

---

# Tourism, Leisure and Recreation Strategy for South East Essex

2020 – 2038

Association of South Essex Local Authorities (ASELA)

---

## Executive Summary

 **Basildon Council**  
BASILDON • BILLERICAY • WICKFORD



 **castlepoint**  
benfleet | canvey | hadleigh | thundersley

 **Essex County Council**

 **Rochford**  
District Council

 **southend  
onsea**  
BOROUGH COUNCIL

 **thurrock.gov.uk**

---

 **S4W** Stimulating Economic Growth

Tel: 0115 855 9983 Email: [info@s4w.org.uk](mailto:info@s4w.org.uk) Web: [www.s4w.org.uk](http://www.s4w.org.uk)

The Association of South Essex Local Authorities (ASELA) comprises Basildon, Brentwood, Castle Point, Essex County, Rochford, Southend-on-Sea, and Thurrock Councils. The South Essex Local Authorities have agreed a common approach to work across borders on strategic issues such as:

- infrastructure,
- planning and growth,
- skills,
- housing; and
- transport connectivity.

ASELA have prepared this strategy to understand the contribution that Tourism, Leisure and Recreation, currently makes to the South Essex economy and to local communities, the long term opportunities that may exist and the barriers that need to be removed, to grow that contribution.

Data from Visit Britain suggests a total of 514,000 domestic overnight visits to South Essex in 2018 and a total of 28.5m leisure and tourism day visits. In 2018 there were 27,440 direct jobs in the tourism sector in South Essex, which is an increase of 11% from 2014.

The partners overall vision for the sector to 2038 is:

*“...to make South Essex a **renowned major tourism destination** comprising a corridor of quality interrelated tourism, leisure and recreation attractions. An expanded visitor offer will encourage people to stay and enjoy our culture, resorts, countryside, market towns and coastline. In turn this will add to the area’s vibrancy and make us a more attractive place to live, work and start up a business.’*

The study will be used as evidence for both the South Essex Plan and subsequent Local Plans and will contribute to prioritising and attracting additional and devolved funding to invest against strategic priorities in the area. The findings will provide a framework for developing the Tourism, Leisure and Recreation offer in South Essex, with an emphasis on increasing visitor numbers and spend and economic impacts.

The time of preparation of this strategy is one of great short-term uncertainty with regards to the potential socio-economic legacy of the current COVID-19 outbreak and the UK leaving the European Union. The horizon for this study, over almost two decades, should overcome some of these short-term challenges and position South Essex to take advantage of long-term opportunities such as the development of the Lower Thames Crossing, potential expansion at London Southend Airport and the benefits of a proposed increase in population and housebuilding.

The wider context to this strategy is the opportunities for South Essex as part of the most significant economic gateway and strategic route between mainland Europe, London and the rest of the country. Tourism is identified as a key economic sector by the South East Local Enterprise Partnership and also in a range of sub-regional, County-wide and local strategies, including the Thames Gateway Commission.

There are clear economic links between tourism and the cultural and creative sectors, town centre regeneration and wider retail and leisure. The activities of tourism also create local facilities for health and well-being, green and blue infrastructure and supporting local ecosystems.

|   |  |
|---|--|
| <p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>• Wide range of attractions</li> <li>• Attractive countryside and market towns</li> <li>• Southend Airport with growing national/international visitors</li> <li>• A good base for access to London, Mid and North Essex, Kent attractions</li> <li>• Cultural provision and events programme</li> <li>• Rail Links to London</li> <li>• Strong traditional day visit offer around Southend and the pier</li> <li>• Strong 'green' offer for nearby urban populations</li> </ul>   | <p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>• Limited "Crown Jewels" large scale attractions</li> <li>• No major local National Trust offer</li> <li>• Limited wet weather /indoor facilities</li> <li>• North/South transport links poor</li> <li>• Car travel to Southend-on-Sea difficult at peak times</li> <li>• Modest camping provision</li> <li>• Limited provision to support conference activity</li> <li>• Perception as day trip destination only</li> </ul>   |
| <p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>• COVID-19 driven 'staycations'</li> <li>• Town centre renewal programmes planned</li> <li>• More inbound visitors as Airport grows</li> <li>• South Essex Estuary Park</li> <li>• Lower Thames Crossing and better connectivity to South East and Europe</li> <li>• Tilbury Cruise Terminal visitors and passengers</li> <li>• Better curation of events/festivals programme to maximise impact</li> <li>• Leisure walking and cycling infrastructure</li> <li>• Nascent water sports activities/marina potential</li> <li>• Growing food and drink offering</li> <li>• Camping and caravan offer/Glamping</li> <li>• Generating more overnight stays</li> <li>• River transport</li> <li>• Growth of green/blue infrastructure and expanding wildlife sites</li> </ul> | <p><b>Threats</b></p> <ul style="list-style-type: none"> <li>• Impact of COVID-19 on local businesses, domestic and international travel patterns, leisure habits</li> <li>• Stereotypical image through TOWIE</li> <li>• Impact of Brexit on visitor numbers</li> <li>• Impact of Brexit on hospitality workforce</li> <li>• Town centre decline through retail changes</li> <li>• Local economic strategies targeting higher wage knowledge intensive jobs</li> <li>• Housing growth impact on green/open space</li> <li>• Unidentified resources to implement strategy</li> <li>• Competition from other UK destinations</li> <li>• Climate crisis impact on coastal communities</li> <li>• Confidence of traditional seaside operators</li> <li>• Development pressure and land values and impact on key leisure/tourism sites</li> <li>• London and Mid/North Essex more popular destination to stay in</li> <li>• Impact of COVID-19 on hospitality</li> </ul> |

The table overleaf shows the areas key known Strengths, Weaknesses, Opportunities and Threats with regards to developing the local tourism offer and wider leisure and recreation offer over the period of the Strategy to 2038. The analysis shows that most key opportunities for South Essex are based upon developing existing strengths.

