# 5 CURRENT PATTERNS OF RETAIL AND LEISURE SPENDING

## Household Survey Methodology

5.1 The assessment of current patterns of retail and leisure spending is based on a telephone survey of 800 households by NEMS Market Research, undertaken between Wednesday 22nd April 2009 and Tuesday 5th May 2009. The study area was defined on the basis of postcode geography and consultations with Council officers. The full household survey results can be found at **Volume 4**. A detailed analysis of the household survey results is presented at **Appendix 5**.

5.2 In respect of food and grocery shopping (known in PPS4 as 'convenience' shopping), the survey sought to establish patterns of convenience goods spending, based on the location of:

- the shop where the household spends most money on food and groceries, whether other shops were visited during the trip, the amount spent per week (questions 1 to 5);
- spending on food and groceries in small shops (question 6); and
- the shop where the household undertakes most 'top-up' food and groceries purchases and the amount spent per week (questions 7 and 8).

5.3 In respect of non-food goods (known in PPS4 as 'comparison' shopping) the survey sought to establish patterns of comparison goods spending, based on the locations of the last <u>two</u> purchases of:

- Clothes and shoes (questions 9 and 10);
- Furniture, carpets and soft household furnishings (questions 11 and 12);
- DIY, decorating goods and gardening items (questions 13 and 14);
- Electrical items, such as TVs, DVD players, digital cameras, MP3 players, mobile phones, computers and domestic appliances such as washing machines, fridges and cookers (questions 15 and 16);
- Health, beauty and chemist items (questions 17 and 18);
- Recreational goods such as sports equipment, bicycles, musical instruments or toys (questions 19 and 20); and
- Specialist non-food items, such as books, CDs, jewellery, china and glass (questions 21 and 22).

5.4 The survey also established the proportion of the household's total spending on non-food goods that is accounted for by the internet (questions 23 and 24) and how frequently households visit Epping Forest's centres and how they can be improved (questions 25 to 28);

5.5 In respect of commercial leisure services, questions 29 to 33 asked about the locations where each household spends most money on:

- Restaurants;
- Cinema/theatre;
- Cafes/pubs/bars;

- health and fitness; and
- Family entertainment (such as ten pin bowling, skating and so on).

5.6 In order to understand patterns of spending in the study area, a composite set of market shares is used for convenience and comparison goods. The process for achieving this is explained at Appendix 5 and relies on amalgamating the results from a series of questions based on weights applied to the different types of shopping undertaken by residents of the study area.

5.7 The composite pattern of spending for convenience goods was achieved on the basis of the mean weekly household expenditure findings as follows in **Table 5.1**.

**Table 5.1 Mean Weekly Household Expenditure for the Study Area**

| | Mean Household Spend | Percentage Weighting |
|---|---:|---:|
| Main Food & Groceries | £82.51 | 77.5% |
| Top-up Food & Groceries | £17.96 | 16.9% |
| Small Local Shops | £5.94 | 5.6% |
| All Convenience Goods | £106.41 | 100% |

Source: Appendix 5

5.8 However, the composite pattern of spending for comparison goods was achieved on the basis of MapInfo expenditure data in relation to seven categories of comparison expenditure as follows in **Table 5.2.**

**Table 5.2 Sub-Sections of Comparison Expenditure for the Study Area**

| Goods | Percentage Weighting |
|---|---:|
| Clothing and footwear | 24.5% |
| Recreational goods | 15.8% |
| Audio-visual equipment and other durables | 15.2% |
| Furniture, carpets and soft household furnishings | 12.5% |
| Health, beauty or chemist items | 12.1% |
| DIY, decorating goods and gardening items | 10.7% |
| Specialist non-food items | 9.3% |

Source: MapInfo spending breakdown

5.9 The following paragraphs describe the study area and spending patterns. The spreadsheets necessary to understand this exercise can be found at **Appendix 6**. Population and expenditure data are combined to understand the monetary values of shopping patterns. A more detailed explanation of the quantitative need assessment that these assessments underpin can be found at **Section 6**.

