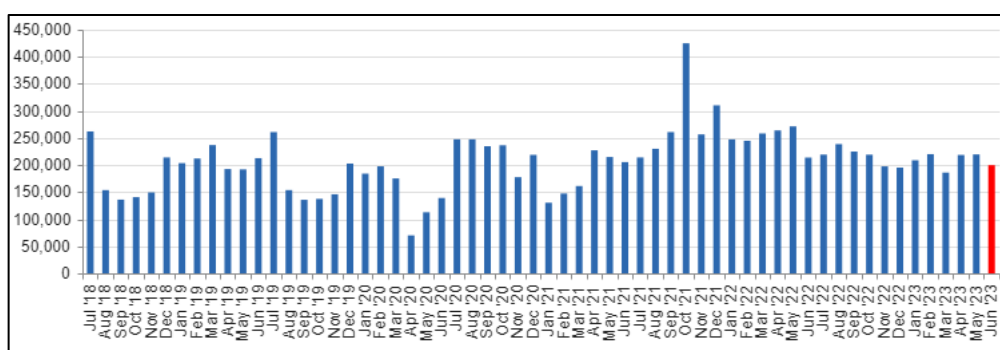
**Figure 3.3: Billericay Town Centre Footfall Heat Map**



Source: Datscha

- 3.37 The busiest section of the town centre, located along High Street, was sampled to obtain information on how footfall levels have changed between July 2018 and June 2023.
- 3.38 Footfall has remained relatively consistent over this period, with the obvious exceptions of April, May and June in 2020 and January, February and March of 2021 where restrictive COVID-19 measures were in place.
- 3.39 When comparing the year of 2019 to 2022, average monthly footfall levels increased by 21% (191,000 in 2019 compared to 233,000 in 2022). This suggests that the town centre has not only recovered strongly from what looks to have been a temporary blip during the pandemic but has surpassed and built on pre-pandemic activity levels.

**Figure 3.4: Footfall of High Street, Billericay Town Centre (July 2018 – June 2023)**



Source: Datscha

- 3.40 A Huq footfall report (August 2023) provided to the Council reviewed dwell times in Billericay Town Centre, comparing 2019 to the most recent 12-month period at the time of the report being created. Dwell times can indicate what people are using a town centre for and have been shown to correlate closely with spend.
- 3.41 When comparing the average dwell time of a recent 12-month period to that of 2019, visitors were found to be spending 15% less time in the centre post-pandemic than they were pre-pandemic.

### Accessibility

- 3.42 Billericay is accessible given its proximity to main roads (A12, A127 and A130) which connect to Billericay town centre via many minor roads. The High Street runs through the centre of the town with on-street parking available in several parts. Traffic calming measures come in the form of several traffic light crossings. Cycling within the centre is feasible due to the road network however there are no dedicated cycle lanes. There is a limited provision of places for cyclists to safely lock their bikes.
- 3.43 Billericay train station is just north of the town centre's border and can be accessed conveniently by foot from the High Street. Regular services run to and from London to the west and Southend to the east. Bus services run frequently and connect Billericay with places such as Chelmsford, Basildon, Brentwood and Wickford.
- 3.44 Pedestrian accessibility around the centre is adequate with wide pavements in parts and several traffic light crossings to support people navigating the busy High Street. Dropped kerbs and tactile paving are present to support people getting around Billericay town centre.

### Crime and Safety

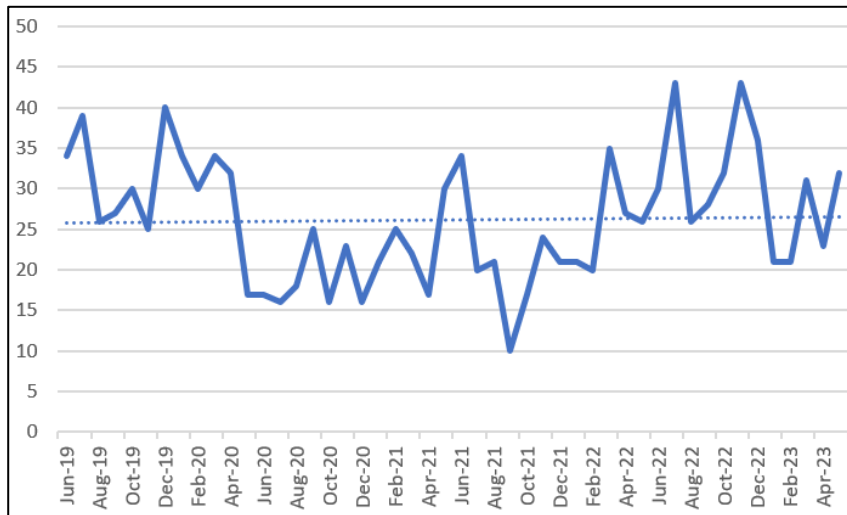
- 3.45 A central postcode within Billericay was used to review total crime data within a ¼ mile radius between June 2019 and May 2023. The figure below outlines the total crime rate month by

month within this period, as well as a trendline to show the overall change in criminal activity over the four years.

3.46 As can be seen, recorded crime levels have been consistent over this period, with peaks coming more recently in July and November 2022 (43 crimes) and a low of 10 recorded crimes in September 2021.

3.47 When considering Billericay’s relative size and its evening economy which will be covered later, it can be seen as a relatively safe and secure area based on these records.

**Figure 3.5: Total Crime Incidences, Billericay, June 2019 – May 2023**

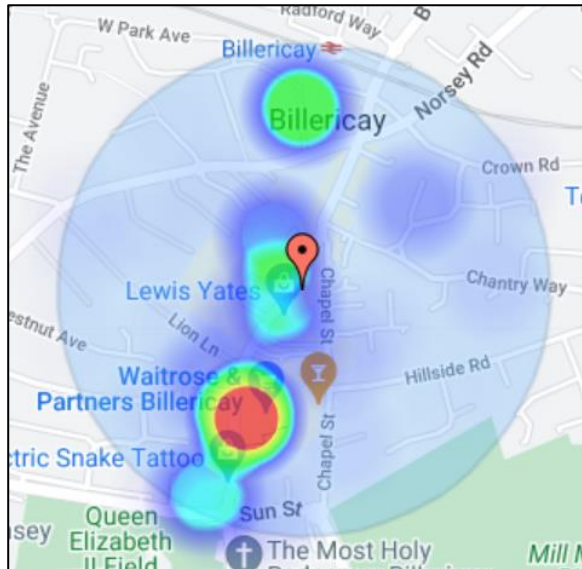


Source: UKCrimeStats

3.48 The figure below shows a heat map representing criminal activity within the same area and for the same period outlined previously. As can be seen, criminal activity is predominately concentrated at the Waitrose, likely due to shoplifting offences.

3.49 The top three types of crimes recorded within this area during this period are violence and sexual offences (313), anti-social behaviour (200) and shoplifting (189).

**Figure 3.6: Crime Heat Map, Billericay**



Source: UKCrimeStats

### **Town Centre Environmental Quality**

- 3.50 The environmental quality of Billericay Town Centre is good, with characterful buildings, ample provision of street furniture and some elements of greenery.
- 3.51 Billericay Town Centre forms a large part of the Billericay High Street Conservation Area. This designation recognises the historical and architectural importance of the area and the features within it such a number of listed buildings, a number of protected trees and listed telephone boxes. Its designation will ensure that the character and qualities of Billericay High Street are protected and enhanced going forward.
- 3.52 Buildings on the whole are in good condition and are well-maintained. Newer developments such as the Waitrose store have been designed to be in-keeping with the existing architecture in the area whilst St Mary Magdalen Church and nearby buildings with original, historic features add to the character and charm of Billericay Town Centre.

**Figure 3.7: Waitrose Store**



Source: LSH Site Visit

- 3.53 Whilst trees can be found dotted around the centre, there is a lack of open green space to be enjoyed. Some planters and flower beds are present, which is complemented by the efforts of some operators such as Wetherspoons (The Blue Boar) and The Chequers pub with additional floral displays.
- 3.54 Bins are commonly found in the centre making it easier for visitors to dispose of their waste which consequently reduces the likelihood of litter in the area. Bollards and railings line the pavements in areas of high traffic congestion to improve the safety of pedestrians. Public benches can be found along the High Street allowing visitors to rest and enjoy the centre. Some cycle parking is available for those who wish to securely lock their bikes whilst visiting the area.
- 3.55 The busy main road running through the centre of Billericay can cause challenges to pedestrians whilst also increasing noise and air pollution in the area.

### **Barriers to Business**

- 3.56 External influences can cause significant problems for businesses such as the current political, economic and environmental conditions which are often outside of our control. Understanding the potential issues and being aware of the barriers to business is important to consider to enable businesses to combat and address them, as these can also result in opportunities. The major challenges include:
- Cost of Living/ Inflation – consumers are tightening their budgets as a result of inflationary pressures on things such as grocery shopping and energy bills.



- Brexit – adding complexities and costs to the price of goods.
  - Global Climate Emergency – the need to operate and live in a more sustainable and environmentally friendly way, which can sometimes be more costly/ less efficient and the overall impact of climate change (e.g., weather changes and flooding).
  - Digital Connectivity – the provision of low-cost, high-speed broadband to businesses and the ability to aid business start-ups with access to full fibre broadband. The provision of public Wi-Fi to promote interconnectivity between borough residents and businesses. Using smart technology to augment physical spaces to location specific digital services (such as wayfinding) to create a meaningful destination for the borough’s residents and businesses.
  - Online Shopping – the convenience and product range offered by online retailers such as Amazon and Temu is leading to a growth in consumers shopping online.
- 3.57 The main challenges businesses currently face include impacts on supply chains, rising cost of supplies, rising operational costs (e.g. energy prices), labour shortages, and the squeeze on household income from the cost of living crisis which combined are impacting on business viability and growth potential.

### Evening and Night-Time Economy

- 3.58 A sample of 21 retailers was selected across multiple categories throughout the town centre which provides a general overview of the opening and closing times of retailers and weekend offer.
- 3.59 Billericay has a healthy evening time offering with a range of restaurants, pubs and bars that are open until 10pm and beyond. It can also be seen that many retailers remain open on Sundays to strengthen the town centre’s weekend attraction.

**Figure 3.6: Retailer Opening Times**

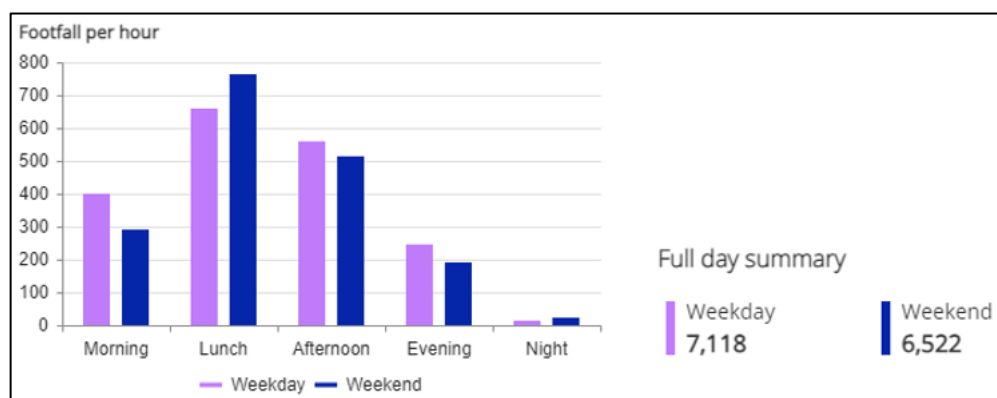
Retailer Name	Open	Close	Sunday	Type
Iceland	8am	7pm	Yes	Convenience
GAIL's bakery	7:30am	5:30pm	Yes	Convenience
Billericay Food & Wine	8am	11pm	Yes	Convenience
Greggs	6:30am	6pm	Yes	Convenience
The Crown Pub	11am	1am	Yes	Leisure Services
Giggling Squid	12pm	10:30pm	Yes	Leisure Services
Cloud 9 Espresso Bar	8am	4:00pm	Yes	Leisure Services
The Blue Boar	8am	11:30pm	Yes	Leisure Services
ASK Italian	11:30am	9pm	Yes	Leisure Services
Boots	9am	5:30pm	Yes	Comparison
Lewis Yates	10:00am	5:30pm	No	Comparison
Poundland	8am	6pm	Yes	Comparison
Superdrug	8:30am	6pm	Yes	Comparison
WH Smith	8:30am	5:30pm	Yes	Comparison
K Barbers	9am	7pm	No	Retail Services
Hotshots	9am	7pm	Yes	Retail Services

TONI&GUY	9:30am	6:30pm	No	Retail Services
Mr.Choppers	9am	7pm	Yes	Retail Services
Forbidden Ink	10:00am	5pm	No	Retail Services

Source: LSH Research

- 3.60 The figure below is taken from the pedestrian footfall polygon (along High Street) analysed in the section entitled 'Pedestrian Flows'.
- 3.61 When comparing the evening (5pm-9pm) footfall of the five town centres, Billericay Town Centre has the highest average hourly evening footfall rate (230 footfall per hour).
- 3.62 Despite Basildon Town Centre having the highest overall activity, the strong presence of pubs, bars and restaurants such as Giggling Squid, Red Lion pub and Harry's Bar & Restaurant strengthens Billericay's evening offering and is drawing people into the town centre later into the day – both on weekdays and weekends.

**Figure 3.8: Average Footfall Counts**



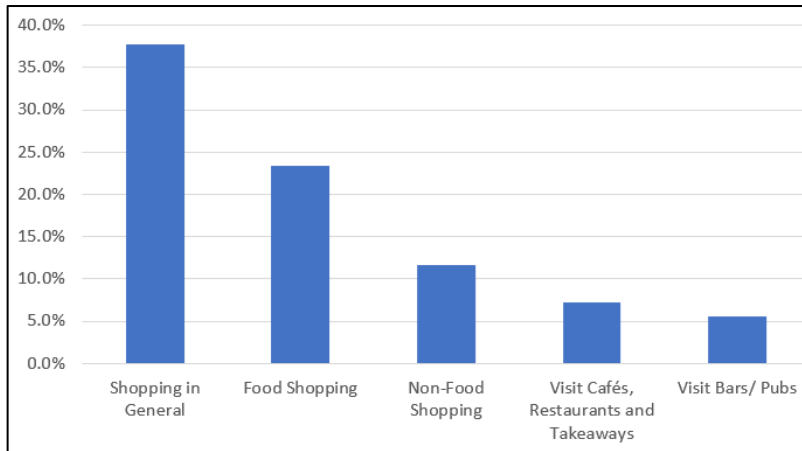
Source: Datscha

## Customer Perception

- 3.63 Our assessment of customers' views and behaviours draws on the household survey conducted by NEMS Market Research (NEMS) across the 8 study zones between March and April 2023.
- 3.64 Apart from helping to identify shopping and leisure patterns across the defined catchment area and zones, the household survey also asked specific questions on their main reason for visiting and what they like most about the centres.
- 3.65 The figure below sets out the main reasons for respondents visiting Billericay Town Centre. As with all of the centres, shopping dominates the graph – 'Shopping in General' (37.7%), 'Food Shopping' (23.4%) and 'Non-Food Shopping' (11.7%).
- 3.66 Beyond shopping, a notable percentage of customers also referenced leisure related activities such as going to Cafes, Restaurants, Bars and Takeaways. This feedback from

respondents builds on the previous section where a strong evening economy with a varied leisure offering was outlined.

