7 LEISURE NEED

7.1 In this section, an assessment of the quantitative and qualitative needs for commercial leisure floorspace is undertaken. When interpreting these outputs, it should be borne in mind that the techniques used to determine leisure needs are not as well developed as those utilised in assessing retail needs. Despite this qualification, practical resources and effective methodologies are used to assess this sector for the district as robustly as possible. The quantitative assessments are included at Tables 16 to 20 in **Appendix 6**.

Leisure Expenditure Growth

7.2 There is an existing lack of industry-standard methodologies for modelling and apportioning growth in leisure expenditure. However, it is still possible to forecast and allocate leisure expenditure using alternative approaches. MapInfo provides data on per capita leisure expenditure in Classification of Individual Consumption by Purpose (COICOP) categories. This resource is used to provide a broad level of 'quantitative need' for additional leisure facilities in the district.

7.3 The first stage is to assess the breakdown of leisure expenditure by COICOP in the study area, as shown in **Table 7.1**.

Table 7.1 Breakdown of Leisure Spend in Study Area (2009)

COICOP Categories	Description	Total Expenditure (£m)	% of Total Leisure Services Spend
11.1.1	Restaurants, cafés, bars, etc	423.6	59.9%
9.4.2	Cultural services	85.3	12.1%
9.4.3	Games of chance	53.0	7.5%
11.2	Accommodation services	71.3	10.1%
9.4.1	Recreational and sporting services	40.2	5.7%
12.1.1	Personal services (hairdressers, etc.)	34.2	4.8%
	TOTAL 'LEISURE SERVICES' EXPENDITURE	**707.6**	**100%**

Source: MapInfo and Appendix 6

7.4 The table shows that total spend on leisure services per capita in the study area in 2009 amounts to £707.6 million, of which more than half accrues to spending on 'restaurants, cafés, bars, etc.' (59.9%). The second highest leisure expenditure is on 'cultural services' (12.1%) which is closely followed by spending on 'accommodation services' (10.1%). Expenditure on cinema and theatre tickets, a sub-category of 'cultural services,' accounts for 0.4% of overall spend per capita. 'Games of chance,' 'recreational and sporting services' and 'personal services' have a 7.5%, 5.7% and 4.8% share, respectively, of total spend.

7.5 Apportioning leisure expenditure in the COICOP categories provides a structure for current expenditure on leisure activities. This current structure can be used to calculate the growth in leisure spending by residents of the study area between 2009 and 2031. The projected growth in expenditure on leisure services is set out in Table 16 (Appendix 6).

7.6 As can be observed on Table 17, Appendix 6, *total* expenditure on leisure services in the study area is projected to increase from £707.6 million in 2009 to £715.7 million by 2011. This increases to £792.0 million by 2016, to £889.0 million by 2021, to £1,001.1 million by 2026 and £1,123.6 million by 2031.

7.7 The overall growth in expenditure in leisure services between 2009 and 2031 is estimated at £416.0 million. In **Table 7.2** below the current proportions of leisure spend are applied to the levels of growth to determine the expected change in each COICOP category.

Table 7.2 Allocating growth in spending by COICOP categories

COICOP Categories	Allocating additional spend of £416.0 million 2009-31 (£m)
Restaurants, cafés, bars, etc	249.0
Cultural services	50.2
Games of chance	31.2
Accommodation services	29.6
Recreational and sporting services	23.7
Personal services (hairdressers etc)	20.1
TOTAL 'LEISURE SERVICES' SPEND	**403.8**

Source: Appendix 6

Assessment of Commercial Leisure Requirements

7.8 Based on the forecasts above, we can now determine a 'need' for some of the main expenditure categories. Quantitative results are combined with qualitative messages to assess whether there is a need for further commercial leisure facilities within the district.

Food and Drink

7.9 The expenditure leakage for food and drink uses (i.e. A3, A4 and A5 uses) is approximately 70% of total expenditure in this category (exact figure is 71.2% or £585.3 million). This figure is calculated by taking the combined leakage figures for two related categories as estimated from the household survey: restaurants/cafes & bars/clubs/ pubs in 2009. This level of leakage is not unexpected due to the proximity of central London and other nearby higher order centres. Furthermore, this type of expenditure is very mobile.

7.10 Based on the market shares of the six centres, the estimated turnover of all A3, A4 and A5 floorspace in the district in 2009 is £122.1 million (or 28.8%). However, it is appreciated that additional expenditure is likely to be spent in local centres within the district that has not been accounted for in this assessment.