## Study Area

5.10 A map of the study area is included below. It comprises eight zones, based on postcodes. For convenience, we have labelled the zones as set out in **Table 5.3**

**Table 5.3 Study Area**

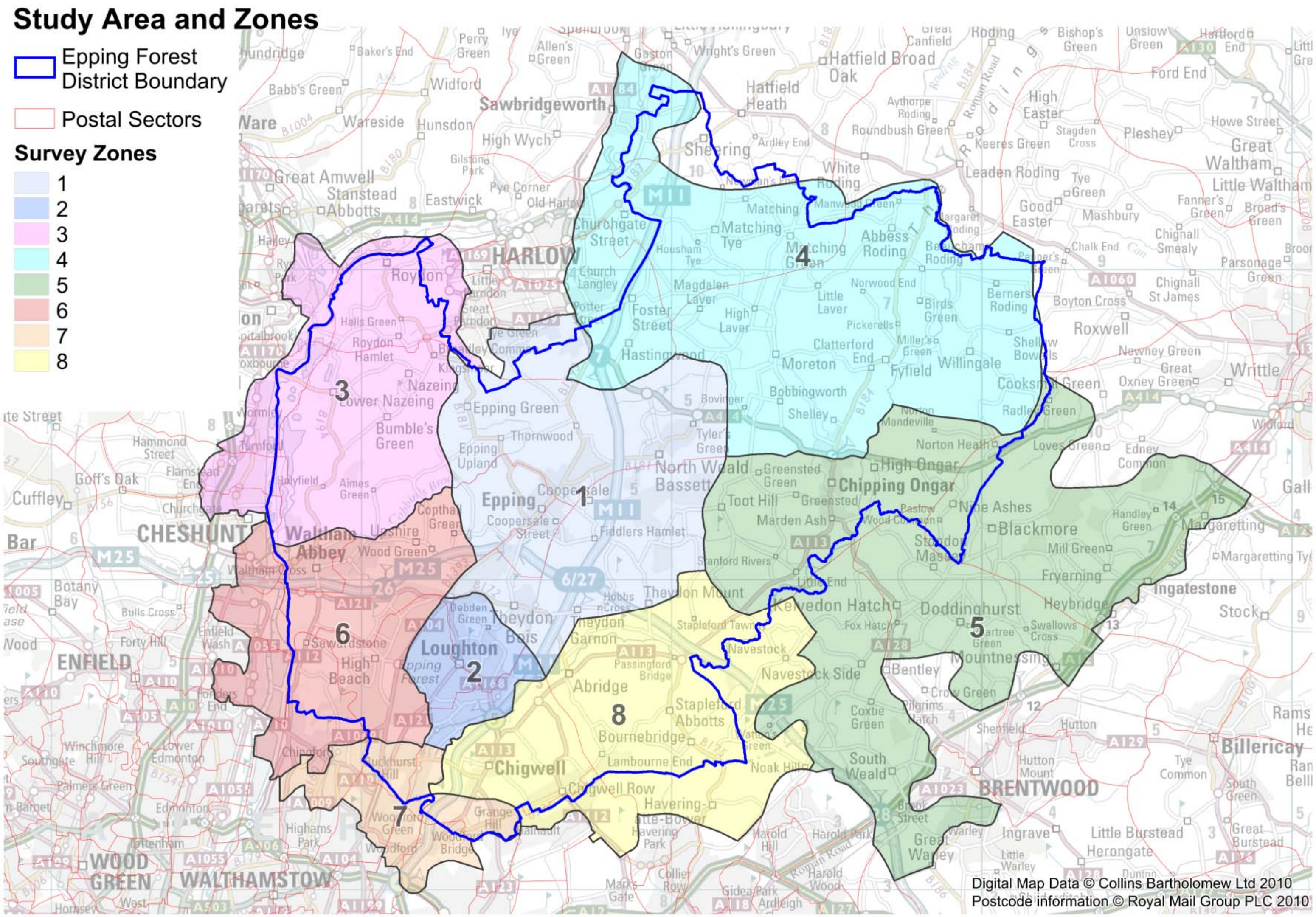
| Zone Number | Predominant Administrative Area Based on Population |
|---|---|
| 1 | Epping Forest, Harlow |
| 2 | Epping Forest |
| 3 | Broxbourne, East Hertfordshire, Epping Forest, Harlow |
| 4 | East Hertfordshire, Epping Forest, Harlow, Uttlesford |
| 5 | Brentwood, Chelmsford, Epping Forest, Havering |
| 6 | Enfield, Epping Forest, Waltham Forest, Broxbourne |
| 7 | Epping Forest, Redbridge, Waltham Forest |
| 8 | Epping Forest, Redbridge, Brentwood, Havering |

Source: RTP

5.11 The majority or all of the population in zones 1, 2, 3, 4 and 6 lies within the administrative boundaries of Epping Forest. The population of zone 5 is split between Epping Forest, Brentwood, Chelmsford and London Borough of Havering while the population of zone 7 is distributed between Epping Forest, London Borough of Redbridge and the London Borough of Waltham Forest. The population of zone 8 is mainly within Epping Forest, with some also located within the administrative areas of the London Boroughs of Redbridge and Waltam Forest.