**Figure 3.9: Billericay Town Centre, Main Reasons for Visiting**

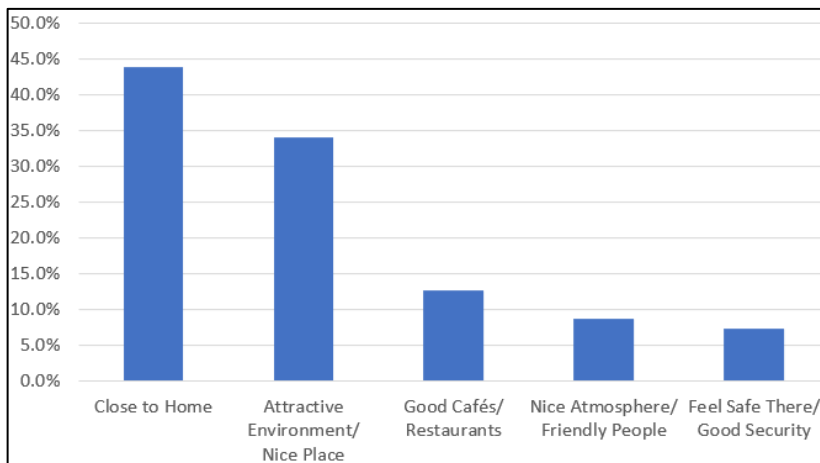


Source: NEMS Household Survey Results

3.67 The figure below sets out the main things that respondents like about Billericay Town Centre. Other than the expected response of 'Close to Home' (43.9%), there was particularly strong feedback outlining a perception of Billericay having an 'Attractive Environment' and being a 'Nice Place' – more than one in three gave this answer.

3.68 Building on this positive survey result for Billericay Town Centre, 12.6% like that there are 'Good Cafes/ Restaurants', 8.6% enjoy the 'Nice Atmosphere/ Friendly People' and 7.2% 'Feel Safe' when visiting.

**Figure 3.10: Billericay Town Centre, Main Customer Likes**



Source: NEMS Household Survey Results

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## Conclusion

- 3.69 Billericay Town Centre is a strong, functioning centre that offers a good range of retail, leisure and services.
- 3.70 Its low vacancy rate is a good indication that businesses are thriving in the area, and with footfall improving post-pandemic, the centre is in a strong position to evolve and strengthen.
- 3.71 Billericay High Street Conservation Area ensures that the architectural and historic importance of the town centre is preserved, securing Billericay's image as an attractive, characterful location that people enjoy spending time.
- 3.72 Overall, Billericay is a vital and viable town centre that not only meets the day-to-day needs of its local catchment, but also has an attraction through its evening economy and leisure provision that will draw visitors from beyond the immediate catchment.
- 3.73 Overall, the Strengths, Weaknesses, Opportunities, Threats (SWOT) can be summarised as follows:

Strengths
<ul style="list-style-type: none"><li>• Low vacancy rate with no concentration of vacancies in one or more areas of the centre.</li><li>• Strong financial and business service provision comparative to the UK average.</li><li>• The food and beverage offer is strong with a quality, varied offer of restaurants and bars.</li><li>• Strong independent offer which adds to the uniqueness of the town centre.</li><li>• Footfall levels have surpassed pre-pandemic figures.</li><li>• Train station is accessible with links to and from London.</li><li>• There is a lively evening and night-time offer with a range of venues opening late.</li><li>• Good parking provision including on street parking along the High Street.</li><li>• Low crime rate relative to the size of the town as well as when factoring in the evening economy present.</li><li>• Historic and characterful features such as buildings and trees make up the Billericay High Street Conservation Area which will continue to be preserved and enhanced.</li></ul>
Weaknesses
<ul style="list-style-type: none"><li>• A lack of greenery and public areas with seating for people to spend time and enjoy.</li></ul>

- Heavy flow of traffic along High Street has a negative impact on shopping environment including poor air quality.
- No cycle paths.
- Dwell times have dropped post-pandemic – visitors are spending less time in the centre on average.
- Vacancy rates have risen in recent years.

#### **Opportunities**

- Demand from multiple retailers.
- Urban greening should be encouraged.
- Provision of bike racks / cycle ways.
- Opportunity to improve the street scene, perhaps making it safer, calmer and more attractive for pedestrians.

#### **Threats**

- The growth in online shopping and its impact on brick-and-mortar retail outlets.
- The longer-term impacts of the pandemic are still yet to be determined.
- High / increasing business operating costs.

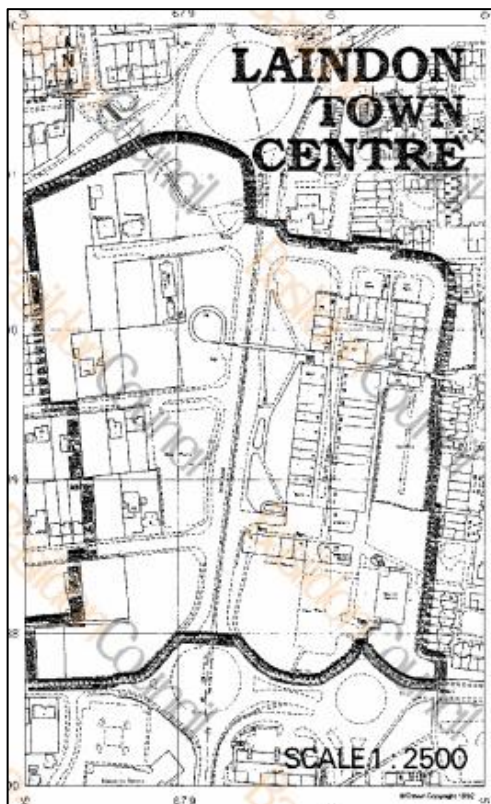
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## 4. LAINDON TOWN CENTRE HEALTH CHECK

### Overview

- 4.1 Laindon is a small Essex town located 2.5km west of Basildon Town Centre. High Road runs through the town centre, with the B148 and A127 accessible to the north.
- 4.2 Laindon Train Station is located approximately a third of a mile to the south of the town centre. The station has an accompanying car park with around 270 parking spaces and train services that run regularly into London (Fenchurch Street) in just over half an hour.
- 4.3 The town centre has a Lidl store to the north west of its boundary which can be accessed via Manor Road. The c.1,500 sqm store is a clear focal point for Laindon, with little other supporting retail or service provision currently on offer.
- 4.4 Laindon Place development to the east of High Road has plans to bring new shops, office space, a health centre and high-quality homes to the area.
- 4.5 The map below, taken from the Basildon District Local Plan 1998 – Town Centre Inset Maps, outlines Laindon's town centre boundary.

**Figure 4.1: Laindon Town Centre Boundary**



Source: Basildon District Local Plan 1998 – Town Centre Inset Maps

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## Diversity of Uses

- 4.6 There is a very limited provision of retail and services within Laindon Town Centre.
- 4.7 The offer is convenience led, with a c.1,500 sqm Lidl store to the north west of the centre. Supporting services come in the form of a Well Pharmacy and Templeman Opticians Laindon. These are both currently situated within temporary portacabin units, to the rear of the Laindon Place development. These two units occupy a combined floorspace of roughly 220 sqm.
- 4.8 As previously mentioned, the Laindon Place development promises to deliver retail units as part of the overall scheme which will be a welcome boost to the provision and diversity of uses within the centre.
- 4.9 Away from the town centre, facing Laindon train station, there is a small parade of units which include takeaways, a café and a newsagents. This is located c.550m south of the town centre and supports commuters/ rail travellers.

**Figure 4.2: Well Pharmacy Portacabin Unit**



Source: LSH Site Visit

## Vacancies

- 4.10 Given the extremely limited provision of retail units, there are currently no vacancies in Laindon Town Centre.

## Multiple and Independent Representation

- 4.11 As defined by Goad, a multiple retailer is part of a network of nine or more outlets. These household brands are crucial to the draw of a town centre and allow an area to attract visitors from beyond its immediate catchment.

- 
- 4.12 Lidl and Well Pharmacy are key national multiples that will bring visitors to the town centre for their day-to-day grocery shopping and medical-related needs.
- 4.13 Independent retailers act as an integral part of a vital and viable town centre. They provide an area with a unique character and local feel. There is a lack of independent retailers within Laindon Town Centre at present.

### **Retailer Requirements**

- 4.14 Demand from retailers and leisure operators for representation in a centre is an important indicator of a centre's overall health and viability. As of July 2023, a review of published requirements did not identify any operators seeking to obtain space in Laindon Town Centre.
- 4.15 The Laindon Place development proposes to create 224 new homes on the land to the east of High Road. This will grow the town centre's residential catchment and may therefore improve the commercial attractiveness of the area.

### **Street Markets**

- 4.16 Laindon Town Centre does not currently have a street market. The nearest market is Basildon Market, just over 2km east.

### **Commercial Rents and Yields**

- 4.17 Due to a lack of recent transactional history, we are unable to present any information for Laindon Town Centre.

### **Car Parking**

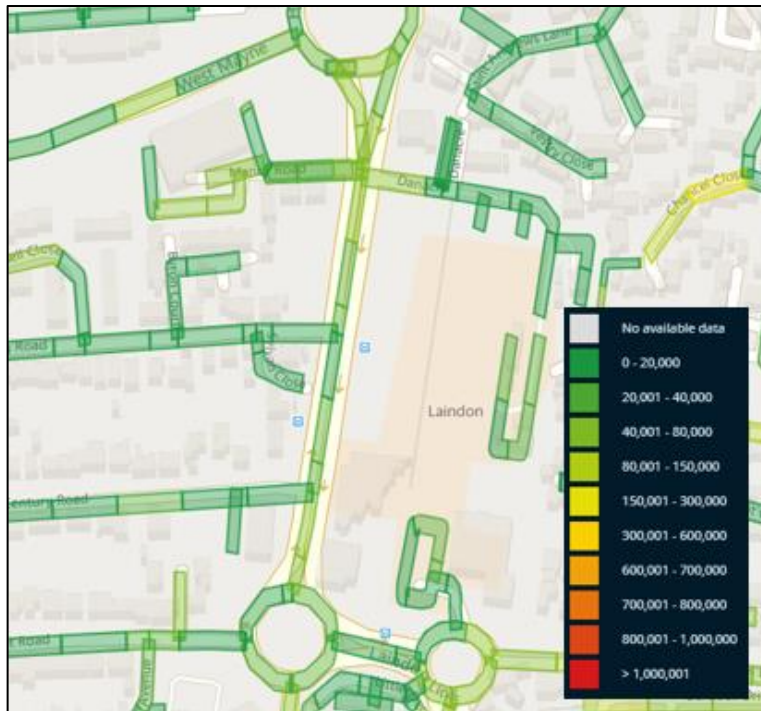
- 4.18 Car parking in Laindon Town Centre is limited to Lidl's dedicated car park and the car park by the temporary Well Pharmacy and Templeman Opticians portacabins.
- 4.19 Lidl's car park can be accessed via Manor Road and has c.100 parking spaces for customers. The Well Pharmacy/ Templeman Opticians car park can be accessed via Danacre and has over 30 spaces.

### **Pedestrian Flows**

- 4.20 The figure below illustrates the pedestrian heat map for Laindon Town Centre and shows a particular concentration of footfall along High Road, Manor Road (leading to Lidl) and Danacre.



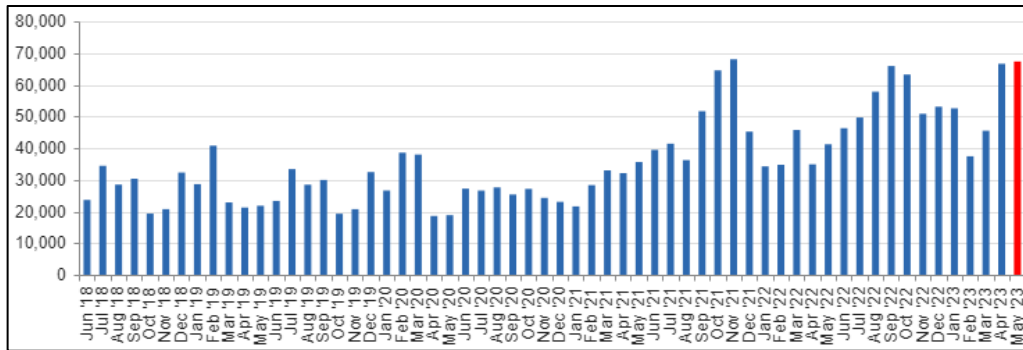
Figure 4.3: Laindon Town Centre Footfall Heat Map



Source: Datscha

- 4.21 The busiest section of the town centre, located along High Road, was sampled to obtain information on how footfall levels have changed between June 2018 and May 2023.
- 4.22 The impacts of COVID-19 restrictions cannot be seen as evidently for Laindon Town Centre as with other centres in the borough. Instead, the trend shown below is one of significant footfall growth when comparing the second half of 2018 through to the end of 2020 and 2021 through to May 2023.
- 4.23 Footfall levels in 2019 peaked in February at just over 40,000. In the last two years, figures have regularly been above 40,000, sometimes even topping 65,000.
- 4.24 When comparing the five centres within the borough, Laindon Town Centre shows the lowest levels of footfall. This is reflective of the lack of retail and service provision within the centre.

Figure 4.4: Footfall of High Road, Laindon Town Centre (June 2018 – May 2023)



Source: Datscha

### Accessibility

- 4.25 Bus services can be accessed along High Road with routes providing connections to places such as Basildon Town Centre, Basildon Hospital and Laindon Train Station. The bus stops have benches and shelters.
- 4.26 With multiple lanes of traffic, the central reservation with fencing and the removal of the footbridge, crossing High Road for pedestrians can be challenging. There are two crossings along High Road which are located 260m apart to support those navigating the centre by foot.
- 4.27 Cycle lanes are present to the north of the centre, either side of the traffic light crossing on High Road, but not along High Road itself. There are no bicycle parking facilities.
- 4.28 Although not within the town centre itself, Laindon train station is c.550m south of the centre and provides access to regular services that travel east in the direction of Basildon, Pitsea, Leigh-on-Sea and Southend (Central and East) and west towards Upminster, Barking and London (Fenchurch Street station).