7.11 In the same way that an allowance is made in the retail sector for existing operators to improve their turnover efficiency, it is reasonable to assume that some of the growth in available food & drink expenditure should be directed to existing operators (to allow them to grow their business, re-fit their premises, and so on). Unlike in the retail sector, however, there is a lack of published advice on what proportion of expenditure growth in the food & drink sector should be ring-fenced for existing operators. In the absence of firm guidance, we have therefore allocated half of the growth in food & drink expenditure to existing restaurateurs and pub/bar operators.

7.12 The estimated turnover for A3, A4 and A5 floorspace (£122.1 million), when divided by the gross A3, A4, A5 floorspace in the six centres (15,836 sqm) provides a district-wide sales density of £7,707 per sqm. This figure was used as a guide to the sales density of new floorspace. The indicative A3, A4 and A5 gross floorspace requirements are included at Table 20 of Appendix 6 and are reflected in the town centre strategies for each of the six town centres, at Section 8.

7.13 Quality restaurants can enhance the current mix of eating and drinking places in Epping Forest. Presently, restaurants offer a range of cuisines in the district, providing evidence on demand for variety amongst customers. Accordingly, new operators can specialise in particular cuisines and bring new taste into the current market. This will vitalise the restaurant market and keep consumer interest active. Good quality cafes, bars and pubs can also attract more customers, expanding the target market and potentially increasing the district's retained level of expenditure on food and drink.

Cinemas and Theatres

7.14 The closest cinema to the study area is Cineworld in Harlow, which has six screens. It is anticipated that approximately 2% of growth in leisure expenditure can be apportioned to cinema and theatre admissions combined, sub-categories under 'cultural services.' Although this change in spending is not significantly higher than current levels, the presence of one cinema may not be sufficient to accommodate this growth. To confirm this, we must resort to screen density and existing drive time figures.

7.15 Cinema operators make decisions of expansion or location based on 'screen density' – that is, the existing provision within appropriate drive-time isochrones, taking account of population levels (or the number of screens available per 100,000 people). The latest information that we have access to indicates that the average travel time to a cinema is around 18 minutes (as defined by Caviar). We have therefore analysed cinema provision within an 18-minute drive-time of Epping, since it sits centrally within the district. This is presented in **Figure 7.1** below, along with bingo halls and gym/fitness centres.

7.16 **Table 7.3** indicates that current screen density around Epping, being 2.8 screens per 100,000 people, is 50% lower than the UK (5.9 screens per 100,000) and South East (5.8 screens per 100,000) average screen densities.

Table 7.3 Cinema Screen Density within an 18-minute drive-time of Epping

Cinemas within 18 minute drive-time	No of screens within 18 minute drive-time	Population within 18 minute drive-time	Epping Screen Density (i.e. screens per 100,000 people)	SE Average Screen Density	UK Average Screen Density
1	6	213,759	2.8	5.9	5.8

Source: RTP Analysis

7.17 In terms of pure screen density, the assessment reveals that a further cinema could be provided within the district. However, due to the lack of higher order centres within the district and the large centres such as Harlow and Romford nearby, we do not expect there is scope for a multiplex cinema within the district. A more realistic option would be to encourage a small art house cinema to improve competition and provide an alternative to a large multiplex.

Games of chance

Bingo Halls

7.18 As shown on **Figure 7.1** below, there are two bingo halls immediately outside the study area - Mecca Bingo in Harlow, and Gala Bingo in Ilford. Applying current expenditure proportions, approximately £31.2 million of expenditure growth can be allocated to 'games of chance'. Although there are many different sub-categories within 'games of chance', previous RTP research shows that bingo comprises approximately 7.2% of the expenditure. From this, we estimate that additional spending over the period up to 2031 at bingo halls will be around £1.4 million. This is limited and due to the nearby facilities, we expect these to be of a sufficient scale to absorb the limited growth.

Bookmakers

7.19 There are a number of operators located in Loughton, Waltham Abbey and Epping. Based on gambling licences, we found that there are currently 11 outlets where the principal activity is betting. These include large bookmaker chains such as William Hill which have more than one shop within the district. Referring back to the anticipated growth in this sector, there may be potential for further bookmaker presence and operation in the district. However, it is recommended that such growth is delivered by the market rather than a specific DPD policy.

Casinos

7.20 There are no casinos within the district and the closest are located in London. There is no evidence to support growth in casino development within the district.