5.12 When describing spending patterns, reference is made to the findings within the spreadsheet tabulations numbered Tables1-20 in Appendix 6, focusing on the base year position of 2009.

Figure 5.1 Study Area Zones



## Comparison Goods Spending Patterns

5.13 The per capita spend on comparison goods in 2009 (Table 3, Appendix 6) varies from £3,196 in zone 3 to £3,931 in zone 5. The total amount of comparison goods spending for residents of the whole of the study area in 2009 is £1,068.4 million (Table 4, Appendix 6), of which £79.1 million has been deducted for Special Forms of Trading (catalogue, TV and internet shopping, which is subsequently abbreviated as SFT).

5.14 The pattern of expenditure flows for the comparison goods sector as a whole, as revealed by the survey of households, is set out in Tables 5 and 6 (excluding SFT) at Appendix 6.

5.15 Overall, 29.8% of the expenditure on comparison goods of residents of the study area is spent in centres, retail parks and freestanding stores within the study area. The balance of 70.2% is spent in locations outside the study area. This is demonstrated at **Table 5.4** below.

**Table 5.4 Study Area Retention Level for Comparison Goods Expenditure**

| **Broad Destination for Comparison Goods Expenditure** | **£m** | **%** |
|---|---|---|
| Retained Expenditure | 295.1 | 29.8% |
| Other Destinations Outside Study Area | 694.2 | 70.2% |
| **TOTAL** | **989.3** | **100.0%** |

Source: Appendix 6

5.16 Turning to the district itself, some 14.4% of the study area comparison expenditure is spent in centres, retail parks and freestanding stores within Epping Forest District. The balance 85.6% is spent in on locations outside of the district (Table 6, Appendix 6). This is presented in **Table 5.5**.

**Table 5.5 Epping District Retention Level for Comparison Goods Expenditure**

| **Broad Destination for Comparison Goods Expenditure** | **£m** | **%** |
|---|---|---|
| Retained Expenditure within EFDC | 142.1 | 14.4% |
| Other Destinations outside EFDC | 847.3 | 85.6% |
| **TOTAL** | **989.3** | **100.0%** |

Source: Appendix 6

5.17 The estimated comparison goods turnover of destinations in the study area prior to making any allowance for any inflow expenditure from those who are resident beyond the study area, is set out in the penultimate column of Table 6, Appendix 6. These data are summarised in **Table 5.6** below.

**Table 5.6 Comparison Goods Expenditure Retained within the Study Area**

| Destination | £m | % |
|---|---|---|
| Epping | 26.8 | 2.7% |
| Loughton High Road | 48.8 | 4.9% |
| Waltham Abbey (including Tesco) | 25.0 | 2.5% |
| Loughton Broadway | 13.6 | 1.4% |
| Chipping Ongar | 6.7 | 0.7% |
| Buckhurst Hill | 4.4 | 0.4% |
| Other EFDC | 16.7 | 1.7% |
| *Brookfield Centre* | *51.3* | *5.2%* |
| *Waltham Cross* | *42.6* | *4.3%* |
| *Other Outside EFDC* | *59.1* | *6.0%* |
| TOTAL | 295.1 | 29.8% |

Source: Appendix 6 (*italicised* destinations are outside EFDC, figures may not sum due to rounding)

5.18 This indicates that out of the Epping Forest centres, Loughton High Road has the highest comparison goods turnover of £48.8 million followed by Epping achieving £26.8 million. The popularity of the Brookfield Centre (albeit outside the district) is also significant with a comparison goods turnover of £51.3 million derived from the study area.

5.19 As with destinations within the study area, the main destinations for leakage beyond the study area are shown in the penultimate column of Table 6, Appendix 6 and summarised in **Table 5.7** below. There are a number of different destinations for expenditure leakage reflecting the choice of centres in this part of South East England.

**Table 5.7 Comparison Goods Study Area Expenditure Spent Outside the District**

| Destination | £m | % |
|---|---|---|
| Harlow | 202.1 | 20.4% |
| Enfield | 85.5 | 8.6% |
| Romford | 61.2 | 6.2% |
| Ilford | 52.2 | 5.3% |
| The West End | 43.7 | 4.4% |
| Brentwood | 31.6 | 3.2% |
| Other Outside Study Area | 218.0 | 22.0% |
| TOTAL | 694.2 | 70.2% |

Source: Appendix 6 (figures may not sum due to rounding)

5.20 Several centres achieve a very high turnover generated from the study area as demonstrated. These include Harlow (£202.1 million), Enfield (£85.5 million), Romford (£61.2 million) and Ilford (£52.2 million). To some extent, this level of leakage is to be expected since a large proportion of the centres' catchment areas overlap with the study area.