Figure 4.5: Laindon Train Station

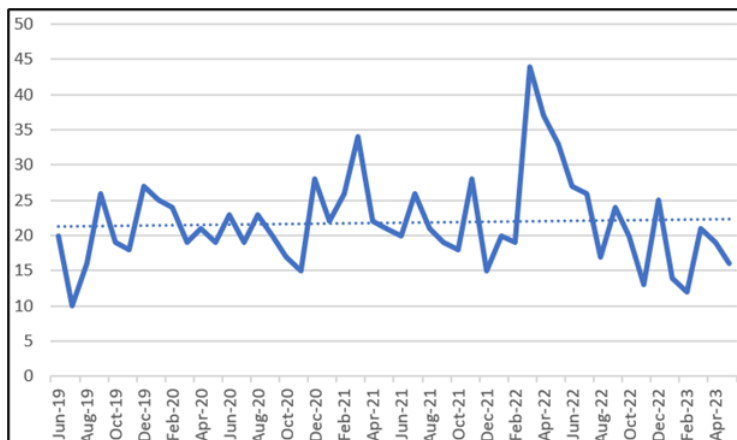


Source: LSH Site Visit

### Crime and Safety

- 4.29 A central postcode within Laindon was used to review total crime data within a ¼ mile radius between June 2019 and May 2023. The figure below outlines the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.
- 4.30 As can be seen, crime levels have been relatively low and stable in the area during this time. Although March 2022 saw a spike in activity with 44 crimes recorded, monthly rates tend to average between 20 and 25.

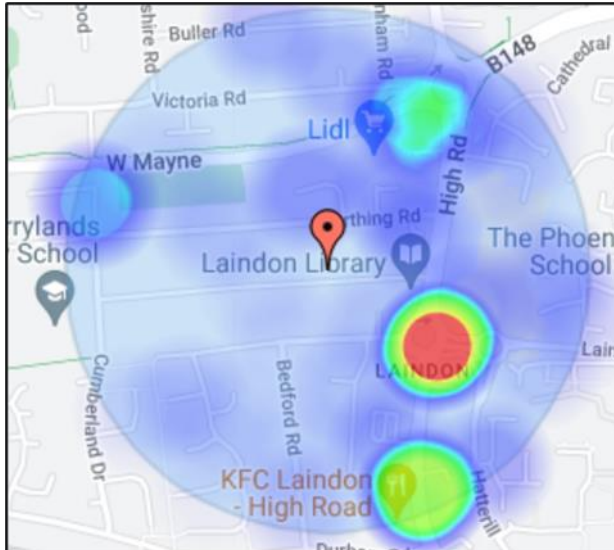
Figure 4.6: Total Crime Incidences, Laindon, June 2019 – May 2023



Source: UKCrimeStats

- 4.31 The figure below shows a heat map representing criminal activity within the same area and for the same period outlined previously. As can be seen, criminal activity seems to be concentrated between the two roundabouts to the southern edge of the town centre.
- 4.32 The top three types of crimes recorded within this area during this period are violence and sexual offences (458), anti-social behaviour (149) and public order offences (96).

**Figure 4.7: Crime Heat Map, Laindon**



Source: UKCrimeStats

### **Town Centre Environmental Quality**

- 4.33 The environmental quality of Laindon Town Centre is low, with elements of greenery balanced with a dual carriageway that cuts through the area.
- 4.34 Whilst there is a natural presence of greenery in the area, particularly to the west of High Road in the form of trees, bushes and hedges, there are unkept elements with instances of weeds lining the pavements and central reservations as well as overgrowth in parts which indicate a lack of maintenance and upkeep.
- 4.35 The dual carriageway makes it challenging for pedestrians to navigate the centre whilst increasing levels of air and noise pollution.
- 4.36 Minimal street furniture provision likely comes as a result of low footfall as outlined previously.
- 4.37 The centre is also currently dominated by the ongoing development which is bordered by the boardings, which whilst being effective in blocking the view of the construction site itself, do not do much for the appearance of the area.

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## **Barriers to Business**

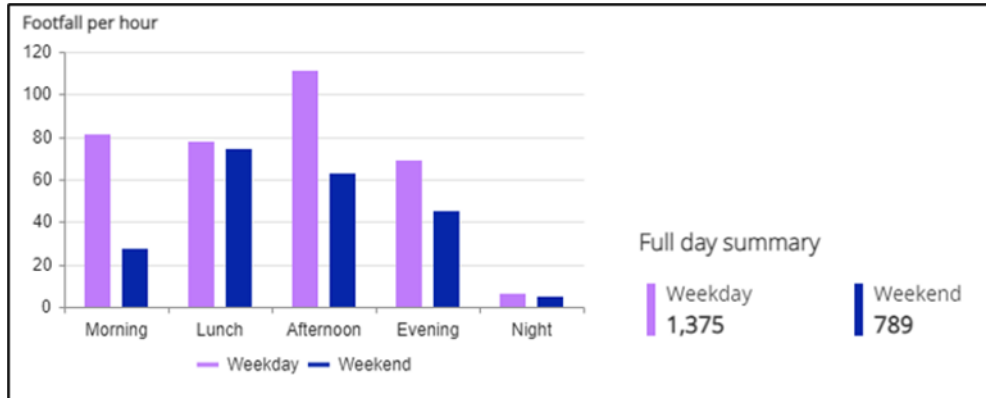
- 4.38 External influences can cause significant problems for businesses such as the current political, economic and environmental conditions which are often outside of our control. Understanding the potential issues and being aware of the barriers to business is important to consider to enable businesses to combat and address them, as these can also result in opportunities. The major challenges include:
- Cost of Living/ Inflation – consumers are tightening their budgets as a result of inflationary pressures on things such as grocery shopping and energy bills.
  - Brexit – adding complexities and costs to the price of goods.
  - Global Climate Emergency – the need to operate and live in a more sustainable and environmentally friendly way, which can sometimes be more costly/ less efficient and the overall impact of climate change (e.g., weather changes and flooding).
  - Digital Connectivity – the provision of low-cost, high-speed broadband to businesses and the ability to aid business start-ups with access to full fibre broadband. The provision of public Wi-Fi to promote interconnectivity between borough residents and businesses. Using smart technology to augment physical spaces to location specific digital services (such as wayfinding) to create a meaningful destination for the borough's residents and businesses.
  - Online Shopping – the convenience and product range offered by online retailers such as Amazon and Temu is leading to a growth in consumers shopping online.
- 4.39 The main challenges businesses currently face include impacts on supply chains, rising cost of supplies, rising operational costs (e.g. energy prices), labour shortages, and the squeeze on household income from the cost of living crisis which combined are impacting on business viability and growth potential.

## **Evening and Night-Time Economy**

- 4.40 Laindon's retail and leisure provision is almost entirely made up of the Lidl located on Manor Road which is open from 8am until 9pm Monday to Saturday and 10am until 4pm on Sunday. A Well Pharmacy can also be found in a portacabin unit located at the back of the car park accessed via Danacre.
- 4.41 Given the lack of leisure services in the town centre, there is no real evening economy of note in Laindon. The Laindon Place development to the east of High Road has plans to include retail and leisure units, which may see the beginnings of some evening activity.
- 4.42 The figure below is taken from the pedestrian footfall polygon (along High Road) analysed in the section entitled 'Pedestrian Flows'.
- 4.43 Whilst footfall levels don't significantly decline in the evening in the same way that can be seen for other town centres, Laindon does have the lowest average hourly evening (5pm-9pm) footfall levels of the five town centres.

4.44 The absence of a notable drop in pedestrian activity from lunch to evening that can be seen in other centres is likely due to there being minimal daytime attraction to the area and so a low level of footfall at all times of the day.

**Figure 4.8: Average Footfall Counts**



Source: Datscha

## Customer Perception

4.45 Our assessment of customers' views and behaviours draws on the household survey conducted by NEMS Market Research (NEMS) across the 8 study zones between March and April 2023.

4.46 Apart from helping to identify shopping and leisure patterns across the defined catchment area and zones, the household survey also asked specific questions on their main reason for visiting and what they like most about the centres.

4.47 Whilst the sample size for Laindon was not large enough to carry out an in-depth analysis of the results, the key takeaways from the responses that were given are:

- 'Food Shopping' (36%) and 'Shopping in General' (22.9%) were the top two responses to the reason for visiting Laindon Town Centre.
- When asked what they liked about Laindon Town Centre, 36.1% said that it is 'Close to Home', 28.4% said 'Nothing' and 23.3% said the fact that it is 'Easy to get to by car'.

## Conclusion

4.48 Laindon has a very limited town centre offer. Whilst there is hope that the Laindon Place development will stimulate the area and lead to a more legitimate centre, at present it lacks the key elements that comprise a town centre. The current provision in the core of the centre comprises a Lidl and a library. It is clear that much more is needed to meet the needs of the local catchment.

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

<b>Strengths</b>
<ul style="list-style-type: none"><li>• Lidl creates a focal point for the town that will draw visitors in from a wider catchment.</li><li>• Footfall has grown significantly when comparing 2018 to 2020 with 2021 to 2023.</li></ul>
<b>Weaknesses</b>
<ul style="list-style-type: none"><li>• At present extremely limited provision of retail and service within the defined core of the centre dominated by a Lidl and a pharmacy. Beyond the core, opposite the rail way station, there is a small collection of independent outlets catering for F&amp;B and small convenience provision.</li><li>• Limited provision results in residents shopping and socialising across other centres.</li><li>• Despite the growth in footfall levels, actual numbers are still very low.</li><li>• Town centre signage is not clear and seems to direct people towards the train station as opposed to the area defined as the town centre.</li><li>• The dual carriageway and central reservation with a fence make it challenging for pedestrians to cross the High Road.</li></ul>

<b>Opportunities</b>
<ul style="list-style-type: none"><li>• For the Laindon Place development to become a true hub for the centre. This is anticipated to deliver retail, leisure, office space and community services for the local community.</li></ul>
<b>Threats</b>
<ul style="list-style-type: none"><li>• Laindon Place is not delivered.</li><li>• Competition from the new Lidl store on St Hilary retail park. Shoppers travelling from a distance to the Laindon Lidl may now find it more convenient to travel to the St Hilary retail park store, whilst also being attracted by the neighbouring offer on Pipp's Hill Retail Park.</li><li>• Nearby town centres such as Basildon and Pitsea have much stronger retail, leisure and service provision. The Laindon Place development will not change that immediately, and so it will still be challenging to draw visitors from beyond the immediate catchment.</li></ul>

- 
- The growth in online shopping and its impact on brick-and-mortar retail outlets.
  - The longer-term impacts of the pandemic are still yet to be determined.
  - High / increasing business operating costs.



## 5. PITSEA TOWN CENTRE HEALTH CHECK

### Overview

- 5.1 Pitsea is a small market town located in the county of Essex and is roughly 3km east of Basildon and 42km from central London. The A13 major road runs to the south of the town centre, giving access to London to the west and the A130 and A127 to the east.
- 5.2 Pitsea Train Station is located to the south of the A13, offering services into Basildon within 4 minutes, Southend (Central) in around 15 minutes and London (Fenchurch Street) in under an hour.
- 5.3 A c.13,500 sqm Tesco Extra neighboured by a B&M store lies outside of the town centre boundary, potentially competing with the centre's offer. Having said this, a strong convenience provision also exists within the town centre's boundary, with ALDI located to the north of High Road and Lidl based on Old Market Retail Park. These retailers are supported on their respective retail parks by national multiples such as Greggs, Costa Coffee, McDonalds, The Range and Pets at Home.
- 5.4 The map below, taken from the Basildon District Local Plan 1998 – Town Centre Inset Maps, outlines Pitsea's town centre boundary.

**Figure 5.1: Pitsea Town Centre Boundary**



Source: Basildon District Local Plan 1998 – Town Centre Inset Maps

## Diversity of Uses

- 5.5 The table below is based on the Category Goad report by Experian which was informed by survey data undertaken in February 2022. It shows that Pitsea town centre has a total of 70 outlets with an overall quantum floorspace of 36,613 sqm.
- 5.6 14 of these outlets are comparison retail, which take up a combined floorspace of just over 12,000 sqm. As a proportion of the centre, it accounts for 20% of the total outlets (lower than the UK average) and 33.3% of the total floorspace (above the UK average).
- 5.7 There are 10 convenience retail units, which have a combined floorspace of around 16,000 sqm (largely impacted by the Tesco store which falls within the Goad survey area). As a proportion of the centre, it accounts for 14.3% of total outlets and 43.2% of total floorspace (both above the UK average).
- 5.8 Retail services has 14 outlets and approximately 1,300 sqm in floorspace. 20% of the outlets in the centre are retail services, but only 3.6% of the floorspace.
- 5.9 There are a total of 24 Leisure Service outlets which account for 34% of the overall outlets. These 24 outlets have a combined floorspace of 5,509 sqm which represents 15% of total floorspace within the surveyed area.
- 5.10 Financial and Business Services have a total of 3 outlets and 530 sqm of floorspace, both lower than the UK averages when it comes to proportional representation.

**Table 5.1: Number of Units in Pitsea Town Centre**

	No. Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Pitsea	UK Average		Pitsea	UK Average
Comparison Retail	14	20.00%	26.87%	12,189	33.29%	30.13%
Convenience Retail	10	14.29%	9.27%	15,803	43.16%	15.47%
Retail Services	14	20.00%	15.75%	1,319	3.60%	7.23%
Leisure Services	24	34.29%	25.31%	5,509	15.05%	26.19%
Financial & Business Service	3	4.29%	8.75%	530	1.45%	6.60%
Vacant	5	7.14%	13.85%	1,263	3.45%	13.79%
<b>Total</b>	<b>70</b>	<b>100.00%</b>	<b>99.80%</b>	<b>36,613</b>	<b>100.00%</b>	<b>99.41%</b>

Source: Experian Goad Category Report - March 2022

- 5.11 The table below breaks down the Leisure Service sector into the food and beverage (F&B) offer within the centre. There are a total of 16 F&B related outlets which represents over a fifth of the overall outlets, which is slightly higher than the UK average.
- 5.12 F&B floorspace occupies 2,035 sqm which is 5.6% of the total survey area floorspace (much lower than the UK average figure of 15.8%). Fast food & takeaways dominate the makeup of the provision when it comes to number of outlets (10).