**Coastal tourism** is a key strength of the area, centred around Southend-on-Sea, one of the country's most popular traditional seaside resorts. Alongside Southend-on-Sea, the coastal area has a network of high quality open spaces and wildlife and countryside sites and attractive coastal settlements including Leigh-on-Sea and Canvey Island.

The area has strong **recreational, cycling and walking provision**, which are growth activities across the country, especially during COVID-19 when other leisure activities have not been available. Rural parts of South Essex within Castle Point, Rochford and Brentwood can make a particularly important contribution to this sector. This has the potential to grow with the extension of the English Coastal Trail and the potential to develop a South Essex Estuary Park.

The areas **retail, leisure and sport** offer is concentrated within South Essex's major urban centres and around Lakeside. The challenge in the post-COVID economy is to ensure the area's offer remains relevant and new opportunities, for example in the food and drink sector, are taken advantage of.

The area has a strong **cultural and heritage offer**, including an array of theatres, galleries and events and live music. The Thames Estuary Production Corridor Partnership has the potential to rapidly expand the area's cultural and creative offer. Thurrock already hosts Purfleet High House Production Park and there are longer term ambitions to make the Thames estuary the world's largest creative corridor. There are a number of heritage sites that have the capacity to grow, related to the cultural, economic and military history of the area and of the Thames. There is scope for this offer to be more integrated through the development of a South Essex Estuary Park

Further developing **high quality visitor infrastructure** is critical to the areas success, including facilitating long term expansion of London Southend Airport based around the site's masterplan. There is scope to increase the area's serviced and non-serviced accommodation stock, including gaps in budget and boutique hotels and opportunities to develop 'compact' hotels. There are significant opportunities to expand non-serviced accommodation, of which there is a significant under-supply. South Essex only has 1% of Essex's non-serviced accommodation, including self catering accommodation and camping and caravan sites.

It is also important to ensure **local people and businesses can take advantage of opportunities** through providing relevant support and expanding vocational qualifications such as T-Levels and Apprenticeships and ensure there are opportunities to develop core skills such as language skills, digital skills and customer service skills.

The priority for the plan is to respond to changing opportunities, both from within the tourism, leisure and recreation sector and within the wider economy. The approach must alleviate long term growth barriers and ensure that South Essex has the required infrastructure and planning framework, underpinned by the South Essex Plan, to secure long term success and growth. In order to achieve these outcomes within the timeframe to 2038, a series of short, medium and long-term interventions have been identified across the following areas:

- Develop the Cultural and Visitor Offer including Food and Drink
- Develop the infrastructure to secure more short breaks and overnight stays
- Expand and develop the current network of formal countryside sites and trails linked to the development of a South Essex Estuary Park
- Provide a planning framework to facilitate development in the tourism and leisure sector
- Expand Connectivity and Access to South Essex linked to improved Infrastructure
- Help businesses to grow, develop skills within the labour market and attract new entrants into the sector

Whilst securing large inward investment into the area's visitor economy is an approach that should be pursued to help overcome this structural weakness, the area could seek to promote is the concept of "**Strings of Pearls**", a broad range of high quality and inter-linked smaller attractions. This would enable the merits of individual attractions to be packaged together (including potentially those outside of South Essex), whether by theme or place and attract greater numbers of visitors and encourage them to stay longer. This is the concept behind the South Essex Estuary Park.

Within the framework are a number of potential '**quick win**' activities and key areas of focus, especially with regards to recovering from the COVID-19 outbreak and the opportunities to take advantage of both the potential boom in staycations and the proximity to London. These opportunities represent early stage priorities, but also should be tempered against the impact on business viability, reductions in air traffic and an economic downturn. These include:

- **Plan and prepare a business case to develop a South Essex Estuary Park**, *including linking to the South Essex stretch of the England Coastal Path and existing key coastal attractions and sites. Support the development of cycling and walking infrastructure alongside water and land-based attractions.*
- **Create a framework to develop the tourism, leisure and recreation sector through the South Essex Plan**, *with an emphasis on supporting the development of further serviced and non-serviced accommodation, facilitating new investment in new rural and urban attractions and enhancing and linking existing visitor sites.*
- **Work to secure existing and future leisure investment in Basildon, Brentwood and Southend-on-Sea**, *as both stand alone and mixed-use developments, including working with developers to allow sensitive changes to overcome current market disruption. Identify long term transformational projects and make the most of water front leisure opportunities.*

- **Lobby to support rural diversification and investment into rural economic development**, *including working with SELEP and DEFRA to invest in formal access to the countryside, developing the offer at existing rural sites and to support farms and rural businesses to provide attractions, food and drink and accommodation*
- **Develop a co-ordinated approach to cultural and food and drink activities, events and festivals**, *including working to expand or extend current key events – including incorporating a local food and drink offer and support the development of new cultural infrastructure and museums*