## Comparison Goods Catchment Areas

5.21 Comparison goods catchment area plans are attached at **Figures 1-13** at **Appendix 7**. These plans graphically present the market share by zone for all of the centres within the district and the major centres outside the district that draw trade from the study area. The darker colours of red represent a higher market share. As expected, the centres within the district have a localised market share drawing trade predominantly from their local zones. Conversely higher order centres, in particular Harlow, have a dominant influence on the comparison shopping patterns throughout the study area.

5.22 As a further exercise, the dominant centres and those centres with a subsidiary influence on each zone are assessed in **Table 5.8.** This is an arbitrary exercise, where we have defined those centres that achieve a comparison market share of expenditure of over 40% as 'dominant' and those between 10% and 39% as having a subsidiary influence.

**Table 5.8 Dominant Comparison Goods Centres and Centres of Subsidiary Influence**

| Zone | Dominant Centre (Market Share 40%+) | Centres of Subsidiary Influence (Market Share 10% to 39%) |
|---|---|---|
| 1 | Harlow | Epping |
| 2 | - | Loughton High Road |
| 3 | - | Harlow, Brookfield Centre, Enfield |
| 4 | Harlow | - |
| 5 | - | Brentwood, Chelmsford |
| 6 | - | Enfield, Waltham Cross |
| 7 | - | Ilford, The West End. |
| 8 | - | Ilford |

Source: Appendix 6

5.23 Importantly, the above table shows that centres within the district are not dominant in any zones, with Epping and Loughton High Road having a subsidiary influence on zones 1 and 2 respectively.

5.24 Harlow is the unopposed dominant centre in zones 1 and 4 and has subsidiary influence in zone 3. Within zone 1, Harlow competes with Epping and within zone 3 with the Brookfield Centre and Enfield. Within zone 4, Harlow has no competitor with market shares above 10%.

5.25 Loughton High Road is the main influence in zone 2, albeit using the definition a subsidiary influence. Zone 5 has subsidiary influence from Brentwood and Chelmsford and Zone 6 from Enfield and Waltham Cross. Ilford has subsidiary influence for zone 7 (alongside the West End) and zone 8. Importantly, for six of the eight zones there is no dominant centre and it is these zones for which the competition for market share is most intense.

## Patterns of Convenience Goods Expenditure

5.26 The per capita spend on convenience goods in 2009 (Table 9 Appendix 6) varies from lows of £1,716 in zone 3, to £1,999 in zone 5. The total amount of convenience goods spending for residents of the whole study area in 2009 is £580.7 million including special forms of trading. (Table 10, Appendix 6).

5.27 The pattern of expenditure flows for the convenience goods sector as a whole, as revealed by the survey of households, is set out in Tables 11 and 12 from Appendix 6, having excluded SFT.

5.28 As with the comparison goods exercise, the retention level for the study area and for the district is calculated and can be found in the final two columns of Table 12, Appendix 6. Overall, some 59.5% of the expenditure on convenience goods of residents of the study area is spent in stores within the study area, as summarised in **Table 5.9.**

**Table 5.9 Study Area Retention Level for Convenience Goods Expenditure**

| **Broad Destination for Convenience Goods Expenditure** | **£m** | **%** |
|---|---|---|
| Retained Expenditure | 338.7 | 59.5% |
| Other Destinations outside Study Area | 230.7 | 40.5% |
| **TOTAL** | **569.3** | **100.0%** |

Source: Appendix 6

5.29 The district aggregate retention rate of study area expenditure is 33.8% and is summarised in **Table 5.10**.

**Table 5.10 Epping Forest District Retention Level for Convenience Goods Expenditure**

| **Broad Destination for Convenience Goods Expenditure** | **£m** | **%** |
|---|---|---|
| Retained Expenditure within EFDC | 192.3 | 33.8% |
| Other Destinations outside EFDC | 377.0 | 66.2% |
| **TOTAL** | **569.3** | **100.0%** |

Source: Appendix 6

5.30 The estimated convenience goods turnovers of the foodstores located within the study area, prior to making any allowance for any expenditure inflow from those who are resident beyond the study area, are set out in Table 12, Appendix 6 and are summarised in **Table 5.11** below. The foodstores which are *italicised* are located within the study area but outside the administrative boundaries of the district itself.