**Table 5.2: Food & Beverage Units and Floorspace**

	No. Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Pitsea	UK Average		Pitsea	UK Average
Bars & Wine Bars	0	0.00%	2.24%	0	0.00%	2.36%
Cafes	4	5.71%	5.00%	511	1.40%	2.83%
Fast Food & Take-aways	10	14.29%	6.05%	1,394	3.81%	3.03%
Public Houses	0	0.00%	2.60%	0	0.00%	3.45%
Restaurants	2	2.86%	4.89%	130	0.36%	4.16%
<b>Total</b>	<b>16</b>	<b>22.86%</b>	<b>20.78%</b>	<b>2,035</b>	<b>5.6%</b>	<b>15.8%</b>

Source: Experian Goad Category Report - March 2022

## Vacancies

5.13 The Goad survey identified a total of 5 vacant outlets which equals to a total of 1,263 sqm in floorspace. This represents a low vacancy rate, with vacant outlets representing just over 7% of the totals units, and vacant floorspace representing 3.5% of the overall floorspace. Both percentages are well below the UK averages.

5.14 The figure below is a visual representation of these vacancies and their locations. It shows that there is no significant clustering of vacancies and that the empty units are mainly of small proportion.

**Figure 5.2: Vacancies in Pitsea Town Centre**



Source: Experian Goad (June 2023)

- 5.15 Local Data Company (LDC) also monitor vacancy rates and show figures dating back to 2017. The area covered by LDC does not match that of Goad and so they are not directly comparable. Goad covers the town centre as well as the retail area to the south west (Tesco and B&M), whereas LDC only covers the retail area to the north of High Road (the parade of units fronting High Road and the retail park with The Range and ALDI to the rear).
- 5.16 LDC's vacancy rates show a worsening situation, with figures jumping from 3.8% in 2018 to 11.5% in 2020, with a further increase to 12% in 2023.

### Multiple and Independent Representation

- 5.17 Experian Goad data identified 28 multiples in the town centre as of March 2022 which accounts for 40% of all outlets in the centre with a total quantum floorspace of 38,772 sqm. National brands include ALDI, Lidl, The Range, McDonald's, KFC and Pets at Home. The identified national brands provide a good mix of offer that meet the needs of local residents and visitors on a day-to-day basis.

**Table 5.3: Retail Multiple Representation**

	No. of Outlets	% of Total
Comparison Retail	6	21.4%
Convenience Retail	6	21.4%
Retail Service	4	14.3%
Leisure services	10	35.7%
Financial & Business Service	2	7.1%
<b>Total multiples</b>	<b>28</b>	<b>100%</b>

Source: Experian Goad Category Report – March 2022

- 5.18 Pitsea has a good representation of independent operators which is essential for town centres to create a unique and local feel. Examples of these include Rose Cafe, Jes Afro-Caribbean Food Market and Broadway Barbers.

### Retailer Requirements

- 5.19 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 5.4: Retailer Requirements for Pitsea Town Centre**

Recorded Date	Operator	Sector	Min Sqm	Max Sqm
Feb-23	Savers	Comparison	190	330
Apr-22	M&S Food	Convenience	1,160	2,320
			<b>1,350</b>	<b>2,650</b>

Source: The Requirement List, July 2023

- 5.20 As of July 2023, a review of published operator requirements identified 2 recorded requirements from retail and leisure operators since April 2022, seeking a combined maximum floorspace of up to 2,650 sqm.
- 5.21 It should be noted that these are not necessarily operators seeking representation in the town centre but potentially out-of-centre locations and industrial parks.
- 5.22 It is also possible that these operators are not looking for opportunities in Pitsea specifically, rather they are looking for opportunities in areas similar to and including Pitsea.
- 5.23 Independents do not publish their requirements in the same way and so are harder to identify.

### **Street Markets**

- 5.24 Pitsea Market runs every Wednesday, Saturday and Sunday with a second hand/ boot fair day every Friday. Stalls are predominantly based in the dedicated square between the Aldi store and High Road.
- 5.25 With free parking for up to 3 hours conveniently located by the market, visitors can park up and peruse the many stalls offering a range of goods including clothing & footwear, accessories, jewellery, plants & flowers and cleaning & kitchen products. Food and drink vendors also pitch up to offer meals, snacks and refreshments.

### **Commercial Rents and Yields**

- 5.26 Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or Pre pack Administrations. Retailers and restaurateurs have frequently used these processes to effectively impose lower rentals, turnover rents and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.
- 5.27 In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.

- 
- 5.28 The impact of the pandemic has exaggerated this trend and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.
- 5.29 A broad estimate of prime Zone A rental tone within Pitsea would indicate a rental level in the region of £325/sqm (£30/sqft) – £375/sqm (£35/sqft).
- 5.30 In terms of investment yields, retail as an asset class has seen a significant fall in value over the past decade. Transactional volumes in 2023 are subdued with high interest rates and global political uncertainties impacting on investor sentiment. Clearly, there are many factors that impact on town centre retail yields including lease length, tenant covenant and basis of rent review but in the broadest terms we would comment as follows:
- Prime high street yields – 6.75%
  - Good secondary high street yields – 9%
  - Secondary high street yields – 12%

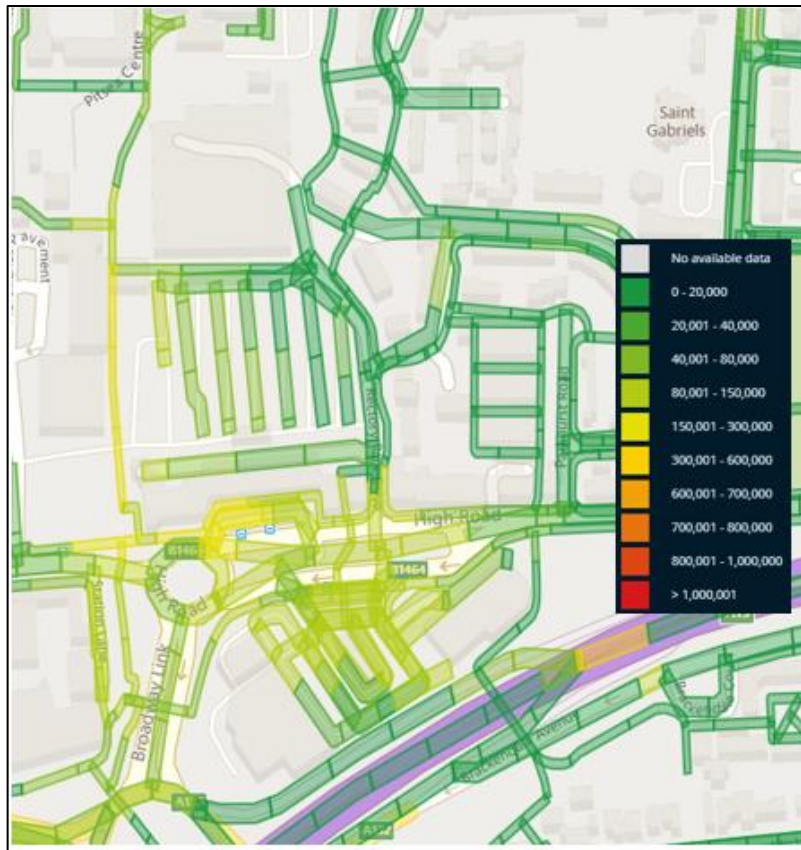
### **Car Parking**

- 5.31 The two retail parks make up the majority of the parking provision in Pitsea Town Centre. There is additional parking associated with the two parades of shops – Station Lane and north of High Road to the rear of Broadway Bus Stop.
- 5.32 The retail park to the north of the centre offers the largest car park, giving visitors convenient access to Aldi, The Range, Pitsea Market and more. There are over 400 spaces with no charge and a maximum stay of 3 hours.
- 5.33 Old Market Retail Park, to the south of High Road, has convenient parking provision for McDonald's, KFC, Lidl and more. There are over 175 parking spaces and free parking for varying lengths of stay dependent on time of day.
- 5.34 The parade of shops on Station Lane has 13 accompanying parking spaces, whilst the parade north of High Street has over 20 spaces and is a pay and display parking area.

### **Pedestrian Flows**

- 5.35 The figure below illustrates the pedestrian heat map for Pitsea Town Centre and shows a particular concentration of footfall on the northern side of High Road and up towards Aldi and Pembroke House.

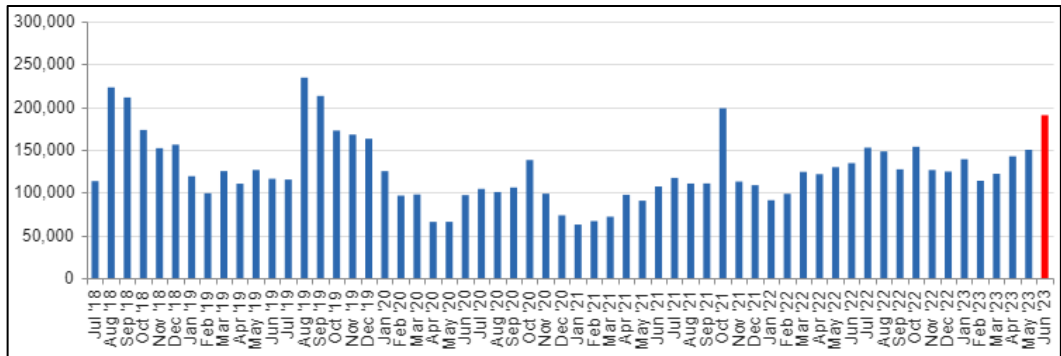
Figure 5.3: Pitsea Town Centre Footfall Heat Map



Source: Datscha

- 5.36 The busiest section of the town centre, located next to the Aldi car park, was sampled to obtain information on how footfall levels have changed between July 2018 and June 2023.
- 5.37 As can be seen in the graph below, excluding a handful of peaks and some troughs that can likely be associated with restrictive COVID-19 measures, footfall levels have been relatively consistent over the last 5 years.
- 5.38 When comparing the year of 2019 to 2022, average monthly footfall levels decreased by 13% (147,000 in 2019 compared to 128,000 in 2022). It is possible to suggest therefore that Pitsea Town Centre has struggled to fully recover from the impacts of the pandemic.
- 5.39 This decrease looks to be partly due to the disappearance of the peaks that were seen in August and September of both 2018 and 2019. In recent years, footfall figures in these months have significantly dropped in comparison and now blend in with the rest of the year's activity levels.
- 5.40 June 2023 shows a promising sign, with this month representing the highest level of footfall since October 2021, however, there is no guarantee that this will not be a one off (as October 2021 proved to be), as opposed to being the beginning of an upward trend.

**Figure 5.4: Footfall of High Road, Pitsea Town Centre (July 2018 – June 2023)**



Source: Datscha

### Accessibility

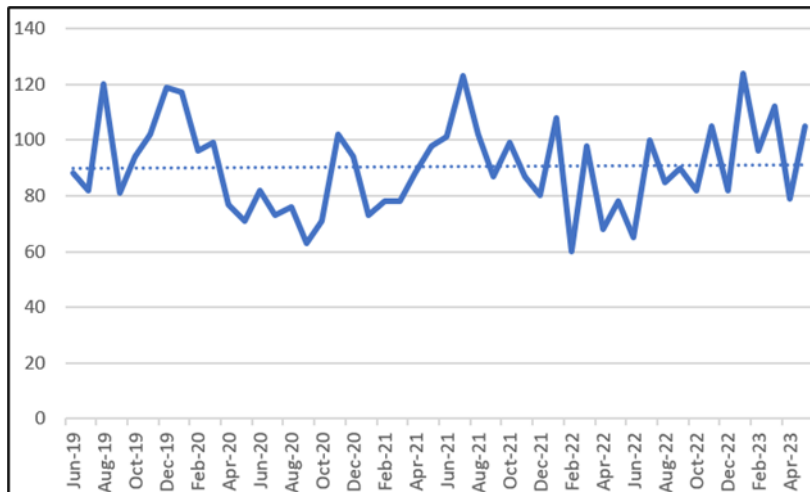
- 5.41 As mentioned previously, Pitsea town centre mostly comprises of purpose-built retail parks with both accessible via High Road that runs through the town centre east to west. The A13 can be found to the south of the centre and heads west in the direction of London and east to the A130 which runs north towards Chelmsford. Cycling within the centre is likely challenging due to a lack of dedicated cycle lanes and the busy multi-lane roads within the centre.
- 5.42 Public transport within Pitsea town centre comes in the form of bus services that run through the area, connecting passengers to nearby places such as Basildon and Canvey Island. Pitsea train station can be found c.500m south of the centre with regular services running to and from London to the west and Southend to the east.
- 5.43 Pedestrian access within the centre is good as footpaths can be found across both retail parks. Several traffic light crossings can be used to navigate High Road, although traffic can be heavy with multiple lanes to contend with. Dropped kerbs and tactile paving at the pedestrian crossings assist with pedestrian movement around Pitsea.

### Crime and Safety

- 5.44 A central postcode within Pitsea was used to review total crime data within a ¼ mile radius between June 2019 and May 2023. The figure below outlines the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.
- 5.45 As can be seen, crime levels have been stable during this time, with highs of 124 in January 2023 and a low of 60 in February 2022.
- 5.46 When compared to the other centres, Pitsea has the second highest crime rate.



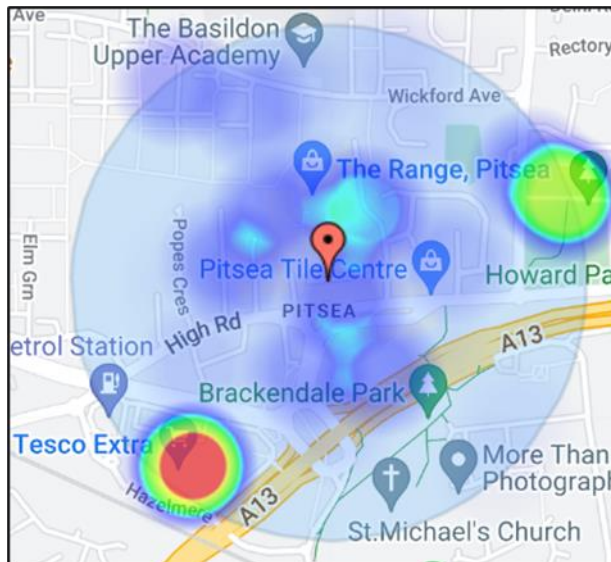
**Figure 5.5: Total Crime Incidences, Pitsea, June 2019 – May 2023**



Source: UKCrimeStats

- 5.47 The figure below shows a heat map representing criminal activity within the same area and for the same period outlined previously. As can be seen, the largest concentration of criminal activity comes from the Tesco Extra (outside of the town centre boundary), likely related to shoplifting offences. There also seems to be a notable number of incidents in Howard Park (again, outside of the town centre boundary, to the east).
- 5.48 The top three types of crimes recorded within this area during this period are violence and sexual offences (1,238), anti-social behaviour (795) and shoplifting (639).