Figure 7.1 Location of cinemas, bingo halls and gyms within and immediately outside Epping Forest

ROGER TYM & PARTNERS
Planners and Development Economists

Gyms

1 - Waltham Abbey Sports Centre
2 - Body & Soul (Leisure Centres) Ltd
3 - Virgin Active
4 - Waltham Abbey Swimming Pool
5 - Loughton Leisure Centre
6 - Loughton Sports Centre
7 - Rectory Lane
8 - Think Fitness
9 - Ongar Leisure Centre
10 - The Football Academy Ltd
11 - David Lloyd Leisure
12 - North Weald Health & Leisure Club Ltd
13 - Firehouse Play Centres
14 - Pilates
15 - Krunch Gym
16 - David Lloyd Chigwell

Bookmakers

17 - Jennings Racing Ltd
18 - Thames Bookmakers North Ltd
19 - William Hill
20 - William Hill
21 - Bruce Bookmakers
22 - Coverdale Racing
23 - Eljay Racing
24 - William Hill
25 - Boost Bookmakers
26 - William Hill
27 - Bets R Us

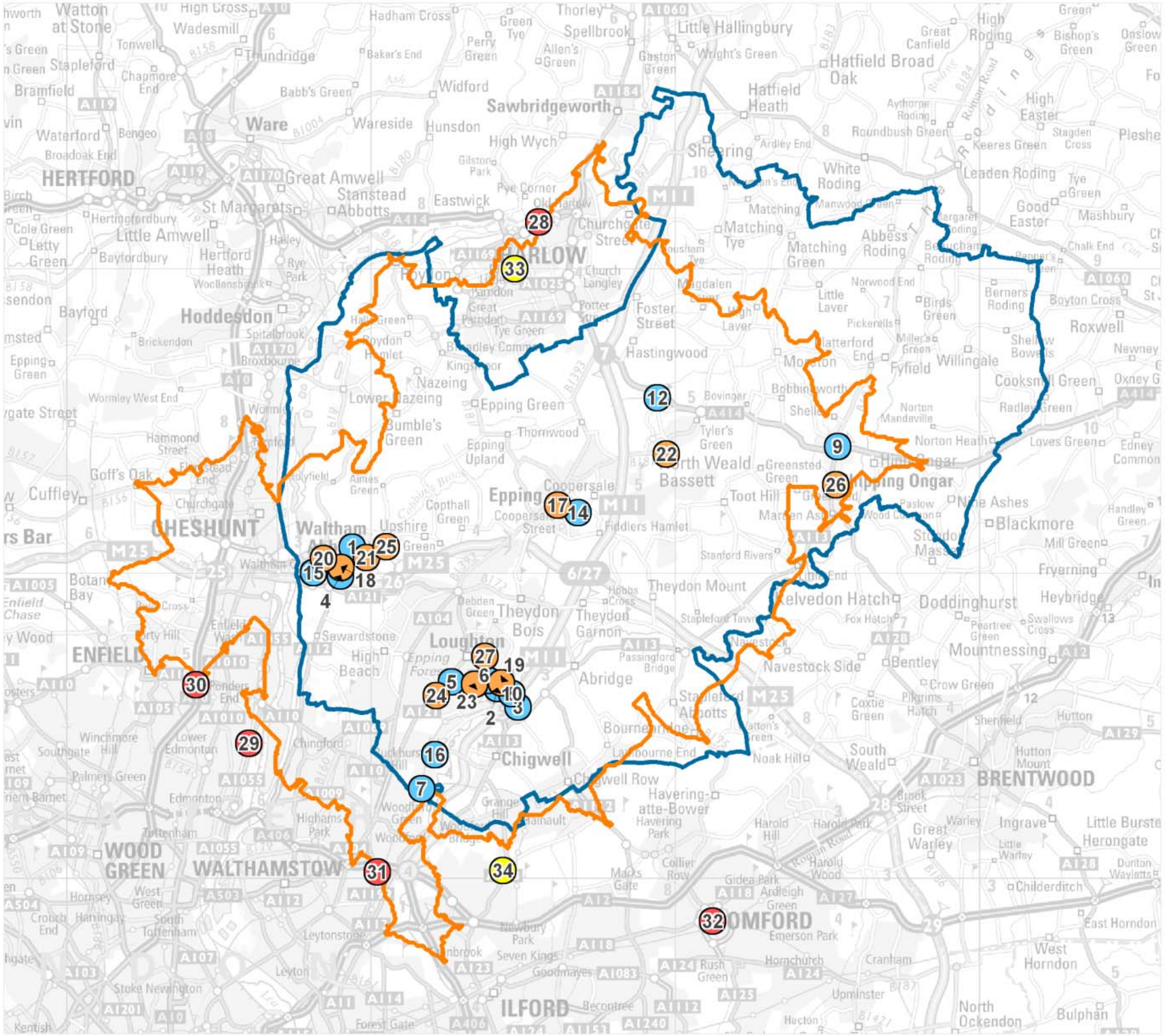
Nearest Cinemas

28 - Cineworld
29 - Odeon
30 - Cineworld
31 - Odeon
32 - Vue

Nearest Bingo

33 - Mecca Bingo
34 - Gala Bingo

18 Minute Drivetime from Epping Town Centre
Epping Forest Boundary



Digital Map Data © Collins Bartholomew Ltd 2009

Health and fitness

7.21 There are 12 gyms or fitness centres in the district which vary in terms of the quality and type of activities offered. Details are given in **Table 7.4** below.

Table 7.4 Schedule of Health and Fitness Facilities within Epping Forest

Gym/Fitness Centres	Address	Type	Facilities/services
Waltham Abbey Sports Centre	Broomstick Hall Rd, Waltham Abbey	Public	5 court sports hall, movement studio for martial arts, dance and fitness classes, 2 squash courts, gym with resistance equipment, free weights and cardio-vascular machines, bar
Body & Soul (Leisure Centres) Ltd	10, Torrington Drive, Loughton	Private	Women only- Gym with cardio-vascular machines, resistance equipment and free weights, exercise studio, toning tables, sauna and steam rooms, sun beds, beauty room
Epping Sports Centre	25 Hemnall Street, Epping	Public	Fitness Suite, Group Exercise Studios with semi sprung floor, 4 court sports hall, 4 squash courts, 1 glass backed, Crèche
Virgin Active	Woolston Manor, Abridge Rd, Chigwell	Private	Gym with core stability zone, flexibility zone, free weights, ladies zone and personal training, kids club, crèche, indoor pool, outdoor pool, kids pool, spa, beauty & massage, Jacuzzi, sauna, sun beds, steam room, aerobics studio, studio classes, v-cycle studies, bar, free internet, free parking, lockers, pro shop, towel hire
Waltham Abbey Swimming Pool	Roundhills Estate, Waltham Abbey	Public	Fitness suite, group exercise studios with sprung floors, 25m main pool, teaching pool, kids activities