**Table 5.11 Turnover of Main Foodstores derived from Study Area**

| **Destination** | **£m** | **%** |
|---|---|---|
| Tesco, Sewardstone Road, Waltham Abbey | 45.5 | 8.0% |
| Sainsbury's, Old Station Road, Loughton | 26.7 | 4.7% |
| Tesco, 77-79 High Street, Epping | 26.5 | 4.7% |
| Morrison's, 246-250 High Road, Loughton | 25.7 | 4.5% |
| Sainsbury's, Bansons Lane, Chipping Ongar | 17.3 | 3.0% |
| Waitrose, 27-43 Queens Road, Buckhurst Hill | 16.4 | 2.9% |
| Sainsbury's, 12 Torrington Drive, Loughton | 8.1 | 1.4% |
| Marks and Spencer's Simply Food, High Street, Epping | 3.5 | 0.6% |
| Iceland, 22/24 The Broadway, Debden, Loughton | 1.6 | 0.3% |
| Other Stores EFDC | 21.1 | 3.7% |
| *Tesco Extra, Brookfield Centre* | *38.5* | *6.8%* |
| *Tesco, Church Langley Centre, Harlow* | *31.7* | *5.6%* |
| *Tesco, Southend Road, Woodford Green* | *16.4* | *2.9%* |
| *Other Stores Outside EFDC* | *59.7* | *10.5%* |
| **TOTAL** | **338.7** | **59.5%** |

Source: Appendix 6 (*italicised* destinations are outside EFDC, figures may not sum due to rounding)

5.31 The main destinations for convenience goods expenditure leakage to outside the study area are also shown in the penultimate column of Table 12, Appendix 6 and are set out in **Table 5.12**.

**Table 5.12 Main Destinations for Convenience Goods Expenditure Leakage**

| **Destination** | **£m** | **%** |
|---|---|---|
| Sainsbury's, 51 North Service Road, Brentwood | 16.6 | 2.9% |
| Tesco, 796 Cranbrook Road, Barkingside | 14.0 | 2.5% |
| Asda, Watergardens, Southgate, Harlow | 13.9 | 2.4% |
| Sainsbury's, Brewery Road, Hoddesdon | 12.7 | 2.2% |
| Tesco, East Road, Edinburgh Way, Harlow | 12.2 | 2.1% |
| Morrison's, Salisbury Hall Gardens, Chingford | 10.1 | 1.8% |

| | | |
|---|---|---|
| Other Stores Outside Study Area | 151.2 | 26.6% |
| **TOTAL** | **230.7** | **40.5%** |

Source: Appendix 6

5.32 This expenditure leakage is a function of a number of large stores located just outside the study area and the good accessibility between the study area and neighbouring urban areas.

5.33 Since convenience shopping is a more localised activity, we can also look at the zonal retention levels of expenditure. The localised convenience goods retention rate is the proportion of expenditure on convenience goods available to residents in a specific zone that is also spent in town centres and stores located in that same zone, expressed as a percentage.

5.34 The zonal retention level for the study area is set out at **Table 5.13**. These data can be derived from Table 12, Appendix 6 and are graphically presented in Figure 14, Appendix 7.

**Table 5.13 Localised Convenience Goods Retention Levels**

| Zones | Area | Localised Convenience Goods Retention Rate (%) |
|---|---|---|
| 1 | Epping | 48.7 |
| 2 | Loughton | 79.4 |
| 3 | North West Rural Epping Forest | 46.4 |
| 4 | North East Rural Epping Forest | 39.6 |
| 5 | Chipping Ongar | 29.7 |
| 6 | Waltham Abbey | 49.9 |
| 7 | Buckhurst Hill | 37.4 |
| 8 | Chigwell | 12.3 |

Source: Appendix 6

5.35 Despite the study area in aggregate retaining almost 60% of the convenience expenditure, the zonal retention levels vary significantly. All but one zone achieving a zonal retention level of less than 50%.

5.36 It should be noted that the zonal retention level is strongly linked to the distribution of large foodstrores, which is presented graphically on **Figure 5.2** below, overlapping catchments within each zone and the geography of the zones. Therefore, just because there is a low zonal retention level, it is not necessarily a cause for concern and we must take a holistic view of the shopping provision. This matter is examined in further detail within our assessment of retail need in Section 6 and our strategies for each centre in Section 8. However, for the eight zones we now describe the reasons behind each of the retention levels.