**Figure 5.6: Crime Heat Map, Pitsea**



Source: UKCrimeStats

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## Town Centre Environmental Quality

- 5.49 The environmental quality of Pitsea Town Centre is fair with a lack of greenery and/ or green space, but adequate provision of street furniture.
- 5.50 Buildings in the centre on the whole are presentable and well-kept, particularly within the retail area to the north of the Pitsea Town Centre. There is however scope to freshen up and enhance some of the frontages along High Road, particularly the parade of shops to the rear of Broadway Bus Stop, north of High Road.
- 5.51 There is a distinct lack of green space and general greenery within Pitsea, with the exception of the very centre of the town, along High Road where large trees line the street.
- 5.52 Street furniture is adequately provisioned with bins, public seating, bollards & railings, lighting and signage present around the centre.

**Figure 5.7: Signposting in Pitsea Town Centre**



Source: LSH Site Visit

- 5.53 There is potential for the area by Pitsea Leisure Centre, to the north west of Pitsea to become a quiet place for people to enjoy and spend time, given the open pedestrian space and the presence of 'The Place' (Pitsea Leisure Centre). As it is currently however, it feels somewhat hidden and forgotten, with railings wrapped around overgrowth and the Pitsea Centre building itself in need of general cosmetic attention.
- 5.54 With multiple lanes and heavy traffic at times, High Road can be challenging to navigate for pedestrians whilst also impacting the air and noise pollution within the area.

**Figure 5.8: Pitsea Centre Building, Overgrowth and Fencing**



Source: LSH Site Visit

## **Barriers to Business**

5.55 External influences can cause significant problems for businesses such as the current political, economic and environmental conditions which are often outside of our control. Understanding the potential issues and being aware of the barriers to business is important to consider to enable businesses to combat and address them, as these can also result in opportunities. The major challenges include:

- Cost of Living/ Inflation – consumers are tightening their budgets as a result of inflationary pressures on things such as grocery shopping and energy bills.
- Brexit – adding complexities and costs to the price of goods.
- Global Climate Emergency – the need to operate and live in a more sustainable and environmentally friendly way, which can sometimes be more costly/ less efficient and the overall impact of climate change (e.g., weather changes and flooding).
- Digital Connectivity – the provision of low-cost, high-speed broadband to businesses and the ability to aid business start-ups with access to full fibre broadband. The provision of public Wi-Fi to promote interconnectivity between borough residents and businesses. Using smart technology to augment physical spaces to location specific digital services (such as wayfinding) to create a meaningful destination for the borough's residents and businesses.
- Online Shopping – the convenience and product range offered by online retailers such as Amazon and Temu is leading to a growth in consumers shopping online.

5.56 The main challenges businesses currently face include impacts on supply chains, rising cost of supplies, rising operational costs (e.g. energy prices), labour shortages, and the squeeze on household income from the cost of living crisis which combined are impacting on business viability and growth potential.

## Evening and Night-Time Economy

- 5.57 A sample of 10 retailers was selected across multiple categories throughout the town centre which provides a general overview of the opening and closing times of retailers and weekend offer.
- 5.58 There is a limited provision of Leisure Services, which tends to be the main component of a healthy evening economy. Pitsea has a distinct lack of pubs, bars and restaurants to strengthen its evening offer, instead relying on a small number of takeaway and fast-food restaurant outlets.

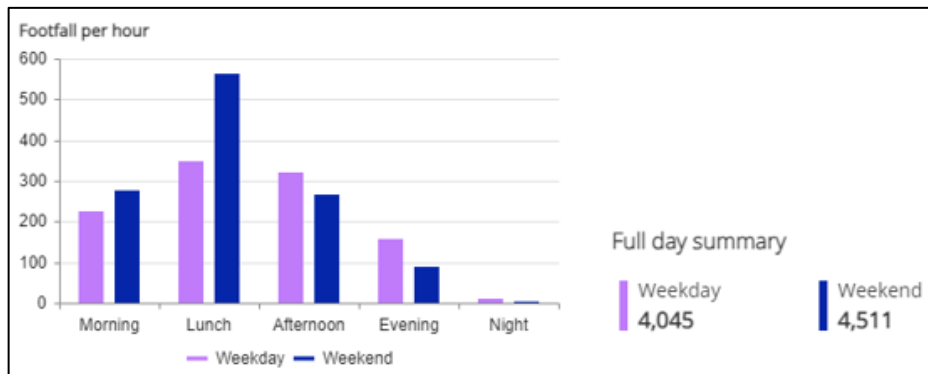
**Table 5.5: Retailer Opening Times**

Retailer Name	Open	Close	Sunday	Type
Lidl	8am	10pm	Yes	Convenience
ALDI	8am	8pm	Yes	Convenience
Churchill's Fish and Chips	11:30am	10pm	Yes	Leisure Services
McDonalds	Open 24hrs	Open 24hrs	Yes	Leisure Services
Domino's	11am	11pm	Yes	Leisure Services
Pets at Home	9am	8pm	Yes	Comparison
The Range	9am	8pm	Yes	Comparison
Card Factory	9am	5:30pm	Yes	Comparison
Honie's Nails	9am	7pm	Yes	Retail Services
T & M Nails and Beauty	9am	5:30pm	Yes	Retail Services

Source: LSH Research

- 5.59 The figure below is taken from the pedestrian footfall polygon (located by Aldi car park) analysed in the section entitled 'Pedestrian Flows'.
- 5.60 As a result of the 10 sampled outlets all opening on Sundays, weekend footfall is strong, particularly at lunch time (11am-2pm).
- 5.61 Although footfall drops in the evening (5pm-9pm), the decline is not as steep as may be expected given the lack of pubs, bars and restaurants in the town centre. This may be due to the provision of convenience and comparison retailers that are open until 8pm-10pm. There is also 'The Place', which is a multi-purpose leisure centre that offers fitness classes in an evening.

**Figure 5.9: Average Footfall Counts**

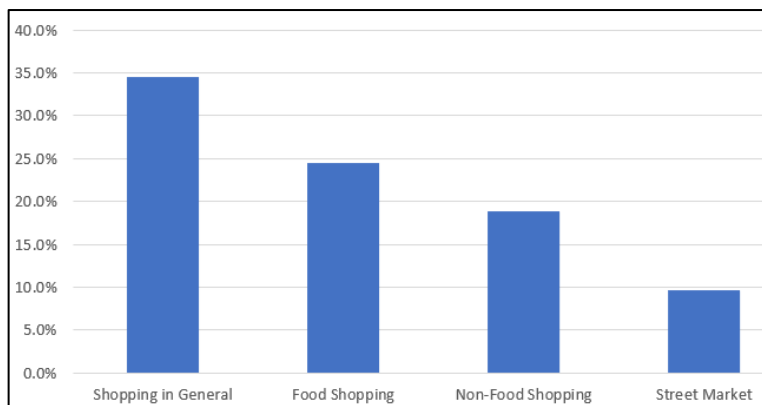


Source: Datscha

### Customer Perception

- 5.62 Our assessment of customers' views and behaviours draws on the household survey conducted by NEMS Market Research (NEMS) across the 8 study zones between March and April 2023.
- 5.63 Apart from helping to identify shopping and leisure patterns across the defined catchment area and zones, the household survey also asked specific questions on their main reason for visiting and what they like most about the centres.
- 5.64 The figure below sets out the main reasons for respondents visiting Pitsea Town Centre. Again, as with other centres, shopping is an evident attraction for those choosing to visit – 34.5% said that they come for 'Shopping in General', 24.5% for 'Food Shopping' and 18.9% for 'Non-Food Shopping'.
- 5.65 Almost 1 in 10 said that they visit Pitsea Town Centre for its market, which also appears in the top responses to what customers like about the centre, giving a strong indication of its draw and appeal for those who choose to frequent the area.

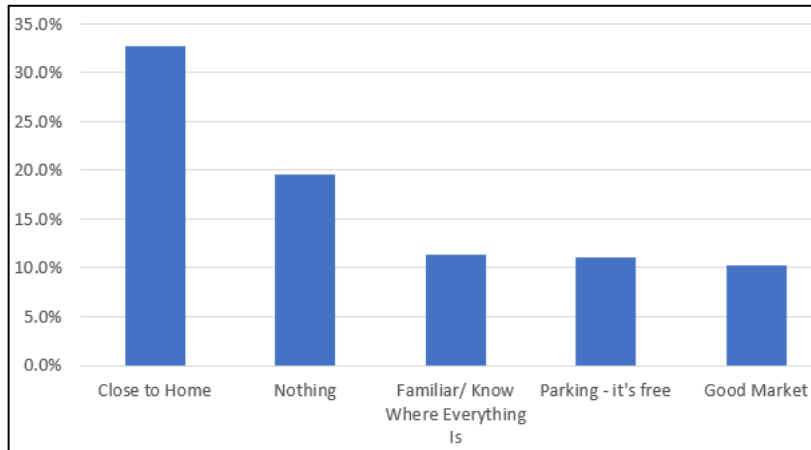
**Figure 5.10: Pitsea Town Centre, Main Reasons for Visiting**



Source: NEMS Household Survey Results

- 5.66 The figure below sets out the main things that respondents like about Pitsea Town Centre. Almost one in three said that it is the fact that it's 'Close to Home' and just under 1 in 5 said that there is 'Nothing' that they like about it.
- 5.67 Beyond that however, roughly one in ten provided 'Familiar/ Know Where Everything Is', 'Parking – it's free' and 'Good Market' as aspects of Pitsea Town Centre that they like.

**Figure 5.11: Pitsea Town Centre, Main Customer Likes**



Source: NEMS Household Survey Results

## Conclusion

- 5.68 Pitsea Town Centre is dominated by large format retail units in its centre with the High Road Retail Park and a Lidl supermarket beyond the core of the centre. As such, it has a strong convenience and comparison offer that will meet the relevant needs of its immediate and broader catchment.
- 5.69 The market provides a complementary retail and leisure offer that sits alongside the national multiple brands that dominate the permanent retail units in the centre. The market is popular and allows for a diverse range of local / smaller businesses to thrive.
- 5.70 The decrease in footfall levels in recent times is of some concern and should be monitored going forward.
- 5.71 Improvements could be made to the environmental quality of the town centre through greenery and street furniture to make Pitsea a more appealing centre to spend time and enjoy.
- 5.72 Overall, the Strengths, Weaknesses, Opportunities, Treats (SWOT) can be summarised as follows:

<b>Strengths</b>
<ul style="list-style-type: none"> <li>• Low vacancy rate with no concentration or cluster of vacancies</li> <li>• Good retail provision across two adjacent retail park type floorspace provision.</li> </ul>

- Presence of national multiples and big brands that will attract visitors from beyond the immediate catchment
- Pitsea Market attracts visitors and enhances the sense of community
- Parking provision is good across both retail parks
- There is good signposting across the centre to help visitors navigating their way around.

### Weaknesses

- The food and beverage offer is heavily dominated by fast-food and takeaways.
- Footfall has decreased by 13% between 2019 and 2022 suggesting that the impacts of the pandemic may be long-lasting.
- Heavy traffic along High Road causing congestion and pollution, as well as making it more dangerous for pedestrians trying to navigate from north to south.
- The train station is not easily accessible from the town centre, particularly by foot
- There is a lack of green spaces and welcoming public areas with seating for people to spend time.
- The area tucked away between The Range and Pembroke House is unkept and neglected. The Pitsea Leisure Centre and Pitsea Library buildings could do with some general maintenance whilst temporarily fencing and overgrown hedges and bushes is unwelcoming.

### Opportunities

- More greenery and public spaces to sit and enjoy, particularly near to the market where people may want to eat and drink in a pleasant environment
- Improvements to Pitsea Leisure Centre and Pitsea Library buildings as well as the area surrounding so that it becomes an integral component of the town centre offer as opposed to a forgotten place hidden away.
- The opening of the Pitsea Diagnostic Centre (to be located at The Place in the town centre) will provide additional footfall that can be capitalised and aiding to the vitality and viability of the centre.
- Productive Use / development of the land to the rear of Tudor Manors as highlighted within the Basildon District Local Plan Saved Policies (2007)

### Threats

- Tesco and B&M are located outside of but nearby to the centre and in combination provide a strong convenience and comparison offer. Having said this, Pitsea town centre competes well with this based on its own retail provision
- The growth in online shopping and its impact on brick-and-mortar retail outlets
- The longer-term impacts of the pandemic are still yet to be determined
- High / increasing business operating costs

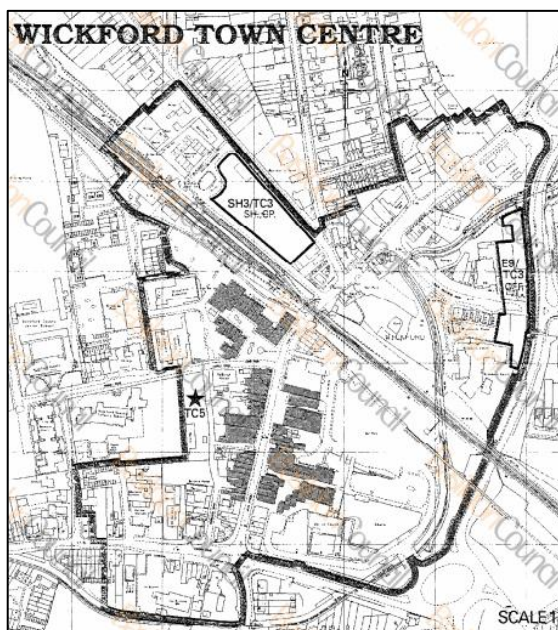


## 6. WICKFORD TOWN CENTRE HEALTH CHECK

### Overview

- 6.1 Wickford is a town located in the county of Essex, approximately 46km east of central London and roughly 6km north east of Basildon Town Centre.
- 6.2 The town is bordered by two major roads - the A127 located on the south of the town which can be used to drive towards London and the A130 to the east of the town which leads north to the city of Chelmsford.
- 6.3 At the north west extremities of the town centre boundary, Wickford Train Station and its large 460 space car park provide transport links to London and Billericay to the west and Southminster and Southend to the east.
- 6.4 The centre has both an ALDI (which temporarily closed in March 2023 for major redevelopment work) and an Iceland, acting as the town's convenience focal points. Wickford does also have a Tesco Express and two small Co-op stores, but neither are located within the town centre boundary. They help to serve the top-up mission of their immediate catchments, whilst ALDI acts as the go-to destination for locals to complete their larger grocery shopping trips.
- 6.5 There is some ongoing residential development works to the north of the centre, west of Runwell Road which will boost the residential population of Wickford Town Centre
- 6.6 The map below, taken from the Basildon District Local Plan 1998 – Town Centre Inset Maps, outlines Wickford's town centre boundary.