Loughton Leisure Centre	Traps Hill, Loughton	Public	Fitness suite, group exercise studio, 25m main pool, teaching pool, viewing area, café, movement studio, crèche
Think Fitness	Unit D4, Seedbed Centre, Langston Rd, Loughton	Private	Gym, free parking, customer rest areas, toilets, metabolic fitness testing, sports physiotherapy
Ongar Leisure Centre	The Gables, Ongar	Public	Fitness suite, 2 group exercise studios with sprung floors, 25 m main pool, 4 court sports hall, outdoor pitches, crèche, sports school, holiday activities
The Football Academy Ltd	Sports Pavilion, Langston Rd, Loughton	Private	Gym, cardio suite, new ladies changing facilities, weights gym, personal trainer, sauna and steam room, sun beds, bar
David Lloyd Leisure	Roding Lane, Buckhurst Hill	Private	Gym, personal training, indoor & outdoor pools, spa, 17 indoor and outdoor tennis courts, badminton courts, steam room, sauna, whirlpool, group exercise classes, restaurant, bar, children's area, crèche & nursery, hair & beauty salon, physio, sports shop, internet café & wireless internet access
North Weald Health	Rayley Lane, North Weald,	Private	Gym with cardio-vascular equipment, free weights area and personal training, fitness studio, saunas,

& Leisure Club Ltd	Epping		sun beds, beauty therapy, hairdressing salon
Krunch Gym	Ability House, 121, Brooker Rd, Waltham Abbey	Private	Gym with free weights, cardio-vascular equipment, power plate training and personal training, exercise classes, café, sun beds

Source: Roger Tym & Partners research

7.22 Gyms/fitness centres fall within the 'recreational and sporting services' category, which is expected to grow by £23.7 million by 2031. Although this category comprises many other activities, including sports and amusements parks, there is a general trend of increased consciousness regarding the importance of physical fitness. Therefore, there is scope to develop more quality fitness centres in the district, offering more facilities and activities to the population of the study area.

Family Entertainment

7.23 This is a broad category that comprises facilities for activities such as ten pin bowling. There are no family entertainment centres as such within the district with the exception of some of the fitness centres listed above, which also cater for recreational activities. However, as indicated by the household survey, many of Epping Forest's residents travel to Harlow, Chelmsford and Romford. Consequently, there is potentially scope to improve the local family entertainment provision within the district.