5.37 Firstly, addressing zone 1 (Epping) and as is evident in Figure 5.2 there is no 'superstore' within this zone. Therefore, although the 48.7% retention is reasonable compared to other zones, it is clear that there is expenditure leakage to large superstores stores in Harlow. However, part of this is likely to be due to the northern part of the zone extending to the edge of the Harlow urban area.

5.38 The retention level is highest for zone 2 (Loughton High Road and Loughton Broadway), which has a localised retention rate of 79.4%. The high retention level for this zone is due to the large Sainsbury's and Morrison's stores in Loughton. The expenditure leakage is minimal with the most significant portion being to the Tesco in Waltham Abbey, which is likely to be due to Tesco not having a presence in zone 2.

5.39 Zones 3 and 4 represent the northern rural areas of the district and have retention levels of 46.4% and 39.6% respectively. These zones do not include any of the centres assessed as part of this study. However, zone 3 includes the Brookfield Centre and thus Tesco Extra contributes to a high retention level in this zone. Zone 4 incorporates part of the urban area of Harlow and thus the Tesco in Church Langley is a dominant destination for convenience expenditure in this zone.

5.40 Zone 5 is large and includes Chipping Ongar, albeit it incorporates a large rural area to the south towards Brentwood and the east towards Chelmsford. The retention level is 29.7% which appears to be relatively low with stores in Brentwood (in particular the Sainsbury's) attracting a high proportion of the expenditure. Part of this will be due to the geography of the zones (i.e. the zone touches the edge of the urban area of Brentwood). However, we note that the Sainsbury's in Chipping Ongar is particularly small – it has less than 1,000 sqm sales area - and means that some residents are likely to travel further for the choice offered by larger stores.

5.41 Zone 6 includes Waltham Abbey and achieves a retention level of 49.9%, but due to its geography and accessibility it experiences several overlapping catchments. For example, there is evidence of trade draw from stores to the east, west and south with no store providing a dominant destination for the expenditure leakage.

5.42 Zone 7 includes Buckhurst Hill and achieves a retention level of 37.4%. However, this zone incorporates part of Greater London and as with Zone 6 experiences a high degree of overlapping catchments with stores in Loughton, Chingford, South Woodford and Barkingside all drawing trade from zone 7.

5.43 Zone 8 includes Chigwell and although it is not one of the centres that is assessed as part of this study, it does fall within the district and the retention level is the lowest of all zones at 12.3%. Importantly, this zone has no stores of a significant size and the expenditure leakage dissipates to surrounding zones and outside the study area with the Tesco in Barkingside having the most dominant draw.

## Convenience Goods Catchment Areas

5.44 As we have explained in the preceding paragraphs, convenience goods shopping has a much more localised catchment and in Figures 15 to 20 of Appendix 7 we show the convenience catchments for the six centres in the district. In calculating these catchments, we aggregate the convenience turnover of all the stores in each centre (including out of centre stores). As with the comparison exercise, the darker colours show a higher market share and this exercise demonstrates the localised catchment of convenience goods spending and the convenience function of the six centres in the district.

5.45 Taking this exercise further, **Table 5.14** shows dominant stores with a zonal convenience market share of over 30% and stores with shares between 10 and 30%, which have subsidiary influence.