**Figure 6.1: Wickford Town Centre Boundary**



Source: Basildon District Local Plan 1998 – Town Centre Inset Maps

## Diversity of Uses

- 6.7 The Goad Category Report for Wickford was informed by a survey dated November 2022. It shows that Wickford town centre has a total of 170 outlets and an overall quantum floorspace of 29,496 sqm.
- 6.8 47 of the outlets are occupied by comparison retail operators which have a combined floorspace of 8,881 sqm. The proportion of comparison retail units and floorspace in Wickford is similar to that of the UK.
- 6.9 16 of the outlets are occupied by convenience retail operators which have a combined floorspace of 2,917 sqm which represents 9.9% of the total floorspace within the surveyed area. This is comfortably lower than the UK average of 15.5%.
- 6.10 Retail services have 31 outlets and approximately 2,400 sqm in floorspace. As a proportion of the total, both are slightly higher than the UK average.
- 6.11 There are a total of 46 leisure service outlets which is around 27% of the total outlets in the centre, similar to the UK average of around 25%. These percentage figures are very similar when it comes to leisure service floorspace.
- 6.12 Financial and business services have a total of 11 outlets and approximately 1,600 sqm. As a proportion of the total, both are slightly below the average seen across the UK.

**Table 6.1: Number of Units in Wickford Town Centre**

	No. Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Wickford	UK Average		Wickford	UK Average
Comparison Retail	47	27.65%	26.87%	8,881	30.11%	30.13%
Convenience Retail	16	9.41%	9.27%	2,917	9.89%	15.47%
Retail Services	31	18.24%	15.75%	2,397	8.13%	7.23%
Leisure Services	46	27.06%	25.31%	7,098	24.06%	26.19%
Financial & Business Service	11	6.47%	8.75%	1,607	5.45%	6.60%
Vacant	19	11.18%	13.85%	6,596	22.36%	13.79%
Total	170	100.00%	100.00%	29,496	100.00%	99.41%

Source: Experian Goad Category Report - November 2022

- 6.13 The table below breaks down the leisure service sector into the food and beverage (F&B) offer within the centre. There are a total of 38 F&B related outlets which represents just over 22% of the overall outlets, which is slightly higher than the UK average.
- 6.14 F&B floorspace occupies 4,599 sqm which is 15.6% of the total floorspace within the surveyed area (UK average is 15.8%). Fast food & takeaway outlets dominate the F&B provision in Wickford with a total of 19 units. Restaurants have the largest quantum of floorspace (1,830 sqm).

**Table 6.2: Food & Beverage Units and Floorspace**

	No. Outlets	% of Total Outlets		Gross Floorspace (sqm)	% of Total Floorspace	
		Wickford	UK Average		Wickford	UK Average
Bars & Wine Bars	1	0.59%	2.24%	74	0.25%	2.36%
Cafes	8	4.71%	5.00%	938	3.18%	2.83%
Fast Food & Take-aways	19	11.18%	6.05%	1,301	4.41%	3.03%
Public Houses	2	1.18%	2.60%	455	1.54%	3.45%
Restaurants	8	4.71%	4.89%	1,830	6.20%	4.16%
<b>Total</b>	<b>38</b>	<b>22.35%</b>	<b>20.78%</b>	<b>4,599</b>	<b>15.6%</b>	<b>15.8%</b>

Source: Experian Goad Category Report – November 2022

### Vacancies

- 6.15 There are 19 vacant outlets, which represents 11% of all outlets. These 19 units however account for 6,500 sqm of floorspace, making it the third largest user of space within the surveyed area, second only to comparison retail and leisure services. This means that over 22% of the floorspace in Wickford is vacant, significantly higher than the UK average of around 13.8%.
- 6.16 The figure below outlines where these vacant units can be found. There is a notable vacant outlet in the south east corner of the centre which alone totals 3,360 sqm. This outlet was formerly a Co-op store which closed in May 2022.

**Figure 6.2: Vacancies in Wickford Town Centre**



Source: Experian Goad (June 2023)

- 6.17 Local Data Company (LDC) also monitor vacancy rates and show figures dating back to 2017. The area covered by LDC does not match that of Goad and so they are not directly comparable.
- 6.18 LDC's vacancy rates show a worsening situation over this period, with a rise from 2.9% in 2017 to 9.1% in 2020. The rate seems to have stabilised in recent years with the 2023 figure at 9%

### Multiple and Independent Representation

- 6.19 There is a good presence and mix of both national multiple and independent outlets in Wickford Town Centre.
- 6.20 National multiples can be found throughout the centre and combined, create an offer of well-known brands that will draw visitors in from the immediate catchment and beyond.
- 6.21 To the north of the centre, ALDI (which is currently undergoing a store re-development), Premier and Betfred can be found. More central to the town, key national multiples include Iceland, Card Factory, Poundland, Costa Coffee and Greggs.
- 6.22 The Willows Shopping Centre, which is located to the west of High Street and just south of the railway line has an offer which includes New Look, Peacocks and Boots Pharmacy.
- 6.23 There is a fair provision of high street banks within Wickford Town Centre at present – Halifax, Nationwide and NatWest. Santander closed their branch in 2021.
- 6.24 Independent outlets such as Plush Restaurant, Stephen's Bouquet (florist) and J Clark & Sons Butchers help to give the centre a unique and local feel.

### Retailer Requirements

- 6.25 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 6.3: Retailer Requirements for Wickford Town Centre**

Recorded Date	Operator	Sector	Min Sqm	Max Sqm
May-23	Lidl	Convenience	1,670	2,420
Feb-23	Kwik Fit	Service	460	930
Jan-23	The Range	Comparison	2,320	3,720
Feb-22	Travelodge	Leisure	930	3,720
Jan-21	ECigWizard	Comparison	28	93
			<b>5,408</b>	<b>10,883</b>

Source: The Requirement List, July 2023

- 6.26 As of July 2023, a review of published operator requirements identified 5 recorded requirements from retail and leisure operators since January 2021, seeking a combined maximum floorspace of up to 10,883 sqm.
- 6.27 It should be noted that these are not necessarily operators seeking representation in the town centre but potentially out-of-centre locations and industrial parks (e.g., The Range).
- 6.28 It is also possible that these operators are not looking for opportunities in Wickford specifically, rather they are looking for opportunities in areas similar to and including Wickford.
- 6.29 Independents do not publish their requirements in the same way and so are harder to identify.

### **Street Markets**

- 6.30 In May 2021, Wickford Market began to operate along the High Street, with a temporary traffic regulation order in place on market day to create a pedestrian, car-free zone. The hope was for this to become the permanent set-up of the market, however, due to various objections, the market had to relocate to Market Lane in June 2023 as a temporary alternative whilst a permanent solution can be found.
- 6.31 The markets operates on Saturdays with a range of traders offering a variety of goods and services.

### **Commercial Rents and Yields**

- 6.32 Over recent years the UK Retail sector has experienced a significant number of corporate failures, which has often resulted in Creditor Voluntary Arrangements (CVAs) or Pre pack Administrations. Retailers and restaurateurs have frequently used these processes to effectively impose lower rentals, turnover rents and flexible leases onto landlords. The upshot of this is rental levels can vary widely, even for identical shops adjacent to each other.
- 6.33 In light of the above and current vacancy rates, solvent retailers have adopted aggressive positions at lease renewal seeking to drive rents down and reduce lease commitments, regardless of comparable evidence.
- 6.34 The impact of the pandemic has exaggerated this trend and flexible leases and turnover linked rents are becoming more common place. In many cases landlords have adopted the policy that keeping a shop occupied, and thereby mitigating void costs is preferable to maintaining a rental tone within a retail location.
- 6.35 A broad estimate of prime Zone A rental tone within Wickford would indicate a rental level in the region of £325/sqm (£30/sqft) – £375/sqm (£35/sqft).
- 6.36 In terms of investment yields, retail as an asset class has seen a significant fall in value over the past decade. Transactional volumes in 2023 are subdued with high interest rates and global political uncertainties impacting on investor sentiment. Clearly, there are many factors

that impact on town centre retail yields including lease length, tenant covenant and basis of rent review but in the broadest terms we would comment as follows:

- Prime high street yields – 6.75%
- Good secondary high street yields – 9%
- Secondary high street yields – 12%

## Car Parking

- 6.37 There are four official car parks within the town centre boundary, with a combined capacity of 849 parking spaces. These are summarised in the table below.
- 6.38 Wickford Station car park can be accessed via Station Road and is a pay on arrival car park with varying charges for different lengths of stay and at different times of the week. The car park's location provides a convenient facility for those looking to connect to rail services.
- 6.39 Wickford Main car park is located to the east of the centre and can be accessed from the Golden Jubilee Way/ Radwinter Avenue/ London Road roundabout junction. It is a pay and display car park with 240 spaces, electric vehicle charging facilities and pedestrian access routes to the High Street.
- 6.40 Upper Market Road car park is located just south of Wickford train station and can be accessed via Market Road. It is a pay and display car park with varying charges dependent on the length of stay with a total of 97 spaces.
- 6.41 Wickford Ladygate car park is located to the southern edge of the town centre and as with Wickford Main car park, can be accessed from the Golden Jubilee Way/ Radwinter Avenue/ London Road roundabout junction. It is a pay and display car park with a total of 52 spaces.

**Table 6.4: Car Parks in Wickford Town Centre**

Name / Location	Spaces
Wickford Station	460
Wickford Main	240
Upper Market Road	97
Wickford Ladygate	52
	849

Source: Parkopedia

- 6.42 Upon ALDI's re-opening, this will re-instate another sizeable car park facility within the town centre. The car park will be for customer use with a likely capacity of c.100 spaces.

## Pedestrian Flows

- 6.43 The figure below illustrates the pedestrian heat map for Wickford Town Centre and shows a particular concentration of footfall at Wickford Train Station as well as along High Street leading up to The Broadway and Runwell Road.

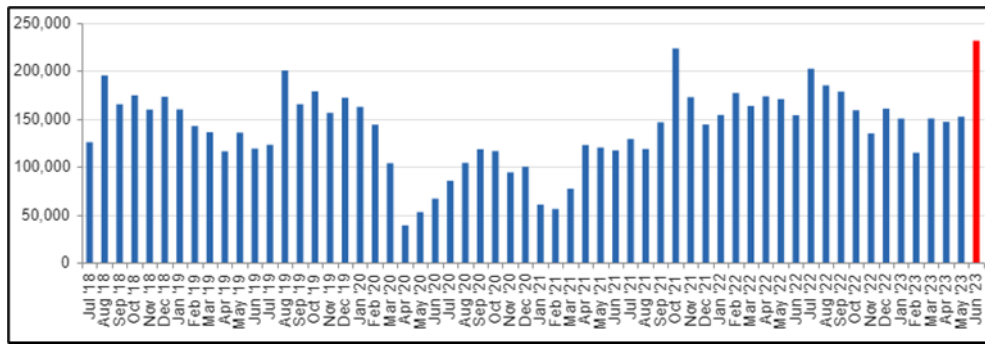
**Figure 6.3: Wickford Town Centre Footfall Heat Map**



Source: Datscha

- 6.44 The busiest area of the town centre is Wickford Train Station car park, but for the purpose of this study, a section on High Street was sampled to obtain information on how footfall levels have changed between July 2018 and June 2023.
- 6.45 Similarly to Basildon Town Centre and Billericay Town Centre in particular, the impacts of the COVID-19 lockdowns can be seen in the Wickford Town Centre footfall data – April, May & June 2020 and January, February & March 2021 saw especially low pedestrian activity.
- 6.46 When comparing the year of 2019 to 2022, average monthly footfall levels increased by 11% (151,000 in 2019 compared to 168,000 in 2022). Wickford Town Centre has therefore not only made a full recovery from the pandemic in terms of pedestrian activity but is now showing signs of a healthier, stronger centre.

**Figure 6.4: Footfall of High Street, Wickford Town Centre (July 2018 – June 2023)**



Source: Datscha

- 6.47 A Huq footfall report (August 2023) provided to the Council reviewed dwell times in Wickford Town Centre, comparing 2019 to the most recent 12-month period at the time of the report being created. Dwell times can indicate what people are using a town centre for and have been shown to correlate closely with spend.
- 6.48 When comparing the average dwell time of a recent 12-month period to that of 2019, visitors were found to be spending 16% less time in the centre post-pandemic than they were pre-pandemic.

### **Accessibility**

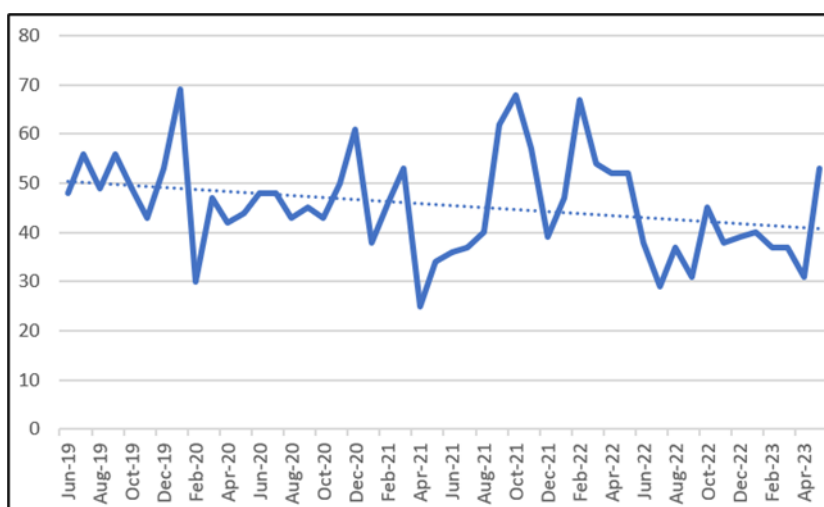
- 6.49 Wickford is near to two main roads, the A130 to the east and the A127 to the south. The A130 leads north to Chelmsford while the A127 can be used to travel towards London. Runwell Road and Golden Jubilee Way can be used to access these main roads from the town centre. The High Street runs through the centre of Wickford town centre with no provision of on-street parking or cycle lanes. There is a lack of bike storage facilities for those who wish to cycle into the centre. Zebra crossings can be found throughout the centre, acting as both a traffic calming measure and an aid to pedestrians navigating the busy roads.
- 6.50 Bus services run through the heart of the centre and offer routes that run to and from places such as Chelmsford and Basildon. Wickford train station is within the town centre with services running frequently to and from Billericay and London to the west and Southend to the east. It can be conveniently accessed by foot and offers a large car park along with a bike rack/ shelter by the station’s bus stop, making it a well-connected transport link.
- 6.51 Pavements on either side of High Street along with several footpaths connecting to the car parks allow for safe and pedestrian-friendly movement around the centre. As mentioned, zebra crossings are located around the centre to assist with navigating the busy roads with dropped kerbs and tactile paving also present to further support.



## Crime and Safety

- 6.52 A central postcode within Wickford was used to review total crime data within a ¼ mile radius between June 2019 and May 2023. The figure below outlines the total crime rate month by month within this period, as well as a trendline to show the overall change in criminal activity over the four years.
- 6.53 As can be seen, criminal activity has steadily decreased over this period, dropping from an average of around 50 to just above 40. Peak months have seen almost 70 crimes recorded – January 2020, October 2021 and February 2022.

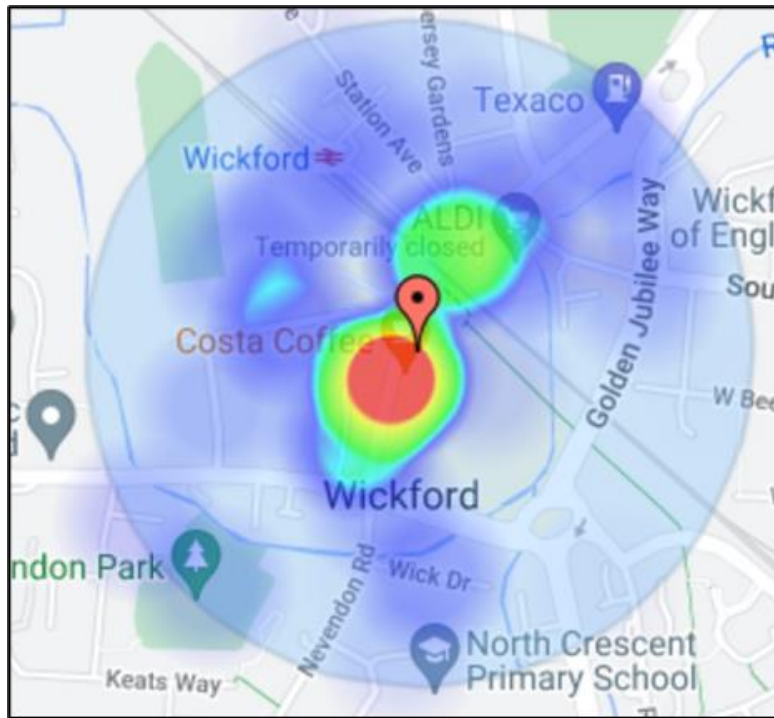
**Figure 6.5: Total Crime Incidences, Wickford, June 2019 – May 2023**



Source: UKCrimeStats

- 6.54 The figure below shows a heat map representing criminal activity within the same area and for the same period outlined previously. As can be seen, a concentration of criminal activity has been recorded along High Street, in the vicinity of the Poundland and Costa Coffee.
- 6.55 The top three types of crimes recorded within this area during this period are violence and sexual offences (499), anti-social behaviour (424) and shoplifting (272).

Figure 6.6: Crime Heat Map, Wickford



Source: UKCrimeStats

### Town Centre Environmental Quality

- 6.56 The environmental quality of Wickford Town Centre is fair with a few examples of greenery and natural vibrancy and provision of various types of street furniture.
- 6.57 Buildings in parts are dated and tired with minimal architectural merit and would benefit from some cosmetic attention in order to boost their appearance.
- 6.58 Whilst there is a lack of green space and very few trees to enhance the environmental quality through greenery, effort has been made to brighten up the centre with the planters dotted around and the 'Wickford in Bloom' initiative which is a community-led volunteer group that have provided the centre with hanging baskets and flower displays that now line the streets and bring some colour and vibrancy to the town centre.

**Figure 6.7: Wickford in Bloom**



Source: LSH Site Visit

6.59 Bins are commonly found in the centre making it easier for visitors to dispose of their waste which consequently reduces the likelihood of litter in the area. Bollards and railings line the pavements in areas of high traffic congestion to improve the safety of pedestrians. There is a relative lack of public benches and seating which limits visitors who may want or need to sit and rest whilst in the centre. There is a lack of cycle parking along the High Street for those who wish to cycle to the town centre and conveniently and safely store their bikes.

### **Barriers to Business**

6.60 External influences can cause significant problems for businesses such as the current political, economic and environmental conditions which are often outside of our control. Understanding the potential issues and being aware of the barriers to business is important to consider to enable businesses to combat and address them, as these can also result in opportunities. The major challenges include:

- Cost of Living/ Inflation – consumers are tightening their budgets as a result of inflationary pressures on things such as grocery shopping and energy bills.
- Brexit – adding complexities and costs to the price of goods.
- Global Climate Emergency – the need to operate and live in a more sustainable and environmentally friendly way, which can sometimes be more costly/ less efficient and the overall impact of climate change (e.g., weather changes and flooding).
- Digital Connectivity – the provision of low-cost, high-speed broadband to businesses and the ability to aid business start-ups with access to full fibre broadband. The provision of public Wi-Fi to promote interconnectivity between borough residents and businesses. Using smart technology to augment physical

spaces to location specific digital services (such as wayfinding) to create a meaningful destination for the borough's residents and businesses.

- Online Shopping – the convenience and product range offered by online retailers such as Amazon and Temu is leading to a growth in consumers shopping online.

6.61 The main challenges businesses currently face include impacts on supply chains, rising cost of supplies, rising operational costs (e.g. energy prices), labour shortages, and the squeeze on household income from the cost of living crisis which combined are impacting on business viability and growth potential.

### Evening and Night-Time Economy

6.62 A sample of 20 retailers from all sectors was used to obtain a general understanding of the opening and closing times of commercial outlets as well as whether they remain open over the weekend.

6.63 A handful of restaurants help to create an evening offering, supported by The Swan pub which is the only pub within the town centre, although The Duke is located just outside of the southern boundary line. Wickford Town Centre is well represented when it comes to takeaways, making up over 11% of all outlets.

6.64 The weekend opening times are relatively strong, however it can be seen that all sampled Retail Services are closed on Sundays.

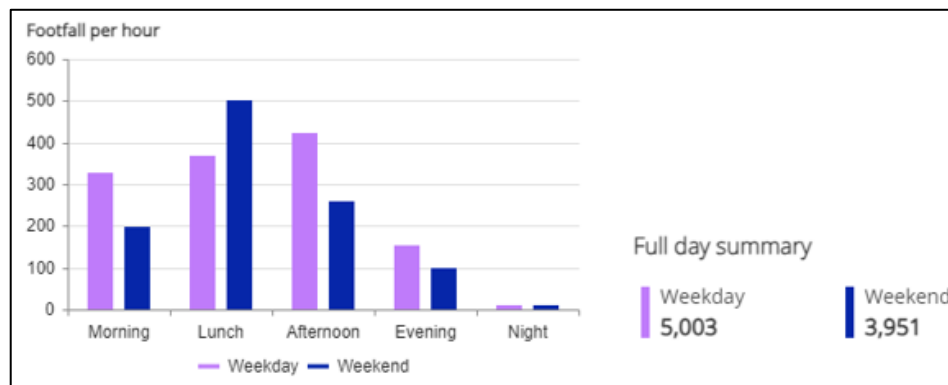
**Table 6.5: Retailer Opening Times**

Retailer Name	Open	Close	Sunday	Type
Londis	6am	9pm	Yes	Convenience
Clark J & Sons Butcher	7am	4pm	No	Convenience
Greggs	6:30am	6pm	Yes	Convenience
Cosson's Bakery	8am	2pm	No	Convenience
Iceland	8am	7pm	Yes	Convenience
Costa	7am	5pm	Yes	Leisure Services
Plush	12pm	10pm	Yes	Leisure Services
Sultana Restaurant	5:30pm	10:30pm	Yes	Leisure Services
Tony's (Pizza Restaurant)	12pm	9:30pm	Yes	Leisure Services
Oriental Chef	5pm	9pm	Yes	Leisure Services
Clarks	9:am	5pm	Yes	Comparison
Poundland	8:30am	5:30pm	Yes	Comparison
WH Smith	9am	5:30pm	Yes	Comparison
M&Co	9:30am	5pm	Yes	Comparison
Peacocks	9am	6pm	Yes	Comparison
Inpressed Dry Cleaning	8am	5pm	No	Retail Services
Headlines	9am	5pm	No	Retail Services
Sparkle Dry Cleaners	8am	5:30pm	No	Retail Services
Power Cuts	9am	5pm	No	Retail Services
Eye Clinic	9am	5:30pm	No	Retail Services

Source: LSH Research

- 6.65 The figure below shows the average footfall counts in respect of the footfall polygon (along High Street) analysed in the 'Pedestrian Flows' section.
- 6.66 The footfall tends to be stronger during weekdays compared to the weekend, potentially due to retailers that do not open on Sundays as previously outlined. The exception to this however is lunch time (11am-2pm) which at a weekend represents the busiest time of the week.

**Figure 6.8: Average Footfall Counts**

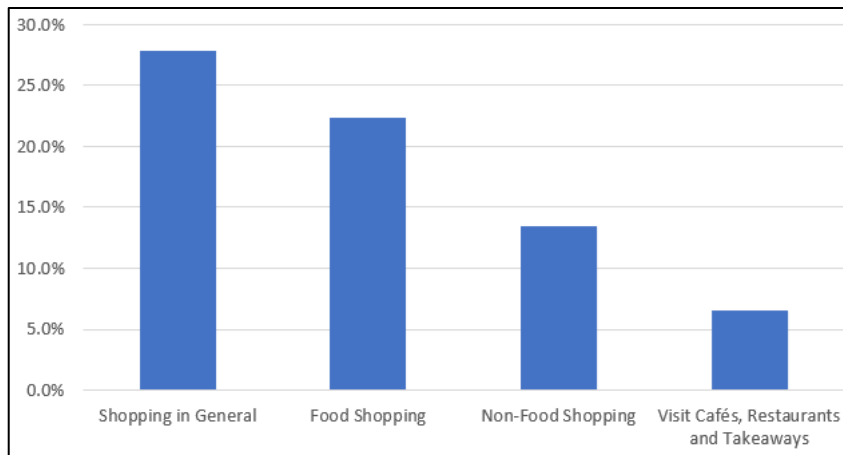


Source: Datscha

## Customer Perception

- 6.67 Our assessment of customers' views and behaviours draws on the household survey conducted by NEMS Market Research (NEMS) across the 8 study zones between March and April 2023.
- 6.68 Apart from helping to identify shopping and leisure patterns across the defined catchment area and zones, the household survey also asked specific questions on their main reason for visiting and what they like most about the centres.
- 6.69 The figure below sets out the main reasons for respondents visiting Wickford Town Centre. Shopping dominates the most common responses here ('Shopping in General' (27.8%), 'Food Shopping' (22.3%) and 'Non-Food Shopping' (13.4%)) whilst visiting 'Cafes, Restaurants and Takeaways' was mentioned by 6.5% of customers.

**Figure 6.9: Wickford Town Centre, Main Reasons for Visiting**

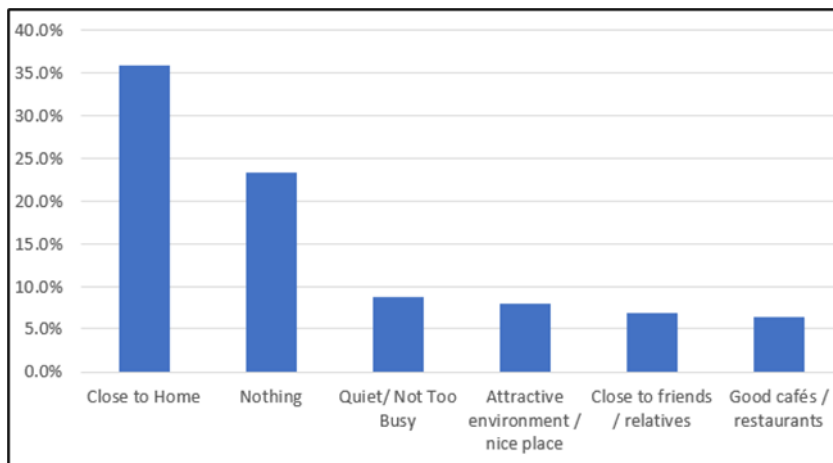


Source: NEMS Household Survey Results

6.70 The figure below sets out the main things that respondents like about Wickford Town Centre. As with Pitsea, 'Close to Home' and 'Nothing' are the top two responses, in that order.

6.71 Away from that, 8.8% of customers surveyed indicated that they like that it is 'Not Too Busy', 8% enjoy what they deem to be an 'Attractive Environment', 6.8% like that it is 'Close to Friends/ Relatives' and 6.4% enjoy the 'Cafes/ Restaurants'.

**Figure 6.10: Wickford Town Centre, Main Customer Likes**



Source: NEMS Household Survey Results

## Conclusion

6.72 Wickford Town Centre is a functioning centre that benefits from its rail links and nearby road networks.

6.73 The mix of uses within the centre is broadly in line with the UK average, and as such allows it to meet its catchment's wide range of needs.

6.74 The rate of vacant floorspace creates some cause for concern. Whilst footfall levels are up post-pandemic, dwell times have fallen. To encourage visitors to spend more time in the

centre, improvements could be made to the environmental quality of the area – ‘Wickford in Bloom’ has gone some way to address this, but more can be done.