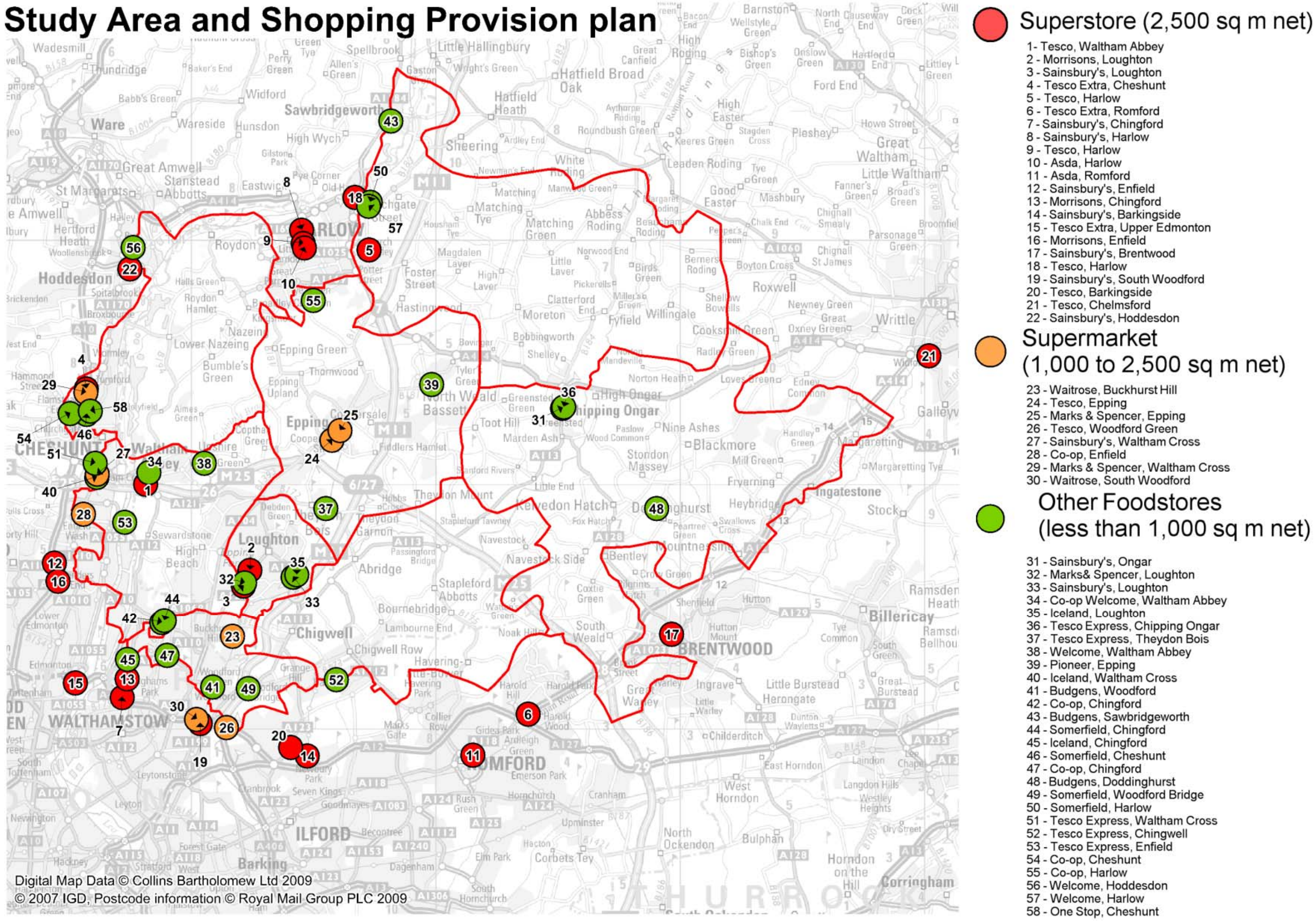
**Table 5.14 Market Shares for Convenience Goods Dominant Stores and Stores with Subsidiary Influence**

| Zone | Dominant Stores (Market Share of 30%+) | Subsidiary Stores (Market Share 10 to 30%) |
|---|---|---|
| 1 | Tesco, 77-79 High Street, Epping | Tesco, Church Langley Centre, Harlow |
| 2 | Morrison's, 246-250 High Road, Loughton | Sainsbury's, Old Station Road, Loughton,<br>Sainsbury's, 12 Torrington Drive, Loughton |
| 3 | Tesco Extra, Brookfield Centre | Sainsbury's, Brewery Road, Hoddesdon |
| 4 | Tesco, Church Langley Centre, Harlow | Tesco, East Road, Edinburgh Way, Harlow,<br>Asda, Watergardens, Southgate, Harlow |
| 5 | Sainsbury's, 51 North Service Road, Brentwood | Sainsbury's, Bansons Lane, Chipping Ongar |
| 6 | Tesco, Sewardstone Road, Waltham Abbey | - |
| 7 | - | Tesco, Southend Road, Woodford Green,<br>Waitrose, 27-43 Queens Road, Buckhurst Hill |
| 8 | - | Tesco, 796 Cranbrook Road, Barkingside |

Source: Appendix 6

5.46 This demonstrates that six of the eight zones have a dominant store with a market share of over 30%, namely zones 1, 2, 3, 4, 5 and 6. The survey findings confirm that most convenience shopping is undertaken on a highly localised basis. Table 12, Appendix 6 reveals that only one store within the study area – Tesco at the Church Langley Centre, Harlow – has market shares of over 10% in more than one zone, namely zones 1 and 4.

## Figure 5.2 Study Area Shopping Provision Plan



## Patterns of Spending on Commercial Leisure Services

5.47 The telephone survey of households also included a number of questions that asked residents of the study area where they spent most money in relation to various types of leisure services, as follows:

- Restaurants;
- Cafes, pubs, bars;
- Cinemas/theatres;
- Health and fitness centres, and;
- Family entertainment centres (i.e. ten pin bowling and skating).

5.48 The most popular destinations for these different activities for residents of each survey zone are set out in **Table 5.14** below.

**Table 5.15 Most Popular Destinations for Expenditure on Leisure Services**

| Survey Zone | Restaurants | Cafes/ Bars etc… | Cinema/ Theatre | Health & Fitness | Family Entertainment |
|---|---|---|---|---|---|
| 1 | Harlow | Epping | Harlow | Harlow | Harlow |
| 2 | Loughton High Road | Loughton High Road | The West End | Loughton Leisure Centre, Traps Hill, Loughton | Romford |
| 3 | Harlow | Harlow | Harlow | Grundy Park Leisure Centre, Cheshunt/John Warner Sports Centre, Hoddesdon | Harlow |
| 4 | Harlow | Harlow | Harlow | Harlow | Harlow |
| 5 | Brentwood | Brentwood | Chelmsford | Brentwood | Chelmsford |
| 6 | Enfield | Waltham Abbey | Enfield | Enfield | Romford |
| 7 | North Chingford | North Chingford | The West End | Chigwell | Romford |
| 8 | Chigwell | Chigwell | The West End | Chigwell | Romford |

Source: Volume 3

### *Restaurants*

5.49 Almost 80% of households across the study area undertake visits to restaurants and cafés. The most popular destinations, by far, are Harlow (32.3%) and Loughton High Road (31.7%) followed by Brentwood (23%) and Chigwell (19%).

### *Cafes, Pubs and Bars*

5.50 Only 67.4% of households claim to visit cafes, pubs and bars. Loughton High Road is by far the most popular destination at 42.6% and is followed by Brentwood (26%), Epping (24.8%) and Harlow (21.2%).

### *Cinemas and Theatre*

5.51 67.7% of those interviewed visit the cinema or theatre and the most popular cinema destinations are Harlow (45.5%), Enfield (40%), and the West End (24.8%) which reflects the trend for such facilities to be accommodated in higher order centres.

### *Health and Fitness Centres*

5.52 63.3% of respondents claim not to undertake health and fitness activities although both Brentwood (11%) and Chigwell (7%) attract those respondents that do undertake such activities.

### *Family Entertainment Centres (i.e. Ten Pin Bowling, Skating and so on)*

5.53 66.3% of respondents claim not to visit family entertainment centres such as ten pin bowling alleys and skating rinks. However, Harlow (6.3%), Chelmsford (5.6%) and Romford (9.1%) are popular destinations for these activities.

## Summary of Retail & Leisure Spending within the Study Area

### *Comparison Goods Spending*

5.54 Overall, some 29.8% of the comparison goods expenditure of the residents of the study area is retained by town centres, retail parks, and freestanding stores located within the study area. The main destination for comparison expenditure within the district is Loughton High Road followed by Epping, whilst the Brookfield Centre and Waltham Cross are also destinations within the study area that attract comparison expenditure.

5.55 Expenditure leakage from the study area, including short-distance leakage to places like Harlow, Romford and Ilford, accounts for 70.2% of the residents' comparison goods expenditure.

5.56 The comparison catchments for the six centres within the district are unsurprisingly localised, with Harlow dominating shopping patterns within the study area. In particular, Harlow secures an unopposed dominant comparison goods market share in excess of 40% in zones 1 and 4 as well as a subsidiary share in zone 3. Consequently there might be opportunities for the centres in the district to improve their market share vis-à-vis competing centres. However, this would only be achieved through the development of floorspace of a sufficient scale to change shopping patterns.

### *Convenience Goods Spending*

5.57 Overall, 59.5% of the convenience goods expenditure of residents of the study area is retained by town, district and local centres and freestanding stores located within the study area. The stores located within the district account for 38.8% of the convenience goods expenditure of the study area.

5.58 The study area experiences a number of overlapping catchment areas and contributes to variations in the levels of expenditure retention. The highest retention level is zone 2 achieving 79.4% (Loughton) with the other zones experiencing retention levels of between 29.7% and 49.9%. The only exception is zone 8 (Chigwell), which although is not one of the centres we are assessing, does fall within the district and has a limited level of expenditure retention at 12.3%.

### *Leisure Services Spending*

5.59 Harlow, Brentwood and Loughton High Road are the most important locations for spending on leisure services. Other important locations include Chelmsford for the residents of zone 5, North Chingford for the residents of zone 7, and the West End for cinema and theatre entertainment for zones 2, 7 and 8