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

<b>Strengths</b>
<ul style="list-style-type: none"> <li>• Good car parking provision across the centre.</li> <li>• Footfall levels have bounced back since the pandemic and were 11% higher in 2022 than 2019.</li> <li>• The train station is accessible within the centre and provides links to and from London.</li> <li>• Decrease in crime incidences in recent years.</li> <li>• Aldi’s re-development of their stores indicates a desire for investment in the area and will strengthen the convenience offer.</li> </ul>
<b>Weaknesses</b>
<ul style="list-style-type: none"> <li>• The food and beverage offer is dominated by fast food and takeaway outlets.</li> <li>• There is a large proportion of the total floorspace in the centre that is vacant (22%).</li> <li>• Vacancy rates have risen in recent years.</li> <li>• There is a limited provision of places and areas to sit and enjoy.</li> <li>• Beyond hanging baskets there is a lack of greenery and green spaces.</li> <li>• Low provision of EV charging points.</li> <li>• No cycle paths.</li> <li>• Dwell times have dropped post-pandemic – visitors are spending less time in the centre on average.</li> </ul>
<b>Opportunities</b>
<ul style="list-style-type: none"> <li>• Retail and commercial leisure interest for representation.</li> <li>• Public realm and greening improvements.</li> <li>• to improve the street scene, perhaps making it safer and more attractive for pedestrians.</li> <li>• Improvements / upgrades to the public realm.</li> </ul>

### Threats

- The growth in online shopping and its impact on brick-and-mortar retail outlets
- The longer-term impacts of the pandemic are still yet to be determined
- High/ increasing business operating costs



## 7. OUT-OF-TOWN OFFER

### Introduction

- 7.1 The out-of-centre retail and leisure offer within the Borough is largely made up of retail/leisure parks and supermarkets. These make up a large proportion of the Borough's total provision and have therefore been reviewed to better understand their role.
- 7.2 The retail parks reviewed are Festival Leisure Park, Pipp's Hill Retail Park, Mayflower Retail Park and the new St Hilary's Retail Park.
- 7.3 As can be seen in the table below, an initial overview of the retailers operating from each of the three main retail parks has been summarised. This list is based on a combination of LSH research and data available via Completely Retail.
- 7.4 Following on from that is an audit of each retail park, as well as a review of supermarkets in the area that do not form part of one of the aforementioned retail parks.

**Table 7.1: Retail/ Leisure Park Operators**

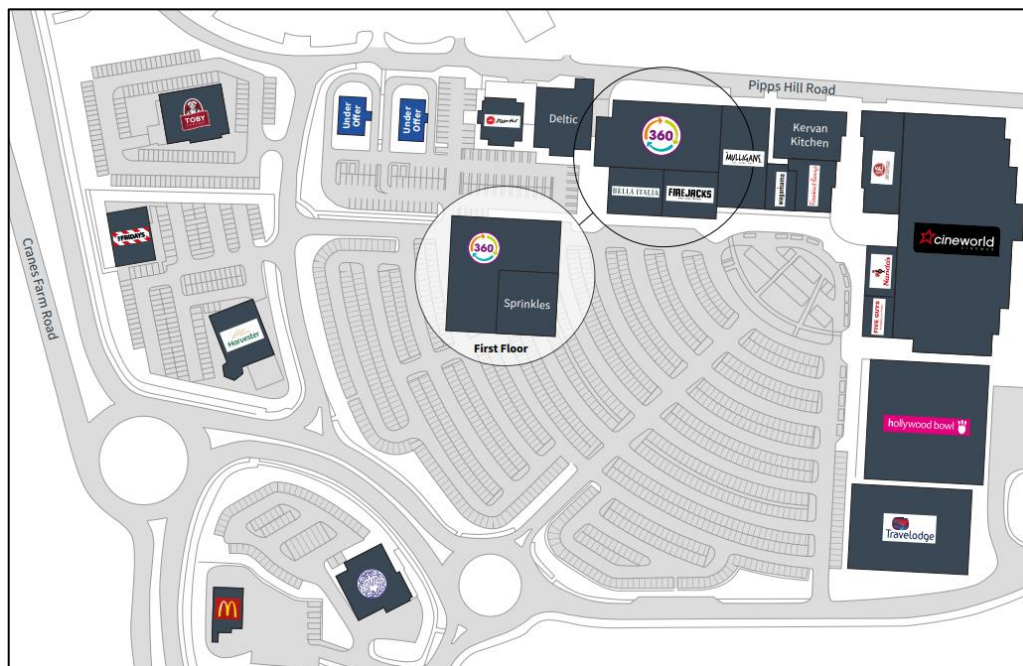
Festival Leisure Park	Pipp's Hill Retail Park	Mayflower Retail Park
McDonald's	Asda	Lidl
Pizza Express	DFS	Bensons for Beds
Harvester	Halfords	Sports Direct
TGI Fridays	ScS	Next
Toby Carvery	TX Maxx	M&S Simply Food
Pizza Hut	Currys	Dunelm
Deltic	Wren Kitchens	Home Bargains
360 Play	B&Q	Choice Discount Stores
Firejacks	Pets at Home	Boots
Bella Italia	The Gym Group	KFC
Sprinkles	Carpentryright	Nando's
Mr Mulligans	Poundstretcher	Costa Coffee
Wagamama	Wenzel's	Tapi Carpets
Frankie & Benny's	Burger King	River Island
Kervan Kitchen	Costa Coffee	Superdrug
Aroma	Card Factory	Greggs
Cineworld	Subway	Clarks
Nando's	Wenzel's	McDonald's
Five Guys		
Hollywood Bowl		
Travelodge		

Source: Completely Retail and LSH Research

## Festival Leisure Park

- 7.5 Festival Leisure Park is located c.1.5km directly north of Basildon Town Centre. It can be accessed via the A1235 and has 20 units with a combined commercial floorspace of 22,300 sqm.
- 7.6 As a leisure park, food and beverage outlets are a key component of its offer. Representation is through restaurants such as TGI Fridays, Nando's and Wagamama and are complemented by the Travelodge hotel, Hollywood Bowl and the Cineworld cinema (18 screens).

**Figure 7.1: Festival Leisure Park Site Plan**



Source: Completely Retail

- 7.7 Festival Leisure Park has a strong leisure offer which is anchored by the large Cineworld. It is a dominant destination for leisure within the Borough. As shown from the household survey in the commercial leisure analysis for eating and drinking out, locations and venues across the Borough attain a good market share of 55.1% of which the dominant location is Festival Leisure Park (16.7%) followed by Billericay Town Centre (15.4%) and Basildon Town Centre (13.4%).

## Pipps Hill Retail Park

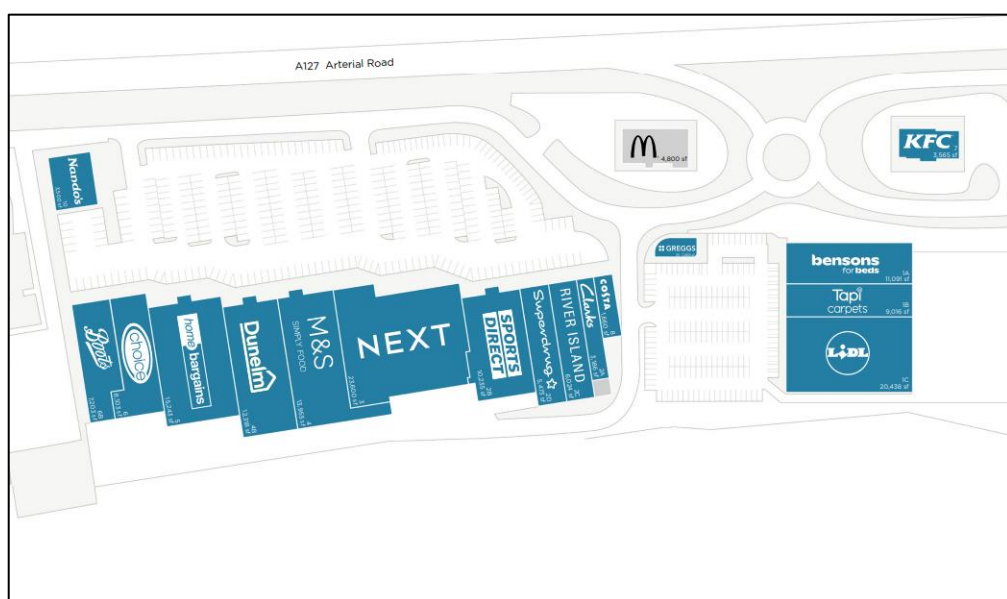
- 7.8 Pipps Hill Retail Park is located c.1.3km north of Basildon Town Centre. It can be accessed via the A1235 and has 18 units with a combined commercial floorspace of 20,300 sqm.
- 7.9 The retail park has a good mix of uses, with convenience retail represented by Asda and comparison retail by TX Maxx, B&Q amongst others. Services are represented by The Gym Group gym as well as leisure and food & beverage (Burger King, Costa Coffee etc.) operators.

- 7.10 The retail park technically operates on a 24 hour basis as the The Gym Group gym is open 24 hours a day, 7 days a week. The Asda store opens at 7am and closes at 10pm from Monday to Saturday which is broadly in line with the Asda store in Basildon Town Centre – the only variation is that the town centre store closes at 8pm on a Saturday.
- 7.11 The LSH site visit (August 2023) found that there was one vacant unit (the former Argos outlet).
- 7.12 Pipp's Hill Retail Park is easily accessible by car and has a good mix of offers at present. With only one vacant unit and an anchor store such as Asda, it has the ability to draw trade from a wide catchment. The development of the adjacent St Hilary's Retail Park forms an agglomeration of out-of-centre retail floorspace which competes with town centres in the Borough.

### Mayflower Retail Park

- 7.13 Mayflower Retail Park sits 2.6km north east of Basildon Town Centre and 3.7km south west of Wickford. There are 17 units with a combined floorspace of over 14,900 sqm.
- 7.14 The retail park can be accessed from the A127 (for those travelling from east to west) which is a heavily used connection between London and Southend. There are over 600 parking spaces, with customer parking free for up to 4 hours.
- 7.15 The convenience offer is strong, with an M&S Foodhall and Lidl located on the retail park. This is complemented by an adjacent Tesco Extra store (reviewed within the subsequent 'Supermarkets' section). The comparison retail offer comes in the form of various national multiples such as Next, Dunelm and Sports Direct. KFC, McDonald's, Greggs, Costa Coffee and Nando's make up the food & beverage provision.

**Figure 7.2: Mayflower Retail Park Site Plan**



Source: Completely Retail

7.16 With great car accessibility complemented by a strong mix of uses and brands, Mayflower Retail Park is performing well – successfully drawing customers from a wide catchment. The units fit with modern retailer requirements.

### **St Hilary's Retail Park**

7.17 St Hilary's Retail Park opened in November 2023 and is adjacent to Pipp's Hill Retail Park. Its 6 units have a combined floorspace of approximately 6,200 sqm.

7.18 The new retail park is smaller than the three outlined above and by proximity provides a complementary offer to Pipp's Hill Retail Park, particularly in the form of convenience retail and food & beverage outlets. The Lidl store is the anchor, whilst Lok N Store occupy the largest unit.

7.19 St Hilary's Retail Park in combination with Pipp's Hill Retail Park now provide strong competition to Basildon Town Centre, particularly when it comes to convenience retail. Whilst both offer a large Asda store, the presence of Lidl on St Hilary's Retail Park now adds a point of differentiation.

7.20 It can also be seen as a concern for Laindon, where Lidl currently makes up almost all of the town's offer. A new Lidl store on St Hilary's Retail Park, 1.8km from the Lidl store in Laindon, that is supported by a strong comparison and leisure offer potentially poses a risk of competition to the Laindon Lidl store.

### **Supermarkets**

7.21 Although convenience retail is the predominant offer of supermarkets, comparison retail (such as clothing and homeware), food and beverage outlets (such as cafes), retail services (such as barbers) and other offers can regularly be found within/ alongside large format supermarkets. In combination therefore, these supermarkets can often compete with town centres. As such, they are an important consideration when assessing the future vitality and viability of nearby town centres.

7.22 The following supermarkets are of relevance to one or more of the town centres within the Borough:

- **Tesco Extra, Pitsea** – the store is located to the south west of Pitsea Town Centre, just a 3-minute drive along High Road. The store is accompanied by a B&M store and together provide a strong offer of convenience and comparison retail with a combined floorspace of around 15,650 sqm. The Tesco store has a pharmacy, electric vehicle charging points, a petrol station and a café amongst other offers and services. As the household survey market share analysis has shown, Tesco Extra attains a market share of 8.2% out of the 56.4% overall level of retention from convenience floorspace in the Borough.
- **Tesco Extra, by Mayflower Retail Park** – the store is approximately 2.4km to the north east of Basildon Town Centre. With a total floorspace of 8,500 sqm, it sits adjacent to

Mayflower Retail Park's offer, strengthening the draw of this retail and leisure location. The store contains a café, a Tesco Mobile and pharmacy, with further services such as electric charging points and Timpson (dry cleaning, shoe repair, key cutting etc.) located in the car park. As the household survey market share analysis has shown, Tesco Extra attains a market share of 6.3% out of the 56.4% overall level of retention from convenience floorspace in the Borough.

- **Sainsbury's, Cricketers Retail Park** – the store is located on Cricketers Retail Park alongside a Matalan store. The retail park sits 3.4km north east of Basildon Town Centre and 2km south west of Wickford Town Centre. The store has a total floorspace of 10,300 sqm and as with many large Sainsbury's stores, has an in-house Argos offer. In addition, the store has a petrol station, a Timpson and a Specsavers. Nearby bus services connect to Basildon Town Centre and Wickford Town Centre. As the household survey market share analysis has shown, Sainsbury's attains a market share of 3.9% out of the 56.4% overall level of retention from convenience floorspace in the Borough.
- **Tesco Superstore, Mandeville Way** – the store sits 3.9km west of Basildon Town Centre and 1.75km west of Laindon Town Centre. The store is located to the edge of the area's residential catchment. The store has a total floorspace of 4,200 sqm and is accompanied by a large customer car park. A bus stop is conveniently located by the store and offers services to and from Basildon Town Centre via Laindon Town Centre Laindon train station. Complementary services/ offers include a petrol station, a Timpson and a 24/7 InPost locker. As the household survey market share analysis has shown, Tesco Superstore attains a market share of 4.4% out of the 56.4% overall level of retention from convenience floorspace in the Borough.

## Conclusion

- 7.23 Retail/ Leisure parks and supermarkets make up a significant proportion and market share of the overall retail and leisure provision within the Borough. As a result, collectively these form strong competition to the town centres within the Borough.
- 7.24 Shoppers are often drawn to retail parks and out-of-centre supermarkets due to the convenient, free parking provision and the presence of larger units that allow retailers to provide a wider range of goods and services in store. Whilst car accessibility tends to be strong for retail parks and supermarkets, other modes of transport are often not as readily supported.
- 7.25 In order to differentiate themselves from out-of-centre retail/ leisure parks and supermarkets, town centres must focus on offering a more attractive, higher-quality and diverse environment. Green spaces and seating areas can help to create an enjoyable place that people choose to frequent more often, and for longer. Town centres must look to other potential unique selling points to support this, such as healthcare & educational services, community facilities and street markets.

